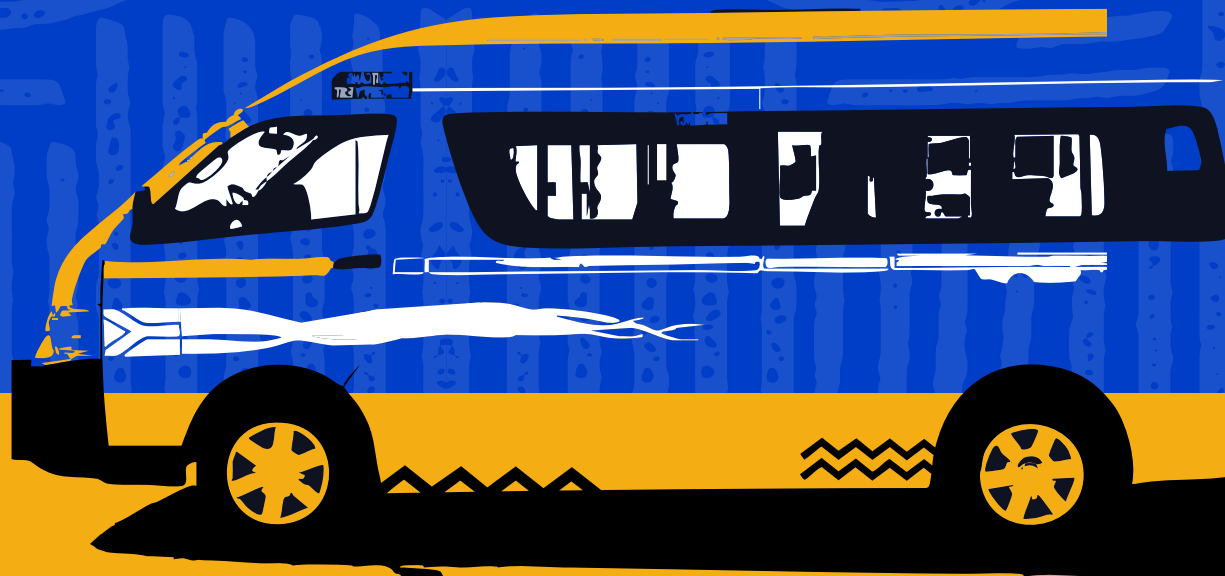


takealot.com

PERSONAL SHOPPER

YOUR COMPLETE TRAINING GUIDE

Easy to Follow • Practical Tools • Real Examples



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**PERSONAL
SHOPPER**

YOUR COMPLETE TRAINING GUIDE

1

MODULE 1: CUSTOMER SERVICE EXCELLENCE

Build trust & handle complaints like a pro
Duration: 20 hours



2

MODULE 2: SALES EXCELLENCE & BASKET BUILDING

Close more deals & build bigger baskets
Duration: 9 hours



3

MODULE 3: DIGITAL & WHATSAPP SELLING

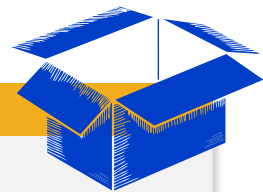
Master WhatsApp selling & content creation
Duration: 9 hours



4

MODULE 4: OPERATIONAL EXCELLENCE & SOPS

Handle returns, delivery & products expertly
Duration: Reference Material



WELCOME!

WHETHER YOU'RE 16 OR 60, THIS MANUAL IS DESIGNED FOR YOU!

How to Use This Manual

This training manual is organized to help you learn step-by-step:

- Read each module at your own pace
- Complete the practice activities as you go
- Use the templates and checklists in your daily work
- Track your progress with the assessments
- Come back to review sections whenever you need



PRO TIP

Don't try to memorize everything! Bookmark important pages and keep this manual handy for quick reference.

What Makes a Great Personal Shopper?

Quality	What It Means
Trust Builder	Customers choose YOU because they trust you
Product Expert	You know the platform inside and out
Clear Communicator	You explain things simply and professionally
Problem Solver	You handle issues quickly and calmly
Business Minded	You grow your customer base smartly



KEY POINT

Your success depends on mastering ALL four modules - they work together to make you a top-earning Personal Shopper!



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Note: Page numbers are located at the bottom center of each page.

MODULE 1: Customer Service Excellence • 20 hours

Build customer relationships that last

MODULE 2: Sales Excellence & Basket Building • 9 hours

Sell strategically and ethically

MODULE 3: Digital & WhatsApp Selling • 9 hours

Market yourself professionally

MODULE 4: Operational Excellence & SOPs • Reference

Master returns, delivery & products



MODULE 1: CUSTOMER SERVICE EXCELLENCE FOR PERSONAL SHOPPERS



MODULE PURPOSE

To equip Personal Shoppers with the foundational customer service skills, communication strategies, and operational knowledge needed to build trust, resolve customer issues effectively, and drive repeat business.



Learning Outcomes

By the end of this module, you will be able to:

- Greet and onboard customers professionally via WhatsApp, phone calls, and in-person interactions
- Explain the Personal Shopper process using the standard 7-step customer journey
- Apply active listening techniques to understand customer needs
- Answer questions about delivery options, timelines, and returns policies accurately
- Handle complaints and difficult conversations professionally
- Close the service loop by confirming delivery and inviting repeat orders
- Build trust through transparent communication and record-keeping
- Apply upselling and cross-selling techniques ethically

Theoretical Foundations

1. The Customer Service-Sales Connection

Customer service is not separate from sales—it IS sales. Research shows that:

- 86% of buyers will pay more for a better customer experience
- Acquiring a new customer costs 5-25 times more than retaining an existing one
- Customers with positive service experiences spend 140% more



KEY POINT

Every customer interaction is an opportunity to build trust that leads to current and future sales.

2. The Trust Equation in E-Commerce

When customers work with a Personal Shopper, they're trusting you with:

- Their money (payment handling)
- Their personal information
- Their expectations (quality, timing)
- Their time (waiting for orders)

THE TRUST EQUATION

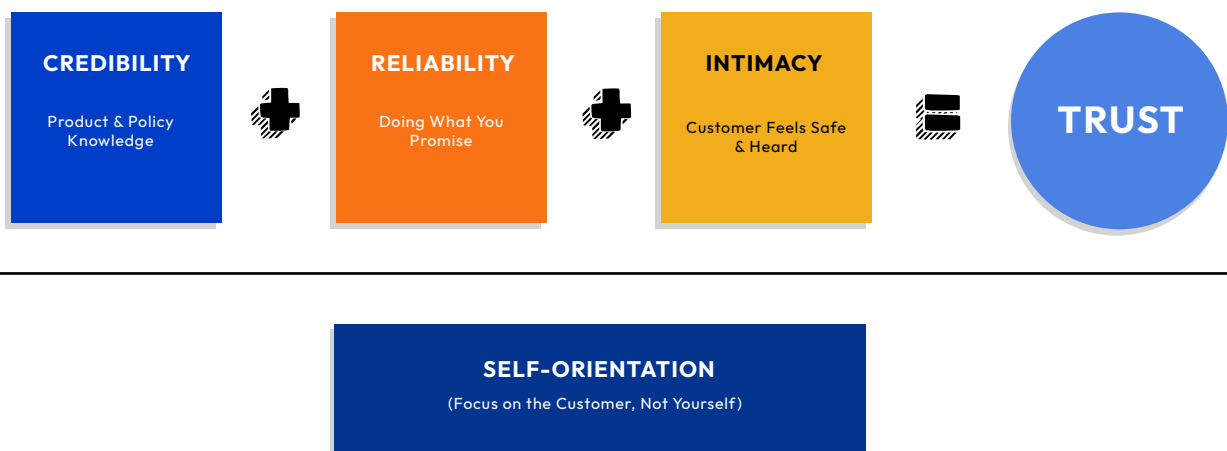


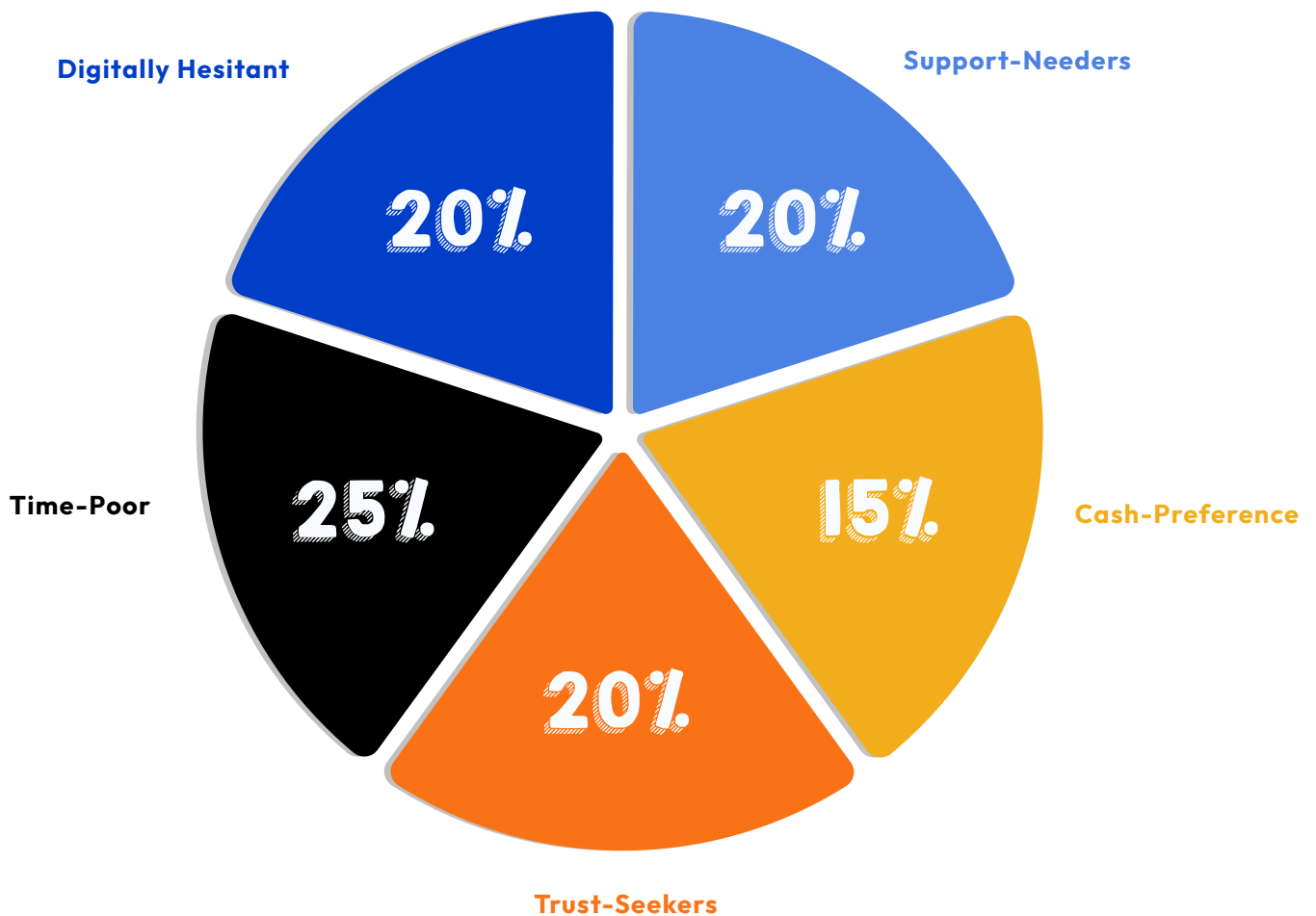
Figure 1.1: The Trust Equation - Building Customer Confidence

Trust Component	What It Means
Credibility	Knowing your stuff (products, policies, process)
Reliability	Doing what you say you'll do
Intimacy	Making customers feel safe and understood
Self-Orientation	Low focus on yourself, high focus on customer

3. The Psychology of Online Shopping Assistance

Understanding why customers use Personal Shoppers helps you serve them better.

CUSTOMER SEGMENTS



Understanding WHY customers use Personal Shoppers

Figure 1.2: Customer Segments - Why They Choose Personal Shoppers

Segment	Characteristics	How to Serve
Digitally Hesitant	Don't trust online shopping	Extra reassurance
Time-Poor	Too busy to shop	Efficient service
Trust Seekers	Prefer personal connection	Build relationships
Cash-Preference	Want cash payments	Accommodate safely
Support- Needers	Need extra assistance	Show patience



PRO TIP

Personal shoppers help clients spend less by prioritizing versatility and longevity, with advanced inventory knowledge.



SECTION 1.1: The Personal Shopper 7-Step Journey

This is the backbone of your service and the framework for all customer interactions.

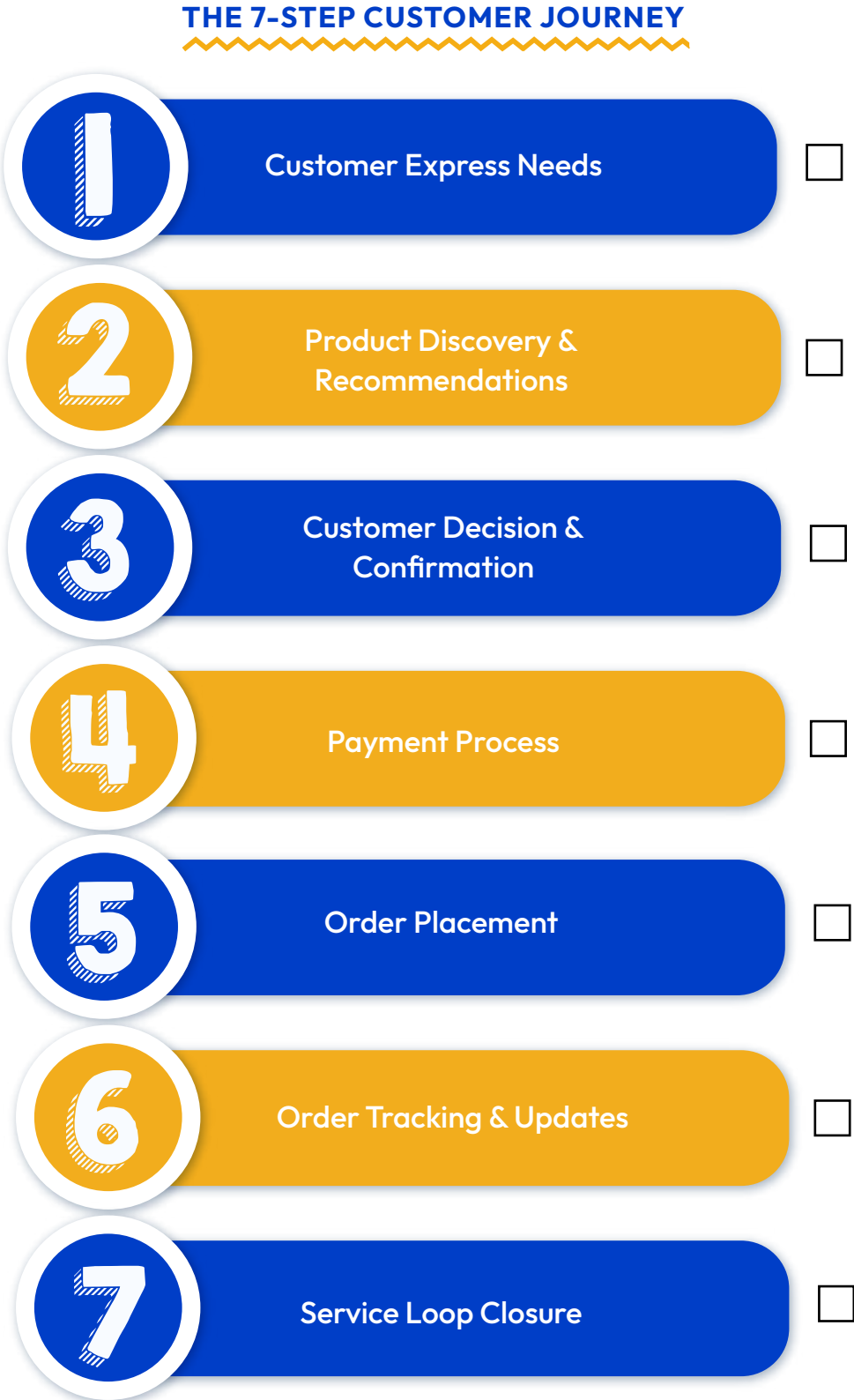


Figure 1.3: The 7-Step Customer Journey - Your Complete Service Framework



1

STEP 1: Customer Expresses Need

Customer contacts you via WhatsApp, phone, or in-person

- Listen actively
- Ask clarifying questions
- Understand the real need

2

STEP 2: Product Discovery & Recommendation

Search Takealot for suitable options and share 2-3 choices with:

- Clear descriptions
- Pros and cons
- Delivery timelines
- Price comparison

3

STEP 3: Customer Decision & Confirmation

Customer chooses their option. Confirm:

- Final price
- Delivery/collection option
- Timeline
- Special requirements

4

STEP 4: Payment Processing

Ensure safe, documented payment:

- Customer pays via agreed method
- Record proof immediately
- Send confirmation

5

STEP 5: Order Placement

Execute the order carefully:

- Place through Takealot account
- Double-check details
- Share order proof

6

STEP 6: Order Tracking & Updates

Keep customer informed:

- Monitor status 11
- Send proactive updates

7

STEP 7: Service Loop Closure

Complete the experience:

- Confirm delivery
- Check satisfaction
- Address concerns
- Suggest next order



PRO TIP

Don't overwhelm with options. Three is the sweet spot—gives choice without decision paralysis.

SECTION 1.3: Active Listening & Needs Discovery

Active listening means fully concentrating on what the customer is saying, understanding their message, responding thoughtfully, and remembering the information.

HEAR FRAMEWORK: Active Listening

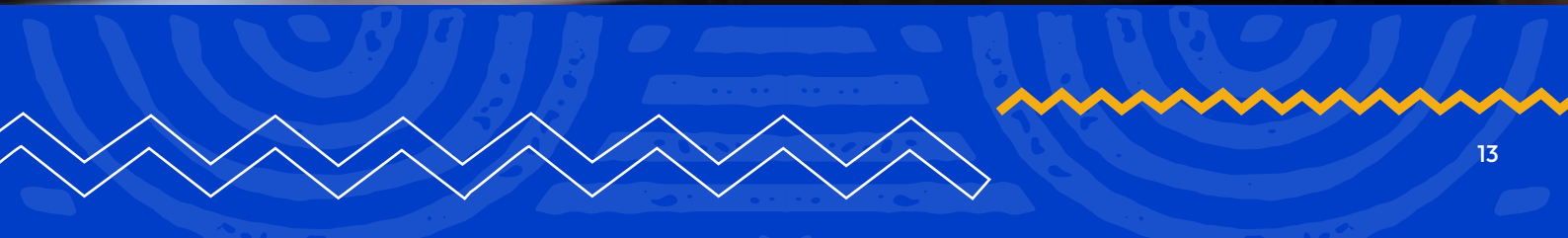


Figure 1.4: HEAR Framework - Mastering Active Listening

Letter	Action	What It Means
H	Halt	Stop and give full attention
E	Engage	Show you're listening
A	Anticipate	Think ahead about needs
R	Respond	Reply thoughtfully

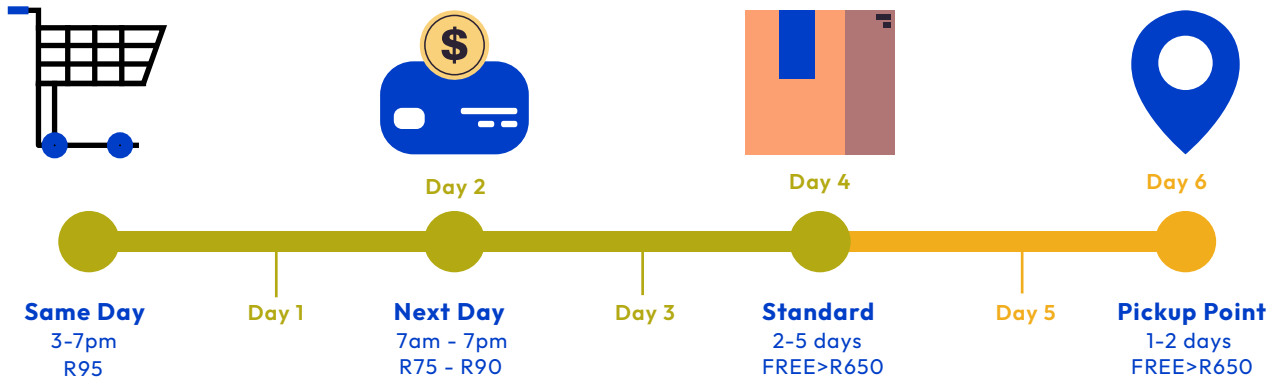
Common Customer Concerns & Responses

What They Say	What They Mean	How to Respond
Is it safe?	Worried about scams	Explain security and your process
When will it arrive?	Need by a specific date	Give an accurate timeline
What if I don't like it?	Nervous about committing	Explain return policy
Do I pay extra?	Worried about costs	Clarify delivery fees



SECTION 1.4: Delivery & Collection Fundamentals

DELIVERY OPTIONS TIMELINE



IMPORTANT NOTES

- Same/Next Day: Main centres only, subject to stock at nearest DC
- Bulky items (fridges, TVs): Standard delivery only, no pickup points
- Pickup Point: 7-day collection window from ready notification

Figure 1.5: Delivery Options Timeline - Compare All Options

Understanding Takealot's delivery system is essential for managing customer expectations.



Delivery Options

Home/Office Delivery

- Most products delivered to any address
- Large items (fridges, TVs) delivery ONLY
- SMS/email tracking notifications

Pickup Points

- 100+ locations nationwide
- 7-day collection window
- Not available for large/heavy items



SECTION 2.2: Complaint Handling & Difficult Conversations

Complaints are gifts—they tell you what's broken and give you a chance to fix it before the customer leaves forever.



Figure 1.6: LAST Model - Professional Complaint Resolution

Breaking down the LAST model:

Step	Action	Why It Works
L - Listen	Let customer vent completely	They feel heard
A - Apologise	Show empathy	Defuses anger
S - Solve	Propose concrete solution	Shows commitment
T - Thank	Appreciate patience	Ends positively

MODULE 1: Performance Metrics

To track your success as a Personal Shopper, focus on these key performance indicators:

PERSONAL SHOPPER KPI DASHBOARD

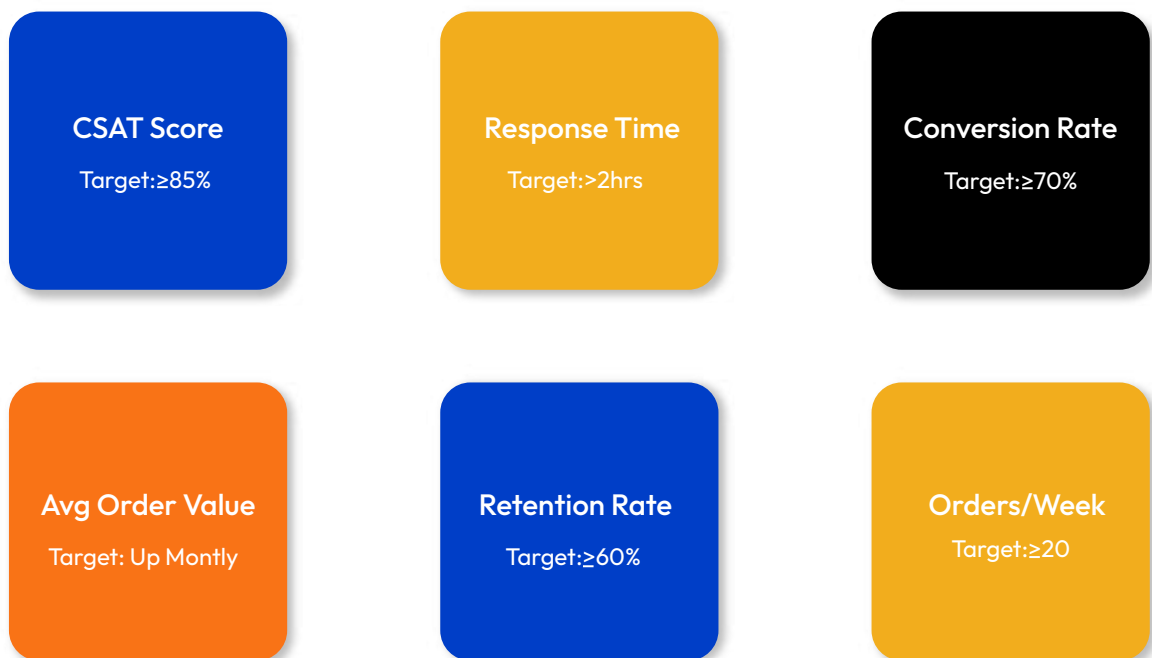


Figure 1.7: Personal Shopper KPI Dashboard - Track Your Success



SUCCESS FORMULA

Great Service + Strategic Sales + Digital Marketing = Top-Earning Personal Shopper

MODULE 1: ASSESSMENTS

Assessment Breakdown:

Formative: Communication templates (15%), Active listening (10%), Order log (5%)

Summative: Return role-play (15%), Complaint handling (20%), 7-step journey (25%)



ASSESSMENT 1: CHANGE MY MIND RETURN ROLE-PLAY (15%)



SCENARIO

Customer bought running shoes 10 days ago in perfect condition but doesn't like the color. Shoes unworn with tags, box perfect.

Task: Conduct WhatsApp or phone call handling

Must explain return eligibility, packaging, next steps, maintain professional tone

Reflection: Write 200 words on how this affects CSAT and Retention KPIs



ASSESSMENT 2: Complaint Handling Simulation (20%)



SCENARIO

Order placed 5 days ago, expected 3 days ago. Birthday gift for child's party tomorrow. Customer frustrated: 'Where is my order?? This is terrible service!'

Part A (40pts): WhatsApp response (150 words max) - address emotion, take ownership, explain action

Part B (60pts): Follow-up call script (400 words max) - greeting, acknowledgment, investigation, solution, close



ASSESSMENT 3: 7-Step Journey Case Study (25%)



SCENARIO

Mrs. Nkosi, 68, new customer referred by daughter. Needs birthday gift for 7-year-old grandson in 5 days. Budget R500-800. Grandson loves superheroes and building things. Delivery to Soweto.

Task: Document entire 7-step journey with product links, WhatsApp scripts, timing, and decision rationale

MODULE 2: SALES EXCELLENCE & BASKET BUILDING

2



MODULE PURPOSE

Equip Personal Shoppers with consultative selling skills to recommend products strategically, close sales ethically, and build value-driven baskets.



Learning Outcomes

By the end of this module, you will:

- Apply the Triple C framework for effective communication
- Conduct needs analysis using ADAPT questioning
- Design value-driven baskets that increase Average Order Value
- Leverage product categories strategically while maintaining ethics
- Handle price objections professionally



The Triple C Communication Framework

TRIPLE C COMMUNICATION FRAMEWORK



CLEAR

Eliminate Ambiguity



CONCISE

Respect Cognitive Load



CONVINCING

Build Value Perception

Clear + Concise + Convincing = EFFECTIVE SALES COMMUNICATION

Figure 2.1: Triple C Framework - Communication Excellence

Every product recommendation should be:

C	Principle	Application
Clear	Eliminate ambiguity	Use specific language, define technical terms
Concise	Respect cognitive load	Max 3 key features, lead with benefit
Convincing	Build value perception	Connect features to outcomes

ADAPT Questioning Framework

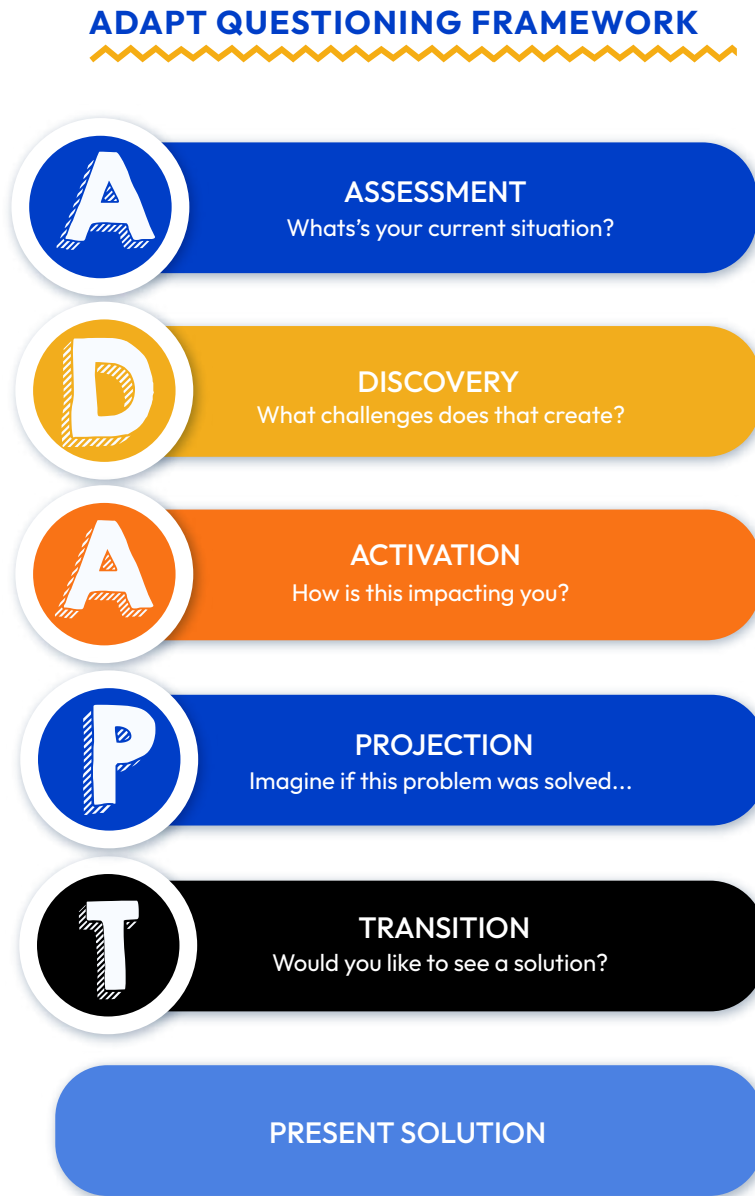


Figure 2.2: ADAPT Questioning Flow - Consultative Selling

The ADAPT framework guides you through systematic needs discovery:

Stage	Purpose	Example Questions
Assessment	Under current situation	What are you currently using?
Discovery	Uncover problems	What challenges does that create?
Activation	Recognize urgency	How is this impacting you?
Projection	Paint positive outcome	Imagine if this problem was solved?
Transition	Move to solution	Would you like to see a solution?

Strategic Basket Building



Figure 2.3: Strategic Basket Building - The Right Way

A well-structured basket has:

- Anchor Product - The main item solving primary need
- Essential Accessories - Functionally necessary items
- Protection Items - Extend product life
- Value Add-ons - Enhance the experience



ETHICAL BOUNDARY

NEVER recommend products solely for higher commission. Customer needs ALWAYS come first. Trust = Repeat Business = Long-term Earnings

MODULE 2: ASSESSMENTS



ASSESSMENT 1: Strategic Basket Design (100pts)



SCENARIO

Back-to-school basket for 2 children (ages 6,9), R2,500 budget, 10-day delivery

Requirements: 5-8 products with Takealot links, prices, commission categories, delivery verification, Triple C WhatsApp message (150-200 words)



ASSESSMENT 2: Triple C Pitch Role-Play (100pts)



SCENARIO

Customer hesitant about R2,200 air fryer, never used one, concerned about electricity costs

Requirements: ADAPT needs analysis (2-3min), Triple C pitch (2min), price objection handling (1-2min), complementary items (1min), close



ASSESSMENT 3: Lead Segmentation Plan (100pts)



Task: Classify 15 customers (Cold/Warm/Ready to Buy), justify classifications, create 7-day follow-up calendar, write sample messages



MODULE 3: DIGITAL & WHATSAPP SELLING

3



MODULE PURPOSE

Use WhatsApp, calls, and digital channels effectively to sell, follow up, handle queries, and build a strong Personal Shopper reputation.



Professional WhatsApp Communication Anatomy of a perfect whatsapp message

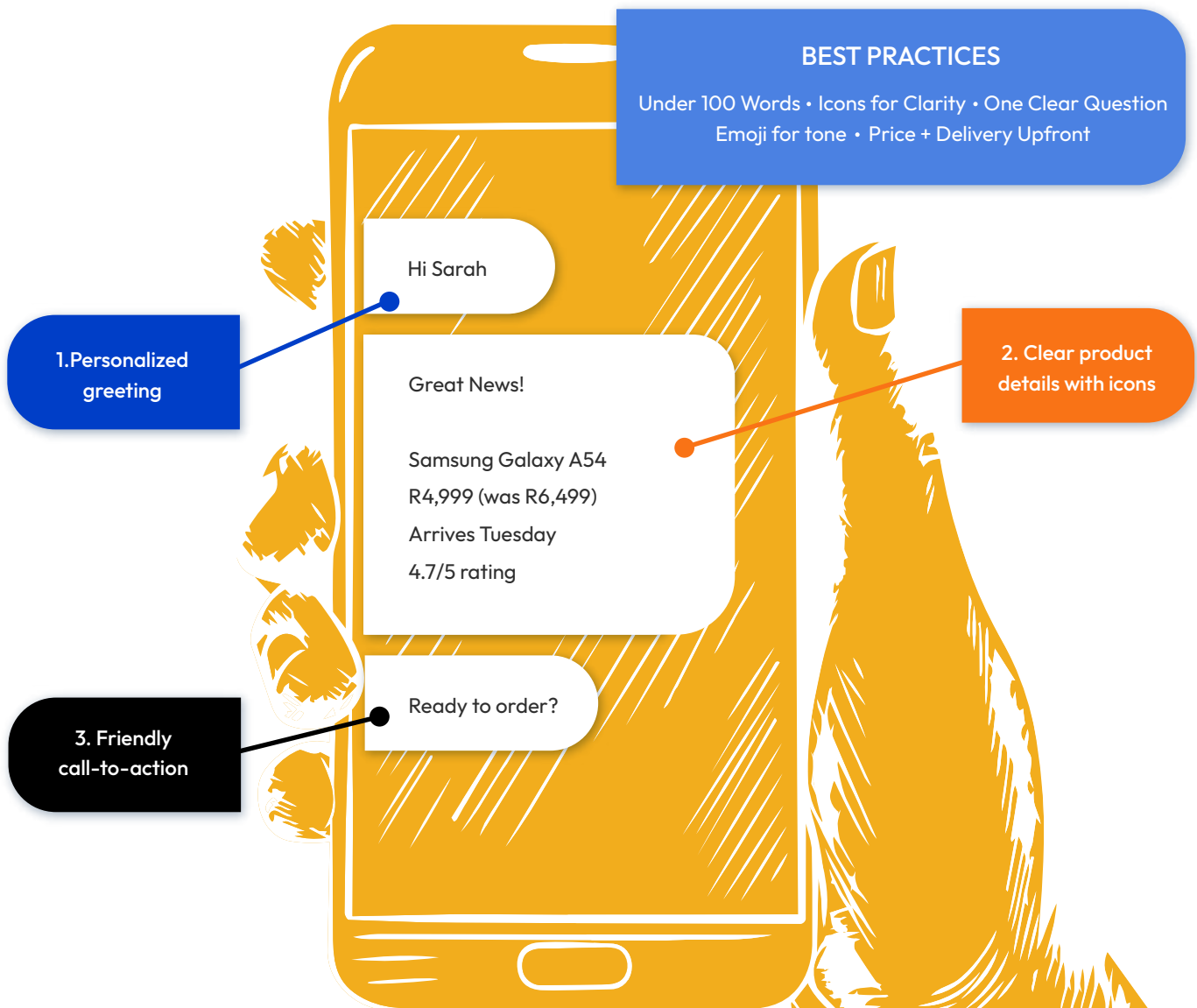


Figure 3.1: Anatomy of a Perfect WhatsApp Message

Best Practices for WhatsApp Messages:

- Keep under 100 words for quick reading
- Use emojis sparingly for tone (2-3 max)
- Include price + delivery upfront
- One clear question or call-to-action
- Professional greeting with customer name



The 5 C's of Digital Communication

Principle	What It Means	Example
Clear	One main point per message	Not: Long paragraphs. Do: focused messages
Concise	2-3 sentences ideal	Respect their time
Courteous	Always professional	Use please, thank you
Correct	Proper spelling/grammar	Use spell-check
Compliant	Protect privacy	Follow POPIA rules



MODULE 3: ASSESSMENTS



FORMATIVE ASSESSMENTS



1. Channel Selection Practice: Identify best channel for 3 scenarios
2. Message Critique: Identify problems and rewrite unprofessional messages
3. Privacy Protection: Write correct responses protecting customer privacy
4. Product Photography: Take/edit product photo with 100-word explanation



SUMMATIVE ASSESSMENTS



1. WhatsApp Campaign Design (40 marks): 5-day Health & Beauty campaign with KPI alignment
2. Digital Etiquette Analysis (30 marks): Analyze 3 conversations, identify professional/unprofessional elements
3. Data Privacy Scenario Response (30 marks): Comprehensive response to complex privacy request
4. Visual Content Portfolio (40 marks): 6-image product showcase, before/after editing, brand visual guide



MODULE PURPOSE

Master all rules and procedures for returns, delivery, and products so you can handle any situation confidently.



Returns Eligibility Framework

RETURNS ELIGIBILITY DECISION TREE

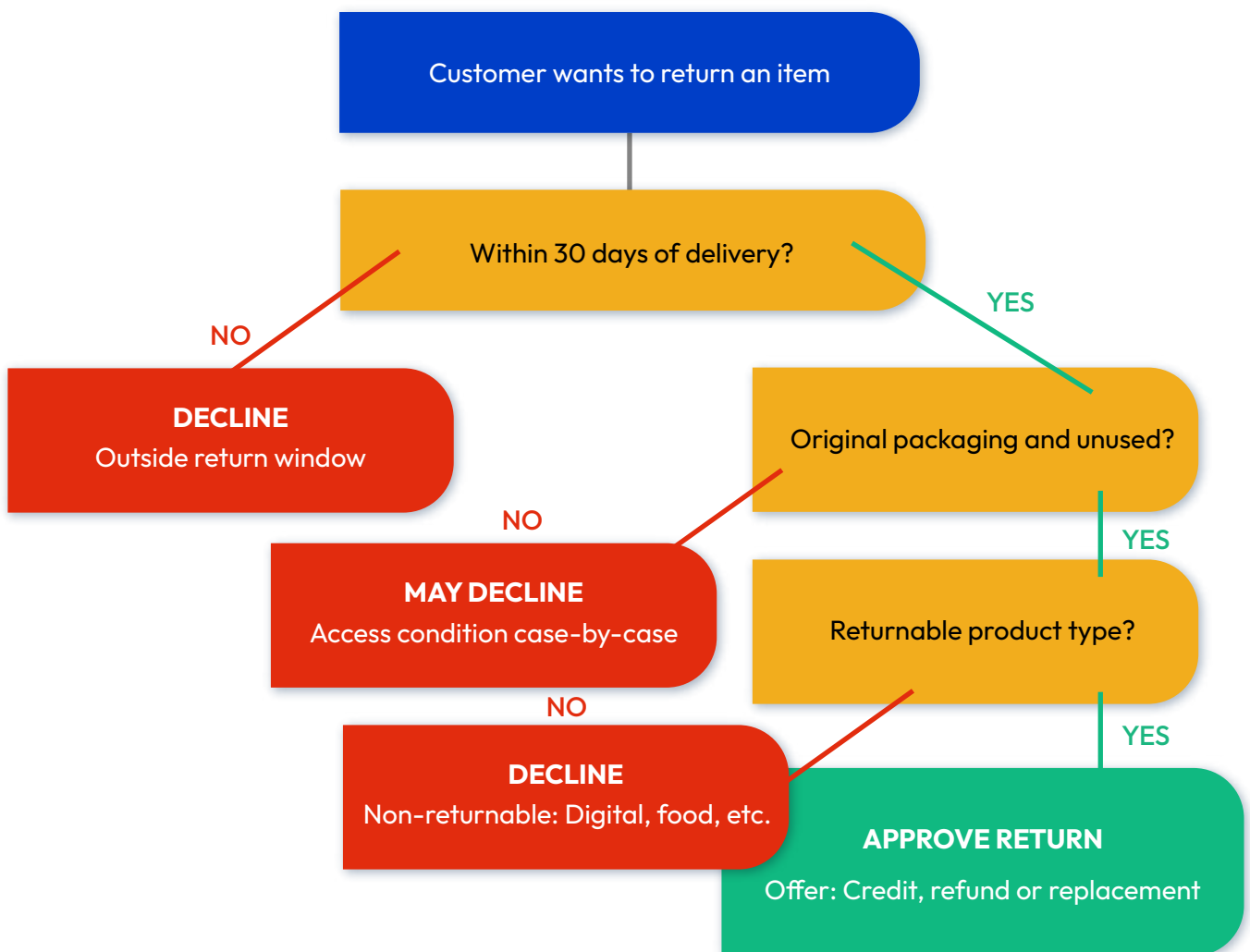


Figure 4.1: Returns Eligibility Decision Tree - Navigate Policy Easily

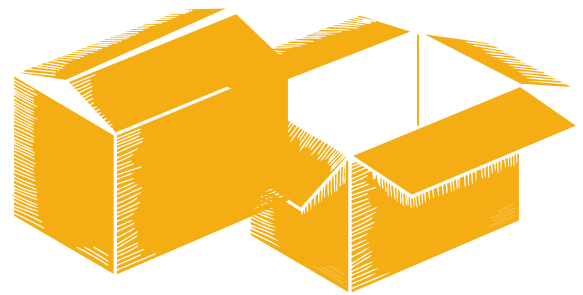
Returns are governed by the Consumer Protection Act (CPA). Three primary return reasons:

Reason	Timeframe	Condition	Outcome
Changed Mind	30 Days	Unused, original packaging	Credit or refund
Damaged on Delivery	7 Days	Report immediately	Replacement
Defective	6 months	Under warranty	Repair/replace/credit

Critical Product Exclusions

NON-RETURNABLE unless damaged on delivery:

- Digital products (eBooks, vouchers, codes)
- Unsealed media (DVDs, CDs, games)
- Food, beverages, supplements
- Used beauty products, opened cosmetics
- Personalized or customized items
- Assembled flatpack furniture



MODULE 4: ASSESSMENTS



OPERATIONAL KNOWLEDGE QUIZ



- Q1: Gaming headset return after 25 days, unused - Eligible? Outcome?
- Q2: Vacuum cleaner stopped after 8 months - Which warranty? Process?
- Q3: Return pre-packed bundle but keep one item - Possible?
- Q4: Next-day delivery for laptop + 40kg treadmill + phone case - Available?
- Q5: Delivery failed 'Customer Not Available' - Next steps?
- Q6: TV license verification failed but customer says it's valid - What to do?
- Q7: Multi-Buy bundle (3 t-shirts R500 total), return 2 keep 1 - Credit amount?



TRAINING COMPLETION REQUIREMENTS



- Module Assessments: Minimum 80% each
- Practice Scenarios: Complete all exercises
- Final Assessment: Minimum 85%
- Role-Play: Demonstrate multi-issue competency



GLOSSARY OF TERMS



QUICK REFERENCE FOR KEY TERMINOLOGY USED THROUGHOUT THIS MANUAL

AOV (Average Order Value): Average amount spent per customer order

Basket Building: Strategy of recommending complementary products

Conversion Rate: Percentage of customers who complete purchases

CSAT: Customer Satisfaction score (0-100%)

Cross-Selling: Recommending related products

KPI: Key Performance Indicator

POPIA: Protection of Personal Information Act

Upselling: Recommending higher-quality versions



QUICK REFERENCE GUIDE

CUSTOMER SERVICE QUICK TIPS

- Respond within 2 hours during business hours
- Use HEAR framework for active listening
- Follow up after delivery

SALES QUICK TIPS

- Use Triple C: Clear, Concise, Convincing
- Ask ADAPT questions
- Recommend 2-3 options, not 10

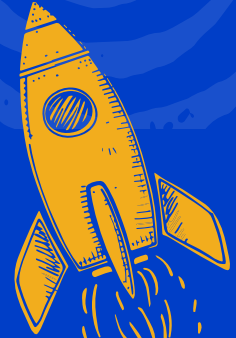
DIGITAL MARKETING QUICK TIPS

- Keep WhatsApp profile professional
- Use good lighting for photos
- Always get consent for broadcast lists

OPERATIONS QUICK TIPS

- 30-day return window for most items
- Large items: delivery only, no pickup
- TVs require valid TV license





CONGRATULATIONS!

You now have all the knowledge
you need to succeed

• CUSTOMER TRUST IS YOUR MOST VALUABLE ASSET

• EVERY INTERACTION IS A CHANCE TO BUILD YOUR REPUTATION

• KEEP LEARNING AND IMPROVING EVERY DAY

• USE THIS MANUAL AS YOUR DAILY REFERENCE GUIDE

• YOUR SUCCESS IS IN YOUR HANDS - GO MAKE IT HAPPEN!

Now go build your Personal Shopper business!

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