

*Understanding
the
Workforce
Needs
of*

**NEW JERSEY'S
RETAIL
INDUSTRY**

**A REPORT OF THE
READY FOR THE JOB
INITIATIVE**

Prepared for the
New Jersey
State Employment and
Training Commission

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Background: The Ready for the Job Initiative

This report is an integral part of the *Ready for the Job* initiative, which began in 2002 to determine the skill needs of New Jersey's employers. The goal of *Ready for the Job* is to improve alignment between the workforce needs of employers and the preparation of potential and current workers by providing timely and accurate information about employer skill needs to policymakers, educators, counselors, job seekers, students, and others.

The *Ready for the Job* initiative, a joint effort of the New Jersey State Employment and Training Commission, the New Jersey Department of Labor and Workforce Development, and the New Jersey Department of Education, uses industry advisory groups, interviews and focus groups with employers, and analysis of all available data to profile the workforce and skill requirements of key industries and occupations.

Two fundamental assumptions underlying *Ready for the Job* are:

- A skilled workforce is essential to the state's economic growth, and
- In order to fully participate in the economy, the state's residents must possess the skills employers need.

Ready for the Job reports have focused on the skill and workforce requirements of key industries in the state including:

- Health Care
- Construction
- Hospitality/Tourism
- Manufacturing
- Utilities/Infrastructure
- Finance
- Information Technology
- Transportation
- Public Health/Disaster Management
- Retail
- Port Newark/Elizabeth Marine Terminal

Results and reports from the Ready for the Job initiative are distributed through the NJNextStop website, www.njnextstop.org. NJNextStop is the State of New Jersey's primary career guidance Internet portal for high school students, counselors, teachers, and parents.

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Executive Summary

The retail industry, a cornerstone of New Jersey's economy, is changing in ways that affect the skills and education workers need to be successful. With access to consumers in the tri-state area and nearly a half-million jobs (470,000 or 12% of all jobs statewide),¹ retail is the largest private employer in the state, and it continues to grow. Like other industries in today's fast-paced economy, the retail sector is changing in response to technology, competition, and globalization. Industry consolidation, emerging business models, and the increasing reliance on technology are reshaping the retail workplace and increasing the skill requirements for many jobs. These changes require that employers, workers, and education and training institutions that prepare retail workers adapt accordingly.

This report explores the changing skill and education needs of the modern retail workplace. It identifies key skills employers now require from their workforce, trends driving employer skill needs, and other workforce challenges employers face. The report also identifies jobs that employers report the most difficulty finding and keeping skilled workers. Findings are based on input from an industry advisory group of New Jersey retail employers and industry experts, background interviews with state and national retail industry experts, and reviews of labor market information, state and national websites, and industry and scholarly literature. See the Appendix for a list of employers consulted.

Several Industry Trends are Driving Changes in the Skill Requirements for Jobs in the Retail Industry

A range of factors contribute to difficulties employers face attracting, retaining, and preparing skilled workers to fill jobs at all levels of the organization — from customer-facing positions in retail stores, to managers and corporate

positions. These factors include the industry's comparatively low starting wages for many jobs, a lack of awareness among job seekers about job requirements and career paths, competition for workers among firms, changing workforce demographics, and the high-skill requirements for some jobs, such as pharmacists.

However, several key trends in today's fast-changing marketplace are also contributing to employers' difficulties maintaining a skilled workforce, as they are shifting and increasing the skills most workers need to succeed in the industry and to assist employers to be competitive in an increasingly complex economy. Employers note four key industry trends that are driving many of the changes in the skill and education requirements of retail jobs:

- 1. Two dominant business models have emerged in the retail marketplace that have differing effects on skill requirements for customer service workers.** Divergent consumer demands have led to the development of two primary business models — the “self-service” and “high-touch” models. Self-service model stores emphasize low cost and quick service. In high-touch model stores, workers concentrate on providing superior customer service as an added value to their customers. While back office operations for the two models remain similar, each model places different demands on customer-facing workers such as cashiers, salespeople, and customer care specialists. Customer service oriented workers in self-service model stores need to deliver quick, but effective, service for the customer. Basic customer service skills and a fast, efficient work style are needed to succeed in these workplaces. By contrast, workers in high-touch model stores need sophisticated sales, customer service, teamwork, and other communication skills, as well as superior knowledge, and applicable certifications, regarding the company's products.

2. Industry-wide consolidation is changing the structure of career paths. More efficient, “just-in-time” delivery processes and changes in consumer demand have led to increased consolidation across the retail industry, fostering the growth of large discount stores and mass retailers. This consolidation has changed retail jobs and career paths. Experts report that many low- and mid-level supervisory jobs, which many frontline workers have relied on to advance their careers, are diminishing.² Workers looking to advance need superior business, communication, customer service, and leadership skills and, in a growing number of cases, a postsecondary degree. As one employer notes, many workers need the skills “to think, act, and do like a manager.”

3. The increasing use of technology in the workplace is creating new types of jobs in the industry and changing job functions. The growing use of technology to improve efficiency and training in the retail workplace has also created new jobs for workers to install, maintain, and repair equipment. Many new technologies, such as infrared price scanners that eliminate the need for a worker to affix price labels to products and merchandise, have changed job responsibilities. Workers who used to spend hours engaged in routine job tasks that have now been replaced by technology are increasingly expected to engage in marketing, sales, or customer service tasks. Workers of all types now need basic information technology skills to operate various types of technology — from computerized inventory systems, to scanners, to electronic payment systems needed to perform on the job. More information technology repair staff are also needed at many facilities. Entry-level workers also need higher levels of marketing, sales, problem-solving, and customer service skills as old, routine tasks are replaced by technology and job tasks switch to more customer- and marketing-oriented tasks.

4. The growth of e-commerce is creating new types of jobs in the industry. E-commerce, and “e-tailing,” in particular, is a small but growing segment of the retail industry. Both e-commerce employers and traditional retailers that have an online component to their business. Customer service staff engaged with e-commerce systems need the skills to communicate effectively with customers using information technology and telephone systems. Technical workers need strong Internet and information technology skills, and those involved in website design also need retail marketing knowledge.

The Priority Skill Needs of New Jersey’s Retail Employers

Overall, the industry trends noted above are increasing the skills and education employers demand of their workers today. New Jersey’s retail employers stress several important skills that are becoming increasingly important for workers to acquire across a range of job titles to respond effectively to the changing nature of the retail industry. These priority employer skill needs are:

- **Strong customer service, communication, and interpersonal skills** to interact effectively with customers, co-workers, supervisors, suppliers, and others;
- **Problem-solving and critical thinking skills** for independent decision-making that improves customer service and/or company profits;
- **Teamwork skills**, especially to help achieve key department, store, and company sales goals;
- **Basic business, sales, and marketing knowledge** and understanding of retail operations and the retail supply chain;
- **Information technology skills** to operate a growing array of technology on the job, including e-commerce technology; and
- **Particularly strong leadership, innovation, communication, and business skills** are needed to advance

to supervisory positions (employers also increasingly prefer a college degree for all but entry-level management positions).

Workers in customer service positions, such as cashiers and retail salespersons, which make up two-thirds of industry jobs, also require varying levels of *customer service skills*, as well as conflict management skills to handle difficult co-workers and customers effectively. These workers also need basic marketing knowledge to design product displays, and, in some stores, workers also need in-depth product knowledge of high-tech, or otherwise complex, goods and services.

Employers have difficulty addressing gaps in the skills noted above in a wide range of jobs, including:

- Cashiers
- Drivers/Delivery Drivers
- Retail Salespersons
- Security Guards/Loss Prevention Managers

- First-Line Supervisors/Managers of Retail Sales Workers
- Pharmacists
- Electronic Home Entertainment Equipment Installers
- Repairers/Home Appliance Installers
- Computer Support/Microsoft Certified Support Technicians
- Purchasing Managers/Supply Chain Managers

New Jersey's state agencies and schools at all levels must work together to ensure that training and education in the state addresses the changing foundational skill needs of the state's key employers, including those in the retail industry. In addition to helping employers to compete and remain profitable, ensuring that workers have access to appropriate training will allow low-income workers to gain the skills and knowledge that will allow them to advance to positions of higher pay and authority both within and outside of the retail industry.

Overview: The Retail Industry in New Jersey

The retail industry is a primary driver of New Jersey's economy. At both the state and national level, retail is the largest private employer.³ Nationally, retail employers provided 15.2 million jobs in 2005,⁴ accounting for 11.6% of all employment.⁵ In New Jersey, the retail industry employed 471,600 workers in 2005, or nearly 12% of the state's workforce.⁶

Nationally, the retail industry is expected to grow through 2014, though at a slower rate than the average for all industries (11% versus 14.8% for all industries). This growth is projected to add nearly 1.7 million jobs to the national economy.⁷

The state's economy is expected to grow slower than the national average across all industries (10.1% in New Jersey versus 14.8% nationally from 2004-2014). Growth in retail

industry employment is expected to lag only slightly behind employment growth for all industries in the state (9.2% in retail versus 10.1% overall). However, by 2014, this will still mean an additional 42,900 jobs may be available in New Jersey's retail sector.

Types of Retail Businesses

Retail firms purchase goods for resale to consumers. The industry's focus on reselling items directly to the public distinguishes retailers from wholesalers, which resell goods to retailers, and establishments in the agriculture, manufacturing, and construction industries. Businesses that are involved in processing or other service activities that are incidental to the resale of goods, including optical goods stores that grind lenses, and seafood and meat markets, are also classified as retail establishments.⁸

Table 1
Employment and Compensation in the Retail Industry Compared with All Industries

	Retail	All Industries
Current Employment		
Estimated Number Employed, 2005 (National)	15.2 million ⁹	133.9 million ¹⁰
Estimated Number Employed, 2005 (New Jersey)	471,600 ¹¹	4.1 million ¹²
New Jersey Share of National Employment ¹³	3%	3%
Employment Growth		
Projected Employment Growth, 2004-2014 (National) ¹⁴	11%	14.8%
Projected Employment Growth, 2004-2014 (New Jersey) ¹⁵	9.2%	10.1%
Compensation		
Average Hourly Earnings, 2005 (National) ¹⁶	\$12.36	\$16.11
Average Hourly Earnings, 2005 (New Jersey) ¹⁷	\$13.90	\$21.15
Hours Worked (National)		
Average Hours Worked ¹⁸	30.6	33.8

Store retailers typically sell goods for personal household consumption and operate at fixed point-of-sale locations designed to attract walk-in customers. Retail stores rely on merchandise displays and mass-media advertising to reach potential customers. Many sell to business and institutional clients as well, including, for example, retailers of office supplies and computers, building materials, plumbing supplies, and electrical supplies. Some stores also provide after-sales services including repairs and installation.¹⁹

Non-store retailers are also organized to serve the general public but employ different approaches from traditional bricks-and-mortar establishments. They may sell goods over the Internet, broadcast infomercials, publish print or electronic catalogs, go door-to-door, sell from a portable stall, or distribute goods through vending machines. Also included in the non-store category are businesses that are engaged in the direct non-store sale of products, such as home heating oil dealers and newspaper home delivery companies.²⁰

Key Characteristics of Retail Industry Jobs

Retail employment is comprised of a wide range of positions in sales, marketing, store operations, management, finance, human resources, loss prevention, information technology and e-commerce, distribution, logistics, supply chain management, and merchandise buying and planning.²¹

Retail sales and cashier positions are the two most common and numerous jobs, together accounting for over 35% of retail employment nationwide.²² In New Jersey, retail salespersons comprised the largest employment category in 2004, with 131,550 workers, while cashiers comprised the third largest with 105,150 workers. These two job categories also account for some of the greatest projected occupational growth in the state over the next decade. By 2014, cashiers will fill the number two spot, projected to account for 110,800 jobs.²³ The retail salesperson occupation is projected to increase nearly 12% by 2014, adding 15,550 jobs to the state's economy and bringing the total number of retail sales jobs to 147,150.²⁴

Job Snapshot: Cashiers

According to the U.S. Department of Labor, there is substantial turnover in retail cashier positions. This is in part because entry requirements are minimal, and because the many part-time jobs are attractive to job seekers looking for short-term income rather than long-term careers. Because the turnover is high, there are routinely many openings for full- and part-time cashier jobs. As in many retail jobs, however, seasonal demand and the strength of the economy affect the employment of cashiers.

Cashiers will be one retail occupation affected by demographics: in 2004, almost half of all cashiers were 24 or younger. The aging of the workforce may result in employers needing to change their recruiting strategies for cashier jobs.

Many retail industry jobs, especially entry-level positions, are part time or temporary. In 2005, retail employees worked approximately 10% fewer hours per week, on average, than workers in other industries (30.6 average hours per week in retail compared with 33.8 average hours per week in all industries).²⁵ In 2003, 26.2% of the nation's retail employees worked part time.²⁶

A high demand for workers combined with relatively low-skill requirements for entry-level jobs and flexible work schedules make retail a common industry for many new entrants to the labor market. A 2003 study estimated that retailing is the labor market entry point for approximately 40% of first-time workers.²⁷

Average wages in the retail industry are lower than in other industries. Nationwide, non-supervisory retail trade employees earned 23% less in average hourly wages in 2005 than workers in other private-sector industries (\$12.36 versus \$16.11). New Jersey's retail employees earned \$7.25 less per hour, on average, than workers in all other industries combined (\$21.15), a difference of nearly 34%.²⁸ The average annual salary

for a retail worker in New Jersey in 2005 was \$28,940.²⁹ Traditionally, jobs in durable goods sales have been higher paying and more likely to be held by men; women dominate the lower-paying sales jobs in nondurable goods.³⁰

The provision of benefits varies widely throughout the retail sector. Larger retail employers are more likely to provide pension and medical benefits to employees, but benefit levels still vary from firm to firm.³¹ One study estimated that only one-third of full-time retail employees had pension coverage, and less than two-thirds of employers offered health plans.³² According to data from the March 2005 Current Population Survey, 45.2% of retail workers were enrolled in employer-sponsored health insurance plans.³³ Across all industries during the same period, 53% of workers were enrolled in such plans.

Key Workforce Challenges Retail Employers Face

Across the retail industry, employers face difficulties attracting, recruiting, and retaining a sufficient number of qualified, skilled workers for key jobs. According to one employer describing the state of the applicant pool for frontline jobs, such as cashiers and salespeople, “Soft skills are lacking. Customer service is lacking. In the population we draw from, the work readiness skills are lacking.”³⁴ Employers report that many entry-level workers in the retail industry lack basic academic skills, such as high school-level math, reading, writing, and English language skills. In addition, employers report that many new employees lack basic workplace readiness skills and other important skills, including problem-solving, critical thinking, interpersonal, and communication skills; the ability to work effectively in teams; and the ability to manage conflict. According to employers, many of these abstract reasoning and other “soft” skills are now considered “basic skills” for even the most entry-level jobs.

Retail employers also have a difficult time finding frontline workers and managers who have skills in both English and another language used most often by customers (e.g., Spanish). According to employers, multilingual retail employees can be

an asset in terms of customer service in some communities.

Several factors contribute to employers’ difficulties finding and keeping skilled, qualified workers. One of the largest factors is high turnover. According to retail employers, experts, and other sources, turnover in the retail industry is higher than average for all industries. Annual average turnover for the retail industry ranges from 70% to 125%, depending on the type and size of the company.³⁵ This high level of turnover is costly to employers, and is estimated to range between 70% and 150% of a worker’s annual wage.³⁶

Demand for skilled workers may also increase as the retail industry grows. Despite current economic woes, experts expect employment in the retail industry to rise 10% between 2004-2014. Demand may be especially strong for the frontline customer service positions that make up most jobs in the industry, such as cashiers and salespersons.

Besides the large and growing number of job openings in the industry, several other factors contribute to employers’ workforce difficulties. According to employers, these factors include low starting wages and benefits and the limited availability of full-time employment in entry-level positions, which discourage some applicants from applying for jobs. As one study found, the retail industry suffers from the perception that most of its jobs are low skill and offer little advancement potential, a perception that scares away many educated job seekers.³⁷ According to employers consulted for this study, this general perception has led many job seekers, students, and workers to have an incomplete understanding of the job requirements and career paths associated with particular industry jobs.

Once a worker does enter the industry, retention is made more difficult by the dissatisfaction many current workers feel about their jobs. A 2006 survey of retail workers found that 35% planned to leave their jobs, citing insufficient pay, increasing workloads, and lack of opportunities for career advancement and training.³⁸ Seasonal fluctuations in the retail industry, as well

Factors Contributing to Hiring Difficulties in the Retail Industry

- Low starting wages and benefits in entry-level positions
- Limited access to full-time jobs and opportunities for advancement
- Lack of awareness among job seekers and workers about job requirements and career paths
- Intra- and inter-industry competition for skilled workers
- Changing workforce demographics shifting the traditional makeup of the retail workforce
- High skill and education requirements for some jobs (e.g., pharmacist)
- Rising skill and education requirements for jobs at all levels

Source: Industry workforce advisory group and employer interviews, 2006.

as general ups and downs in the economy, can increase the sense of job instability many entry-level retail workers feel, which also contributes to dissatisfaction and, ultimately, high turnover rates.³⁹

Competition for workers from within and outside the industry also makes finding and keeping skilled workers difficult for retail employers. According to the National Retail Federation Foundation, competition for employees is fierce and finding entry-level employees with the right mix of skills and knowledge is a major challenge. One retail industry expert consulted for this study notes that workers who earn \$7.50 an hour may leave one employer for another who will pay \$.20 an hour more. In addition, since good customer service skills are highly transferable, retail employers must compete with employers from other industries for workers. In Atlantic City, for example, one industry observer consulted for this study notes that retailers are in competition with casinos, which often pay higher wages for the same entry-level skill set. In Jersey City, another observer notes that the competition is with the banking, insurance, and financial sectors. According to local media reports, many retail employers in the Meadowlands region are concerned about the effect that competition from a large retail center planned for the area will have on the ability of current retailers to recruit qualified workers.⁴⁰

Increasing diversity in the workforce has challenged retailers to develop new recruiting strategies to attract new types of workers. The retail industry has long relied on a young

workforce, but older workers are becoming one of the fastest growing segments of the American workforce. The Bureau of Labor Statistics estimates that between 2002 and 2012, the number of workers aged 55 and older is projected to grow by nearly 50%, outpacing any increases in the number of younger workers. By 2012, it is expected that 42% of workers in the United States will be 45 and older, up from 37% in 2002. During this decade, the number of workers aged 45 and older will grow by nearly 27%, compared with a 3% expected growth of workers aged 16 to 44.⁴¹

The demographic trends have several implications for retailers in terms of attracting, recruiting, and retaining talent. One is that fewer young workers, who have traditionally been prominent in entry-level retail jobs, will be available in the future. This may mean rethinking recruiting strategies, workplace policies, compensation, and benefits in order to attract and retain both older and younger workers. In addition, with Baby Boomer retirements on the horizon, industry advisory group members say that little succession planning had been done in the industry thus far. Managers will need to start thinking about the workforce pipeline and how to groom the next generation of industry leaders.

Last, but by no means least, employers have difficulty finding and keeping skilled workers because some retail jobs, such as pharmacists, require many years of formal training, which may limit the available pool of qualified workers. Also, those who repair or install products for customers often need specific training and/or experience to qualify for these positions. In ad-

dition, the skill requirements for many jobs, even entry-level jobs, are changing in response to a variety of industry trends.

Employers consulted for this study and other sources suggest three primary factors are contributing to the difficulty preparing skilled workers for jobs in the retail industry:

- Lack of alignment between the preparation of potential retail workers and the skill needs of employers,
- Limited availability of in-service training for retail workers, and
- Limited employee motivation to apply skills and/or learn new skills.

According to employers consulted for this study, the K-12 educational system, and, to a lesser degree, the workforce development system and postsecondary education and training institutions, are not adequately preparing workers with the basic academic and workplace readiness skills needed for entry-level jobs. Important skills needed in many retail jobs, especially soft skills such as teamwork, communication, and problem solving, are not included in curriculum standards. Even when needed skills are included in curriculum standards, such as basic math and technology skills, employers believe there is not enough accountability to ensure that students master these skills before being promoted to a higher grade level or receiving a high school diploma.

A study by the American Society for Training and Development found that the retail industry spends less on training than any other business sector.⁴² However, frontline employee turnover in the retail industry can be quite high. This high rate of turnover may be one factor that discourages employers from investing in incumbent worker training.⁴³ This may be especially true for training basic academic and workplace readiness skills, which many employers expect workers to have prior to employment.

Employee motivation may also play a role in the difficulties employers face in getting workers to display desired skill sets on the job. For example, a worker may understand the need to show up on time for a job, but may choose not to do so as a result of a lack of motivation rather than a lack of knowledge or skills. Lack of motivation to apply skills on the job in some retail positions may be related to some of the same factors that contribute to employers' challenges in attracting, hiring, and retaining workers, including low pay and benefits.

Industry Trends Affecting the Skill and Educational Requirements of Retail Industry Jobs

The retail industry has undergone a number of important changes in the past several decades that affect the structure of its jobs and the skill requirements for key positions.

This section of the report explores the skill and educational implications these changes have for workers. Overall, employers report that the skills most workers need to perform well and advance to jobs of higher pay and authority are rising. The following trends are driving these skill needs:

- The development of two distinct business models,
- Industry consolidation fueled by “just-in-time” delivery processes,
- Widespread use of technology in retail businesses, and
- The emergence of e-commerce.

Trend #1: The Development of Two Distinct Business Models

Even among the larger, consolidated stores, two primary business models dominate the industry. These models are “self service,” which emphasizes speed, efficiency, and low product cost over high levels of customer service, and “high touch,” which stresses high levels of customer contact and service over product cost and transaction speed.

Self-Service Model Retail Stores

The self-service model is the dominant model in the retail industry.⁴⁴ Stores that follow this business model, which is commonly associated with Wal-Mart, have realized that traditional notions of customer service, which involve high levels of customer contact with highly knowledgeable sales staff, have become outdated in some markets. Many of today’s customers are willing

to exchange high levels of customer service for lower costs. Retailers that have adopted this model, which is based on purchasing goods in high volume and maximizing other efficiencies to keep costs low, realize that many customers, especially those purchasing everyday items, are more concerned with having a fast, efficient shopping trip that gives them access to a variety of low-cost products than in traditional models of customer service. In fact, customers have come to identify fast, no-frills shopping and low prices as one variant of good customer service.⁴⁵ As a result, staff at these stores have less contact with customers and may rely more heavily on technology than other retail establishments, especially to serve customers (e.g., automated checkout, customer-operated price checking machines).⁴⁶

Key Skill and Education Implications for Workers

Managers and other high-skill workers employed in self-service model stores need the innovation and customer service skills to increase efficiency through the use of new technologies and business practices without compromising customer satisfaction. According to employers consulted for this study, entry-level workers in these stores have fewer skill requirements, especially with regard to communication and customer service skills, than their counterparts in other business models, in part because easy-to-use technology minimizes customer-worker interactions. However, these workers must have basic customer service skills in order to give customers the fast and friendly service the retailer is trying to provide. In addition, entry-level workers seeking to advance to higher positions, which have more complex skill requirements, must possess or acquire additional skills to become eligible for management or other types of company-sponsored training. Overall, workers in self-service model stores need to have

highly efficient work habits, strong customer service skills aimed at facilitating quick, efficient customer transactions, and basic marketing skills to be able to arrange in-store displays when not interacting with customers. Those handling money also need strong math and technology skills, as well as basic money handling skills.

High-Touch Model Retail Stores

In certain niche markets, from home repair products to luxury products, successful retailers have realized that customers are indeed searching for a high level of service from staff. Companies that use this model strive to add value by providing superior customer service using experienced sales help that can provide in-depth assistance to customers. For example, sales staff may include former skilled trade employees (carpenters, electricians, and plumbers) who can

provide reliable technical expertise to shoppers. Sales staff in a high-touch department store may act as “personal grooming consultants” who build long-term relationships with their upscale customers.⁴⁷

Firms that use the high-touch model are becoming highly “customer centric” to increase sales and improve customer retention rates.⁴⁸ One employer consulted for this study describes her company’s effort to focus on the “customer’s journey” from the moment the customer enters the store.⁴⁹ Sales staff in these stores are encouraged to engage with the customer throughout the entire shopping experience. While these stores employ a wide array of technology to assist workers to perform their jobs more efficiently, they do not use technology to minimize the interaction between staff and customers.

Priority Skill Needs

Trend #1: The Development of Two Distinct Business Models

Business models influence organizational skill requirements. The self-service and the high-touch models dominate the industry, but each requires workers with different skill sets.

The **self-service model** offers lower prices and less customer interaction. Key skills needed for this model include:

Entry-Level Employees

- Basic customer service skills (in addition to basic academic and workplace readiness skills)
- Efficient, accurate work habits

Managers

- Innovation skills
- Strong business administration skills to increase efficiency and control costs
- Strong management and leadership skills

The **high-touch model** focuses on superior customer service as a method of increasing sales and customer retention rates. Key skills needed for this model include:

- Superior customer service skills
- High levels of interpersonal communication and teamwork skills
- High level of product knowledge/expertise
- Marketing and sales skills

Key Skill and Education Implications for Workers

Many retail sales and customer service jobs, especially those in high-touch model stores, often require high levels of technical product knowledge and very sophisticated sales, customer service, teamwork, and other communication skills. Some workers may also need credentials that will qualify them as experts of their particular products. According to at least one study, these workers have greater autonomy and earn higher wages with benefits than workers in self-service model establishments and turnover rates are lower as well.⁵⁰

Trend #2: Industry Consolidation

Retailers that have mastered the ability to streamline their production processes using “just-in-time” delivery have thrived in the past several decades. Just-in-time delivery involves ordering products directly from manufacturers or vendors based on an analysis of the amount of product needed, distributing these products to stores, and selling them to customers.⁵¹ Those retailers that have reduced inefficiencies in this process through innovative business practices have become industry leaders.

Just-in-time delivery practices and shifting customer demands have led to increased consolidation throughout the retail industry, spurring strong growth among mass discount stores and nationwide franchises. These large operations can deliver a wide range of products more efficiently and cheaply to customers than small, independent retailers. In the discount store category, the top 10 stores today account for 95% of sales.⁵² This trend first became apparent during the so-called “supermarket revolution” that started in the 1950s and drove many small independent grocers out of business over the next two decades. The “category killers” also emerged during this period, offering bigger selection and lower prices than many smaller retailers could manage. Mergers and acquisitions as well as the development of superstores resulted in further consolidation of the retail industry during the 1980s and 1990s.⁵³

Priority Skill Needs

Trend #2: Industry Consolidation

Organizations are implementing flatter organizational hierarchies, with fewer managers. As a result, entry-level workers increasingly need the following skills and credentials to successfully assume the higher levels of responsibility expected of them on the job and/or to prepare for the shrinking number of management positions available:

- Superior customer service and communication skills
- Problem-solving and critical thinking skills
- Strong teamwork and leadership skills
- Basic marketing and sales skills
- Basic business skills

Those seeking managerial jobs above entry-level supervisor positions may also require a postsecondary degree, preferably in a business discipline.

Jobs and career paths have changed as a result of this industry consolidation, with most stores relying on a reduced number of managers. In particular, the lower-level supervisory jobs, which in the past formed the basis for a career ladder for those lacking postsecondary education, are diminishing.⁵⁴ Sales and service jobs make up more than two-thirds of employment opportunities. The average ratio of managers to frontline workers is 1:15.⁵⁵ One example of a large discount retailer showed a ratio of 1 manager and 4 assistant managers to 235 hourly workers.⁵⁶

Key Skill and Education Implications for Workers

This trend indicates that employers are seeking more applicants to fill non-managerial, entry-level positions and fewer supervisory workers. As a result, entry-level workers are expected to take on greater levels of responsibility for product display and marketing ideas, setting and achieving store and company-wide sales

goals, making decisions with customers, and other tasks that mid-level managers may have performed in the past. This requires basic sales, marketing, and business skills, in addition to customer service skills.

Entry-level workers looking to advance need superior business, communication, customer service, and leadership skills and, in a growing number of cases, a postsecondary degree to fill management positions. Several employers consulted for this study note that, while they would prefer to promote in-house, they increasingly look outside the company to hire supervisory and managerial personnel as many current staff do not have the skills and, in some cases, the college degrees that some employers prefer. In particular, employers note that workers need the “soft skills” that will allow them to perform well in managerial training programs. As one employer states, workers need the skills “to think, act, and do as a manager,” including communication, leadership, teamwork, and critical thinking skills. A management training program can train people in technical skill areas, but candidates are expected to have the motivation and soft skills needed to succeed.”⁵⁷

Trend #3: New Technologies in the Workplace

According to employers and industry experts interviewed for this study, retail employers use technology extensively to increase the quality and efficiency of work as well as to train workers. In general, technology is used on the job to improve efficiency of business processes and results in shifts in many workers’ tasks. Technology replaces some functions, and, in some cases, entire jobs. Some jobs end up requiring few skills; in other cases, employers may add new and sometimes more complex tasks to replace those made simpler by technology.

The 1980s ushered in a transformation in information and communications technology that had a dramatic effect on retail trade operations. The foundation for this transformation was the development of the Universal Product

Code (UPC), which automatically identifies the relevant information about a specific product. Using UPCs, retailers dramatically improved their ability to track the movement of goods through a distribution network, which in turn increased the speed, accuracy, and efficiency of retail activity.⁵⁸

Other technological advances followed, such as the development of Electronic Data Interchange (EDI) standards that allow for the transfer of business data across independent information systems. EDI technology allows retailers to use UPCs to organize information about products and automatically inform wholesalers about the quantity of a product that is in stock. This automates inventory management such that wholesalers can send a shipment “just-in-time” — without consultation with the retailers and just as inventory levels reach a specific point.⁵⁹

Retail stores are expected to implement new technologies as they compete for customers and work to reduce costs. A newspaper report about the National Retail Federation’s 2006 convention described the event as resembling “a computer or electronics show, with powerhouses like Microsoft, Intel, and Cisco taking up a lot of the floor space along with hundreds of tech firms.”⁶⁰ New applications being tested include paying by touch (instead of credit or debit card), private broadcast systems that might target messages to different customers depending on the time of day (such as seniors in the morning and teens in the evening), and customer loyalty cards that allow a computer terminal to ask a shopper about a recent purchase and suggest something else they might want to consider.⁶¹

According to the U.S. Department of Labor and the National Retail Federation, the number and variety of retail industry technology careers are expanding rapidly. These include working on e-commerce websites, complex inventory systems, technology-driven training programs, state-of-the-art cash register and credit systems, web design, and server and network system management.⁶²

Priority Skill Needs

Trend #3: New Technologies in the Workplace

New technologies are eliminating a number of tasks traditionally carried out by entry-level workers. For example, some frontline job responsibilities now focus less on cashier-related tasks and more on sales generation. As this trend increases, the following skills will increasingly be in demand among retail employers:

- Customer service skills
- Sales skills
- Product marketing knowledge and skills
- Basic information technology skills and equipment troubleshooting, repair, and maintenance skills for some workers
- Lifelong learning skills to adapt to new technologies

Key Skill and Education Implications for Workers

Some entry-level retail sales, cashier, and customer service workers will need to demonstrate the basic information technology skills needed to operate various types of technology on the job — from computerized inventory systems, to scanners, to electronic payment systems, needed to perform on the job. However, the effect of new technologies has been felt most strongly on the back end of the retail operations or in positions with high entry-level skill requirements, such as information technology networking specialists. Unlike many other industries, while technological change has had a strong effect on retailing productivity and efficiency, it has not resulted in a major “upskilling of core frontline jobs.”⁶³ Technology has eliminated a number of tasks for frontline workers and reduced the level of skill needed to succeed on the job. Barcodes, for example, have led to the elimination of certain retail jobs and tasks, including the need for sales clerks who affix price labels to every item in a store. Taking inventory of products in stock can now be done automatically when cash registers record sales, or by a few workers using handheld scanners, instead of by a team of workers manually counting items throughout a store.⁶⁴ While employers might prefer that workers have the skills to compensate for a failure of the technology, this level of knowledge is generally not required in the retail industry.

However, technology has shifted the emphasis on core job responsibilities in some frontline jobs. Given that less time is required for non-sale tasks that are now handled by technology, such as stocking and pricing, many employers now require retail sales workers to spend more time generating sales. This shift increases the emphasis on sales, customer service, and, in some cases, product marketing skills. For example, sales clerks may need to spend more time designing creative product displays to attract customers.

Trend #4: The Growth of E-Commerce

E-commerce, and in particular e-tailing, is a small but growing portion of the retail industry that is having some effect on employers’ workforce and skill needs. In 2000, the largest “pure” Internet retailer, Amazon.com, generated only 1% of the revenues collected by the largest physical retailer, Wal-Mart.⁶⁵ In 2005, online sales comprised between 2% to 4% of all retail sales, depending on estimates.⁶⁶ While some experts predict that online sales are unlikely to ever exceed 10% of total retail sales,⁶⁷ the U.S. Commerce Department estimates that online sales are currently growing rapidly — up 25% from 2004-2005, compared with 7.2% growth in overall retail sales for the same period.⁶⁸

Today, many store retailers are engaged in “multi-channeling” by developing an e-commerce website to complement in-store sales. According to one study, sales from multi-channel retailers accounted for 75% of online sales in 2003.⁶⁹

Key Skill and Education Implications for Workers

Both store retailers that engage in e-commerce and non-store retailers dedicated to online sales require workers who have strong information technology skills and knowledge about the needs of customers to build customer-friendly websites, conduct electronic marketing, and operate e-commerce systems. E-commerce systems require a range of different types of workers, from customer service workers, to Web-based marketing staff needed to design and maintain websites, to technical staff who maintain and repair backend information technology equipment. In the case of e-commerce, customer service workers need the same skills as other retail customer service and sales staff, with added competency in using information technology to communicate with customers and resolve customer disputes effectively. Some technical workers, especially those involved in the design and maintenance of e-commerce websites, need strong Internet and information technology skills, as well as retail marketing knowledge and skills to design effective websites.

Priority Skill Needs

Trend #4: The Growth of E-Commerce

Companies are using e-commerce websites to complement in-store sales. As this trend increases, both store retailers and online retailers will need workers with the following skills:

- Strong technical skills
- Strong customer support skills
- Marketing skills

Information Technology and E-Commerce Career Options in the Retail Industry

- Head of Information Systems and Data Processing
- Head of Systems Applications Programming
- Systems Development Manager
- Head of Computer Operations/Technical Services
- Point-of-Sales Administrator
- E-Commerce Director
- Website Designer/Art Director
- Website Project Manager

Source: National Retail Federation Foundation, 2006.

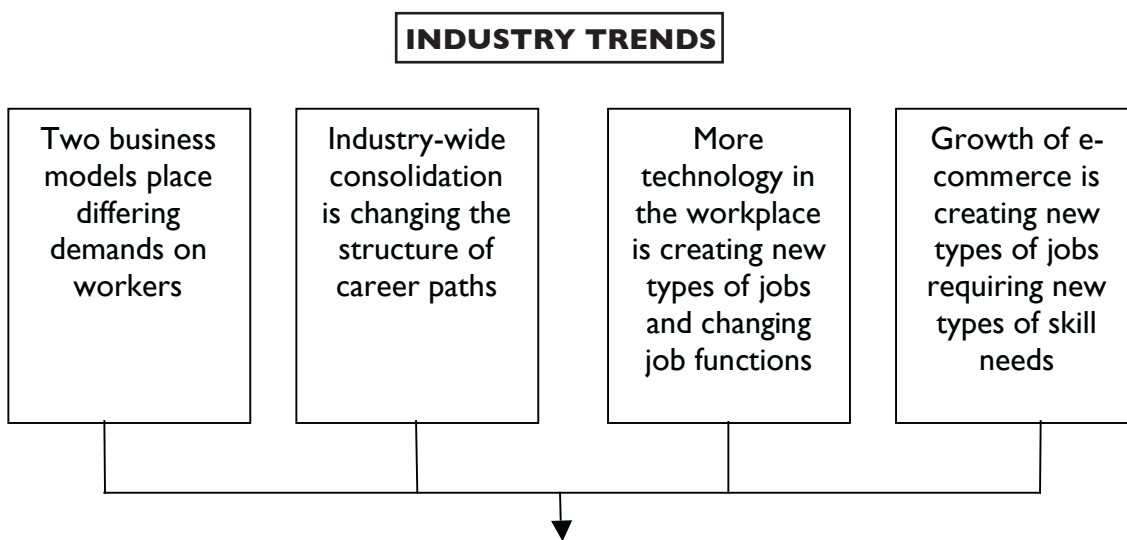
Conclusion: The Priority Skill Needs of Retail Employers

Basic skill requirements for jobs in the retail industry vary widely. According to employers, retail salespersons, cashiers, and other entry-level positions often require few skills and have limited educational requirements. A high school diploma or equivalent is preferred for most entry-level positions, particularly at larger retailers. At small stores, on-the-job-training for new employees is typically brief. Larger stores may offer more structured training sessions.⁷⁰ On the higher skill end of the spectrum, employers prefer that retail corporate staff — in-

cluding buyers, financial managers, and financial and accounting staff — possess an Associate's or Bachelor's degree in business or retail-related studies.

Several industry trends — from industry consolidation, to the emergence of new business models and technologies, to the rise of e-commerce — are driving up the level of skill needed for many jobs, making the search for good talent even more difficult for retail employers. These trends are also shifting the priority skill needs of employers to include an array of “soft skills”

Industry Trends Affecting the Priority Skill Needs of Retail Industry Employers



PRIORITY SKILL NEEDS OF RETAIL EMPLOYERS

- **Customer service, communication, and interpersonal skills**
- **Problem-solving and critical thinking skills**
- **Teamwork skills**
- **Basic business, sales, and marketing knowledge**
- **Information technology skills**

Workers looking to advance to supervisory, management, and corporate positions in retail need **particularly strong leadership, innovation, communication, and business skills**. Employers increasingly prefer a college degree for all but entry-level management positions.

that go beyond the basic workplace readiness, academic, and technical skills employers describe in most job postings.

Across multiple job levels, employers describe several priority skills that most workers need today to succeed and advance in the retail industry. These skills include **strong customer service, communication, and interpersonal skills**, which allow workers to interact effectively with customers, co-workers, supervisors, suppliers, and others, and to respond to the demands of emerging business models and shifting consumer demands.

Workers at all levels are also expected to have strong **problem-solving and critical thinking skills** that allow them to make independent decisions to improve customer service and/or company profits. These skills are especially important in an age where organizational hierarchies are flattening and more responsibility is being placed into the hands of frontline workers.

Employers also report that **teamwork skills** are critical at all levels, especially to help achieve key department, store, and company sales goals and to work effectively with managers and co-workers. When workers have difficulty acting as a unit, employers find that both customer service and, ultimately, profits, are negatively affected. **Basic business, sales, and marketing knowledge** is also increasingly needed at all levels, especially in high-touch model stores, and e-commerce operations. Workers at many retail stores are also increasingly expected to have a basic understanding of retail operations and the retail supply chain to make meaningful contributions to their teams and stores.

As technology becomes an increasingly dominant force in the retail industry in all areas of operations, **information technology skills** are becoming more important. Workers operating new technologies, such as new cash registers, need a more limited information technology skill set than those who maintain, manipulate, and/or repair a growing array of technology on the job, including technology related to e-commerce.

Finally, workers looking to advance to supervisory, management, and corporate positions in retail need **particularly strong leadership, innovation, communication, and business skills**. Employers also increasingly prefer a college degree for all but entry-level management positions.

Many employers have difficulty addressing gaps in these key skill areas in a wide range of jobs, including:

- Cashiers
- Drivers/Delivery Drivers
- Retail Salespersons
- Security Guards/Loss Prevention Managers
- First-Line Supervisors/Managers of Retail Sales Workers
- Pharmacists
- Electronic Home Entertainment Equipment Installers
- Repairers/Home Appliance Installers
- Computer Support/Microsoft Certified Support Technicians
- Purchasing Managers/Supply Chain Managers

High turnover, industry growth, and strong competition for workers from other employers fuel a near-constant need for skilled workers in the retail industry. As skill requirements for jobs rise and change in response to industry trends, employers, workers, and the education and training institutions that prepare workers will need to adapt to keep the retail industry strong.

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Appendix: List of Industry Advisory Group Members and Interviewees

The Heldrich Center conducted background interviews with industry experts and convened an industry workforce advisory group consisting of employers and others knowledgeable about the retail industry in the spring of 2006.

Individuals Interviewed

John Holub
New Jersey Retail Merchants Association

Kathy Mance
National Retail Federation Foundation

Monte Roberts
Jersey City Customer Service Skills Center

Industry Advisory Group Members

Tom Aruanno
CVS Pharmacy

Sarah Conrad
National Retail Federation Foundation

Linda Dolan
New Jersey Institute for Service Excellence,
Atlantic Cape Community College

Nancy Fisher
Jewish Vocational Services

Diane Higgins
Circuit City

Corina Marcus
Wal-Mart

Colleen Meares
The Stop & Shop Supermarket Company

Tammy Molinelli
The Bergen Workforce Investment Board

Monte Roberts
Jersey City Customer Service Skills Center