Canada Retail Industry Participation Webinar

March 20, 2024

Your dedicated Mercer Team

Christian Montemayor
Senior Associate, Product Manager

Christian is a Product Manager in Mercer's Career Products business. He is based in Tampa, Florida and helps manage the US Mercer Benchmark Database (MBD) and the Canada MBD – Mercer's flagship General Industry compensation surveys in North America. He also manages select industry-specific offerings including the US Transportation, Logistics and Warehousing Survey, a consumer goods forum in Canada, and assists with the North America Retail Surveys.

christian.montemayor@mercer.com

Phoebe Min
Senior Associate, Product Manager

Phoebe is a Product Manager in Mercer's Career Products based in Los Angeles. She manages a portfolio of industry-specific surveys including US and Canada Retail, US and Canada Financial Services (FSS), and US Pharmacy (PCS). She also assist with the US Healthcare Survey (IHN), US Property & Casualty Insurance Survey (PCICS), and Canada General Insurance HR Group Survey (GIHRG).

phoebe.min@mercer.com

Elizabeth English
Principal, Career Products

Liz is a Principal in in the Products segment of Mercer's Career business in Toronto. As the Product Lead for Canada, she is focused on driving the best outcomes for the Canadian survey portfolio. She works closely with clients and internal colleagues throughout the survey process, delivers key insights and continues to evolve the surveys.

elizabeth.english@mercer.com

North American Customer Service

A centralized team to ensure overall consistency in approach and maximum support for our survey clients.

- Providing a point of contact for general queries and support
- Assist with job matching and data submission queries, if required
- Provide training and daily support with Mercer Data Connector, Mercer WIN®, survey tools, methodology
- Orders and invoicing

P | 1 800 333 3070
E | surveys@mercer.com

Mercer

2023 CA Retail Survey: Overview

143
Total number of organizational entities

521,643
Total number of incumbents

514
Reportable Positions

$550 Million
Median net revenue of participants (CAD)

What you receive with CA Retail Survey

Full Compensation Data Package

- Receive the full compensation data, including: Annual Base Salary, Total Cash Compensation and Total Direct Compensation
- Access to WIN, Mercer's online platform for analyzing survey results

Policies & Practices Report (Updated in 2024!)

- Go beyond the paycheck to enhance your compensation strategy
- Explore other areas of employee compensation, such as work arrangements, employee perquisites and benefits, differentials, and other HR policies

Partnership and Networking

- Offerings of in-person and virtual meetings, allowing you to connect with peers and discuss hot, relevant topics in HR/retail industry
(In-person results meeting scheduled for late October in Toronto – stay tuned!)

Client Engagement and Support

- Dedicated team available to support you through participation and results seasons, and address any inquiries and concerns regarding the survey
- Evolving product and deliverables based on client feedback and engagement
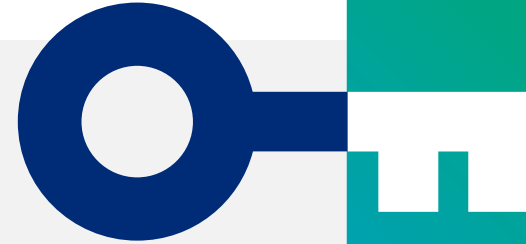
Retail Industry Themes

Talent

Employee Experience

Customer Experience

Mercer

Mercer

Global Talent Trends

2024

Insights from the retail industry

welcome to brighter

Mercer's 2024 Global Talent Trends

Drive
human-centric
productivity

**Solve the
productivity equation
with AI, Assessment, and
work design**

Anchor
to trust
& equity

**Foster a climate of
trust through fair pay,
equity, and inclusion**

Boost
the corporate
immune system

**Build resilient cultures
with teams that are risk
aware and healthy at the core**

Cultivate
a digital-first
culture

**Design an adaptive,
digitally fluent organization
where people can thrive**

9

Key takeaways for today's webinar

1 | *Critical retail-related fields for submission*
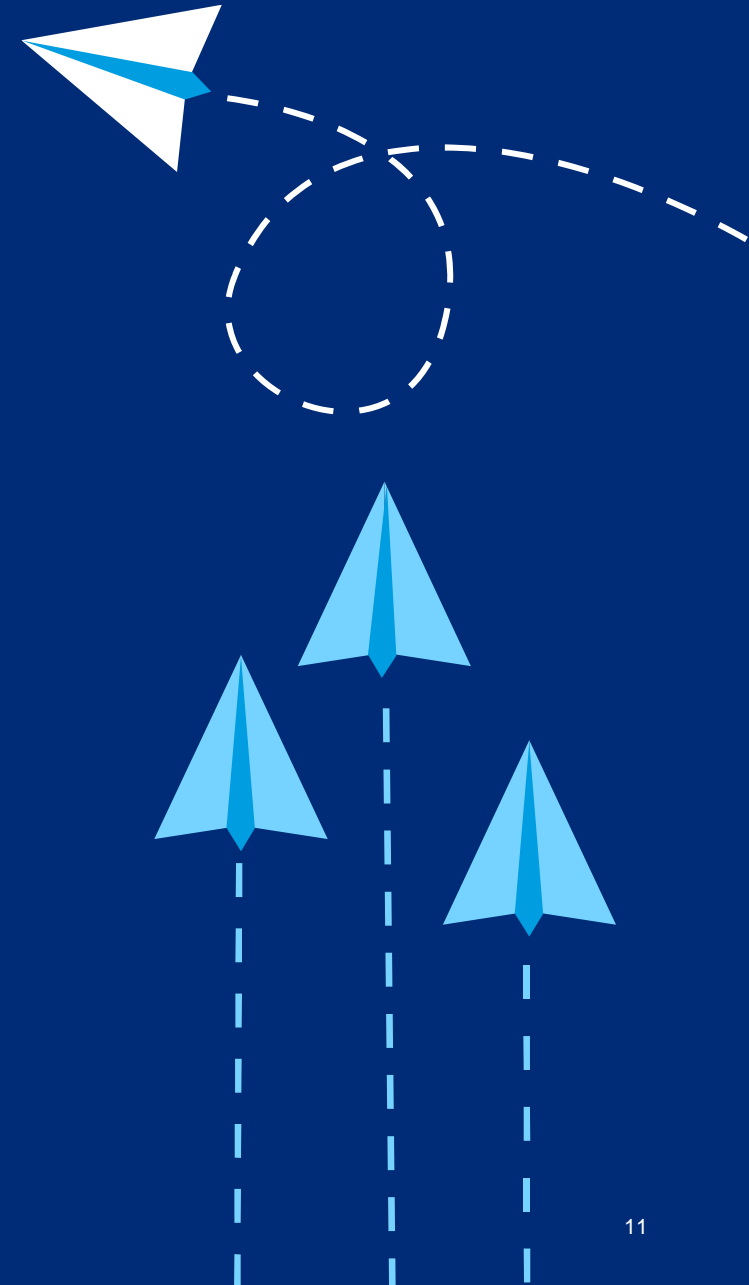*Employee location, most prevalent store/restaurant size, total number of stores/restaurants, etc.*

2 | *New Retail Policies & Practices section*
Policies & Practices will not be pre-populated this year. Please make sure to complete the section

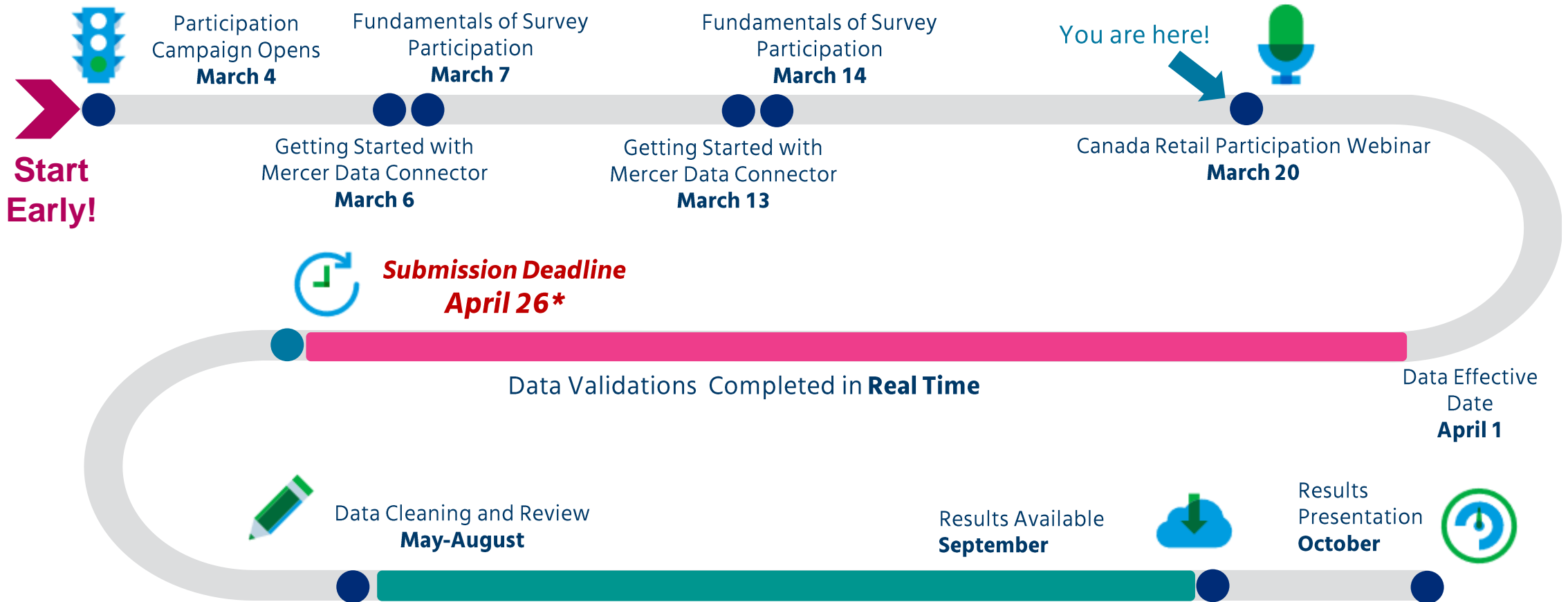**3** | *Simplified Executive Framework*
Past participants will have their matches mapped over to new framework

Mercer

Survey Timeline
2024 Survey Cycle

* **Extensions beyond April 26 cannot be provided** *
If you have concerns, please visit www.imercer.com/market-analytics-services to learn more about our Participation Services to ensure you meet the deadline.

Start Early!

Participation Campaign Opens
March 4

Getting Started with Mercer Data Connector
March 6

Fundamentals of Survey Participation
March 7

Getting Started with Mercer Data Connector
March 13

Fundamentals of Survey Participation
March 14

You are here!

Canada Retail Participation Webinar
March 20

Submission Deadline
April 26*

Data Validations Completed in **Real Time**

Data Effective Date
April 1

Data Cleaning and Review
May-August

Results Available
September

Results Presentation
October

Mercer

12

Survey Timeline: Where we are in the process

You should now be set up in Mercer Data Connector

- Use of Mercer Data Connector is by invitation only.
- Mercer has set up a profile and sent an *Invitation to Participate* to the person that submitted your organization's data on Mercer Data Connector last year.
- All 2024 participants will have their matches pre-populated in the employee data file.
- **Did not participate in 2023? Did not receive an Invitation to Participate email from Mercer Data Connector?**
- **Please call 800-333-3070 or email us at surveys@mercer.com as soon as possible.**

You should have attended two fundamental webinars for participation

- *Getting Started with Mercer Data Connector* and *Fundamentals of Survey Participation using Mercer Data Connector*
- If you missed them, you can view the recording and presentation deck by going to the Canada iMercer page (Canada Home | Mercer (imercer.com)): Click on "Webinars & Training" and select "Webinars & Events"
- Locate the two webinars on the page, and click on 'View Webinar Replay' and 'View PDF' on the right.

Survey Overview: Company Data & Employee Data

Company Data

- Super sector, sector, and sub sector (if applicable)
- Type of Organization
- FTEs
- Financials, including net sales revenue and operating budget

Key retail data!

- **Total Number of Stores/Restaurants**
- **Most Prevalent Store/Restaurant Size**
- **Is your organization a franchisor? & Restaurant concept type**
  (For restaurants only – New!)

…

Employee Data

- Base Salary
- Short-term Incentives, Sales Incentives
- Profit Sharing
- LTI – Eligibility, Plan Type, and Awards
- Year of Hire
- Full-time/Part-time status

Key retail data!

- **Postal code** (Workplace and Home)
- **Total Number/Type of Store Managed**
- **Store/Restaurant Headcount**

…

[New fields added to Canada Retail in 2024]

Type	Question	Notes
Company Data	Number of part-time employees	
Company Data	Is your organization is a franchisor?	Answer options: Yes / No / Not Applicable
Company Data	Restaurant concept type	Answer options: Quick Service / Fast Casual / Family Dining / Casual Dining / Fine Dining / Restaurant Group / Other / Not Applicable
Employee Data	Type of store/restaurant managed	For select specializations only: • HPY.11.003 - Single Location Restaurant Management (Hospitality & Retail) • HPY.11.007 - Restaurant Management Trainee (Hospitality & Retail) • RET.01.022 - Single Store Management (Retail) • RET.01.032 - Store Co-Management (Retail) • RET.01.033 - Assistant Store Management (Retail) • RET.01.066 - Store Management Trainee: Store (Retail)
Employee Data	Total dollar volume responsibility	Total annual dollar volume at cost responsibility. For select specializations only: • SCN.03.010 - Buyer (Retail) • RET.06.001 - General Merchandising (Retail)
Employee Data	Type of designer	For select specializations only: • CRT.01.003 - Fashion Design (Retail) • SMP.04.003 - Product Design • SMP.04.004 - Product Technical Design (Retail) • SMP.04.006 - Product Pattern Development (Retail)

[Employee Data] Which Incumbents to Match?

Do Include

Full-time

Part-time

Survey effective: April 1

Incumbents on parental leave

Do **NOT** Include

Seasonal employees

Contractors

Expatriates

Co-ops/interns

Long-term leave

Future hires

Survey Overview: Retail Policies & Practices

Updated Retail Policies & Practices Section!

- The entire Retail Policies & Practices section has been reviewed & simplified & improved to become more relevant!
- With a general overhaul of the questionnaire, <u>NO FIELDS will be prepopulated for 2024.</u> **PLEASE MAKE SURE TO FILL OUT THE POLICIES SECTION!**

Employee Groups	Minimum Wage	Recognition, Development, Advancement
Work Hours	Differentials	Work-Life Programs
Emergency Closing	Recruiting & Retention	Employee Discounts
Seasonal Staff	Severance Packages & Payments	Employee Purchases
Delivery	Incentives	Employee Uniforms
	Sales Incentives & Quotas	Benefits
	Seasonal Bonus	

Survey Overview: 2024 Pricing

2024 CA RET Pricing		
Product	**Participant Rate**	**Non-Participant Rate**
CA Retail	$2,850 CAD	$8,550 CAD

In order to ensure your organization is eligible for Participant Prices,
it is important to provide as close to **a full census of your employee population** as possible.

Mercer Data Connector: Process

Please remember to SUBMIT!

Register securely
Through Mercer single sign on

Upload data
Review prior year data online

Match jobs
Review automated suggestions

Submit data
Download submission
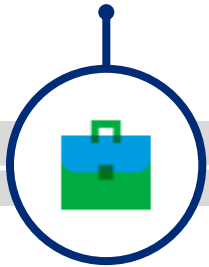
Add users
Unlimited # of users with role-based security
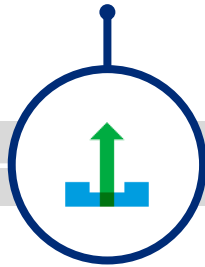
Monitor status
Real-time visibility to work in progress
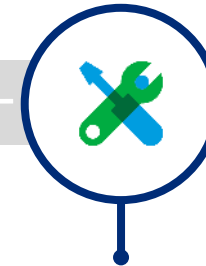
Correct issues
In real-time

Mercer Data Connector: Survey Participation

https://www.imercer.com/mercer-data-connector-participation

Mercer Data Connector: Easy User Access Functionality

Manage Users in one place

Add new users with a click of a button

Edit or delete user
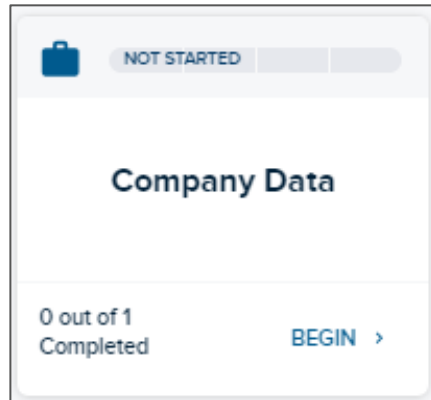
User Role Permissions	Administrator	Delegate
Manage companies within organization	Yes	
Manage users	Yes	
View, enter and edit data	All sections	Select sections
Submit data	Yes	
Download your data	Yes	
Order products	Yes	

22

Mercer Data Connector: Dashboard

Mandatory

💼 NOT STARTED	📋 NOT STARTED	💼 NOT STARTED	💼 NOT STARTED
Company Data	**Employee Data**	**Long-Term Incentive Plans**	Other Benefits
0 out of 1 Completed BEGIN ›	0 out of 1 Completed BEGIN ›	0 out of 1 Completed BEGIN ›	0 out of 1 Completed BEGIN ›
💼 NOT STARTED	💼 NOT STARTED	💼 NOT STARTED	💼 NOT STARTED
Contact Center Location Details	Contact Center Policies	**Retail Policies and Practices**	Mercer/Gartner IT Jobs and Skills Policy
0 out of 1 Completed BEGIN ›	0 out of 1 Completed BEGIN ›	0 out of 1 Completed BEGIN ›	0 out of 1 Completed BEGIN ›
🛒 NOT STARTED	✓ NOT STARTED		
Order Products	**Submit Data**		
ORDER ›	0 out of 1 Submitted SUBMIT ›		
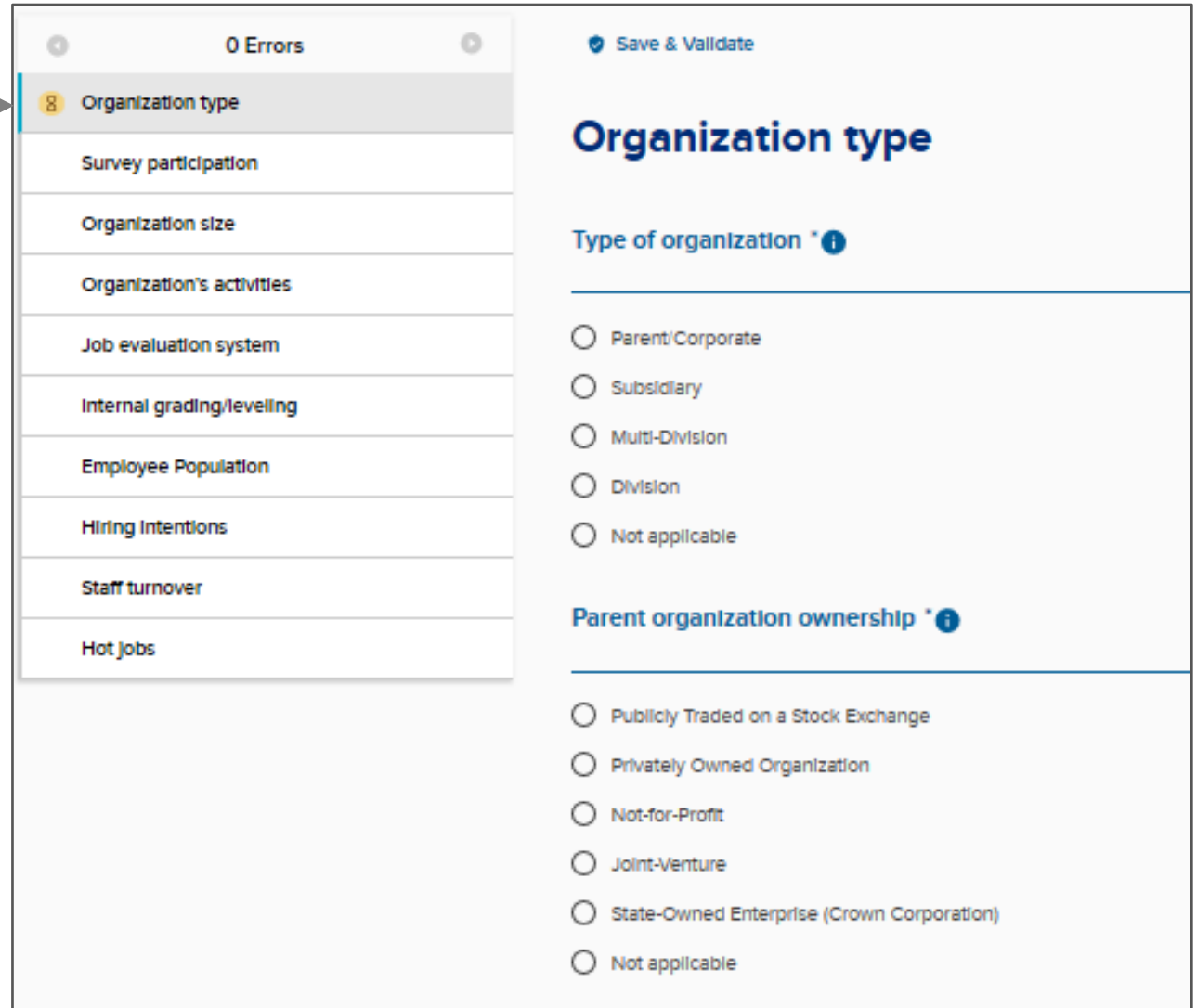
Mercer

Mercer Data Connector: Company Data

Please complete this section as much as possible!
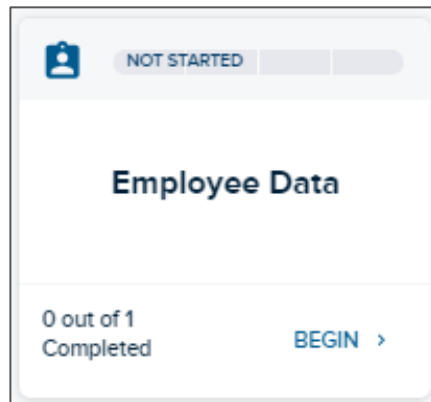
Submitting data allows for data cuts within survey results by (for example):

- *Net Sales Revenue*
- *FTEs*
- *Geographic scope of organization*
- *Total number of stores/restaurants, etc.*

Mercer Data Connector: Employee Data (Downloading Template)

NOT STARTED

Employee Data

0 out of 1
Completed

BEGIN ›

2024 DATA COLLECTION

Employee Data

- Status
- 1. File Upload
- 2. Job Match
- 3. Validation

File Upload

US Retail Company (US) ✕

Filter: 1 Companies selected CLEAR

Choose Your Company ▾

Choose your company(ies)

First select companies you want to upload from the drop down list on the right. When preparing your file choose one of below options:

I participated last year and want to review my pre-populated data.

Click the "Download Template" button and Mercer Data Connector will generate an Excel file that contains your data from last year. If you have more than one company and country (or region) combination selected, they will be identified in the "Company Name" and "Country/Region Code" columns. This is the easiest way to update your employee data.

I want to use a blank template.

Click the "Download Template" button and Mercer Data Connector will generate an Excel file template. If you didn't participate last year, the template will be blank but if you did participate, data will be pre-populated – just delete it and copy and paste your data into the Excel file – don't modify the columns.

I want to upload my HRIS file.

Using an Excel (xlsx only) file, upload your file by clicking the "Upload" button. Once your file is uploaded, Mercer Data Connector will prompt you to map your column headings to Mercer's columns and identify the country (or region) combinations the data applies to.

Are you uploading data for multiple countries (or regions) using one file?

During the file upload process, Mercer Data Connector will automatically skip data that is not applicable for the countries (or regions) that you are participating in. Why do we do this? Mercer Data Connector automatically cleans and validates your data during the file upload process, you won't have to review answers that are not needed for your survey participation.

Download Template

Download the template

Mercer

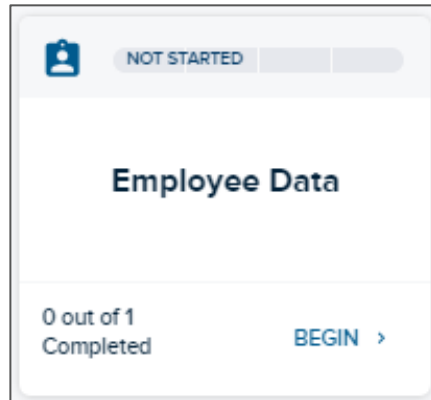# **Mercer Data Connector:** Employee Data (Pre-populated Template)

Mercer Data Connector: Employee Data (Uploading Template)

NOT STARTED

Employee Data

0 out of 1
Completed   BEGIN ›

Are you uploading data for multiple countries (or regions) using one file?

During the file upload process, Mercer Data Connector will automatically skip data that is not applicable for the countries (or regions) that you are participating in. Why do we do this? Mercer Data Connector automatically cleans and validates your data during the file upload process. By removing responses that are not applicable, you won't have to review answers that are not needed for your survey participation.

Download Template

Time Saver Tip:

When you upload your file, Mercer Data Connector will automa[...]ob Library. If we can't find a match, we'll make a suggestion for you to review.

☐ I have agreed to the upload **Terms & Conditions**

Agree to Terms & Conditions

Select Date Format   Select Numeric Format
YYYY-MM-DD   ▼   X,XXX,XXX.XX   ▼

Upload the Employee Data file

Drop files here or click to upload, make sure to accept Terms & Conditions to activate

⬆

Mercer

27

Mercer Data Connector: Real-time Data Validation

Review validations by type

Make sure to budget time to complete data validations!
The quality of the survey data depends on your ability to properly address your validations.

Mercer Data Connector: Real-time Data Validation

Fix the error: The tool is user friendly, and you can address any corrections though this without redoing the incumbent submission.

Dismiss: This accepts the entry as is and Mercer may take further action if required

Exclude: This omits the entire line of data from being included in the submission. ***Use with caution.***

Be sure to understand the difference between Dismiss and Exclude

Mercer

Mercer Data Connector: Where to get help

Mercer Resources Center
Survey resources, all in one place

Custom resources
Job catalogues and other documents

Announcements
What's new, alerts

Contact us
Get help

In Mercer Data Connector, look for the *pink "i" icon* on the bottom right.
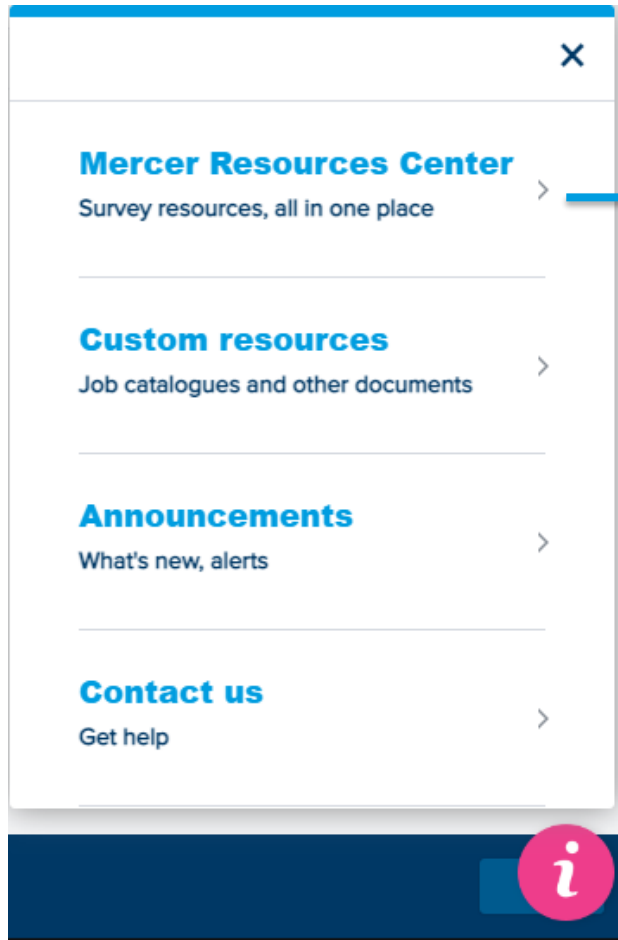
About Mercer Data Connector

Access & First Steps

File Upload

Match Jobs

Validation (Employee Data)

About employee data validation

Data Submission Management

Employee data validations

Reviewing validations

Navigating Validations

How to fix errors

Manually changing data

Using the Bulk Update functionality

Using an Excel file with Validations

How to dismiss validations

Review resolved validations

Policy & Benefits sections

Submit & Download data

Navigating Validations

1. Use the **Choose Your Company** drop down list.
2. Select one or more **Validation types** for review.
3. Apply an **Advanced Filter**.
4. Review validation **Results**, color coded by type.
5. Click the arrow to see a description, including the correction that will be applied if the validation is not resolved.
6. In the **Action** column, click **Fix Error/Review/View** to see more details and take action.
7. Use page navigation to switch between pages or expand to view more results on one page.

After you click on one of the action buttons it will take you to the error page where you will:

1. Review the **validation message and description**. Where applicable, it will include the action Mercer will take if
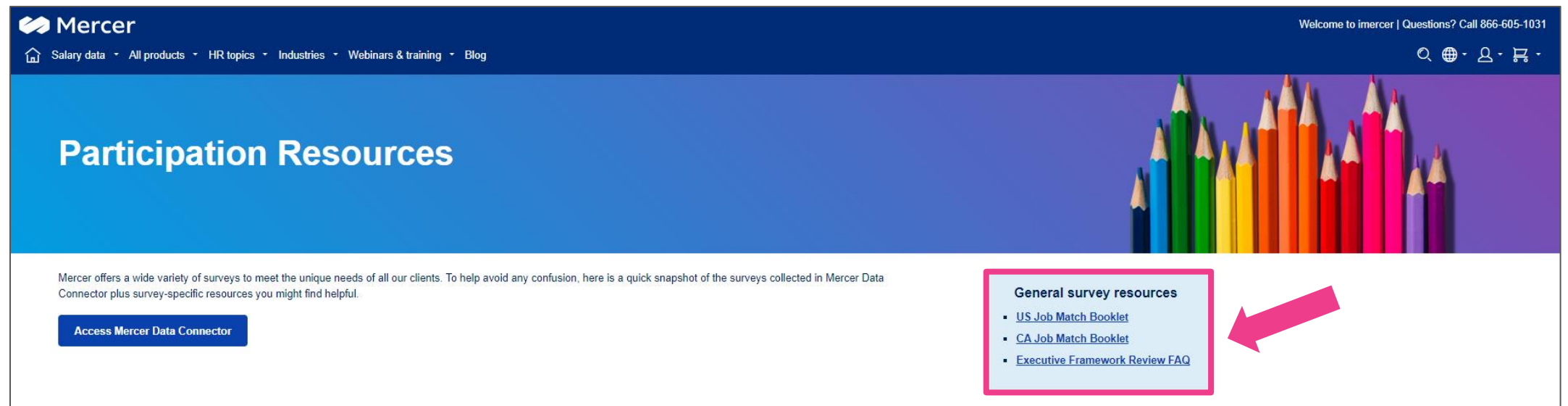
2024 Job Matching Booklet: Where to access

- *All CA surveys on Mercer Data Connector share the same Job Matching Booklet.*

- In addition to assisting you with the job matching process, the Job Matching Booklet helps you identify which Mercer Job Library specializations are covered by which survey product / module.

  - There may be supplementary or adjacent survey products you may be interested in apart from the survey products you traditionally participate in.

- *To access the Job Matching Booklet:*

  - Go to the Participation Resources page: Mercer Data Connector Surveys (imercer.com)

2024 Job Matching Booklet: How to use

Some jobs are covered by surveys outside the Retail Survey. Use the Job Matching Booklet to see which jobs are covered by which survey.

Filter on the Retail Compensation and Benefits column to see which jobs are part of the Retail Survey.

Please note that columns have been hidden to allow you to easily view the list of Specializations and/various survey products. Please expand and collapse the hidden columns as necessary to view additio and/or Jobs.

| | | | | | | MBD/TRS | MTCS | Mining | Other Products | | |
| | | | | | | Full Mercer Benchmark Database/Total Remuneration Survey (Click at the plus button to see detailed product information) | Mercer Total Compensation Survey for the Energy Sector All Modules (Click at the plus button to see detailed product information) | Mining – All Modules (Click at the plus button to see detailed product information) | | | |
Specialization Code	Specialization Title	Industry	Broad-Based/General Specialization	Specialization Year over Year Change Status	Executive Framework Role Type				Mercer Life Sciences	Retail Compensation and Benefits Survey	Canada Financial Services Suite (FSS)
GMA.01.001	Chair of the Board (Non CEO)	Cross Industry			Head of Organization	●	●		●		
GMA.01.002	Chair of the Board and CEO	Cross Industry			Head of Organization	●	●		●	●	
GMA.01.003	Head of Organization (CEO)	Cross Industry	X		Head of Organization	●	●	●	●	●	
GMA.01.008	Head of Commercial/Chief Commercial Officer (CCO)	Cross Industry			Head of Major Function	●	●		●		
GMA.01.011	Head of Brand Business Unit (Retail)	Retail		NEW	Head of Organization					●	
GMA.01.006	Head of International Operations	Cross Industry			Head of Major Function	●	●		●		
GMA.01.009	Head of Business Products/Se				Head of Major Function	●			●		
GMA.01.010	Chief of Staff (CoS)				Head of Function	●	●	●	●	●	
GMA.01.004	Chief Operating Officer (COO)/ Operations				Head of Major Function	●	●	●	●	●	
GMA.01.005	Head of Administration	Cross Industry			Head of Major Function	●	●		●	●	

Familiarize yourself with the available Career Streams & Levels in Mercer Job Library

| Introduction | **MJL Specializations & Levels** | Job Catalogue | Career Streams & Levels | Family & Sub-Fa ... | ⊕ |

NEW! Unveiling the simplified Executive Framework

In order to improve the job matching experience we are streamlining Mercer Job Library's Executive Framework.

5

New 5 top leadership benchmark levels, replacing current 22 Executive and Top Management level job codes.

Key changes

Introduction of Executive Tiers
Represent leadership breadth of role by replacing Executive Levels with Executive Tiers.

Organization Type & Geographic Scope of Role
Above elements detached from executive job code, but kept as data refinements.

Defining Top Leadership
Refreshed relationship between Executive and Management Career Stream – complementing Executive Tiers with Director Levels.

What's in it for you

Simplification
Reduced number of levels and jobs while keeping existing benchmarking information.

Easier Job Matching
Job matching process made easier and faster allowing for more flexibility and higher accuracy.

Improved Data Availability
Within new framework, larger portion of available executive benchmarks will be published on the compensation survey reports.

Executive Framework: What does this mean for you?

If you are a past participant…

We've mapped over everything to our new framework

If you are a new participant…
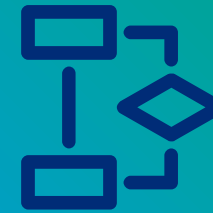
We'll teach you how to match your executives

Mercer

Executive Framework: Year over Year Mapping

Simplified Mapping Table – By Level Code

Previous Executive Levels

Executive Level 5: E5A

Executive Level 4: E4A, E4S, E4D, E41

Executive Level 3:
E3A, E3S, E3D, E31, E32, E34, E30

Executive Level 2:
E2S, E2D, E21, E22, E24, E20

Executive Level 1:
E12, E14, E10

Senior Manager II: M50

2024 New Executive Framework

Executive Tier 1 - ET1

Executive Tier 2 - ET2

Executive Tier 3 - ET3

Senior Director - M60

Director - M50

Executive Career Stream
Provides strategic vision and direction.
Leads organization or its business function.
Includes the three Executive Tiers.

Management Career Stream
Focuses on tactical and operational
activities. Includes three main level groups:
Team Leaders (M20 & M10), Managers
(M40 & M30) and **Directors (M60 & M50).**

Executive Framework: Typical Leveling

Parent organization			
Geographic Scope of Role	**Head of Organization**	**Head of Major Function**	**Head of Function**
Global/Multi-Regional	ET1	ET1	ET2
Regional/Multi-Country	ET1	ET2	ET3
In-Country/District	ET2	ET3	M60

Non-parent organization (Subsidiary/Division(s))			
Geographic Scope of Role	**Head of Organization**	**Head of Major Function**	**Head of Function**
Global/Multi-Regional	ET1	ET2	ET3
Regional/Multi-Country	ET2	ET3	M60
In-Country/District	ET3	M60	M50

Mercer

Executive Framework: Organization Type Definitions

Parent/Corporate

The highest reporting entity **without any organization above it.** Typically, management is responsible to either the board of directors and shareholders or to the owners for overall organization performance. Note: Organizations structured as Joint Ventures should report themselves as Parent/Corporate.

Subsidiary

The Subsidiary is **a separately incorporated legal entity** with majority interest held by a Parent/Corporate entity; it can have multiple business divisions and is responsible for most organization functions. Although a Subsidiary may ultimately roll up into a Parent/Corporate entity, management performs most functions of a stand-alone organization and is accountable to the Parent/Corporate organization for operations and financial performance. Note: Hospitals who are majority owned by a college or university and organizations whose parent is structured as a holding company should report themselves as a Subsidiary.
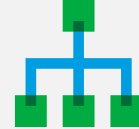
Multi-Division

A major segment of an organization that is **composed of related products/services or lines of business** that are measured for purposes of financial performance. Is held accountable to either a Parent/Corporate or Subsidiary entity. Does not have a Board of Directors and **is not a separately incorporated legal entity.**
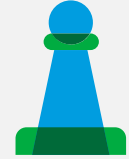
Division

A unit of a Parent/Corporate, Subsidiary or Multi-Division organization that **operates as a profit center.** May comprise most functions of a fully integrated business and/or some functions may be supported by Shared Service Centers. Does not have a Board of Directors and is **not a separately incorporated legal entity.**

Executive Framework: Executive Types Definition
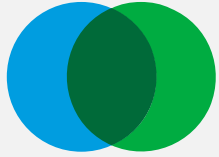
Head of Organization

- Specializations focused on leading entire organization, selected entity or line of business.

- Matching Tier depends mostly on the organization's parameters.

- Following Tiers may be included ET1, ET2 and ET3.

Head of Major Function

- Specializations focused on leading broad umbrella of associated functions.

- Incumbents in those roles lead multiple other Executives and Directors, typically matched to different specializations within the same Job Family.

- Following Tiers/Levels may be included: ET1, ET2, ET3 and M60.
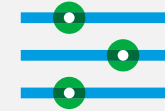
Head of Function

- Typically, responsible for a single business function or part of a function. If role leads any other Executive or Director, matching will most likely be within the same specialization.

- Following Tiers/Levels may be included: ET2, ET3, M60 and M50.

- Within those specializations lower career levels are typically also available.

Executive Framework: Geographic Scope Definitions

Global
- Worldwide

Multi-Regional
- Two or more Regions, e.g., Americas, EMEA, Latin America and APAC, APAC and Middle East

Regional
- Commonly accepted Geo-political area or substantial number of countries, e.g., North America, Europe, Latin America, APAC, Africa, Middle East

Multi-Country
- 3 to 8 countries within a region, e.g., Western or Eastern Europe, ASEAN, North Asia

In-Country
- One country only, e.g., United States, Canada, Australia

District
- Geographically significant area within a country; typically used in large geographically diverse countries, e.g., Pacific Northwest, Southeast, Southwest, etc.

Mercer

Retail Store Management

Position	Mercer Job Code	Responsibilities
Multi-Store Manager	RET.01.002	• Oversees several retail stores to achieve revenue and customer service goals. • M50 (Region), M40 (District), M30 (Area) as general guidelines for matching

NOTE: Please remember to submit data to the '**Total number of stores responsible**', '**Annual net sales revenue**', '**Store headcount**' columns in the Employee Data Template for RET.01.002 (Multi-Store Manager)

Position	Mercer Job Code	Responsibilities
Single Store Manager	RET.01.022.M20	• Manages daily operation of a store including hiring, discipline, scheduling. Promotes sales and maintains appearance of store.
Assistant Manager	RET.01.033.M20	• Assists Store Manager in daily operations. Schedules employees, maintains inventories, completes day-to-day paperwork.

NOTE: Please remember to submit data to the '**Type of store managed**', '**Annual net sales revenue**' columns in the Employee Data Template for RET.01.022 (Single Store Manager) and RET.01.033 (Assistant Manager), as well as '**Store headcount**' for RET.01.022 (Single Store Manager)

Mercer

Retail Store Management

Position	Mercer Job Code	Responsibilities
Dept. & Shift Manager	RET.01.043.M10	• **Department Manager:** Responsible for operations in an area/areas. Responsible for maximizing sales in that area. Supervises, trains and develops staff in the area.
	RET.01.055.M10	• **Shift Manager:** May be called Keyholder. May report to Department Manager, Assistant Manager or Store Manager. Maintains inventory, ensures pricing, assists with training, maintains store's appearance and assists with shift changes.

Retail Store Employees

Position	Mercer Job Code	Responsibilities
Cashier	CSV.02.004.S20	• Handles customer transactions, receives funds from customers, and records monetary transactions incidental to the conduct of the business. • **S20 will be our default match** for organizations with one level of cashier. • If your organization has multiple levels of cashiers, use **S30** for the Senior Level or Head Cashier.
In-Store Sales	SMP.07.025.S20	• Provides high level of customer service support in the selection and purchase of merchandise. Completes sales transactions and assists customers with product information, delivery and installation services. • **S20 will be our default match** for organizations with one level of in-store sales. • If your organization has multiple levels of in-store sales, use S30. • **In-Store Sales: Beauty** (SMP.07.027.S20)
In-Store Customer Service Desk	CSV.02.097	• Provides assistance to customers both in the store and via phone including, but not limited to, price verifications, exchanges and returns, and special orders.
Customer Check-out Support	RET.02.004.S10	• Properly bags the customer's orders. Performs price checks, retrieves carts and other duties as necessary. • **S10 will be our default match if one level of support.** • **Curbside pick-up employees may be matched to this specialization.**

Restaurant Management

Position	Mercer Job Code	Responsibilities
Head of Restaurant Operations	HPY.11.001	• Responsible for the **overall results of all restaurant operations, for the entire organization or concept(s)**. Responsibilities may include franchised operations. Develops operational plans and policies and assists with long-range business planning and strategy.
Multi-Location Operations Management	HPY.11.002	• Responsible for the **overall results of a group of restaurants**. Responsibilities may include franchised operations. Develops and executes operational plans and policies to accomplish assigned goals. Responsible for the implementation of staff policies and programs, and supervises lower-level restaurant managers.

NOTE: Please remember to submit data to the '**Total number of restaurants responsible**', '**Annual net sales revenue**' columns in the Employee Data Template for HPY.11.001 (Head of Restaurant Operations) and HPY.11.002 (Multi-Location Operations Management)

Mercer

Restaurant Management

Position	Mercer Job Code	Responsibilities
Single Location Restaurant Management	HPY.11.003	• Manages the **overall daily operation of one restaurant** including hiring, discipline, and scheduling of employees. Focuses on customer service and exceptional food service while managing the kitchen, dining area and following all regulatory mandates. Completes accounting and paperwork associated with cash receipts and prices and conducts physical inventories.

> **NOTE:** Please remember to submit data to the '**Annual net sales revenue**', '**Restaurant headcount'** columns in the Employee Data Template for HPY.11.003 (Single Location Restaurant Management)

Position	Mercer Job Code	Responsibilities
Restaurant Kitchen Management	HPY.11.005	• **Manages and oversees all kitchen activity**. Responsible for quality and sanitation, inventory control, managing costs, and training kitchen staff.

Restaurant Employees

Position	Mercer Job Code	Responsibilities
Host/Hostess	HPY.11.010	• Greets all guests as they enter and exit the restaurant. Responsible for seating guests and organizing seating arrangements while taking reservations. May also have minor duties to assist with meeting the guests' needs.
Food Table Service	HPY.10.001	• Ensures that all guests' needs are met in a timely and friendly manner. Assists guests with menu inquiries, takes guests' orders, delivers food and processes payments. Also responsible for setting and clearing tables. • **Waiters and servers should be matched to this specialization.**
Food Service Crew Member	HPY.10.004.S20	• Typically cross-trained to work in several areas of the restaurant and may be required to work several positions within a short period of time during peak volume periods. • May have cashier responsibilities. • **S20 will be our default match** for organizations with one level of crew member.
Table Cleaning & Reset	HPY.10.005	• Responsible for setting and clearing tables in an efficient manner. Performs other duties such as sweeping the floor and stocking glassware, and ensures guests' needs are met.

Restaurant Employees

Position	Mercer Job Code	Responsibilities
Executive Chef	HPY.04.001	• Manages and oversees all aspects of food production and kitchen activities. Responsible for budgeting, purchasing of food and kitchen equipment, stock control, menu development, hygiene, sanitation and training kitchen staff. Ensures high quality of product and service levels in regards to the preparation/presentation of menu items, and handling/storage of food
Commis Chef/Line Cook	HPY.04.007	• Responsible for preparing/cooking food in designated areas of the kitchen as per the standards, under close supervision. Responsible for output of their cooking station which may include stocking, cleaning, preparing, and plating the food, in a hygienic and safe manner.
Alcoholic Beverage Preparation & Service (Bartender)	HPY.04.056.S20	• Crafts and serves beverages to guests while handling receipts. Prepares beverages for servers. • **S20 will be our default match** for organizations with one level of beverage preparer.
Coffee/Tea Preparation (Barista)	HPY.04.058.S20	• Creates drinks including coffee, tea, smoothies and other beverages. Assists customers with menu inquiries and takes customers' orders. • **S20 will be our default match** for organizations with one level of barista.

Merchandise Receiving & Stocking

Position	Mercer Job Code	Responsibilities
Merchandise Receiving	RET.02.002	• Primary duty is physical labor and inventory control in store merchandise receiving area (truck dock). • Works with truckers making deliveries. Responsible for checking and accounting merchandise received.
Merchandise Stocking	RET.02.026	• Responsible for stocking merchandise onto shelves. Organizes sales floor to create a pleasant shopping environment and providing customer service as required. • Operates order pickers to bring down merchandise safely from overhead bays to the sales floor.

NOTE: If incumbent does both, match to Merchandise Stocking – RET.02.026

Warehouse & Distribution Center Management

Position	Mercer Job Code	Responsibilities
Distribution Center & Warehouse Management	SCN.05.002	• Responsible for warehouse and distribution activities to ensure efficient and economical utilization of facilities for storing and distributing finished goods.
Warehouse Management	SCN.05.001	• Manages processes and teams associated with planning, directing and monitoring all warehouse activities related to movement, storage and inventory control of materials, finished goods, tools and packaging.
Distribution Center Management	SCN.05.003	• Responsible for managing and directing the activities of the distribution center, involving the reception, delivery and control of merchandise.

NOTE: Please remember to submit data to the '**Square footage managed**' column in the Employee Data Template, for employees matched to all three specializations above (SCN.05.002, SCN.05.001, SCN.05.003)

Warehouse & Distribution

Position	Mercer Job Code	Responsibilities
Warehouse Shipping & Receiving	SCN.05.029.S10	• Includes receiving/inspecting goods and verifying items against the shipment record. Gathering, verifying and packing items for shipment according to specifications and the applicable transportation method. Records received and shipped items. • Management and support levels available; **S10 will be our default match**
Materials Handling	SCN.05.030.S10	• Moves and stores materials/products using a combination of manual labor and low complexity machinery/equipment including: Handling and maintaining flow of materials and products according to established guidelines, logging the movement of incoming and outgoing materials and products, and operating low complexity motorized and non-motorized material handling equipment. • M10 and support levels available; **S10 will be our default match**
Order Filling: Picking & Packing	SCN.05.032	• Verifies stock availability and picks the day's orders to be filled as accurately and completely as possible using established guidelines. • Prepares products for shipment or storage. Places products in proper shipping containers. May mark or identify containers with destination information, etc.
Warehouse/ Distribution Center Order Support	SCN.05.031	• Responsible for in-coming and out-going order processing and documentation, including generating delivery/shipping documents. Liaises with internal and external transport companies/departments for timely in-coming/out-going shipments. Ensures prompt/accurate declaration of permits, prompt delivery and clearance of shipments.

Contact Center Customer Service

Position	Mercer Job Code	Responsibilities
Contact Center Customer Service Representatives	CSV.02.050	• CSV.02.050: Contact Center Customer Service: Non-Technical • Provides post-sale customer service to business or end-consumers via phone, online chat or text. • Responds to a high volume of low complexity general inquiries. Provides responses based on pre-determined scripts. • May recommend alternative products or services as part of customer issue resolution. Not compensated on sales targets. • Majority of individual contributor matches at Support levels (S1-S4). Match nonexempt here. • Professional levels also available.
Contact Center Customer Service Supervisors	CSV.02.050	• Report contact center customer service supervisors and managers to the same specialization as contact center customer service representatives • Supervisor (M1), Team Lead (M2), Manager (M3).

Mercer

Apparel

Position	Mercer Job Code	Responsibilities
Fashion Design (Retail)	CRT.01.003	• Responsible for fashion design of products; research on market, material and fashion trends; participates in initial fitting process. • Assistant Designer (P1), Associate Designer (P2) and Designer (P3)

> **NOTE:** Please remember to submit data to the '**Type of designer**' column in the Employee Data Template by selecting from the drop-down (Apparel, Footwear, and Other)

| Position	Mercer Job Code	Responsibilities

Strategic Sourcing	SCN.03.003	• Manages or performs strategic sourcing work to manage risk and optimize the value/resilience of materials/services sourcing including:
		  • Establishing supplier relationship management processes and continuous improvement goals/programs
		  • Negotiating contracts and coordinating supplier integration plans with internal clients
		  • Monitoring market dynamics that impact materials/services availability and/or pricing
		  • Partnering with internal clients to identify sourcing needs, develop buyer/market profiles, identify marketplace trends and define acceptable service levels

Buyer (Retail)	SCN.03.010	• Manages or performs work associated with planning, selecting and purchasing quantities of goods and merchandise to be sold including:
		  • Liaising with existing suppliers and negotiating contracts. Sourcing and building relations with new suppliers
		  • Monitoring market changes, competitor prices, and products. Analyzing past sales patterns to anticipate trends in consumer buying patterns Presenting new ranges to retail managers
		• P1-P4: Assistant Buyer (P1). Associate Buyer (P2). Buyer (P3). Senior Buyer (P4)

Supermarket

Position	Mercer Job Code	Responsibilities
Supermarket Department Stocking	RET.02.027.S10	• Prepares product for sale. Maintains product level, quality and freshness according to standards. Stocks and rotates all products on shelves according to standards and productivity guidelines. Maintains organized, inventoried and rotated overstock in cooler and freezer areas. Maintains safety and sanitation standards. • **S10 will be our default match.**
Butchering/ Meat Cutting	RET.02.006	• Focuses on handling, preparing, and storing cuts of meat or related products for sale in supermarkets or specialized stores. May liaise directly with customers
Baker	HPY.04.005.S20	• Prepares baked goods, desserts and dough. May be responsible for purchasing materials and ingredients. • **S20 will be our default match.**
Cake Decoration	HPY.04.006.S20	• Prepares and decorates cakes for display and sale. Fills customer orders for specialty cakes. Maintains product level, quality, freshness and variety according to standard. Maintains safety and sanitation standards. • **S20 will be our default match.**

Key takeaways for today's webinar

1 | *Critical retail-related fields in employee data*

Employee location, most prevalent store/restaurant size, total number of stores/restaurants, etc.

2 | *New Retail Policies & Practices section*

Policies & Practices will not be pre-populated this year. Please make sure to complete the section

3 | *Simplified Executive Framework*

Past participants will have their matches mapped over to new framework
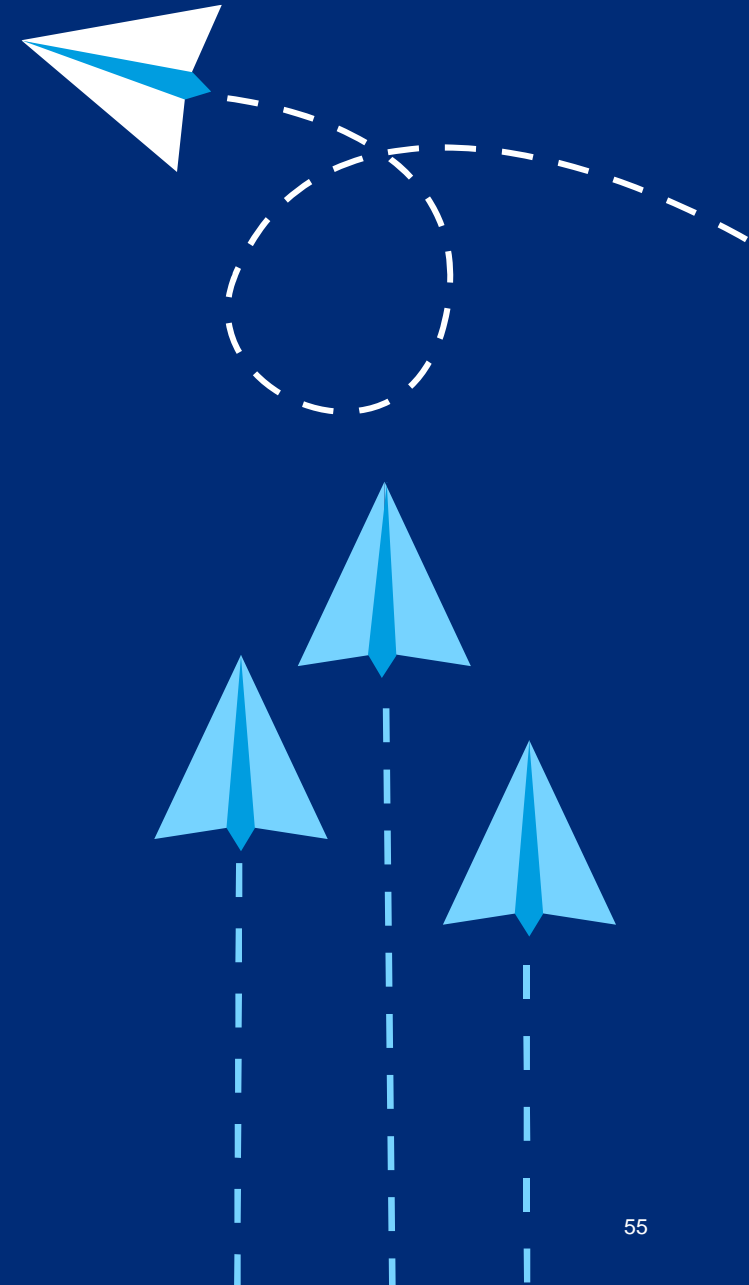
Mercer

Next steps

✓ **Log into Mercer Data Connector**

✓ **April 26, 2024** is the data submission deadline. That is 27 work days from today!
You have plenty of time to submit your data but don't put it off until later.

✓ **Make the use of resources** available – Mercer Resource Center and Webinars
This is all there to make the task easy for you to complete.

✓ **Stay in touch**
Don't hesitate to contact us with your questions. We are here to help you!

✓ **The Mercer Comp Planning Survey is open for participation until March 22!**
Participate now and receive and receive free and fast access to the survey results