Contact Information:
Office: Business and Science 258, Rutgers Office Phone: 856-225-6592
E-MAIL: ckaufman@camden.rutgers.edu
Office Hours are 1:00 to 2:00 pm, 3:30 to 4 pm every Tuesday and Thursday, plus "by appointment". Please email me any questions and a suggested time to meet, and I’ll get back to you.

Prerequisite: 52:630:201 Principles of Marketing

Class Format: Please read and prepare class materials before coming to class. All materials are on the sakai site. Class format emphasizes discussion with power-point summaries of key concepts. Attendance strongly encouraged and is mandatory when speakers are joining our class.

Course Description/Objectives

Many analysts feel that we are in the middle of a Retail Revolution. We’ll use the foundations of retail theory together with current business commentary to analyze retail opportunities today and in the future. This course challenges you to blend traditional retailing knowledge with the new media of today. We will analyze current multi-channel retail strategies among bricks-and-mortar and social media based firms. We will consider the development of a retail format and its strategy, the analysis of a target market, demographic analysis related to site selection, retail personnel issues, and category management. Buying, financial analysis, and pricing will also be investigated.

We will also cover the major building blocks of retailing, such as physical site-selection and display analysis. We will look historically at some firms that are failing such as Sears and KMart; some that have changed, such as WaWa; and some that are continually-evolving, such as Amazon and Wayfair. We’ll look at some that are innovative, such as Wal-Mart, Best Buy, and Taco Bell (see text page 21 for current examples).

Upon completing this course, students will be able to:

- Use professional retail sources to analyze today’s shopping trends,
- Use retail anthropology to analyze and compare retailers’ interior design and layout,
- Use and apply the Americans with Disabilities Act (ADA) to determine accessibility, and
- Use the Policy Map and the Factfinder databases to analyze demographic and geographic information

Text: Retail Management: A Strategic Approach (13th edition) by Barry Berman and Joel R. Evans, and Patrali Chatterjee (2018), Pearson Education, Inc. It is available in the bookstore, rented through the bookstore and is also sold online. The 12th edition is acceptable, but those using it are responsible to obtain information updates.
## Grading Policies

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<tr>
<th>Course Component</th>
<th>Description</th>
<th>Weight</th>
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| Participation     | Participation in class, in-class exercises, reading assigned papers, contributing to class understanding. Regular attendance is expected. There are several ways to earn participation credit:  
- Post a video or article link to share with the class  
- Hand in a short write-up on a topic you’d like to see discussed in class. You can be a discussion leader later in the semester, earning participation credit. | 10 percent |
| Forums:          | Active participation in discussion forums, worth 1 point each. Due by 11:55 pm before class (Midnite) – indicated by “M”  
See *A Well-Written* post for guidelines | 5 percent |
| Assignment 1     | Retail Anthropology: Customer traffic flow, overcrowdedness, and in-store accessibility  
Skills: perception, ADA compliance, store assessment | 15 percent |
| Assignment 2     | Accessibility Messaging in Restaurants and Entertainment Venues  
Skills: How can social media and web sites communicate access? | 15 percent |
| TERM PROJECT     | Location, Location, Location!  
This term we'll analyze site selection for Dunkin’ Donuts. Dunkin’ Donuts must have bricks and mortar stores and cannot be entirely online, or can it? How can technology improve their business?  
Skills: retail site analysis, use and analysis of demographic data, mapping skills, Policy Map combining demographic data with geography. | 25 percent |
| Final Examination| A review will be posted on our course web site  
Format: multiple choice, true-false, short essay | 15 percent |
University Policies and Procedures

**Academic Integrity**

Policy found at [http://academicintegrity.rutgers.edu/academic-integrity-at-rutgers](http://academicintegrity.rutgers.edu/academic-integrity-at-rutgers)

Students are responsible for understanding the principles of academic integrity and abiding by them in all aspects of their work at the University. Students are also encouraged to help educate fellow students about academic integrity and to bring all alleged violations of academic integrity they encounter to the attention of the appropriate authorities.

This means that you must:
- properly acknowledge and cite all use of the ideas, results, or words of others,
- properly acknowledge all contributors to a given piece of work,
- make sure that all work submitted as your own in a course activity is your own and not from someone else
- obtain all data or results by ethical means and report them accurately
- treat all other students fairly with no encouragement of academic dishonesty

Adherence to these principles is necessary in order to ensure that:
- everyone is given proper credit for his or her ideas, words, results, and other scholarly accomplishments
- all student work is fairly evaluated and no student has an inappropriate advantage over others
- the academic and ethical development of all students is fostered
- the reputation of the University for integrity is maintained and enhanced.

Failure to uphold these principles of academic integrity threatens both the reputation of the University and the value of the degrees awarded to its students. Every member of the University community therefore bears a responsibility for ensuring that the highest standards of academic integrity are upheld. If there are questions on how to comply, please contact Mary Flaherty in the Rutgers-Camden Dean of Students office: marykreb@camden.rutgers.edu or contact the appropriate Associate Dean or Area Head at the School of Business.

**Student Code of Conduct**

Violations of the Student Code of Conduct are considered serious infractions of student behavior and students who violate the code are subject to penalties relative to the level of the matter. In general, students may not disturb normal classroom procedures by distracting or disruptive behavior. Examples of disruptive behavior include, but are not limited to, the following:
- Repeatedly leaving and entering the classroom without authorization
- Answering cellular phone or allowing pager to beep
- Making loud or distracting noises
- Repeatedly speaking without being recognized, interrupting the instructor or other students, or otherwise acting in disregard of the instructor’s requests
- Threats or violence

Violations of the code should be reported to the Dean of Students office deanofstudents@camden.rutgers.edu or 856-225-6050.

If the violation is immediate and a potential threat is a concern, call the Rutgers-Camden police at 856-225-6111.
Disability Services

Rutgers University welcomes students with disabilities into all of the University's educational programs. In order to receive consideration for reasonable accommodations, a student with a disability must contact the appropriate disability services office at the campus where you are officially enrolled, participate in an intake interview, and provide documentation:

https://ods.rutgers.edu/students/documentation-guidelines.

If the documentation supports your request for reasonable accommodations, your campus’s disability services office will provide you with a Letter of Accommodations. Please share this letter with your instructors and discuss the accommodations with them as early in your courses as possible. To begin this process, please complete the Registration form on the ODS web site at:

https://ods.rutgers.edu/students/registration-form.

Ajeenah Nuriddin-Little
(856) 225-2722
Rutgers-Camden Disability Services at the Rutgers-Camden Learning Center
Armitage Hall, Room 240, 311 North Fifth Street, Camden, NJ 08102-1405
Web page: https://learn.camden.rutgers.edu/disability-services
E-mail: Ajeenah.nuriddin-little@camden.rutgers.edu

Course Policies

Attendance: Come to class on time, participate, stay in class until the end. Texting not allowed in class. Unexcused absences are not acceptable, both here and in the business world.

Cell phones: Students are required to turn off their cell phones while they are in class.

Class Participation
Any class is better when the class participates, but participation grades are not automatic and are not simply based on attendance. Participation includes suggestions of examples, articles, and videos, plus participation in forums. Negative participation (disruption, sleeping, reading, TEXTING, etc) detracts from everyone’s time. Points will be deducted, rather than added for these types of behaviors.

Computers: You may bring your computer to class to TAKE NOTES and look up course material. Please email me your course notes before leaving class. These will be used to help students who have missed class due to an excused absence.

Discussion Forums: In order gain insights from the entire class, discussion forums have been posted in sakai with specific due dates for your posts coordinated with our class discussions. A well-written post* is worth 1 point each. There are 5 required posts throughout the semester. The remaining points will be earned through in-class contributions and participation.

* A Well-Written post: Contributions to the online class discussion are well-written, proofread, and directly relevant to the discussion topic. Students must submit substantive work, i.e., they must refrain from using terms like: “I agree”, or “Others have basically said what I think.” Substantive work means that you have added to the body of knowledge in any given discussion. You are expected to use course concepts and reply in at least 100 words. Applying and referencing the course concepts, assigned course readings, cases, videos, required websites, and other literature is critical. Additionally, sharing personal experiences can enrich your post. Posts must be made within the assigned time period. One substantive post is required. Reply posts are encouraged.

- In all of your interactions, remember there is a person behind the written post.
- Pause and reflect on a post that is uncomfortable before responding. Consider the root of your emotional reaction.
• Remember, we are discussing ideas and disagreements that are not personal in nature. Take care in crafting your response to demonstrate your disagreement with the idea, not the person.

• Do not participate in "flaming." Flaming is inflammatory comments that are hostile and insulting and do not contribute to the learning process. Choose not to respond to "flames" to support a better learning experience for everyone.

• Contribute to a meaningful discussion by presenting your "best self" in the course environment:
  - Take the time to explain your ideas respectfully and completely.
  - If a peer misinterprets your meaning, acknowledge this without being rude or defensive. It can be challenging to communicate some ideas in writing. This is your opportunity to practice clarifying your ideas to others.

• Do not post in all caps. This is the equivalent of SHOUTING at someone and is not acceptable.

Email Etiquette: This is a business course. Professional emails are expected, with “Retailing” in the subject line and a proper salutation (e.g. “Dear Professor”) and correct grammar.

Exam Make-up Policy
If, for a university approved reason, you cannot take an exam at the scheduled time you must give the professor written notice at least one week in advance so that other arrangements can be made. If the situation does not allow for advance notification (for example, emergency hospitalization), contact the professor as soon as possible after a missed exam. Make-up exams for non-university approved reasons are not guaranteed. The professor reserves the right to request written documentation to support your absence (such as a doctor’s note, an obituary, or military orders).

Incompletes and Problems
If you find that you are having trouble completing course work or need further explanation of class topics, please meet with me immediately. If you are having a serious personal or family problem, illness, or other difficult situation, please contact the Dean of Students office for help. “Incompletes” will only be given through prior consultation, under extreme circumstances. Incomplete grades must be made up prior to the start of the next semester.

Raptor Cares: RU Raptor CARES works closely with faculty, staff, students, and families to provide care and support for students of concern who may be in distress. It is important to RU Raptor CARES that all students know and understand that they are an important part of the RUC community. Please see the Raptor Cares discussion at: https://deanofstudents.camden.rutgers.edu/raptor_cares.

Videos of Class Lecture and Discussion: All class lectures, discussions, and presentations will be videotaped. Videos will be posted on Sakai for your review. NOTE:

Important Administrative Dates

Tuesday, September 12, 2017 – Last day to drop a class without a “W” (this can be done through WebReg)

Tuesday, November 14, 2017 – Last day to withdraw from one or all classes with a “W”. (This can be done through WebReg). For more information, see the registrar’s website http://registrar.camden.rutgers.edu/

Thursday, November 23 – Sunday, November 26, 2017 – Thanksgiving recess

Wednesday, December 13, 2017 – Last day of classes

Friday, December 15 – Friday, December 22, 2017 - Final Exam Period
COURSE ROADMAP

Assignments: Dates are approximate; any changes will be announced in class. NOTE: topics do not strictly follow the order of the textbook since they are related to your assignments.

Week 1: September 5 and 7: Chapters 1 and 2
DUE: Info Sheet – please hand in paper copy by Tuesday, Sept 12th
Class Procedures: syllabus, assignments, information sheet, online readings

Chapter 1: Introduction and overview - Go Over Homework 1, Retail Anthropology
- Look over Sakai site and retail professional sources
- How has retailing changed – just in the last year?
- What is an omnichannel consumer? How do retailers forecast demand?

Begin Chapter 2: Building and Sustaining Relationships with customers
- What is the “value chain?” How can retailers create customer value? What about customer complaints? Can strategic use of social media help to strengthen relationships with customers?
- Which stores do you visit again and again? Why? Stores that you “like?” Stores that you “hate?”
- What is the ADA? What does it have to do with retailing?
- Reality Check: Text Appendix beginning on page 20.

Week 2: September 12 and 14: Chapter 3 and 4
DUE: Forum A due Sept 12th, Retailers want to reach millennials. Why? Who are Millennials?

Chapter 3: Strategic Planning in Retailing, Figure 3-1 text
- (Developing a retail strategy: what is your mission? What are your goals? Who are your customers? What is the marketing mix and location that will let you achieve your goals? How can you control your activities and predict those factors that you cannot control?
- Demonstration of Marketline for Retail Strategic Analysis
- Aldi: Global retail growth here in the U.S.

Chapter 4: Ownership-based Strategy Mix Issues
- Retail institutions can be categorized by ownership, type of store and its typical strategy mix, non-store sales, and service versus product retailing; why are these classifications useful?
- Will independent stores disappear as large chains move into their areas? Will department stores continue to exist? What are power centers and lifestyle centers? How are these definitions changing today? What are the pros and cons about franchising?

Week 3: September 19 and 21: Chapters 5 and 18 (note change of order)
DUE: Forum B, due September 21: Can Sears recover by selling appliances online? (Article)

Chapter 5: Store-Based Strategy Mix Issues, Table 5-1, Figure 5-2 (e.g. DSW vs. high end shoe store)
- How does retailing change over time, and change back again? What can we learn from classic retail concepts like the “Wheel of Retailing”? Which retailers are likely to survive the next 10 years?
- Look at the shaky position of Kmart and Sears. Look at the success of Wal-Mart and the increased profits of Kohl’s and Target. What are some of these firms doing that others are not?
- How do we know that scrambled merchandising will be profitable? We’ll consider operational definitions of retail store types used by industry that establish benchmarks for performance. These help us to know if our stores are operating profitably: Aldi vs. traditional supermarkets
- Width and depth of assortment
Week 3 (continued)

Retail Tools: Retail Anthropology, Consumer Analysis, Marketing Research, Chapter 18, Retail Atmospherics - Retail Image

- **NOTE:** these concepts are needed for Homework 1
- What are the elements of retail atmospherics? How can the retailer design their store environment to maximize customer satisfaction? How are store layouts developed?
- How do retailers create desired images in the minds of their customers?
- How can retailers maximize compliance with the Americans with Disabilities Act?
- **Discussion Example:** Paco Underhill, Envirosell
  - [https://vimeo.com/221293388?from=outro-embed](https://vimeo.com/221293388?from=outro-embed)
- Can these same ideas be applied to e-commerce? How can web sites be designed in order to maximize customer satisfaction?

Week 4: Sept 26 and 28: Chapters 7 and 8 (Chapter 6 is later)

Chapter 7 – How Can Consumer Analysis Predict Retail Shopping Behavior?

- Millennial definition, Gen Y case, page 215
- Major CB areas: demographics, lifestyle data, group and individual attributes. How do people shop given the time scarcity? What are their attitudes towards shopping in-store vs. online?
- National Retail Federation Consumer Research studies
- NPD Group studies consumers and their behavior related to retail firms.

Chapter 8: Marketing Research: Info gathering for Retail, Policy Map

- **Reliable Secondary Data:** National Retail Federation and International Council of Shopping Centers
- **Primary research:** Observational data. Online data. The role of loyalty programs. What types of data would need to be collected in order to answer specific retail questions. Survey formats. Semantic differentials. Mystery shoppers – do they provide valid results?

Week 5: October 3 and 5:

October 3: Homework 1 due, Retail Anthropology Discussion: what did you learn?

- What did you find on this report? What surprised you?
- Did you find any significant store layout differences?
- What do you recommend to management?
- What did you learn about consumer analysis? About marketing research?

Chapter 6: Web, Social Media, Nonstore and Nontraditional Retailing

- What are recommendations for effective web sites? P. 147 chart
- How has social media allowed retailers to reach their customers? Have you ever checked a menu on Facebook? Checked online reviews? Used a chat room when making a purchase?
- How DO people use the web? When do people get stuck? What are their fears?
- Can blind and visually-impaired persons shop online? Excerpts from Dr. KS’s research. What is Web Accessibility? [http://www.webaim.org/](http://www.webaim.org/)

- Go over Homework 2: Building Web and Social Media skills, Accessibility Messaging
Week 6: October 10 and 12:

Chapter 9 on Trading Area Analysis – used in Term Project
- Insights into profitable locations: retail overlap, points of indifference, buying power indexes, and how GIS systems can greatly add to our abilities to make good strategic location choices. What types of relationships are the formulas trying to capture? What is retail overlap?

Chapter 10- Site Selection – used in Term Project
- Concepts: isolated locations, unplanned business districts, and planned shopping centers.
- What will be the Central Business District (CBD) of the future. What criteria can be used in evaluating a retail site?
- Demonstrate mapping programs
- Demonstrate Use of Census Data, www.census.gov

Forum C, Review for Midterm

Week 7, October 17 and 19:

MIDTERM: October 17 – Chapters 1 to 8 and Chapter 18
Oct 19: Continue site selection and location
GROUP TIME TO GET ACQUAINTED AND WORK on Location Project – Hand in Assigned feedback

Week 8, October 24 and 26th: Chapters 11, 12, 13
How to Manage a Retail Business

Chapter 11 - Human Resource Management – Figure 11
- Dividing and organizing the tasks in retail organizations. Basic plans used by retailers. Selecting, training, compensating, motivating retail employees. How have some firms built skills and pride into the relatively mundane tasks. Consider the last time you shopped in a bricks and mortar store. Were the sales personnel knowledgeable and courteous? Are customers turning to the web to avoid poorly trained personnel?
- Discussion: why are retail wages below the “living wage?”
- Discussion: How can retailers train employees to work with customers with disabilities?
- READ AND DISCUSS: Read Dr. KS article on Mobility Disabilities posted in resources

Chapters 12 Retail Financial Operations – Growing Importance for Retail Success
- Operations: financial and operational planning.
- Given the number of retail bankruptcies and reorganizations, what can we learn from those firms in keeping our business healthy?
- How did they choose which stores to close? Will such a move be effective? What are some of the benchmarks that we track in order to make corrections before problems become too large to handle?
- The Strategic Profit Model provides many cues and the financial ratios are important signals for strategic corrections. See text for some sample benchmarks. These relationships must be in balance for a firm to prosper. Correct retail decisions create the balance. E.g. How much must we sell, at what level of margin, to turn inventory efficiently to stay in business?
- Important tables in Chapter 12
- Discussion: Examples of Radio Shack, Macy's and Kmart store closings
Week 9: October 31 and November 2 - Chapter 13
Retail Operations and Supply Chain Management – an operations blueprint
- How are materials stored, shipped, and transported to meet demand and reduce expenses? What is the impact of category management? How can we use skills from Operations Management to streamline our inventory? Control shrinkage?

Chapter 14 Developing Merchandise Plans
- How can information on trends be used to try to maximize on merchandise planning? How can understanding depth and width of assortment help us in creating an efficient merchandise mix that also minimizes inventory costs and stockouts?
- Optimal mix of brands and sizes? How can we develop ways to plan for inventory and for reductions? How can we plan to have buying resources when we need them (Open-to-Buy). Walmart is an expert in managing product flow from their distribution centers to stores.
- How can a retailer forecast demand? How can retailers analyze trends to plan their merchandise? How must e-tailers factor delivery times into seasonal web shopping? How do retailers forecast demand for specific holiday seasons, such as Thanksgiving, Christmas, and the Super Bowl?

Week 10: November 7 and 9 - Report on Homework 2 – Accessibility Messaging

November 7 – Homework 2 due on Accessibility Messaging what did you learn?
- What did you find on this report? What surprised you?
- Did you find any significant differences?
- What do you recommend to management?
- Can new technologies be used to solve any problems?
- Can new technologies be used to collect customer information?

November 9: GROUP TIME TO WORK on Location Project – Hand in Assigned feedback

Week 11: November 14 and 16th
Chapter 19, Promotional Strategy
- How can a firm relate its promotional strategy to its goals?
- What should be the balance among web and traditional promotions?
- What are the advantages and disadvantages of each type of medium.
- Let's also consider some major firms that base their success on creative image delivery

Chapter 15: Implementation of Merchandising Plans
- Supply Chain and Inventory Management
- Understanding the Holiday Shopping Season
- Black Friday, Cyber Monday, and other holiday shopping events

Week 12:
November 22nd – free worktime on your site selection project – online assignment

November 24th - NO CLASS – Happy Thanksgiving!
Week 13: November 28 and 30th: Chapters 16 and 17  
DUE: Forum D, due November 28th: Holiday Shopping Season

Chapter 16 on Financial Merchandise Management
- In-class problem set – you are expected to do these calculations. Retail math is simple, but can give indications of underlying retail strategy problems.

Chapter 17: Pricing in Retailing
- How can retailers determine optimal prices? How can they work with multiple placements of discounts: coupons, in-store promotions, Web-based promotions, etc.? How much pricing information is at consumers’ fingertips today? How is pricing related to demand? What are some basic types of pricing practices? How does government regulate the prices that can be charged? How are discounts related to selling prices and to overall strategies? Other pricing strategies have evolved that assume that consumers are responsive to price certainty: e.g. EDLP. And yet others appeal to the bargain seeker through formats such as dollar stores.

Week 14: December 5 and 7 - Term Project Presentations - Location Assignment
- Post location information online for class resources
- See “How to do a great presentation in 10 Minutes”
- See Term Project Document for required information

Week 15: December 12th
Review for Final,
Discuss Forum E, class reviews online,

FINAL EXAMINATION: TBA

Selections from Instructor’s Research on the Experiences of Shoppers with Disabilities


Homework 1: Using Retail Anthropology to assess store environments  
Date due: Tuesday, October 3 – worth 15 percent

This assignment requires you to conduct some observations of real stores using retail anthropology. Your report should explain what you found in 2-3 pages of narrative. All summary tables must be included at the end of your paper. Samples and grading sheets will be provided and discussed in class.

Professional retail analysts often hire consulting firms to conduct studies that watch how consumers act and move in store settings. This is called “Retail Anthropology.” There are several issues that can help retailers make sure that their store design is optimized for their customers. We'll look at three specific ones: accessibility by persons with disabilities, customer traffic flow, and overcrowding.

You will compare three similar clothing retailers on these attributes. For this exercise, use simple rating scales from 1-10, where a “10” is best and “1” is worst in terms of good retail practice. Make a chart like the one below to summarize your findings. Feel free to expand the summary table. Final score is the sum of the three individual scores.

HINT: extra credit for store observations at 3 different dates/times of day (please list them).

Introduction: Describe this project in your own words

Sample of stores: Visit three retail stores in the clothing industry or in some similar category such as athletic clothing, shoes, or specific departments within the same type of clothing (e.g. men’s suits). Describe the industry, the stores you selected, their addresses, and tell why you selected each.

Accessibility: are all the stores equally accessible to people with disabilities? Can customers enter and leave conveniently? Does the store have automatic doors, ramps, handicapped accessible restrooms, water fountains, fitting rooms (if applicable), checkout counters? Are displays accessible to people in wheelchairs? If needed, is braille used? Hearing devices?

Customer traffic flow: In each store, watch how people move inside the store. Do they follow similar paths? Are they attracted by certain displays or areas of the stores? Is the traffic flow efficient? Give high scores if traffic moves smoothly; low scores if people get in each other’s way.

Overcrowding: compare how crowded/overcrowded each store is. Are the aisles wider in one store versus the other? Do customers get in each other’s way? Can customers reach and examine the merchandise? Is the merchandise crowded? High score for adequate space for customers and being “not overcrowded.”

Your assessment: Cut and paste the chart below into your report and expand it to include your responses. Briefly discuss your findings within the report. Were there patterns in the ways that customers behaved? Were certain stores “better” than others? What would you recommend if you were a consultant?

Conclusion: What can a retail analyst learn through simple observation when comparing and contrasting stores in the same industry? What recommendations can you make to improve each store’s design? To improve shoppers’ experiences?

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<tr>
<th>Stores</th>
<th>Accessibility (all types)</th>
<th>Smooth Customer traffic flow</th>
<th>Not overcrowded</th>
<th>Overall Summed Score</th>
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<td>Store 1 Name and address</td>
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<td>Store 2 Name and address</td>
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<td>Store 3 Name and address</td>
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</table>
NAME: ________________________ Preferred email___________________________________________

Your major, minor?______________________________________________________________

Any special needs? __________________________________________________________________

Employment? ______________________________________________________________________

Approximate Hours per Week________________________________________________________

1) Other Marketing Courses taken in the past?

2) Other Marketing Courses being taken this semester?

3) Any retail experience or skills?

4) Do you shop Online? On your phone? Do you use Groupon? Why or why not?

5) Do you know what the Americans with Disabilities Act (ADA) is?

6) Tell me one thing about you that will help me to teach this class.

7) What would you like to learn in this class? Any specific topics of interest?

Suggested Group members for Term Project on location for a new Dunkin’ Donuts store (Max 5 per group)