

Store Manager Assessment Guide

Resume Assessment

Purpose: Determine which candidates have the past accomplishments and performance that would indicate a match with the success characteristics and abilities of the target market as outlined on the Recruitment Plan.

Process:

- ◆ Review resume for positions in which the candidate had responsibility in the broad categories of success competencies (highlighted in bold). The corresponding success competencies are listed in the category.
- ◆ Call candidates to clarify information if necessary.

Candidate: _____ **Date:** _____ **Conducted by:** _____

Success Competencies	Yes	Somewhat	No	Uncertain
<p>Management/Supervisory responsibilities</p> <ul style="list-style-type: none"> ▶ Use effective personnel management skills to hire, counsel and coach employees ▶ Train supervisors and oversee the training of front line staff ▶ Balance multiple priorities of store, giving equal attention to all aspects of operations ▶ Delegate the day to day store operations to supervisors ▶ Model the behaviors desired of front line and supervisory staff ▶ Use problem -solving abilities to make decisions concerning store and employees; know when to ask for assistance from owner ▶ Observe business trends and changing markets, make adjustments to business accordingly 				
Notes				
<p>Responsibility for inventory</p> <ul style="list-style-type: none"> ▶ Supervise the ordering of all products and supplies 				
Notes				
<p>Responsibility for cash flow</p> <ul style="list-style-type: none"> ▶ Complete day to day cash reconciliation; maintain adequate cash control ▶ Identify innovative ways to reduce expenses 				
Notes				
<p>Responsibility for security</p> <ul style="list-style-type: none"> ▶ Institute and maintain means of dealing with security issues 				
Notes				
<p>Has background in a customer service oriented business</p> <ul style="list-style-type: none"> ▶ Use the Customer Service Action Plan when dealing with customer satisfaction issues ▶ Identify ways for stores to be special or different from competition 				
Notes				

Evaluation: Current or past position with management/supervisory responsibilities is most critical. Consider only candidates with this background.

Store Manager Assessment Guide Phone Assessment

Purpose:

- ☞ Determine why the candidate is interested in the position. (i.e. challenge, money, power, etc.)
- ☞ Obtain additional information as to the management/supervisory responsibilities held in their current/most recent position.
- ☞ Determine if those responsibilities and significant accomplishments are similar to the management/supervisory success competencies of a Store Manager as outlined in the Recruitment Plan.
- ☞ To determine the candidate's ability to overcome obstacles.
- ☞ Obtain this information without the bias of the visual first impression.
- ☞ Prevent spending time interviewing candidates whose past performance does not match the success competencies outlined in the Store Manager Recruitment Plan.

Process:

- ☞ Review resume prior to calling candidate.
- ☞ Begin conversation with a brief description of the position and of .
- ☞ Ask if the candidate has any questions about the position before starting with the assessment.
- ☞ Ask follow up question (who, what, when, where, how) until you have a clear understanding of each answer.

Candidate: _____ Date/Time: _____ Conducted by: _____

PURPOSE OF QUESTION	QUESTION	NOTES
Determine why the candidate is interested in the position.	<input type="checkbox"/> What interests you about this position? <input type="checkbox"/> What is the reason you're looking for a new position now?	
Determine if their management/supervisory responsibilities are similar to those of a Store Manager at our store. Note: Some candidates may have had these responsibilities in a previous position. Ask about that one instead.	<input type="checkbox"/> Give me an overview of the management/supervisory responsibilities you have in your current/most recent position?	
Determine if the most significant accomplishment in that position is similar to what is expected of a Store Manager at .	Describe your most significant accomplishment in that position.	
Determine the candidate's ability to overcome obstacles.	<input type="checkbox"/> What was one of the biggest obstacles you faced while (fill in with the accomplishment) ? <input type="checkbox"/> What did you do to overcome that obstacle?	

PURPOSE OF QUESTION	QUESTION	NOTES
Determine if the most significant management/supervisory accomplishment is similar to what is expected of a Store Manager at .	Describe your most significant management accomplishment. Skip this question if the accomplishment discussed above was of a management/supervisory nature.	
Determine the candidate's ability to overcome obstacles.	What was one of the biggest obstacles you faced while (fill in with the accomplishment)? <input type="checkbox"/> What did you do to overcome that obstacle?	

Notes:

Summary:

- ▶ Record your impressions of whether or not the candidate's past performance and accomplishments are comparable to those expected of a Store Manager based on the success abilities listed in the Recruitment Plan for Store Managers.
- ▶ Comparable is defined as the candidate's having enough experience so that you can predict success, but not necessarily having experience in every aspect of the position. You're looking for someone who has done about 75% of what's going to be expected. This allows room for growth.

	Yes	Somewhat	No	Notes
Scope of responsibilities comparable?				
Past accomplishment(s) comparable?				
Management accomplishment(s) comparable?				
Effective problem solving skills?				

Additional Impressions:

Call candidate for in-person assessment? Yes _____ No _____

Store Manager Assessment Guide In-Person Assessment

Part I

One-On-One Assessment

Purpose: Determine the competence of the candidate.

Process:

- ✓ Begin by briefly re-capping what was discussed in the phone assessment about the candidate's current position and the significant accomplishments.
- ✓ Indicate that you will be taking notes.
- ✓ Proceed with the following questions.
- ✓ As in the phone assessment, ask follow up questions to ensure you have a clear understanding of the candidate's past performance.

Candidate: _____

Date/Time: _____

Conducted by: _____

SUCCESS COMPETENCY	QUESTIONS	NOTES
Use effective personnel management skills to hire, counsel and coach employees	<ul style="list-style-type: none"> ✓ Describe the most challenging direct report you've ever supervised. What did you do to meet that challenge? ✓ As manager, what will you do to build an effective team? ✓ Describe your management style. ✓ Give an example of when your management style was ineffective? What did you do? 	
Supervise the ordering of all products and supplies	<ul style="list-style-type: none"> ✓ Describe your process for ensuring adequate supplies. ✓ What would you do if supplies ran short? 	
Train supervisors and oversee training of front line staff	<ul style="list-style-type: none"> ✓ What did you do to ensure all staff were adequately trained? 	

SUCCESS COMPETENCY	QUESTIONS	NOTES
Balance multiple priorities of store, giving equal attention to all aspects of operations	✓ Describe a time when you dealt effectively with multiple priorities.	
Institute and maintain means of dealing with security issues.	✓ You have heard from one of your best employees that the front liner on 3 rd shift has been taking product without paying for it. What would you do?	
Delegate the day to day store operations to supervisors.	✓ What process do you use to delegate tasks to your staff?	
Identify ways for stores to be special or different from competition.	✓ Name of few things you might be able to do to help our store stand out from the competition.	
Use problem-solving abilities to make decisions concerning store and employees; know when to ask for assistance from owner.	✓ Describe a situation in which your had to use your problem-solving abilities. ✓ What kinds of decisions do you find difficult to make?	
Observe business trends and changing markets, make adjustments to business accordingly	✓ How do you determine what business trends might impact your work.	
Use the Customer Service Action Plan when dealing with customer satisfaction issues	✓ Our business is one of customer service. Tell me about one of your most difficult customer service encounters and how you resolved that issue. ✓ You hear a customer yelling at your deli staff that her sandwich was made incorrectly. What do you do?	
Identify innovative ways to reduce expenses	✓ Describe a time in which it was necessary for you to reduce costs? What actions did you take?	
Model the behaviors desired of front line and supervisory staff	✓ How do you ensure that your staff understand what behaviors are acceptable?	
Complete day to day cash reconciliation; maintain adequate cash control	✓ Candidate completes cash reconciliation case study	

Store Manager Assessment Guide Reference Check

Purpose: Obtain additional facts and to verify candidate's competence.

Process:

- ✓ A reference check is best completed between the 1st and 2nd in-person assessment so you can verify information the candidate provided in the phone and 1st in-person interviews. If the candidate gives any negative information during the reference check, this information can then be discussed with the candidate in the 2nd in-person assessment.
- ✓ The call will take approximately 20 minutes.
- ✓ When making the call, introduce yourself and state reason for calling: "I'm calling because (**candidate's name**) is being considered for a position of Store Manager and (s)he has given your name as a reference .
- ✓ Ask if the reference has time to talk. If not, arrange a time later when you can call again.
- ✓ Give a brief description of the Store Manager success competencies so the reference understands the requirements of the position.
- ✓ The reference check has two parts: verifying the reference and verifying the candidate.
- ✓ Verifying the reference is important so the relationship between the reference and the candidate is clearly understood, making it easier to put the reference's comments into perspective.
- ✓ Clearly explain to the reference that you are calling to get more information about the competency of the candidate to do the job.
- ✓ Ask any or all of the questions below (add more if necessary) to verify the candidate's competence and obtain more information about the candidate's significant accomplishment(s).
- ✓ Ask fact-finding questions (who, what, when, where, how, why) until you have a clear picture of the candidate's competence

Candidate: _____

Date/Time: _____

Reference: _____

Conducted by:

PURPOSE	QUESTION	NOTES
Verify reference	<ul style="list-style-type: none"> ✓ What was the relationship between you and candidate? ✓ How long did the working relationship last? ✓ How many people did you supervise? ✓ Ask the reference how performance was measured. 	

PURPOSE	QUESTION	NOTES
Verify candidate	<ul style="list-style-type: none"> ✓ What was the candidate's most significant accomplishment in this position? ✓ What were the candidate's top 3 strengths? Weaknesses? ✓ What did the candidate do to overcome those weaknesses? ✓ What was the candidate's most significant management accomplishment? ✓ Describe how the candidate used effective personnel management skills to build a team. ✓ Describe a time the candidate had a difficult problem to solve. How did (s)he solve the problem? ✓ How would you compare the candidate to others in the same position? ✓ Why is this candidate stronger/weaker? ✓ What would it take to be even more effective? 	
Additional Questions		

Store Manager Assessment Guide Second In-Person Assessment

Purpose: Determine if the candidate's character and personality are a fit with the success standards as outlined in the Store Manager Recruitment Plan..

Process:

- ★ After the 1st in-person assessment, call the top 2 candidates for a 2nd in-person assessment.
- ★ Review the resumes and all assessment notes prior to the meeting.
- ★ Tell the employees that you'll be unavailable except for emergencies.
- ★ Thank the candidate for taking the time to come in for another assessment.
- ★ Offer refreshments.
- ★ State that now that you have determined the candidate to be competent to do the job, you will now ask questions that will address other issues that are critical for the success of a Store Manager at .
- ★ When asking questions, ask enough follow up questions (who, what, when, where, why, how) until you have a clear impression the "real" answer.
- ★ Add/omit questions as necessary to fill in gaps in information from the earlier portions of the assessment.
- ★ At the end of the questioning period, answer any questions.
- ★ Discuss why is a great place to work, Address salary, benefits and personal growth opportunities.

Candidate: _____

Date/Time: _____

Conducted by: _____

ASSESSMENT PURPOSE	QUESTION	NOTES
Personal Motivation	<ul style="list-style-type: none"> ✓ What is the #1 reason you want to be Store Manager for ? ✓ What are your goals for the next 3 years? ✓ How do you see this position fitting into those goals? ✓ Give me an example of when you've gone above and beyond the call of duty to get something done. 	

CATEGORY	QUESTION	NOTES
Personal Traits	<ul style="list-style-type: none"> ✓ What would the people you have supervised would say is your biggest strength? Weakness? ✓ What steps have you taken to overcome that weakness? ✓ What do you consider one of your biggest mistakes? ✓ What did you learn from it? 	
Decision Making Skills	<ul style="list-style-type: none"> ✓ Describe your decision making process. ✓ Tell me about the most difficult decision you've ever had to make. 	
Work Ethic	<ul style="list-style-type: none"> ✓ It's lunch time and the deli is very busy. You come out to the front to see if they need help and you see a customer drop a whole cup of coffee on to the floor right in front of the deli counter. What would you do? 	
Conflict Management Skills	<ul style="list-style-type: none"> ✓ A customer is complaining that the cashier has an "attitude" problem. What would you do? ✓ Describe a conflict you've had with a supervisor. How did you handle that situation? 	
Team Building Skills	<ul style="list-style-type: none"> ✓ What will you do to build a team in your store? ✓ What role do you think a manager has in recruiting and retaining successful staff? 	
Communication Skills	<ul style="list-style-type: none"> ✓ Describe how you would announce an unpopular decision to the staff. 	
Other questions		

Notes:

Store Manager Assessment Guide

Second In-Person Assessment (cont'd)

Continue with a discussion of the compensation package.

Salary:

Benefits (health & dental insurance, vacation, personal days):

Personal Growth Opportunities (formal & informal training, workshops & seminars, opportunity for increased responsibility within the company):

After discussion of the compensation package, ask the following questions:

Assuming you're the best candidate, what are your thoughts right now about the position?

If offered the position, when would you be able to give me an answer? If response is more than 24 hours, or if excuses are given, probe further with the next question.

What is keeping you from saying yes? Omit this question if the candidate states you would have an answer in 24 hours or less.

When would you be in a position to start?

Making the Decision:

- ★ If at this point you know this is the candidate you want, proceed with an offer.
- ★ If you need to decide between 2 candidates, tell the candidate when you will call with your decision.

Store Manager Assessment Documentation Form

Purpose: Compile information obtained from the assessment.

Process: Record your impressions and scores after each part of the assessment.

Candidate: _____

Assessor: _____

Code: **P = Phone Assessment**

#1 = 1st In-Person Assessment

#2 = 2nd In-Person Assessment

RC = Reference Check

Success Standards	Check Characteristics and Competencies That Match				Notes
Success Characteristics	P	#1	#2	RC	
People person					
Good delegator					
Approachable					
Likes fast paced work environment					
Customer focused					
Mature					
Observant					
Good time manager					
Big picture person					
Trustworthy & honest					
Flexible					
Strong work ethic					
Quick learner					
Detail oriented					

SUCCESS STANDARDS	CHECK CHARACTERISTICS AND COMPETENCIES THAT MATCH				NOTES
	P	#1	#2	RC	
Success Competencies					
Effective personnel management skills to hire, counsel and coach employees					
Complete day to day cash reconciliation; maintain adequate cash flow					
Supervise the ordering of all products and supplies					
Train supervisors and oversee the training of front line staff					
Balance the multiple priorities of the store					
Institute/maintain means of dealing with security issues					
Delegate the day to day store operations					
Identify ways for the stores to be special or different from competition					
Use problem solving abilities to make decisions					
Observe business trends and changing markets making adjustments accordingly					
Use the LAAST plan when dealing w/customer satisfaction issues					
Identify innovative ways to reduce expenses					
Model the behaviors desired of other staff					

Pass cash reconciliation case study Yes No

How Supervise _____ % correct weighted 1 (80% minimum)
 _____ % correct weighted 2 (90% minimum)

Comparable (75%) Match Yes No (75% comparable = a match in at least 20 of the 27 success characteristics and competencies)

Name: _____

Date: _____

Cash Reconciliation Case Study

According to Amanda, at the beginning of the day she had \$100.00 in her cash register drawer.

She had \$457.67 in cash sales for the day.

According to Amanda, she made 3 deposits (drops) into the safe. The amount of these deposits was:

\$240.00

\$100.00

\$135.35

How much money should Amanda have in her cash drawer at the end of the day?

At the end of the day, her cash drawer is supposed to have \$100.00. Is her closing bank correct?

What possible reasons are there for the error?