# Table of Contents

## The Courage to Coach for Retail

### Preparation

**Materials**

<table>
<thead>
<tr>
<th>Introduction</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>About This Program</td>
<td>7</td>
</tr>
<tr>
<td>Training Session Checklist</td>
<td>8</td>
</tr>
<tr>
<td>Possible Session Agendas</td>
<td>9</td>
</tr>
<tr>
<td>Trainer’s Instructions for Evaluation and Follow-Up Methods</td>
<td>10</td>
</tr>
</tbody>
</table>

### 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 for Retail

Preparation Materials
## 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.

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.
Training Session Checklist

Use this checklist to help you gather all necessary materials for the training session.

Meeting Preparation
Determine your training objectives.
Measure the current status of your participants using the Pretraining Survey.
Choose different ways to train to ensure transfer of information.

Location
Create a relaxed environment.
Make sure all seats have a good view of the visuals.
Make sure there is enough light to take notes when participants view the video.
Provide an adequate writing surface for participants.
Check for good acoustics.
Verify that your room is accessible and equipped for participants with disabilities.

Video Equipment
Make sure the VCR is properly connected to the monitor.
Test the VCR, and check monitor for proper picture, color, and volume.
Make sure the tape is rewound and ready to play before beginning your session.
Check all other equipment for proper operations.

Materials
Training Leader’s Guide
Videotape The Courage to Coach for Retail
Overheads
Paper and Pencil
Participant materials for exercises being conducted
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

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

1-Hour Session

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introducing the Session to Participants</td>
<td>10 minutes</td>
<td>12</td>
</tr>
<tr>
<td>Show and Review the Video</td>
<td>30 minutes</td>
<td>13</td>
</tr>
<tr>
<td>Action Plan Exercise</td>
<td>10 minutes</td>
<td>17</td>
</tr>
<tr>
<td>Posttraining Assessment and Session Evaluation</td>
<td>10 minutes</td>
<td>18</td>
</tr>
</tbody>
</table>
Trainer’s Instructions for Pretraining Assessment, Posttraining Assessment and Action Plan

1. Use the Pretraining Survey to evaluate the needs of your participants. This survey will allow you to design the training session to emphasize areas or topics of importance to your participant.

2. A Posttraining Survey is also provided for use at the end of the training session. It will help you determine if your training goals have been met or if further education and training are necessary.

3. The Action Plan has been provided to help participants determine how they are going to use the newly acquired skills once they are back in their work environment. If you like, you could have the participants send you a copy of the action plan after they have met with the associate. Please note: If you decide to have them submit their action plans after coaching the associate, confidentiality about the situation is important.
The Courage to Coach for Retail

Training Materials
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.

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.

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.


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.

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.


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.
How Would You Respond? Worksheet (Trainer’s Copy)

Instructions:
Review each situation, and determine how you would approach the situation with the employee.

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: “I see you’re talking about that last customer, why don’t you come into the back where we can discuss it further.” (It is important to move the conversation to another location and away from the eyes and ears of your customer.)

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: “Alison, how’s it going with the new clothing line? Is there anything I can do to help you out?” (Make sure participants are asking some questions to find out about Alison’s current situation before proceeding.)

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: “Brett, I’ve noticed that you have taken an extra 15 minutes along with your lunch break today and over 30 minutes extra yesterday. Is there something going on I can help you with?” (Remind participants to use facts and have documentation.)
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.

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.

---

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.

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