

RETAIL AREA MANAGEMENT

Training Courses and Development Programmes

outlook
MANAGEMENT • DEVELOPMENT

Managing at a distance



VITAL TRAINING AND COACHING
FOR NEWLY APPOINTED
AREA MANAGERS.

LEADERSHIP DEVELOPMENT
WORKSHOPS FOR THE MORE
EXPERIENCED AREA MANAGER

Retail Area Manager
Training and Development

www.outlookretail.com

Contents introduction

About Outlook Management Development

Outlook is an **Operations Management Development** organisation with the experience and credibility to influence behavioural change within retail field operations. We are proven field management practitioners who can walk and talk confidently and assertively within all levels of retail operations management. This experience gives us the credibility to mentor, coach and act as ideal 'role models' for area managers within the retail industry.

Very few training and development organisations work effectively at this level of retail management, *'we do and we've proved it'*.

What does Outlook Management Development do?

- Coaches and mentors newly appointed area managers
- Supports in the identification of high and under performing area managers
- Supports in the identification of branch managers with potential for area management
- Actively support Operations Directors, Managers or Controllers in their role as field management developers
- Supports the HR function in driving through developmental initiatives within retail operations

About Area Management

In the past, many area managers were appointed on the strength of their technical skills and not necessarily their people management ability. This resulted in the main function of the area manager being one of a policeman, administrator and financial analyst. But things have changed considerably. Area Managers have had to take on many additional branches and are now even more responsible for the performance and development of the branch manager. This means that **Performance Management** and **Performance Development** have become the essential skills of area management and Training and Development in these key areas has never been so important.

Workshops in this brochure

- Workshop 1 - The fundamentals of area management
- Workshop 2 - Managing branch manager performance
- Workshop 3 - Managing branch manager development
- Workshop 4 - Managing the under-performing manager
- Workshop 5 - Succession planning for area management

These workshops are delivered in-company.

For information about our public programmes and workshops visit our web site www.outlookretail.com

Who should attend?

Soon to be appointed area managers, newly appointed managers, experienced area managers, Training or HR professionals responsible for the development of area managers.



The ambiguity of the area manager role

Role & Function

Many senior retail executives have different views of the area manager position, the jobs, key tasks and the necessary skills required to be effective in this crucial role.

This confusion has led to:

- Branch managers being appointed to the area manager position for the wrong reasons.
- Organisations not managing the ongoing development of their area teams effectively.
- Organisations not identifying the core competencies of the area manager job and wasting resources arranging training in the less important areas.

Area Manager Competencies

The following competencies are crucial to the role:

- Ability to think clearly
- Performance Management
- Personal effectiveness
- A strong commercial focus
- Innovation and creativity
- Self development and learning
- Desire for continuous improvement
- Intellectual capacity
- Understanding the culture
- Decision-making
- Managing change
- Influencing others
- Developing the team
- Delight in diversity
- Setting objectives & following through to completion

Area Managers need to be able to inspire, persuade, influence and motivate vital qualities for driving through necessary change.

Managing at a distance ^{workshop} 1

PROGRAMME

Role and Responsibilities

- Differences Manager v Area Manager
- Key skills and competencies
- Key result areas

Managing and Leadership

- Management skills
- Leadership competencies
- Taking stock and self-analysis

Personal Projection

- Being professional
- Assertiveness
- Sub-Culture influence
- Change management

Strategic Planning

- The planning process
- Monitoring and reviewing

Communication

- One to one communicating
- Small group presenting
- Meeting handling and facilitation

Personal Development Planning

- Self-development
- The planning process
- Learning styles
- Development planning

Duration: 2 days

the fundamentals of area management

About the workshop

Area Managers are too valuable to be thrown in at the deep end and need the best initial training possible. This is a 'covering the very basics' workshop, the focus is on; The Area Manager **Function**, the **Tasks** required of the job and the **Qualities** required to 'Lead' rather than just 'manage'.

Thinking ahead, analysing the current situation, and formulating a written business development strategy is an essential starting off point for all newly appointed Area Managers. On completion of this workshop delegates will have commenced formulating a **Strategic Development Plan** for their area and discussed methods of communicating the plan to all managers within their areas of responsibility.

By the end of this workshop participants will have:

- Analysed the true role and function of 'Area Manager'
- Identified the essential 'people skills' required to balance existing technical expertise
- Identified the Key Skills requirements of Area Management
- Learnt how to plan and organise effectively within the role
- Been shown a simple Planning Process to use when formulating their Strategic Development Plan
- Analysed the current situation and formulated a written action plan in the key areas of:
 - Customer Service
 - Team Development
 - Financial Management
 - Businesses Development
- Reviewed and discussed the principles and importance of Management By Objectives
- Learnt an important technique which will help in identifying and writing objectives
- Reviewed and discussed both corporate and divisional objectives

Who should attend?

- Newly appointed or soon to be appointed area managers
- The more experienced area manager as a 'refresher' course
- Training and/or HR professionals responsible for the development of the area management team



managing manager performance

About the workshop

Appointing the wrong person for the branch manager job is costly, damaging to the business and demoralising to the branch team. Recruitment mistakes do happen and quite often it does not become apparent until it is too late.

Setting objectives, identifying training requirements, probationary periods, regularly reviewing, and performance appraising are all vital 'tools of management'. Performance management is a crucial part of the area manager role as he or she is accountable for both the performance and behaviour of branch managers. Many area managers shy away from this responsibility and lose personal credibility from their bosses and their teams because of it.

By the end of this workshop participants will have:

- Developed interviewing and selection skills sufficiently to minimise the risk of selecting the wrong person
- Learnt about the Performance Review Cycle and its importance in the effective management of people performance
- Understood the importance of setting the appropriate SMART objective which will be assessed during and on completion of the probationary period
- Identified and discussed various training methods and opportunities other than 'attending courses'
- Conducted a challenging probationary review and taken the appropriate action when objectives have not been achieved
- Discussed and reviewed appraisal principles and processes and conducted an appraisal interview on a 'challenging' branch manager

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Managing at a distance

workshop

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PROGRAMME

Recruitment and Selection

- What are competencies?
- Conducting and interviewing professionally
- Asking the appropriate questions
- Making decisions

Setting Objectives

- Setting short-term objectives (Probationary)
- Setting longer-term objectives (Appraisal)
- Agreeing standards of performance

Training and development style

- Induction training
- Training needs analysis
- Training and development planning
- Supporting and guidance

Reviewing objectives

- Probationary periods
- Extending probationary periods

Appraising performance

- Reviewing achievements/non-achievements
- Discussing and identifying development objectives
- Discussing performance issues

Performance Improvement Planning

- Gathering the facts
- Discussing performance issues
- Writing performance improving objectives

Setting personal/development objectives

Duration: 1 day

Managing at a distance ^{workshop} 3

PROGRAMME

Why the need?

- Benefits of effective coaching & counselling
- Challenges
- Key influences

What to do

- Keeping to a structure
- Gathering the facts
- Planning and preparing

Coaching & Counselling

- Key activities
- Key principles - The five step approach
- Coaching principles
- Counselling techniques

Case study 1: Probationary periods

- Procedures and processes
- Practical using role-play
- Feedback and coaching

Case study 2: Sickness and Absenteeism

- Record keeping
- Presenting the case
- Practical using role-play
- Feedback and coaching

Case study 3: Performance and Behaviour

- Gathering the facts
- Identifying the problem
- Practical using role-play
- Feedback and coaching

Setting performance and behaviour improving objectives

- Performance
- Behaviour
- Reviewing progress and achievements

Duration: 1 day

managing manager development

About the workshop

Area managers cannot physically manage 15 to 20 branches but they can manage the performance and effectiveness of each branch manager. Coaching and counselling are important functions of area management but these skills are often misused or not used at all. This has resulted in many unresolved behaviour issues that in turn, influence not only performance but also team morale and manager credibility.

Effective coaching and counselling by the area manager, conducted early on, minimises longer-term manager performance issues. Managing performance 'from a distance' is certainly challenging and this practical and very relevant workshop will give area managers the skills to coach and counsel performance and behaviour effectively and with confidence.

By the end of this workshop participants will be able to:

- Implement a structured approach when addressing behaviour or performance issues
- Gather the appropriate 'facts' and be able to present them in an objective and professional way
- Set and agree standards and targets with which to measure performance
- Conduct a challenging counselling session in a planned, structured and objective way
- Set clear behaviour/performance-improving objectives
- Address performance concerns more confidently
- Manage people performance more professionally

Who should attend?

- Newly appointed or soon to be appointed area managers
- The more experienced area manager as a 'refresher' course
- Training and/or HR professionals responsible for the development of the area management team



managing the under-performing manager

About the workshop

Coaching, counselling and setting objectives are important area manager activities but at the end of the day, if improvement is not achieved, disciplinary procedures will have to be considered. Many area managers are reluctant to go 'down the disciplinary route'. It is stressful, fraught with pitfalls and potentially exposes the area manager to criticism. But it is one of the few tools all managers have to help them address unsatisfactory performance. It is vital that area managers know what to do, when to do it and how to conduct a disciplinary interview professionally and objectively.

This workshop is a continuation of workshop 3 and demonstrates how to use the non-achievement of objectives as the opportunity for moving into more formal discussions.

This practical and participative workshop will also give area managers 'hands on' experience of conducting a formal disciplinary interview and appeal hearing.

By the end of this workshop participants will know how to:

- Move from informal to formal discussions
- Conduct a formal disciplinary correctly, professionally and objectively
- Confidently control and manage a disciplinary interview
- Demonstrate confidence when using the procedures
- Use the formal disciplinary procedures to improve performance or behaviour rather than to penalise or punish
- Conduct an appeal in a structured and professional way
- Re-build and re-motivate individuals following a disciplinary interview

Who should attend?

- Newly appointed or soon to be appointed area managers
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Managing at a distance

workshop

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PROGRAMME

Moving from informal to formal discussions

- Presenting the facts
- Saying the correct things
- Controlling emotions

The Formal Procedures

- Adhering to company procedures
- Challenges
- Key influences

Case Study 4: Continuation of Case-study 3 - Unit 5

- Practice using role-play
- Feedback and Coaching

Preparing for the Interview

- Gathering facts
- Seeking advice
- Calling witnesses

Conducting a Disciplinary Interview

- Stating the facts
- Addressing the behaviour and not the person
- Taking mitigating circumstances into consideration
- Summarising/Adjourning
- Making decisions

Re-motivating and re-building

- Morale and motivation
- Setting objectives
- Support and guidance

Personal Development Planning

Duration: 1 day

Managing at a distance

workshop
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PROGRAMME

Area Manager fundamentals

- Differences manager v area manager
- Key task of the job
- Key skills requirements

Key Result Areas

- Results expected to be achieved - branch manager
- Result expectations - area manager

Leadership fundamentals

- Principles
- Competencies
- Vital importance to the area manager role

Taking stock

- Self-assessment
- Review of personal performance
- Career stages, where are you now

Personal development planning

- Definitions of training & development
- The planning process
- Planning personal development

Branch performance

- What is the ideal branch?
- Where are you now?
- What is required?

Branch business planning

- If you cannot plan and implement plans at branch level forget the area manager role
- Formulating a credible branch plan
- Communication plan to team/Implementing plan

Duration: 1 day

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succession planning for area management

About the workshop:

Many branch managers aspire to take on an area manager role and there are numerous disappointed managers who have become frustrated and despondent when they see external candidates being appointed for area manager positions. Many branch managers have 'gone off the boil' because of this and there are also many other branch managers who focus too much on where they want to go in the future and not enough on what they are required to do today. This is made worse when career minded managers are given little explanation or guidance as to what they need to do 'for themselves' in order to be considered seriously for an area manager role.

The Insight Into Area Management Workshop is unique, It gives a "no holds barred" introduction to the role of today's area manager but more importantly it will help individuals identify what they have to do for themselves in order to progress in their personal development and to be seen as a serious contender for area management.

By the end of this workshop participants will have:

- Fully discussed the key differences between the branch manager and area manager roles
- Been given a thorough introduction to the role and function of the area manager position and the key skills necessary to be effective in the area manager role
- Conducted an honest self appraisal on own abilities and strengths
- Formulated an 'in the role' personal development plan focusing on the skills they will need to demonstrate to be considered seriously
- Real tips and advice directly related to 'doing the right things' to be noticed
- A structured process for planning to get their branch back on track and operating to the required standard for them to be noticed by senior management
- Support advice and coaching from a tutor who has been there

Who should attend?

A development workshop for soon to be appointed area managers and branch managers who believe they have the potential for area management.



about Managing at a Distance

For further details about workshop content or in-company training contact:

Anthony Dance on **023 8084 1943** or email info@outlookretail.com

For further details on public seminars contact our web site on www.outlookretail.com

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