

Employee Management

Unit: Business of Textiles

Problem Area: Business Management

Lesson: Employee Management

- **Student Learning Objectives.** Instruction in this lesson should result in students achieving the following objectives:

- 1 Set standards and policies for all employees.**
- 2 Plan product knowledge seminars.**
- 3 Plan weekly meetings.**
- 4 Evaluate employee progress toward goals.**

- **Resources.** The following resources may be useful in teaching this lesson:

E-unit(s) corresponding to this lesson plan. CAERT, Inc. <http://www.mycart.com>.

Galuszka, Amy. *Step-by-Step Guide for Running a Retail Store Business: How to Operate and Market a Retail Shop to Maximize Profits*. Amy Galuszka, 2012.

Granger, Michele M., and Tina M. Sterling. *Fashion Entrepreneurship: Retail Business Planning*, 2nd ed. Fairchild, 2011.

Lewy, Alison. *Design Create Sell: A Guide to Starting and Running a Successful Fashion Business (Country Living)*. Brightword, 2012.

"Retail 2.0," *Global Purchasing Companies*. Accessed Sept. 5, 2014. http://cdn-prod.www.aws.nypl.org/sites/default/files/retail_101_nypl_copy.pdf.

Werner, Jon M., and Randy L. DeSimone. *Human Resource Development*, 6th ed. Cengage, 2012.



■ Equipment, Tools, Supplies, and Facilities

- ✓ Overhead or PowerPoint projector
- ✓ Visual(s) from accompanying master(s)
- ✓ Copies of sample test, lab sheet(s), and/or other items designed for duplication
- ✓ Materials listed on duplicated items
- ✓ Computers with printers and Internet access
- ✓ Classroom resource and reference materials

■ Key Terms. The following terms are presented in this lesson (shown in bold italics):

- evaluation form
- meeting agenda
- meeting minutes
- policies
- policy manual
- standards

■ Interest Approach. Use an interest approach that will prepare the students for the lesson. Teachers often develop approaches for their unique class and student situations. A possible approach is included here.

All classrooms already have procedures and policies in place. Describe some of the policies you have in class. Explain that this is no different in the business world. All companies have set policies in place to ensure that employees do what they are hired to do.

CONTENT SUMMARY AND TEACHING STRATEGIES

Objective 1: Set standards and policies for all employees.

Anticipated Problem: How are standards and policies set for employees?

I. Standards and policies

- A. **Standards** are the exact manner in which business practices are handled at a particular company or industry. Standards should be straightforward, clear, and concise. For instance, at a clothing store, one standard for employees may be to always greet customers as they enter. Another standard may be to check each clothing display every half an hour to ensure that the display is neat and tidy.

Standards are the defined expectations that all employees must follow. Standards may be dictated by local or federal law. For instance, clothing needs to have a tag detailing the materials used.

1. Standards should apply to all employees, from the owner to front-line employees.
 2. Standards should be taught to all employees at the time of hiring and should be reinforced on a regular basis.
 3. Setting standards depends on the company's philosophy as well the industry. If a company's philosophy includes being environmentally conscious, its standards should reflect this. For example, only "green" products should be sold or manufactured. In addition, shipping materials (e.g., cardboard and plastic) should be recycled.
 4. Standards are important and should be followed at all times. When standards are not followed, a process should be followed for reprimanding the offending employees (e.g., a verbal reprimand, written reprimand, or firing if the offenses continue).
- B. **Policies** are rules for a company. Policies are often found in a **policy manual**, which is a company publication that lists all the company rules currently in effect. Companies typically have many policies. Depending on the company, these can be legally required or just a company rule. For example, manufacturers must abide by many legally mandated safety rules. These are typically written into the policy manual. Like standards, policies should apply to all employees. Below is list of potential company policies:
1. Dress code
 2. Phone and Internet use
 3. Vacation request and sick day request
 4. Payroll procedure
- C. Standards and policies vary from company to company. In a retail environment, many of the standards and policies reference how to take inventory, greet customers, cover the sales floor, interact with customers, and other general employee policies.

Teaching Strategy: Conduct a class discussion and lecture. Have students conduct online research on standards and policies. Have students choose a company for this research to determine if they can find standards and policies for this company. This is typically on the company Web site. Have students share their findings with the class.

Objective 2: Plan product knowledge seminars.

Anticipated Problem: How are product knowledge seminars planned?

II. Product knowledge seminars

- A. Extensive knowledge of the product being sold is essential to the sales process because it allows the salesperson to meet customer needs in the best possible way. For instance, if a retail sales clerk at an athletic wear store has a customer asking about the best pair of running shoes for long distances, he or she can confidently point the customer in the right direction and explain why. Generally, a confident salesperson is a successful salesperson.
 - 1. Needed product knowledge
 - a. Pricing
 - b. Available styles and sizing
 - c. Product use
 - d. Anything unique in the material or manufacturing process
 - e. Warranty or repair information
 - 2. Ways to gain product knowledge
 - a. Other salespeople
 - b. Marketing materials from the manufacturer
 - c. Training sessions from the manufacturer or supervisor
 - d. Personal use
 - e. Reviews from current product users
- B. The best way to increase product knowledge is to administer product knowledge seminars. These can be conducted by an expert inside or outside the company. Seminars normally are conducted as training sessions in which a trainer teaches salespeople all about the product. Product knowledge seminars can take a variety of forms.
 - 1. Weekly seminars can be effective. Choosing a couple products a week and spending an hour in training can be beneficial to salespeople. The trainer should cover all aspects of the product, including pricing, styles, use, anything unique, and warranty information.
 - 2. Monthly seminars can be effective, too. Obviously, this type of seminar would be longer and typically would cover an entire product line.
 - 3. Most industries have national conferences once or twice a year. Employees may be sent to these to learn about new trends and new products. In addition, they may attend product knowledge seminars conducted by industry experts.
- C. Planning the seminar types is a company decision made after determining the needs and direction of the company. Planning should include determining who should attend, choosing a location, and choosing a presenter or trainer.

Teaching Strategy: Conduct a class discussion and lecture. Have students choose a product that they use on a regular basis. Have them compile all the product knowledge about this product that would be pertinent to a salesperson.

Objective 3: Plan weekly meetings.

Anticipated Problem: How are weekly meetings planned?

III. Weekly meetings

A. Planning

1. All meetings should have a clear purpose detailed in the **meeting agenda**—a document stating the schedule, purpose, and order of the meeting. Creating the meeting agenda is an important part of planning any meeting. The agenda should be sent to potential attendees in advance, so attendees know the purpose and direction of the meeting. The agenda can be sent via email, company memo, or on a central notification board.
2. Once the purpose is defined, the next step is to decide who will attend and where the meeting will take place. When deciding a location, it is important to know if special accommodations (e.g., a projector connected to a computer) are needed.
3. The time of the meeting is important. The meeting should be conducted at a convenient time for attendees and at a time that will not disrupt the operation of the business. For instance, all salespeople attending a meeting while the store is open will create problems on the sales floor.

B. Conducting the meeting

1. Weekly meetings for a retail establishment typically include sales numbers from the previous week, any customer complaints or successes, sales quotas or forecasts for the week, any new products, new procedures, and a question-and-answer session.
2. An assigned person should take notes during the meeting. He or she will be responsible for compiling the **meeting minutes**—a document detailing the attendees, what was accomplished, and any assignments moving forward. The meeting minutes should be sent to all attendees (usually via email) within 24 hours of the minutes.
3. Meetings should be as efficient as possible, so sticking to the agenda is important. Staying within the designated meeting time is essential to being respectful of other people and their schedules.

Teaching Strategy: Use VM–A. Conduct a class discussion and lecture.

Objective 4: Evaluate employee progress toward goals.

Anticipated Problem: How is employee progress toward goals evaluated?

IV. Evaluating employees

- A. Evaluating employees involves determining whether or not they have achieved the goals set for them.
 1. The job description details the main duties. If the employee is not completing those duties, he or she is not reaching the established goals.
 2. Customer feedback can be used. If the company has a feedback mechanism (e.g., after-purchase surveys), it can have a glimpse of the sales associate's performance.
 3. Concrete numbers are a great way to evaluate progress toward goals. For instance, a sales associate may have a goal of \$500 in sales per shift. It is easy to determine if he or she met the goal.
 4. Management observation can be used as well. This involves management observing an employee as he or she is completing assigned duties.
 5. An **evaluation form** is an item used by company management that details the goals and results of employee performance. It details the evaluation process, goals, and results. The form will be shared with the employee being evaluated.
- B. Creating an evaluation plan involves many steps.
 1. Goals should be set for employees, and they should be aware of them.
 2. A system for measuring progress should be developed. It may include customer feedback, testing, sales numbers, and/or management observation.
 3. Progress should be measured regularly.
 4. Management should meet with employees at set intervals (once a month, every two weeks, etc.) to discuss progress.
 5. Management should discuss ways to improve with employees if applicable.
 6. Once goals are met, new goals can be established.

Teaching Strategy: Conduct a class discussion and lecture. Use VM–B. Assign LS–A.

■ **Review/Summary.** Use the student learning objectives to summarize the lesson. Have students explain the content associated with each objective. Student responses can be used in determining which objectives need to be reviewed or taught from a different angle. If a textbook is being used, questions at the ends of chapters may be included in the Review/Summary.

■ **Application.** Use the included visual master(s) and lab sheet(s) to apply the information presented in the lesson.

- **Evaluation.** Evaluation should focus on student achievement of the objectives for the lesson. Various techniques can be used, such as student performance on the application activities. A sample written test is provided.

■ **Answers to Sample Test:**

Part One: Matching

1. b
2. f
3. e
4. d
5. a
6. c

Part Two: Completion

1. all
2. conferences
3. purpose
4. meeting minutes
5. evaluation form
6. Observation

Part Three: Short Answer

1. Dress code, phone & Internet use, vacation and sick day request, and payroll procedures
2.
 - a. Weekly seminars can be effective. Choosing a couple products a week and spending an hour in training can be beneficial to salespeople. The trainer should cover all aspects of the product, including pricing, styles, use, anything unique, and warranty information.
 - b. Monthly seminars can be effective, too. Obviously, this type of seminar would be longer and typically would cover an entire product line.
 - c. Most industries have national conferences once or twice a year. Employees may be sent to these to learn about new trends and new products. In addition, they may attend product knowledge seminars conducted by industry experts.
3. Answers will vary, but they should include two of the following: customer feedback, numbers (e.g., sales goals), management observation, or evaluation form.

Employee Management

► Part One: Matching

Instructions: Match the term with the correct definition.

- | | |
|--------------------|-------------------|
| a. meeting minutes | d. meeting agenda |
| b. evaluation form | e. standards |
| c. policies | f. policy manual |

- _____ 1. A form used by company management that details goals and results of an employee's performance
- _____ 2. A company publication that lists all the company rules currently in effect
- _____ 3. The exact manner in which business practices are handled at a particular company or industry
- _____ 4. A document stating the schedule, purpose, and order of the meeting
- _____ 5. A document detailing the attendees, what was accomplished, and any assignments moving forward
- _____ 6. Rules for a company

► Part Two: Completion

Instructions: Provide the word or words to complete the following statements.

1. Standards and policies should apply to _____ employees.
2. Employees can gain product knowledge from attending annual industry _____.
3. All meetings should have a clear _____.



4. The person taking notes in a meeting is tasked to create the _____ and send it to all attendees.
5. A/an _____ is an item used by company management that details goals and the results of an employee's performance.
6. _____ involves management watching an employee while he or she completes assigned tasks.

► Part Three: Short Answer

Instructions: Answer the following.

1. List four types of company policies.
2. Explain the types of product knowledge seminars.
3. List and explain two ways to evaluate employees.

SAMPLE MEETING AGENDA FOR ELLIE'S BOUTIQUE

Type of company: Retail clothing for girls from baby to juniors

Meeting agenda

Date: 09/29/20—

Time: 9:30 a.m.

Attendees: All available salespeople

1. Discuss sales results from the previous week.
2. Discuss sales quotas for this week.
3. Reveal the employee of the month.
4. Discuss customer feedback.
5. Introduce the new product line (training to follow at a later date)
6. Adjournment



SAMPLE EVALUATION FORM FOR SALES ASSOCIATE AT ELLIE'S BOUTIQUE

Type of company: Retail clothing for girls from baby to juniors

Employee name: _____

Manager: _____



Goals:

1. Achieve sales of \$400 per 8-hour shift.
2. Achieve a customer satisfaction rating from customer surveys of 95 percent.
3. Complete all duties as assigned in the job description.

Evaluation:

- ◆ Did the employee reach his or her sales goal? Yes or No
- ◆ Did the employee reach a customer satisfaction rating of 95 percent? Yes or No
- ◆ Did the employee complete all the duties as assigned in the job description? Yes or No
- ◆ Comments (If any question above was marked “No,” the space below is required for explanation)

Policies and Standards

Purpose

The purpose of this activity is to demonstrate the ability to manage employees.

Objectives

1. Set policies and standards.
2. Create an evaluation form for employees.

Materials

- ◆ computer with Internet access
- ◆ word-processing program
- ◆ paper
- ◆ writing utensil

Procedure

1. Create a company of your choosing.
2. Based on the type of company you create, compile five standards and five policies for your company. You may want to brainstorm on your paper.
3. Choose a position that would be available in your company, and assign five duties to that job.
4. Using the standards, policies, and duties you created, design an evaluation form to evaluate an employee in that position.
5. Type all of this into your word-processing program.
6. Proofread, and turn in your work to your instructor.

