
***The Courage to Coach
for Retail***

T r a i n i n g L e a d e r ' s G u i d e

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Table of Contents

The Courage to Coach for Retail

Preparation Materials	Introduction	6
	About This Program	7
	Training Session Checklist	8
	Possible Session Agendas	9
	Trainer's Instructions for Evaluation and Follow-Up Methods	10
Training Materials	Introducing the Session to Participants	12
	Show and Review the Video	13
	How Would You Respond? Exercise	14
	Role-Play Exercise	16
	Action Plan Exercise	17
	Posttraining Assessment and Session Evaluation	18
Participant Materials	Pretraining Assessment	
	Key Training Points Overview	
	Video Discussion Questions	
	How Would You Respond? Worksheet	
	Role-Play Scenarios	
	Observer's Worksheet	
	Action Plan	
	Posttraining Assessment	
Session Evaluation Form		

***The Courage to Coach
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P r e p a r a t i o n M a t e r i a l s

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Icon Key



Read or Paraphrase



Worksheet



Video



Flipchart



Ask and Discuss

Introduction

Coaching. Nobody has time to do it. But, as managers, we all have to. But what's the best way to handle difficult coaching decisions? *The Courage to Coach for Retail* is a video-based training program that will provide participants with real-world skills to effectively coach employees to increase performance.



How do you coach a “problem” associate?

How do you coach someone with an “attitude problem”?



How do you get good people to do even more with less?

Coaches often find themselves in tough situations that are hard to handle. *The Courage to Coach for Retail* takes a real-world look at some of the tough retail situations coaches face and gives specific steps that can quickly and easily get the situation under control and on the right track. At the end of the training session, your participants should be able to:

- Describe the problem and their expectations
- Get agreement on the problem
- Develop solutions together
- Agree on an action plan
- Follow up to ensure the situation has improved

About This Program

There are several ways this material can be used:

- Facilitator-Led Program
- Lunch and Learn Program
- Self-Study Program

Facilitator-Led Program

This program provides session leaders with a one- or two-hour focused training session agenda. We realize that your time is valuable and have made every effort to develop a short and concise way to communicate the coaching information to your participants. This will allow for the greatest amount of learning transfer in the time allowed.

There are two different ways to use the video in this session. The video can be used in its entirety or as a stop-and-discuss tool. If used in its entirety, the video will run approximately 20 minutes. If used as a stop-and-discuss tool, time will vary depending on the discussion of training points with your participants.

Lunch and Learn Program

If a lunch and learn program is the chosen means of delivery, then the one-hour session agenda can be utilized. See page nine. After a brief introduction, show the video in its entirety. Allow for discussion following the video. Distribute copies of the action plan for each participant and conclude your session.

Self-Study Program

The self-study program allows organizations to train associates who missed the actual training session, creates an alternative to having a training session, or allows associates to take responsibility for their own learning. A self-study workbook that includes the exercises and action plan is available.

Possible Session Agendas

Two session agendas have been provided to help guide you through your *The Courage to Coach for Retail* session. You may modify these agendas to meet the needs of your participants.

2-Hour Session

Activity	Time	Page
Introducing the Session to Participants	10 minutes	12
Show and Review the Video	45 minutes	13
How Would You Respond? Exercise	15 minutes	14
Role-Play Exercise	30 minutes	16
Action Plan Exercise	10 minutes	17
Posttraining Assessment and Session Evaluation	10 minutes	18

1-Hour Session

Activity	Time	Page
Introducing the Session to Participants	10 minutes	12
Show and Review the Video	30 minutes	13
Action Plan Exercise	10 minutes	17
Posttraining Assessment and Session Evaluation	10 minutes	18

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T r a i n i n g M a t e r i a l s

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Introducing the Session to Participants

Time Required:

- 10 minutes

Materials Needed:

- Copy *Key Training Points Overview* for each participant
- Flipchart

Objective:

- To introduce participants to each other and create an environment conducive to training.
-

Trainer's Instructions:



1. Read or paraphrase the following:

Today, we are going to look at what it takes to coach associates. Now I know what you may be thinking: I don't have time to coach my associates. I understand how you may feel. Coaching is one of those things that we all need to do but don't seem to have time to do effectively.

Our goal today is to give you the skills you need to help you deal with some tough retail situations. Then, hopefully, after you have had some time to practice the skills, you will have the courage to coach.

2. Write key training points on a flipchart and distribute the *Key Training Points Overview*, then read or paraphrase the following:

By the end of this session, you should be able to:

- **Describe the problem and your expectations**
- **Get agreement on the problem**
- **Develop solutions together**
- **Agree on an action plan**
- **Follow up to ensure the situation has improved**

3. Have participant's introduce themselves and describe one thing they hope to gain from the session. You may wish to write these responses down on a flipchart and refer to them throughout the session.

Show and Review the Video

Time Required:

- 30-45 minutes

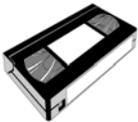
Materials Needed:

- Video, *The Courage to Coach for Retail*
- Copy of the *Video Discussion Questions* for each participant

Objective:

- To introduce the key training points to the participants.

Trainer's Instructions:



1. Read or paraphrase the following:

Coaching isn't rocket science; it doesn't take three degrees from a university or college to do it correctly. Basically, it's common sense. But that doesn't mean that it is easy. It takes courage to confront the situation and get the associate back on track. The video you're about to watch is going to show us several tough coaching situations and the appropriate ways to handle them.

2. View the video, *The Courage to Coach for Retail*.
3. After viewing the video, distribute copies of the *Video Discussion Questions* have participants fill out discussion questions as they watch the video and then discuss as a group.

*** Trainer's Note:** If you are doing the two-hour training agenda, distribute the video worksheet and stop to discuss the questions as you go. Every time you see the screen that says, "What would you do?" stop and review the questions on the video worksheet. If you are doing the one-hour training agenda, play the video all the way through and review questions at the end of the video.

How Would You Respond? Exercise

Time Required:

- 15 minutes

Materials Needed:

- Copy of *How Would You Respond? Worksheet* for each participant
- Flipchart

Objective:

- To help participants identify ways to immediately respond when coaching opportunities arise.
-

Trainer's Instructions:



1. Read or paraphrase the following:

Sometimes taking the initiative to deal with a situation when it occurs is the hardest part of coaching. Once you get a dialogue started, it is easier to begin the coaching process. Remember the goal of this exercise is to look at ways to initially deal with the situation, not the steps of coaching. The steps will be dealt with in a later exercise.

2. Distribute the *How Would You Respond? Worksheet*.
3. Ask participants to write down how they would respond in each of the situations.
4. After several minutes, discuss participants' responses to each situation. Possible answers provided on the next page, however remember there are many ways to approach these difficult situations. Be open to alternatives presented by your participants.

Role-Play Exercise

Time Required:

- 30 minutes

Materials Needed:

- One copy of the *Role-Play Scenarios* for each participant
- Copies of the *Observer's Sheet*—one for each group

Objective:

- To help participants apply the skills they have learned so far.

Trainer's Instructions:



1. Read or paraphrase the following:

Now that we have identified some ways to get the conversation started, let's try practicing each of the steps.

2. Have participants form groups of three or four. Two participants will complete the role play. The other participant(s) will act as observer(s).
3. Cut Role-Play Scenarios A, B and C and distribute a copy of the *Role-Play Scenarios* to everyone. Distribute copies of the *Observer's Sheet* to the observers.
4. Allow participants five minutes to review their situations and decide how they are going to respond.
5. Allow five minutes for the role play.
6. Ask observers to give feedback to the role-play participants.
7. Get together as a large group and discuss the following:
 - What was the most difficult aspect of the role play?
 - What would be the most effective type of follow-up in these situations?
 - Was there information acquired during the role play that you didn't know about at the beginning?

Trainer's Note: When you distribute the role-play scenarios, do not allow the participants to share the situations with each other. Participants need to discover information about one another through their discussion.

Action Plan Exercise

Time Required:

- 10 minutes

Materials Needed:

- Copy of *Action Plan Worksheet* for each participant

Objective:

- To help participants follow through and use the information they learned in the training.

Trainer's Instructions:



1. Read or paraphrase the following:
Learning how to effectively coach when the situation arises is a very important part of any manager's job. But, we don't want you to just practice it here and then not use it when you get back to your store. Therefore, we are going to ask you to plan how you're going to use this information when you get back to work.
2. Distribute the *Action Plan Worksheets* to each participant.
3. Read or paraphrase the following:
To complete your action plans, think of an associate whom you need to spend some time coaching. Identify how you are going to approach the situation with the associate. How are you going to describe the problem and the expectations? What are you going to say to get agreement that a problem exists? What are some possible solutions? Once you have met with the associate, fill out the bottom half of the form and return a copy of it to me. (Optional)

Posttraining Assessment and Session Evaluation

Time Required:

- 10 minutes

Materials Needed:

- *Posttraining Assessment* for each participant
- *Session Evaluation* for each participant

Objective:

- To evaluate what participants have learned at this session and learn what their perception of the session is.
-

Trainer's Instructions:



1. Read or paraphrase the following:
It is important for me to not only assess what you have learned at this session, but also learn what you think about the session. Please take a few moments to fill out both the *Posttraining Assessment* and the *Session Evaluation*.
2. Distribute the *Posttraining Assessment* and the *Session Evaluation* to each participant.

Possible Answers to the Posttraining Assessment:

1. Why does it take courage to coach associates? *Because you don't want to damage the relationship with a good associate, and it is hard to confront an associate who is having problems.*
2. What are the steps to successfully coaching associates? *Describe the problem and the expectations, agree on the problem, develop solutions together, agree on an action plan, and follow up to ensure the situation has improved.*
3. Why is it important to really listen to what the associate has to say? *You may learn information that you were not aware of that could impact the situation.*
4. When you have a problem associate, what do you need to be sure to do in case you have to take further action? *Document behavior*
5. **True or False.** It is important to be very specific with associates who have an attitude problem. *True*

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P a r t i c i p a n t M a t e r i a l s

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Pretraining Assessment

Instructions:

Read each question and write your answer in the space provided. This survey is a learning exercise only, not a test. Your responses will be used to help develop a training session to meet your specific needs.

1. What do you consider to be the most difficult aspect of coaching associates?
2. What steps do you take when you have to coach an associate about a performance issue?
3. What type of coaching situation is the most difficult to handle? (e.g. coaching someone who used to be my peer)
4. Describe why it is important to use specific examples when coaching someone?
5. What are some ways to follow up after you have coached someone?

Key Training Points Overview



How do you get good people to do more with less?

- Describe the problem and your expectations
- Get agreement on the problem
- Develop solutions together
- Agree on an action plan
- Follow up to ensure the situation has improved

DON'T FORGET: Ask for feedback and really listen to the answer. Be specific.

How do you coach someone with an attitude problem?



- Describe the problem and your expectations
- Get agreement on the problem
- Develop solutions together
- Agree on an action plan
- Follow up to ensure the situation has improved

DON'T FORGET: Meet with the associate in private. Make sure body language, tone of voice, and specific examples are clear and consistent about the seriousness of the situation.

How do you coach a "problem associate"?

- Describe the problem and your expectations
- Get agreement on the problem
- Develop solutions together
- Agree on an action plan
- Follow up to ensure the situation has improved

DON'T FORGET: Documentation is important in the "You're not getting the message" cases. You will need documentation if the situation doesn't improve and you have to take further action.

Video Discussion Questions

Instructions:

The following questions are from the video *The Courage to Coach for Retail*. Answer each question and be prepared to share your answers with the group.

- 1. What do you think are some of the reasons managers are hesitant to coach?**
- 2. What do you think is the toughest part of coaching an associate that used to be your peer?**
- 3. What do you think are some of the obstacles in dealing with an associate with an attitude problem?**
- 4. What experience have you had in asking good associates to do more than they were previously doing before? What was the associate's response?**
- 5. What are some difficult coaching situations that you have experienced that the video did not cover? Could the steps in the video be used to deal with these situations?**
- 6. Why do you think follow-up is important to the coaching process?**

How Would You Respond? Worksheet

Instructions:

Review each situation and determine how you would approach the situation with the associate.

- 1. As you walk out onto the sales floor, you can hear an associate being rude to another associate over a sale. You were just coming to talk to that associate about an inappropriate discount that was authorized. As you look around the store, you notice a customer sitting in front of the dressing rooms. The customer is watching the situation like it was a soap opera. How would you respond?**

Possible response:

- 2. Alison is one of your best workers. She is polite and conscientious and always meets her sales quotas. She consistently meets and exceeds your expectations. She is currently swamped with setting up a new line of clothing for the store, a project you gave her. Now, another project has come up and you need her to take it on along with her current project. How would you respond?**

Possible response:

- 3. Brett is a good associate. He always shows up to work on time and takes exceptional care of the customers. He even offers to work for other associates when they are sick. Lately, you've noticed that he is taking an extended lunch break. Store policy allows for an hour lunch. Brett is taking an hour and 15 minutes to an hour and 30 minutes for lunch every day. How would you respond?**

Possible response:

Role-Play Scenarios



Manager A:

You have just been informed that your store is responsible for promoting a new sales campaign that came from corporate. Your best associate is already busy working on the arrival of the spring line. Usually, another associate is responsible for promoting the sales campaigns but that associate was recently “right-sized” and there are now not enough associates to handle the promotion of the sales campaign. You have to approach this associate about taking on this extra duty on top of their current duties.



Associate A:

It is your job to come up with and prepare for all new product lines. You are excellent at your job. You have consistently created displays year after year. During the recent right-sizing of the company you weren't affected because of the importance of the displays to bring in revenue. Due to recent layoffs, you have been putting in a couple of extra hours a day because people that you have been relying on are no longer available. You have to do everything yourself. Your workload is becoming really heavy and you are looking forward to your vacation in two weeks.



Manager B:

You have just received a complaint about your assistant manager. Your assistant manager is a good associate, but when busy this person becomes short and defensive with the other associates. The assistant manager takes on an “it's not my job” attitude. Recently, the problem seems to have escalated because customers are starting to complain. Other associates have suggested replacing the assistant manager with someone who has a better attitude. Given the current state of the job market, replacing someone with these skills would be difficult. You need to approach this associate about their attitude problem.



Associate B:

You are the assistant manager for your store. You have responsibilities to all associates, the manager, and customers. You enjoy your job, although sometimes you think people don't understand what it's like when everyone in the store is wanting something from you immediately. Everyone assumes that his or her request is more important than the other requests that you've received. During busy times you often find yourself running around accomplishing little things all over. There is not really any method to your madness. You don't have time to get organized; you just have to do. You can get a little short with people sometimes, but it is their own fault; they should realize how busy you are.



Manager C:

You are the district manager of 12 franchised stores. Your most effective manager has a problem making personal phone calls. Store policy states that all personal calls need to be made on the two 15 minute breaks the store provides. This manager is making up to 45 minutes of personal calls a day and not during the break times. Although the associates like and respect their manager, they don't understand why the rules apply to them and not to their manager. You need to approach this manager about the situation.



Associate C:

You are the manager in one of 12 franchised stores. You are also in the process of moving. You have been working a lot of overtime and have had to use some work time to take care of situations with the bank, the gas and electric company, etc. This has been a very stressful time for you. Your spouse has had to take on a lot of the responsibilities at home because of the amount of overtime that you have had to put in. You have a good relationship with your associates and enjoy your job. You look forward to the move being over and getting settled in your new house.

Observer's Worksheet

Instructions:

Watch the role play and respond to the following questions. Be prepared to share your responses with your group when the role play is completed.

1. Did the manager accurately describe the problem and expectation? If so, what specifically was the problem and expectation?
2. Did the manager get agreement on what the problem is? If so, what was the agreement?
3. Did the manager develop solutions with the associate? If so, what were the solutions?
4. Did the manager and associate agree on an action plan? If so, what was it?
5. Did the manager discuss following up with the associate? If so, how and when?
6. How did the manager respond when he or she learned new information?
7. What could the manager have done to improve the coaching session?

Action Plan

Instructions:

Think of an associate that you need to coach. Plan for your coaching session below.

Name of associate: _____

Describe the problem: _____

Describe your expectations: _____

What are some possible solutions to help this associate? _____

After you meet with the associate, finish the rest of the plan and return to _____
on _____ Date _____ Trainer/Manager

What solutions did you create together? _____

What action plan did you agree on? _____

What are you going to do to follow up with this associate? _____
