NRF FOUNDATION®

CASE STUDY INSTRUCTOR GUIDE

Burlington

Designing a Gen Z Retail Experience

About NRF Foundation RISE Up

RISE UP concepts come to life through case studies, which help students connect foundational learning to the authentic business challenges facing modern retailers.

RISE UP COURSE ALIGNMENT*

- Retail Industry Fundamentals (Primary Alignment)
- Customer Service & Sales (Secondary Alignment)
- Business of Retail: Operations & Profit (Secondary Alignment)

*See Appendix for detailed chart of Course Alignment and Challenge Connections

RISE UP SKILL CONNECTIONS

This case study supports skills related to:

- Understanding customer needs
- Communication and professionalism
- Customer service
- Teamwork and collaboration
- Problem-solving
- Retail marketing
- Visual merchandising
- Retail operations and profitability

BENEFITS OF RISE UP

- Employability skills needed to land jobs and get promoted in retail
- Flexible delivery options (classroom, online, or blended)
- Scenario-based learning using realistic retail situations
- Hands-on activities that allow learners to practice skills in a safe environment

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RISE UP

RISE Up is the NRF Foundation's training and credentialing program that helps students and job seekers build foundational workplace skills for careers in retail and beyond. RISE Up focuses on communication, teamwork, customer service, professionalism, problem-solving, and workplace readiness through industry-recognized credentials and real-world learning experiences.

Purpose of the Case Study

This case study allows students to explore how retailers create engaging shopping experiences for specific customer groups. Students will analyze Generation Z (Gen Z) consumer trends, develop retail and marketing strategies, and create recommendations that help Burlington strengthen customer engagement and business success.

Students will apply workplace-ready skills while experiencing a real-world retail business challenge.

LEARNING OBJECTIVES

By the end of this activity, students will be able to:

- Analyze the shopping behaviors and preferences of Gen Z consumers
- Develop a retail merchandising and marketing strategy for a target audience
- Apply communication and customer service skills in a retail scenario
- Collaborate with a team to solve a real-world retail challenge
- Present retail ideas using visuals, data, and persuasive communication
- Explain how retailers balance customer experience with profitability
- Understand career connections through practicing authentic skills and tasks

SUGGESTED COURSE CONNECTIONS

This case study could be used in:

- Marketing
- Business Foundations
- Entrepreneurship
- Fashion & Interior Design
- Digital Media
- Graphic Design
- Visual Arts
- Career Exploration
- Consumer Sciences
- Retail & Hospitality Pathways
- School-Based Enterprise Programs
- DECA or BPA preparation activities

Instructor Pre-Work

Students should have started the RISE Up Retail Industry Fundamentals course and have prior exposure to concepts related to:

- Understanding customers and customer needs
- Customer experience and service basics
- Product assortment and merchandising fundamentals
- Marketing and branding basics
- Communication and teamwork skills

OPTIONAL EXTENSION TOPICS

- Social media marketing
- Entrepreneurship
- Consumer psychology
- Retail operations
- Financial literacy

BEFORE CLASS:

- Decide whether students will work individually or in teams of 3–4
- Determine preferred presentation format(s) (see options below)
- Prepare access to digital design or presentation tools if available

Course Criteria

PRESENTATION OPTIONS

Examples: Slide presentation, Canva brand board, Poster or storyboard, Social media campaign mock-up, Short promotional video, TikTok-style pitch, Store display sketch, Interactive storefront concept, “Shark Tank” style retail pitch.

TIME NEEDED

90-135 minutes minimum (2-3 class periods of 45 minutes each is ideal).

Utilizing all components of this case study could take 5 class periods of 45 minutes.

Additional time may be needed for presentations, design work, or extended research.

MATERIALS NEEDED

Examples: Printed or digital case study, Internet access for research, Paper or poster board (optional), Canva, Google Slides, PowerPoint, or similar presentation software, Markers, pens, pencils (optional).

Step-by-Step Instructions

STEP 01

Introduce Burlington and the retail challenge.

STEP 02

Review learning objectives and vocabulary.

STEP 03

Review the case study together.

STEP 04

Organize students into teams or assign individual work.

STEP 05

Distribute the project directions and materials.

STEP 06

Allow time for research, planning, and development.

STEP 07

Students prepare and present their strategic recommendations.

STEP 08

Facilitate discussion using reflection and case questions.

STEP 09

Optional: Have students vote on the strongest retail strategy or customer experience.

STEP 10

Optional: Offer extension activities for accelerated students, to enhance the lesson, or for extra credit.

OPTIONAL EXTENSION ACTIVITIES

- Design a Burlington storefront display
- Create a mock Instagram or TikTok campaign
- Conduct a student shopping survey
- Compare Burlington's strategy to another retailer
- Build a simple marketing budget
- Interview classmates about shopping preferences

LINKS & RESOURCES

RISE Up Portal
RISE Up Help Center
Burlington Stores
NRF Foundation

Burlington: Designing a Gen Z Retail Experience

RETAIL INNOVATION CHALLENGE GOAL

Help Burlington create a retail experience that better connects with Generation Z (Gen Z) customers.

Burlington's business model focuses on:

- Affordability and value
- Frequently changing merchandise
- "Treasure hunt" shopping experiences
- Discovering trendy brands at lower prices

YOUR ROLE

You are part of Burlington's Merchandising Team working as a Merchandising Assistant. Your team has been asked to develop recommendations that will help Burlington better connect with Generation Z (Gen Z) shoppers through product selection, store experiences, and customer engagement strategies.

Your team has been asked to help Burlington attract more Gen Z shoppers by creating a store experience that feels:

- Affordable and easy to shop
- Trend-aware
- Social-media friendly
- Authentic and welcoming

You will research customer behaviors, recommend products, design a retail experience, and pitch your ideas to Burlington leadership.

Burlington DEALS. BRANDS. WOW!

Burlington Stores is a national off-price retailer and Fortune 500 company with stores across the United States and Puerto Rico.

Burlington offers brand-name clothing, shoes, accessories, beauty products, and home décor at discounted prices — often up to 60% below traditional department store prices. Learn more about the store and see their current marketing on their YouTube channel.

BUSINESS CHALLENGE SCENARIO

Gen Z consumers are becoming one of the most influential customer groups in retail.

Many Gen Z shoppers:

- Discover products through social media
- Value affordability and self-expression
- Want brands to feel authentic and inclusive
- Enjoy personalized shopping experiences
- Care about trends and brand identity
- Prefer stores that feel visually engaging and easy to navigate

Burlington wants to strengthen its connection with Gen Z shoppers while continuing to provide strong value and affordability.

Your challenge is to develop a strategy that encourages Gen Z customers to:

- Visit Burlington more often
- Spend more time shopping
- Share their experiences online
- Purchase featured products

You are not simply completing a classroom assignment; you are thinking like retail professionals, marketers, merchandisers, and customer experience strategists.

Your goal is to create realistic, creative, and customer-focused solutions that could work in an actual Burlington store.

Student Directions

Complete the following tasks as directed by your teacher.

CUSTOMER INSIGHTS & TREND RESEARCH

1. Research Gen Z shopping behaviors and preferences.
2. Identify current Gen Z fashion, lifestyle, or shopping trends.
3. Explore how social media influences purchasing decisions.
4. Research how retailers successfully attract Gen Z shoppers.
5. Identify products and price points Gen Z customers value.

PRODUCT STRATEGY DEVELOPMENT

1. Select two product categories that would appeal to Gen Z shoppers.

   Examples: Streetwear, Beauty products, Athleisure, Room décor, Accessories, Sustainable products, Tech accessories.
2. Choose one primary category.
3. Select 3–5 example products.
4. Explain why Gen Z customers would purchase these items.
5. Explain how pricing, style, and branding support your strategy.

POINT SYSTEM

Presentation: Strategy Recommendations
(70 points)

Case Study Questions
(15 points)

Project Reflection Questions
(15 points)

RETAIL EXPERIENCE DESIGN

1. Design an in-store customer experience concept from the examples below or create your own.

   Examples: Feature display, Trend table, Interactive product wall, Seasonal shopping section, Social-media-inspired signage, Selfie/photo opportunity.

2. Include: Store messaging or slogans, Visual design ideas, Store layout suggestions, Customer interaction ideas.

3. Explain how employees can: Communicate professionally, Build trust with customers, Offer product recommendations, Create positive customer experiences.

MARKETING & ENGAGEMENT STRATEGY

1. Create a marketing strategy for your retail concept.

2. Include: Campaign goals, Target audience, Key messages, Marketing channels, Social media ideas, In-store promotion ideas, How success would be measured.

   Possible channels: TikTok, Instagram, Influencer partnerships, Email campaigns, Digital advertising, In-store signage.

FINANCIAL THINKING & PROFITABILITY

1. Estimate and include: Cost of displays or signage, Product pricing, Estimated customer purchases, Potential weekly sales revenue.

2. Then explain: Why your idea could increase sales, How Burlington could stay profitable while maintaining affordability.

   Use reasonable estimates. Exact calculations are not required.

PRESENTATION: STRATEGIC RECOMMENDATIONS

1. Create a presentation using one of the format options shared by your teacher.
2. You should include all the elements from the above 5 tasks.
3. Present your strategic recommendations to an audience. Presentations will be graded using the included rubric.

Your presentation should:

- Include a persuasive title and opening statement.
- Clearly explain your strategy.
- Include visuals and be professional and polished.
- Demonstrate teamwork and communication.
- Explain how your plan helps Burlington connect with Gen Z shoppers.
- Be presented to the class, a small group, a judging panel, or via a recording.

VOCABULARY WORDS

Use at least 5 vocabulary words in your work:

- Brand Identity — The image and personality of a company.
- Consumer Trends — Popular shopping behaviors or interests.
- Customer Experience — How a customer feels while shopping.
- Generation Z (Gen Z) — People born roughly between the late 1990s and early 2010s.
- Marketing Strategy — A plan used to attract customers.
- Merchandise — Products sold by a retailer.
- Profit Margin — The difference between sales revenue and costs.
- Target Customer — The group most likely to purchase products.
- Teamwork — Working effectively with others toward a common goal.
- Visual Merchandising — Designing product displays to attract customers.

Presentation Scoring Rubric

Criteria	8-10 Exceeds Expectation	5-7 Meets Expectations	2-4 Approaching Expectations	0 - 1 Needs Improvement
Customer Insights & Trend Research	Demonstrates strong understanding with realistic and thoughtful ideas	Shows good understanding with mostly relevant ideas	Limited understanding or unclear connections	Minimal understanding shown
Product Strategy Development	Creative, realistic, and strongly connected to the challenge	Appropriate and connected to the challenge	Some ideas are weak or underdeveloped	Ideas unclear or unrealistic
Retail Experience Design	Creative experiences with all four elements included	Appropriate experiences with 3-4 elements included	Some experiences with 2-3 elements included	Experiences are limited
Marketing & Engagement Strategy	Strategy is organized, creative, and realistic	Includes clear marketing ideas	Marketing plan lacks detail	Marketing plan incomplete
Financial Thinking & Profitability	Uses logical estimates and explains profitability clearly	Includes reasonable estimates	Limited financial explanation	Financial thinking missing
Communication & Presentation	Presentation is organized, engaging, and professional	Presentation communicates most key ideas clearly	Some presentation communication is unclear	Difficult to follow
Teamwork & Collaboration	Strong collaboration and participation throughout	Team works together appropriately	Uneven participation	Limited collaboration

TOTAL: _____ / 70 POINTS

Case Questions (15 Points)

QUESTION 01

Why is it important for Burlington to understand Gen Z shopping behaviors?

QUESTION 02

How can retailers create shopping experiences that feel authentic and engaging for Gen Z customers?

QUESTION 03

Why are social media and visual merchandising important in modern retail?

QUESTION 04

How can store employees positively influence customer experience?

QUESTION 05

Why must retailers balance customer experience with profitability?

QUESTION 06

What workplace skills are most important for success in this type of role?

TOTAL: _____ / 15 POINTS

Reflection Questions (15 Points)

Now that you have completed the case study, take some time either individually or in your assigned groups to reflect on the project.

QUESTION 01

How did researching Gen Z customers influence your product or marketing decisions?

QUESTION 02

What part of your retail strategy would most likely succeed in a real Burlington store?

QUESTION 03

How did your team balance creativity with business goals?

QUESTION 04

Which communication or leadership skills did you practice during this challenge?

QUESTION 05

What challenges did your team face, and how did you solve them?

QUESTION 06

Which part of this experience felt most similar to a real workplace project?

QUESTION 07

Would you consider a career in retail marketing, merchandising, customer experience, or retail leadership? Why or why not?

QUESTION 08

If you could improve your project, what would you change?

TOTAL: _____ / 15 POINTS

Career Connections: Careers Related to This Case Study Challenge

Career	Responsibilities	Salary Range*
Marketing Manager	Plans, directs, or coordinates marketing policies and programs; monitors trends	$90,260–$293,610
Merchandise Displayer	Designs displays and store layouts	$30,000–$58,370
Public Relations Specialist	Promotes or creates a public image for an organization; can include social media	$38,570–$126,220
First-Line Supervisor of Retail Sales Workers	Supports and coordinates retail operations and employee management	$33,120–$77,080

**Salary ranges vary by location and experience;*
Data Source: data.bls.gov

LEARN MORE

RISE Up Career Opportunities
RISE Up Career Spotlights
U.S. Bureau of Labor Statistics Careers
Burlington Careers

Appendix A

RISE UP SKILL CONNECTIONS

BURLINGTON: DESIGNING A GEN Z RETAIL EXPERIENCE

This Retail Innovation Challenge provides opportunities for students to apply concepts and workplace skills introduced in multiple NRF Foundation RISE Up credential programs.

PRIMARY ALIGNMENT

- Retail Industry Fundamentals

SECONDARY ALIGNMENT

- Customer Service & Sales
- Business of Retail: Operations & Profit

The charts on the following pages outline specific RISE Up topics from each of the above courses and the connection to this specific case study.

Retail Industry Fundamentals

RISE Up Topic	Connection to Burlington Challenge
Understanding Customers	Students research Gen Z shopping behaviors, preferences, and purchasing motivations.
Customer Experience	Students design retail experiences that improve customer engagement and satisfaction.
Retail Career Awareness	Students research Gen Z shopping behaviors, preferences, and purchasing motivations.
Merchandise & Product Assortment	Students select products and categories that align with customer needs and trends.
Visual Merchandising	Students create displays, signage, and store experience concepts.
Marketing Basics	Students develop strategies to attract and engage target customers.
Communication Skills	Students present recommendations and explain business decisions.
Teamwork & Collaboration	Students work in teams to research, plan, and develop solutions.
Problem Solving	Students address a real-world retail challenge and justify their recommendations.

Customer Service & Sales

RISE Up Topic	Connection to Burlington Challenge
Building Customer Relationships	Students identify ways employees can create welcoming customer interactions.
Effective Communication	Students develop customer messaging and engagement strategies.
Customer Needs Assessment	Students analyze Gen Z preferences and expectations.
Customer Service Excellence	Students recommend practices that improve the shopping experience.
Professionalism	Students practice workplace communication and presentation skills.
Sales Support Techniques	Students explore how displays, messaging, and employee interactions influence purchasing decisions.
Creating Positive Customer Experiences	Students design experiences that encourage repeat visits and customer loyalty.
Active Listening & Customer Engagement	Students consider how employees interact with and support shoppers.

Business of Retail: Operations & Profit

RISE Up Topic	Connection to Burlington Challenge
Retail Operations	Students consider how their ideas could function within a retail environment.
Business Strategy	Students develop recommendations that support Burlington's goals.
Marketing & Promotion	Students create marketing and customer engagement plans.
Financial Thinking	Students estimate costs, revenue, and profitability.
Profitability	Students explain how Burlington can increase sales while maintaining affordability.
Data-Informed Decision Making	Students use research to support recommendations.
Inventory & Product Planning	Students evaluate product categories and customer demand.
Business Performance Measures	Students identify ways success could be measured.
Innovation & Continuous Improvement	Students develop creative solutions to improve customer engagement.

Case Questions Answer Key Sample Responses

QUESTION 01

Why is it important for Burlington to understand Gen Z shopping behaviors?

SAMPLE ANSWER:

Understanding Gen Z helps Burlington create products, experiences, and marketing strategies that feel relevant and engaging to younger shoppers.

QUESTION 02

How can retailers create engaging Gen Z experiences?

SAMPLE ANSWER:

Retailers can use visual displays, social media trends, affordable products, and authentic branding to connect with Gen Z customers.

QUESTION 03

Why are social media and visual merchandising important?

SAMPLE ANSWER:

Social media influences trends and purchasing decisions, while visual merchandising helps products stand out and creates memorable shopping experiences.

QUESTION 04

How can employees positively influence customer experience?

SAMPLE ANSWER:

Employees can greet customers professionally, answer questions, recommend products, and create a welcoming environment.

QUESTION 05

Why must retailers balance customer experience with profitability?

SAMPLE ANSWER:

Retailers must attract customers and increase sales while managing costs to remain financially successful.

QUESTION 06

What workplace skills are important in this role?

SAMPLE ANSWER:

Communication, teamwork, creativity, problem-solving, customer service, and presentation skills are all important.