



From One Shift to the Sales Floor

A three-part retail training solution that drives consultative selling, attach sales, and AI-enhanced coaching.

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The Problem

It's a conversation gap, not a knowledge gap.

New employees often have only one training shift before they are sent to the sales floor to learn on the job. What happens when a customer interacts with a new plant or product? How does the sales associate engage with interested customers?

Customer: This plant is so beautiful. What is it?

Associate: It's an Audrey Ficus. We just got them in.

Customer: Oh, neat...

The customer sets it down and walks away.

That's a lost sale.

The associates who sell the most aren't the ones who know the most about plants. They're the ones who know how to have a conversation. Weak interactions happen daily and erode monthly sales. I built this project to help managers and associates at a regional garden center chain turn customer conversations into revenue.

I design for measurable impact, and I think in systems before I build. This project serves three audiences: the customer who wants a real conversation, the associate who needs to feel ready, and the manager who needs visibility into where coaching will move the numbers. Training alone wouldn't have solved this problem.

The Process

Analysis drives every design decision.

Before designing anything, I isolate what training can solve.

Staffing levels, inventory gaps, and associate pay all influence sales performance. They fall outside the scope of a learning intervention. What is in scope: the moments when a customer engages with a plant on the sales floor, and the associate doesn't know how to open a conversation that effectively leads to a sale.

The training module introduces a currently featured plant to the sales team while building skills in relationship-building and consultative sales techniques. This approach helps floor managers maximize training time for new and retraining employees.

Design starts with domain knowledge.

I served as both SME and designer for this project, drawing on my background as a garden enthusiast, former STEM instructor, and my experience in sales across multiple industries. The analysis followed the same questions a typical SME interview would investigate:

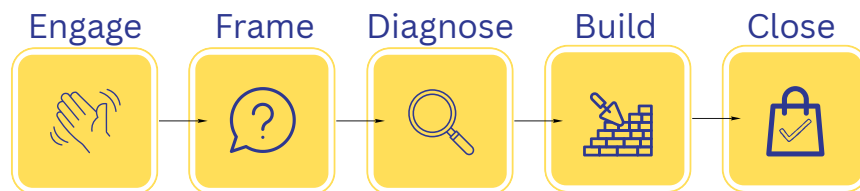
**What does a high-performing sales team do differently?
Where do those differences show up in customer interactions?
What part is trainable, and what isn't?**

Research reshapes the project.

Associates who consistently perform well were following the same conversation pattern every time, naturally, without thinking about it:

- Engage the customer's emotional moment
- Use assumptive language: "when you take this home..."
- Ask diagnostic questions before giving advice
- Build a care pathway that surfaces the right add-ons
- Assist to completion

That insight changed the deliverables. The Audrey Ficus is the vehicle. The transferable conversation pattern is what trains forward to every future plant introduction.



A single module isn't enough.

A single eLearning module won't create confident, effective sales associates. New team members are absorbing product lines, company culture, management expectations, and standard operating procedures all at once.

Frameworks Applied

Action Mapping (Cathy Moore)
Gagne's 9 Events
Kirkpatrick L1 to L4
Cognitive Load Theory

Layer in a few more realities. Inventory shifts constantly, so rebuilding Storyline per featured plant won't scale; AI-powered practice does. Confidence and competence don't always match. The knowledge checks combined with confidence ratings bring clarity to sales metrics. Product info needs to be on-demand, and floor managers need real-time signals before monthly sales reveal the problem.

The Solution

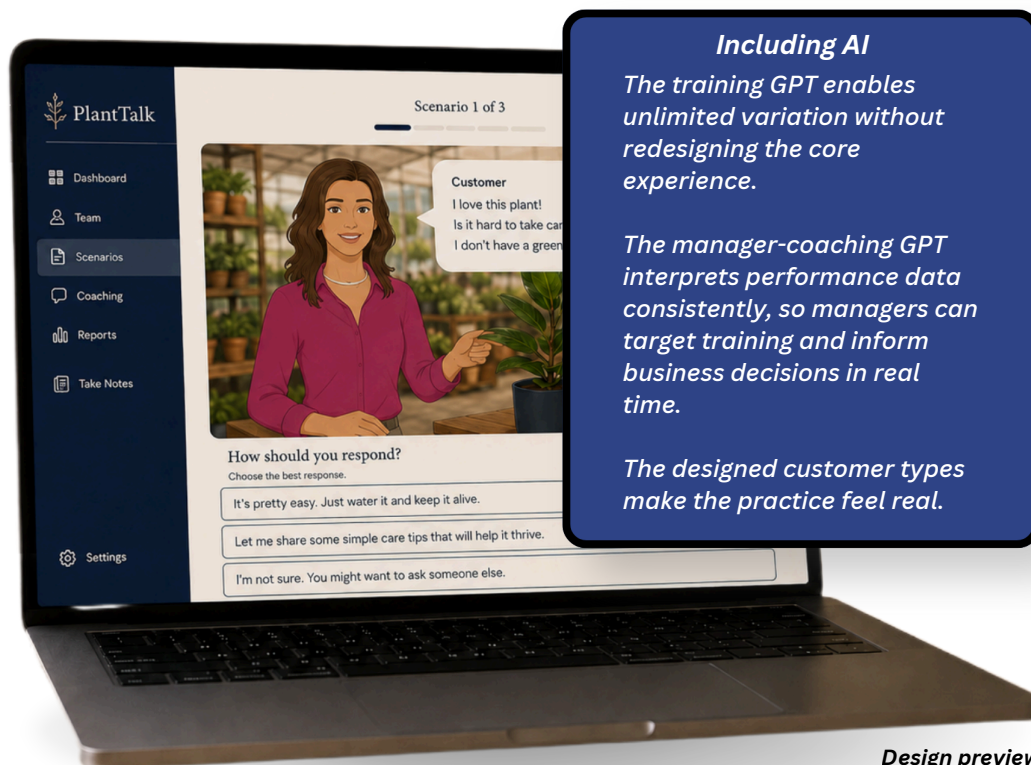
The solution is three connected pieces.

Part 1 is designed as a scenario-based module in Storyline 360.

Team members practice the conversation pattern through a customer interaction, engaging with the featured Audrey Ficus. Three character paths show what good looks like, what passive looks like, and the most common path. That's the associate who knows the plant but fumbles the upsell.

Each wrong turn has a specific, realistic consequence.

The module opens with a pre-check: confidence rating plus two content questions. It closes with a five-question survey. That data automatically feeds the manager dashboard.



Part 2 adds a digital job aid with a manager review loop.

Associates fill out a plant cheat sheet while the information is fresh. A QR code on the final screen saves it to their phone for floor use. The manager automatically receives a copy, creating a structured coaching artifact ready before the first solo shift.



Design preview

One field asks associates to rate their confidence from 1 to 5. A rating of 1 or 2 after completing the module flags the manager for a same-day coaching conversation. The system flags the gap, and the manager addresses it before it reaches a customer.

Part 3 layers in an AI practice coach and manager dashboard.

A Custom GPT stands in for different customer customers each time. Enthusiastic. Skeptical. Budget-conscious. In a hurry. Associates run the same conversation structure, no judgment from coworkers or manager hovering. They build confidence before a real customer walks in.

Early iterations produced generic retail dialogue that sounded scripted. I rewrote the persona prompts with specific behavioral cues. A customer who mentions her cats. Someone who already knows more than expected. A person who pushes back on the price of add-ons. This more closely represents challenging customers experienced in retail settings.

A second GPT layer sits on the manager dashboard. It pulls associate and store-level data and returns specific coaching suggestions, cutting cognitive load and making team support measurable. Managers see individual and team-level views and know where to focus next, which sharpens staffing, training, and store-level decisions.



Design preview

The Impact

Evaluation is part of the design from day one.

Kirkpatrick Level	Data Collected	How
L1. Reaction	Confidence shift and relevance rating	Pre/post survey framing module interaction
L2. Learning	Scenario score and cheat sheet accuracy	Storyline response data and instant manager review
L3. Behavior	Observation of the conversation pattern used on the sales floor	Manager coaching checklist at 30-day review
L4. Results	Featured plant attach rate and add-on sales	Manager dashboard compared against pre-training baseline from a comparable, recent sales season.

The design has built-in safeguards and a clearly defined scope.

*The confidence metric flags associates who pass but feel uncertain.
The shared job sheet doubles as a coaching tool and a quick reference.
The AI practice coach removes the need for a role-play partner.*

Phase 1, the Storyline module and AI practice coach, is in development. Phases 2 and 3 (the manager dashboard and AI coaching layer) are presented as a functional prototype demonstrating the data connections and coaching logic, with full deployment documented as a design roadmap. Production deployment would require a scoping conversation with the chain's IT and operations leadership to integrate with POS and LMS systems and meet data privacy requirements.

The Reflection

Every project sharpens how I design the next one.

What started as a single-module training problem turned into a multifaceted system, and that evolution is what I enjoyed most about this project. My natural strength is designing the system around the learning, not just the learning itself. The strongest outcomes come from intentionally designing for motivation, measurement, targeted practice, and respectful, timely coaching.

I'd like to bring my systems approach to a larger build: a hospital system rolling out a new clinical protocol, an airline crew learning procedures across a hub network, or a bank standardizing customer experience across branches.

I am bringing my work to organizations that are poised to grow, supporting scaling up gracefully. I enjoy creating a variety of content rooted in strong design philosophy. Each project teaches me something I carry into the next one, adding more technical skills along the way.

If you're solving a learning challenge that needs systems thinking, I'd love to talk. Reach me at Melissa@CasteelLearning.com or visit CasteelLearning.com.