



PROFESSIONAL BOOKSELLERS SCHOOL

2024 STORE & OPERATIONS MANAGEMENT



Store & Operations Management 2024
Course Meeting Days: Thursdays
Course Meeting Times: 4:30 PM EST
Course Length: 5 months, March 7-July 18, 2024

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COURSE DESCRIPTION: Store & Operations Management is designed to cover all of the day to day and long term operational and other business-related needs of an independent bookstore, considering both high level management topics and the daily tasks assigned to individual booksellers. Store examples and tutorials will provide opportunities for learning, comparison, and implementation within each student's store. A mix of lectures, workshops, handouts, and assignments will be used to guide the student towards creating or expanding store resources and systems for real-time applications. Assignments do not require access to a student's own store's materials or policies, but they are welcome to use them in completing the assignments.

COURSE COMPONENTS:

- 14 live classes via Zoom
- Bi-weekly course emails with links, recordings, and homework
- Discussions, chat, and office hours via Discord
- Weekly homework assignment uploaded to Discord



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OBJECTIVES: This course will provide a thorough overview of the systems, plans, and processes for running an independent bookstore. At the end of this course, students will have important documents in place, including:

- Store operations manual, including store procedures
- Budget management systems
- Staff handbook, including store policies
- Staff management systems, including training, task, and evaluation plans
- Emergency preparedness plan
- Inventory and store layout plans
- Merchandising plan
- Supply ordering plan
- Promotions and marketing plan
- Leadership tools

PREREQUISITES: All students will need to install the latest version of Zoom and create a free Discord account if they don't already have one ([a guide to getting started](#)). Participants must have a current membership with the American Booksellers Association (ABA) and/or their regional booksellers association. Preference is given to participants who are employed by or who own a retail bookstore (this includes a mobile or pop-up shop) that has been in existence for at least one year. Others may apply and will be considered on an individual basis. *This course is not for someone who does not own, work, or plan to work in a book selling business.*

REQUIRED ACCESS AND RESOURCES:

- Access to the internet and a computer.
- Primary email account to receive course communications.
- Able to use Zoom video conferencing software to participate in webinars and meetings.
- Ability to view documents in Word, PDF, and Excel formats.
- A POS system that tracks individual inventory and supports purchase orders/receiving
- A Discord account (free)

ATTENDANCE & PUNCTUALITY: Online attendance is required for all participants. Students are allowed to miss a small number of synchronous classes (though they should view the recorded program after the class); however, too many missed classes may result in being dropped from the program. We also



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encourage you to keep your video on and to participate, when appropriate, in the webinar. Please make your best efforts to join class on-time. Recordings will be shared within a few days of the class on Discord and in the class follow-up email.

COMMUNICATION: Information and important announcements will be communicated during each class, via email, and on our class Discord channels. Current participants may ask questions during the Q&A sessions at the end of each class, schedule private sessions with the Dean or instructors, email private questions to instructors, or post questions to the module's Discord server. Students are required to sign up for at least one of the four 15-minute office hours sessions offered throughout the course and may sign up for more if they have questions.

OFFICE HOURS: Office hours allow students to check-in with an instructor one-on-one to make sure they're on track in the course and to ask any general questions they may have. If they have a specific question about the material in a class, they should message the instructor directly in Discord - or post the question in the class channel for everyone. Students are required to sign-up for at least one 15-minute office hours slot during the semester. [You can do so here at any time](#) by entering your name in an empty slot.

HOW TO SUBMIT ASSIGNMENTS: We have created a Google Drive folder for each student containing an Operations Module Workbook. Throughout the semester, you'll complete your homework assignment(s) for the previous class in your workbook and then direct message the instructor for the class to let them know that it's ready to be reviewed. Assignments must be completed and noted in Discord by the next scheduled class.

GRADING: Assignments will be Pass/Fail. Failing assignments will be given feedback on how to bring the assignment up to standard and the assignment can be redone prior to the end of the module. No work will be accepted after July 20 without prior permission.

CONFIDENTIALITY: Homework and store data submitted by students during this class is kept confidential and is not shared with anyone without the student's permission. Anything shared with permission will be anonymized. Instructors are reviewing for comprehension of assignments and completion of tasks. It is also understood that the work done in this class is the sole property of the student, regardless of source of registration funding. Materials shared and the information taught in this class is to the benefit of the student and their place of employment. Students are expected to incorporate the forms, procedures, and best practices from the Professional Booksellers School course to their bookstore work.

DOCUMENT STORAGE: Handouts and homework instructions are all included in this workbook. Any additional links or handouts will be shared in Discord to access in Google Drive. Students should save the link to the Google folder provided to them at the beginning of the class. They can upload documents there if they choose to use store information to complete the assignments.



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Instructor Information

Core Faculty

Dean Anna Thorn, The Potter’s House, Washington, DC
 Dean Carol Price, BookPeople, Moscow, ID
 Instructor Candice Huber, Tubby and Coo’s Mid-City Book Shop, New Orleans, LA
 Instructor Julia Davis, The Book Worm, Powder Springs, GA
 Instructor Lisa Swayze, Buffalo Street Books, Ithaca, NY

Guest Instructors

Nathan Halter, Batch for Books
 PK Sindwani, Chief Financial Officer at ABA, ABACUS representative
 Lisa Freedman, Penn National Insurance, Harrisburg, PA

Certification Criteria

- Attend a minimum of 12 of the 14 classes
- Watch recordings of missed classes
- Receive passing grades on 10 of 12 homework assignments
- Attend office hours at least once

Course Calendar

These dates are subject to change at the discretion of the instructors.

| Class # | Date/ Time | Instructor | Class Name | Homework |
|---------|------------------------|------------|---|---|
| 1 | March 7 4:30 pm ET | Everyone | How to Succeed at Operations Management | <ul style="list-style-type: none"> ● Explore and familiarize yourself with Discord. ● Message a question or two to your fellow students. |
| 2 | March 14 4:30 pm ET | Anna | Store Systems | <ul style="list-style-type: none"> ● Put maintenance tasks in a Google cal, Trello, Asana, etc. or create a Master Calendar ● Create a step-by-step instruction form for placing Customer Book Orders ● Create a step-by-step instruction form for handling web orders ● Create a step-by-step instruction form for handling shipping ● Create template emails to website orders |



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| | | | | <ul style="list-style-type: none"> All the above items will go in your Store Operations Handbook once approved by the instructors |
| 3 | March 21 4:30 pm ET | Anna | Inventory Decisions, Store Layout, Merchandising | <ul style="list-style-type: none"> Sketch a possible new layout for your store, or for Paradigm Books, based on ideas you may have discovered from this class. |
| | March 28 4:30 pm ET | Anna Carol | Office Hours | <ul style="list-style-type: none"> Come prepared to discuss the coursework and with any questions about the course. |
| 4 | April 4 4:30 pm ET | Candice Anna Nathan Halter | Financial Systems & Batch | <ul style="list-style-type: none"> Familiarize yourself with your Chart of Accounts for your store, or create one using Paradigm. Go over Paradigm's P&L from last month line by line to see how the store is performing. Go over Paradigm's Cash Flow Statement line by line to see your current cash position. Go over your store's Balance Sheet line by line to see your Assets vs. your Liabilities and how you can improve. Or use Paradigm. |
| 5 | April 11 4:30 pm ET | Anna Candice PK Sindwani | Budget, ABACUS | <ul style="list-style-type: none"> Create a Monthly Budget folder with a cash flow analysis, P&L for the month, P&L for the year to date, and a balance Sheet Create a spreadsheet to keep track of at least 3 of these reports: <ul style="list-style-type: none"> P&L with 3 years of comparison Accounts Receivable Report with Future Due Accounts Payable Report, Future Due Gift Card Balance report Create a spreadsheet to begin a history of your business, creating pages for sections you want to watch, such as Total Sales, Inventory, Book Sales, Stationery & Gift Sales, etc. |
| | April 18 4:30 pm ET | Candice Anna | Office Hours | <ul style="list-style-type: none"> Come prepared to discuss the coursework |
| 6 | April 25 4:30 pm ET | Lisa Carol | Staff Management | <ul style="list-style-type: none"> Write a job description and job posting Develop an application (if you already have one that you use, spend time evaluating/editing it) Create a list of interview questions Create a team building activity |
| 7 | May 2 4:30 pm ET | Carol Lisa Freedman, guest | Staff & Human Resources | <ul style="list-style-type: none"> Develop a benefits structure for your store. Alternatively, edit your current structure or set goals for a future benefits structure. Develop a set of policies regarding discrimination, social media, covid-19/illness procedures. |
| 8 | May 9 4:30 pm ET | Anna Carol | Staff Handbook | <ul style="list-style-type: none"> Begin building or updating on your own Staff Handbook |
| | May 16 4:30 pm ET | Anna Lisa | Office Hours | <ul style="list-style-type: none"> Come prepared to discuss the coursework |



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| 9 | May 23 4:30 pm ET | Lisa Julia | Define Your Store | <ul style="list-style-type: none"> Write a paragraph defining your store. This will appear on the first page of your Store Operations Manual (and Staff Handbook if you choose). Create your store's mission statement; values statement; policy on controversial books/authors; policy on diversity, equity, and inclusion; and anti-racism statement. Create headings in your Operations Handbook for the various other policies outlined in class. |
| 10 | May 30 4:30 pm ET | Julia Lisa Candice | Marketing Overview | <ul style="list-style-type: none"> List at least 10 ways you can engage in your community List at least 5 partnerships you can pursue to benefit your bookstore and another business in your community Create a template for your marketing budget |
| 11 | June 6 4:30 pm ET | Julia Candice | Create Your Own Marketing Plan | <ul style="list-style-type: none"> Create a marketing plan for your store covering three areas: store promotion to the public, in-store marketing, and event marketing Watch 30 minute video <i>Bookstore Merchandising Made Easy</i> from Paz & Associates |
| | June 13 4:30 pm ET | Carol Anna Julia | Office Hours | <ul style="list-style-type: none"> Come prepared to discuss the coursework |
| 12 | June 20 4:30 pm ET | Julia | Websites & Digital Marketing | <ul style="list-style-type: none"> Create your supply spreadsheet based on the handout of instructions, showing budget vs actual, potential vendors and frequency of ordering. |
| 13 | June 27 4:30 pm ET | Candice | Emergency Preparedness | <ul style="list-style-type: none"> Create an Emergency Plan for your bookstore, including a plan to ensure all staff are trained and ready for potential emergencies. |
| 14 | July 11 4:30 pm ET | Everyone | Leadership Discussion | <ul style="list-style-type: none"> Recommended Reading Finish all assignments |
| | July 18 | | | Final day to turn in homework |



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Professional Booksellers School, Inc.'s Code of Conduct

The Professional Booksellers School, Inc. (PBS) values the dignity of everyone with whom we interact. Our safety and anti-harassment policies are critical to ensuring that this core value guides how we speak and how we act. All participants in PBS courses and events are required to adhere to PBS's code of conduct, as described below. This includes booksellers, PBS staff, instructors, speakers/presenters, guests, donors, volunteers, and all affiliated students.

PBS is committed to a broad vision of diversity, equity, and inclusion. This includes providing a harassment-free experience for everyone, regardless of race, color, religion (creed), gender, gender expression, age, national origin (ancestry), ability, marital status, sexual orientation, or military status, in all of its activities or operations. We do not tolerate harassment, discrimination, or other disrespectful or unlawful behavior based on any of these characteristics. We are committed to providing an inclusive and welcoming environment for our students, staff, volunteers, instructors, donors, subcontractors, vendors, and clients.

Behaviors that violate this policy include, but are not limited to:

- Offensive verbal comments related to any protected category above
- Inappropriate physical contact
- Unwelcome propositions, attention, words, or conduct of a sexual nature
- Unwelcome virtual contact inside or outside of PBS settings
- Inappropriate or obscene jokes, remarks, or gestures *Intimidation, stalking, or trolling
- Disrespect towards difference of opinion
- Sustained disruption of speakers, conversations, classes, or events
- Unauthorized screenshots, photography, or audio or video recording

PBS expects all participants in its programs to follow established rules throughout official classes, office hours, virtual platforms, and related social gatherings.

PBS takes any violation of this policy seriously. Accordingly, participants who violate this policy may, in the judgment and discretion of PBS, be asked to stop; may be expelled from a PBS class or event, without refund if applicable; may be prevented from attending future PBS classes or events; may be banned from virtual platforms; and may have future PBS participation privileges revoked.

If you are being harassed, observe someone else being harassed, or have concerns about potential violations of this policy, please notify PBS staff immediately. PBS will take all appropriate action in response to protect anyone affected by violations of this policy.



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Privacy Statement

For Stores

PBS asks for both public (address, etc) and private (square footage, POS, sales levels) information from stores who are enrolled. We ask for this information to help us understand and support students. The only public-facing information in our website directory is the store's name, address, contact information, and regional trade association. PBS uses both private and public information to analyze the effectiveness of our courses and our school, but reports only aggregate data. All other store information is protected and available only to PBS staff.

For Individuals

PBS asks for both public (bookstore, job title) and private (home address, demographic, years of experience) information from individuals who are members. The only public-facing information is the student's name, bookstore, job title, and earned certifications. PBS uses both private and public information to analyze the effectiveness of our courses and our school, but reports only aggregate data. All other information is protected and available only to PBS staff. The exception to this is for students who are receiving financial support or reimbursement from their regional association, with whom their enrollment, attendance, and certification status will be shared.

For Homework

We recognize that homework can contain personal or sensitive information. Student homework assignments are uploaded into a location available only to the individual student, PBS staff, and instructors, with the exception of projects delivered live in class. These projects are announced well in advance and student presentations are never recorded. All student homework for PBS is owned by the student, not PBS or the student's employer, and is confidential and protected. All shared, spoken, shown, submitted, and typed information is protected and confidential and not to be discussed, saved, or shared outside of applicable PBS classes, platforms, or events without express permission.