A STUDY OF RETAIL CHAIN STORE MANAGER SELECTION, TRAINING, AND APPRAISAL IN THE HOUSTON AREA

by

George T. Kingery

A THESIS

Approved:

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A THESIS

Presented to the Faculty of

Sam Houston State Teachers College

in Partial Fulfillment of the Requirements

for the Degree

MASTER OF BUSINESS ADMINISTRATION

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by

George T. Kingery

Huntsville, Texas

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ABSTRACT

Kingery, George T., A Study of Retail Chain Store Manager Selection, Training, and Appraisal in the Houston Area. Master of Business Administration, May 1969, Sam Houston State Teachers College, Huntsville, Texas. 102 pp.

Purpose

It was the purpose of this study to establish guidelines for methods and procedures to use in selecting, training and educating, and evaluating retail store managers in the Houston area.

Methods

The methods used to obtain the data needed for this study were: (1) to search books and current printed material in the subject area; and (2) to prepare and mail a three page questionnaire to local retailers.

Findings

From the evidence presented in this study the following conclusions were formulated:

1. The need for salaried retail managers is greater today than it was 10 years ago and a larger pool of manager trainees is needed.

2. Most retail chains try to find manager trainees among their ranks, but are unable to obtain an adequate supply from this source.

3. The three most important characteristics of a manager trainee are: intelligence, initiative, and personality. Tests, interviews, and personal histories are used to determine possession of these qualities.

4. The average age of the trainees falls between the ages of 20 and 30; pay is not competitive enough.

5. On-the-job training incorporated with some degree of group discussion is offered to manager trainees in most of the retail chain stores.

6. The manager training program usually lasts from 1 to 3 years, although the length of the program might vary depending on the individual trainee's progress.

7. The store manager is responsible for the training and development of his subordinates in most chains.

8. Merchandising, store policy, sales promotion, and inventory control are the topics covered during the training and educating process.

9. Many of the chains expect their managers to take business courses to stay abreast of the times.

10. The three most important and most difficult to master traits for a trainee to possess are: organization ability, self-motivation, and ability to delegate.

11. Appraising the amount of trainee development is not usually done with formal tests.

12. A large percentage of the trainees do not complete the program; incentives to attract and keep better trainees are needed.

Approved:

[redacted]

ACKNOWLEDGMENT

This Master's Thesis was written with a sincere desire to learn more about the retail manager development policies. Appreciation is expressed to the 41 retail chain executives who supplied the answers needed to complete the study.

Dr. Loyce Adams, supervising professor, was very interested and enthusiastic at each step during the preparation of this thesis. Dr. Bobby Kees Marks and Mr. Rusk, committee members, were also most helpful throughout the year. My wife, Joan, did a very commendable job of typing this thesis.

GEORGE T. KINGERY

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CHAPTER I

THE PROBLEM AND ITS SETTING

Reasons for Undertaking the Study

Forty years ago if a young man had the ambition to become a retail manager he would save up enough money to open a retail outlet of his own and would become an owner-manager. As the towns grew, so did the independent businesses. The successful owner-managers brought their sons and other members of their families into their thriving businesses and developed them on the job. Through the leadership of the older generation, the heirs of the founders developed into leaders in their own right. Slowly, the family corporations released some of their corporate stocks to outside investors. These new stockholders relied upon the self-developed senior employees to become managers and develop new managers as the present managers retired. This manager development process normally took an individual approximately ten years.

Today a group of stockholders invest several million dollars in buildings, fixtures and stock, and place a manager in charge. These owners are, for the most part, investors, not managers, and their main objective is getting a good return on their investment. The executives hired by the stockholders must have the necessary tools to develop

men to manage these retail outlets profitably. Some of these companies hire proven managers; other companies prefer to grow their own.

This study is concerned with the selection and development of potential managers. During the last two decades millions of people have moved off the farms and out of the rural areas into the urban areas. This has made possible the rapid growth of retailers in the metropolitan areas. New retail outlets open opportunities for more managers. Unfortunately the retail outlets' starting pay does not attract many potential aggressive managers.

The expansion and growth of some of the major retail companies is unbelievable. Also the keen competition for intelligent and ambitious personnel in other work areas is so great that the personnel departments are kept busy just searching for and interviewing applicants. It is commonly understood that qualities of the applicants are not up to the desired standards in most cases.

Retail manager development is the subject of this thesis, not retail management development. The word "management" was not used as the subject under consideration because it implies group effort, while manager development is a program of individual progress. The development of a manager is the expansion of his ability to utilize his knowledge and experiences in solution of problems.

Statement of the Problem

The problem of this thesis is to discover what criteria to use in selecting, training and appraising retail store managers. This study is involved with three specific phases: selection of the potential managers, educating and training of those selected and the appraisal of the graduates. First, the selection will be discussed in an attempt to determine what the major retailers are looking for in a manager and how these persons are found and attracted into a career in retailing.

The second phase will show the current development procedures being practiced by these retailers in the growth of their leaders. The objective is to determine if the development processes are effective and what implications can be derived.

The third phase is a study of manager appraisal and whether or not it is an important part of the total development process. The answers that the researcher is seeking in this phase are who makes the evaluations, what is looked for, and how are these evaluations of the most help during the process.

The questions discussed in this thesis are: (1) what personal qualities should a person have to perform the duties of a retail store manager; (2) what source is most commonly used to find these potential managers; (3) what

types of education and training should be offered to develop good retail store managers; and (4) what type of progress reports would indicate managerial abilities and show development.

Purpose of the Study

One purpose of this thesis is to establish guidelines for methods and procedures that would assist company executives in developing qualified, enthusiastic and dilligent managers to operate the complex retail stores profitably. Loyal and untiring leaders are hard to find, and the years of experience needed are expensive. Therefore, it behooves the executives to eliminate all unnecessary errors and expenses. This study will inform the retailers about the trends in selection, training and appraisal of the manager development programs.

Another purpose will be to inform high schools and colleges of the trends in retail manager development. If the schools are going to offer helpful courses they need to be aware of what the businessman considers important, and what knowledge the future managers are going to need.

Limitations of the Study

This thesis was limited in scope to the problems and implications of selecting and training managerial personnel

in the field of retailing in Houston, Texas, and its suburbs. The managers in wholesaling, service selling, manufacturing, and industry were not considered. The primary source of information for this study was limited to the questionnaire sent to one hundred retailers. The retailers chosen were all chain stores which are the most progressive in their field. These chains are managed by salaried managers who are up to date in their development programs.

Sources of Data Needed

Both primary and secondary sources were used to gather the data for this thesis. The secondary sources were used to familiarize the researcher with what has been done in the field of selection and development of retail managers prior to 1968.

The researcher used reference books, business journals, and articles from both college and public libraries. There have been a great number of authentic textbooks written about management. Also, a lot of surveys have been made and research papers written on managers and management.

Out of those secondary sources reviewed, however, the writer could not find sufficient information that was especially compiled about the retail manager. Because of the lack of secondary information available from documentary materials, it became apparent to the researcher that it

would be necessary to use some primary source for the information needed.

A questionnaire was determined to be the most reliable source of the needed information. In order to reach a large portion of the major retailers, the writer prepared a questionnaire that would produce reliable and up-to-date information and sent it to prominent retailers in Houston, Texas. Five of the questionnaires were filled out during interviews between personnel managers and the researcher in order to pre-test the questionnaire before the other ninety-five were mailed or delivered. This source provided current information on manager development.

Methods of Investigation

The questionnaire was chosen as the primary source of data needed to draw conclusions about the topics. The questions were compiled with a great deal of forethought. The format was laid out in a manner that would first, encourage complete answers from the respondents; second, eliminate misleading and ambiguous questions; and third, give the information required to draw valid conclusions.

The one hundred questionnaires were delivered or mailed to the personnel managers or store managers in charge of personnel, whichever fit the particular situation. All recipients were salaried personnel working for retail

chain stores and most of them operate nation-wide. Therefore, it would be logical to assume that the information gathered would be current. The annual sales volume varies considerably among the chains, but the researcher made no attempt to use this factor.

Character of Sample

The three-page questionnaire solicited retail store experiences and practices and was divided into three sections: A, manager selection policies; B, manager training procedures; and C, manager appraisal. Even though the year 1968 was typical for this day and time, it would be helpful for the reader to recall that the percent of unemployment was less than normal. Therefore, the competition for valuable employees was keen.

Forty-one percent of the recipients replied to the questionnaire. The retailers that responded were very conscientious about completeness and following directions in answering the questions. The researcher made several follow-up calls on the recipients in order to encourage the best possible response. Information was received from both large and small volume chains. Those to whom questionnaires were sent are listed in Appendix B, and indication is made to show "response" or "no response".

The classifications of retail stores replying to the questionnaire were as follows: 14 department stores, 4 supermarkets, 3 discount chains, 15 specialty stores, and 5 drug stores. Each of the stores is a part of a multi-store operation and most of the multi-store operations do business in many cities. The annual sales of the stores were not a consideration in this survey. All of the companies surveyed have salaried managers.

Summary

Retail organization has changed over the years. In order to meet innovations and operate profitable businesses, the retailers have to develop qualified managers and continue to develop them in order to fill vacancies, as well as take care of expansion.

The three areas to be taken under consideration in the succeeding chapters are: (1) potential manager selection, (2) manager development, and (3) appraisal of this individual development. The problem that is being researched is: what procedures and techniques are most commonly used in selecting, training, and appraising retail store managers.

The purpose of this thesis is to establish guidelines for the development of retail managers and to inform high schools and colleges of the knowledge needed by their

students interested in entering retailing as a career, as well as of the characteristics that will be looked for in hiring manager trainees. It is designed to show trends in selection, training and appraisal of managers.

Because of the lack of enough authentic documentary information available in the Houston libraries, a questionnaire was compiled to facilitate the gathering of needed information. This questionnaire was delivered or mailed to 100 prominent Houston retailers with forty-one percent responding. Only multi-unit retail businesses were asked to participate. The questionnaire was divided into three sections: (1) manager trainee selection policies, (2) manager training procedures, and (3) trainee evaluation.

CHAPTER II

SELECTION, TRAINING, AND APPRAISING OF RETAIL MANAGERS

Background Information

The need for salaried managers is greater now than it was 10 years ago. A decade ago the bulk of our retail businesses were operated by owner-managers. A bulletin published by the United States Department of Labor shows that in 1955 there were 3.6 million proprietors and 2.8 million salaried managers. In 1965 there were 4.7 million salaried as opposed to 2.7 million proprietors.[1]

This study was concerned with what has been done in the field of retail manager development and what techniques and procedures are being practiced. The aim has been to obtain enough information to enable the making of some recommendations that would improve and accelerate the development programs. The documentary research presented in this chapter was done to familiarize the reader with an overview of the existing retail manager development programs.

The authors that have written books and articles about manager growth agree that education alone or training

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[1]United States Department of Labor, Bureau of Labor Statistics, Occupational Outlook Handbook, Bulletin #1550 (Washington: Government Printing Office, 1968), p. 237.

alone will not make a man a manager. Education provides people with broader horizons, deeper appreciation of life, more specific facts, and growth in aptitude. Training, on the other hand, is something that can be acquired by physical experiences. This form of learning ranges from the developing of mechanical ability to the inducing of educated responses to stimuli.[2]

The development of a person means that he becomes more effective. The process of development needs a certain amount of both education and training. The properly developed manager sees things in proper perspective, realizes each individual's limitations in coordinating the job to be done, and has self-confidence and positive attitudes toward the job.[3]

Manager development falls into three major categories: (1) premanager development which includes selection of potentially capable managers and the development of a chosen few, (2) manager development category which includes continuing activity including updating of knowledge, strengthening weak spots in each individual's make-up and providing information about company policy, and (3) promotable manager development which is the process of stepping

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[2]Robert Livingston, The Manager's Job (New York: Columbia University Press, 1960), pp. 331-335.

[3]Ibid.

up to higher level positions those managers who have exhibited, through appraisals, the required traits.

Selection

Sources of Obtaining Retail Applicants

Men who have enough aptitude, endurance and ambition to become retail managers are hard to find. The first step in the process of selection should be to determine what is being looked for in a manager.

Well selected managers can increase sales through better customer service, and they can increase profits by more careful handling of equipment and merchandise and by accuracy and honesty. Standards should be set high enough to meet the store's needs, but not so high that qualified persons cannot be found to fill the job. The requirements and standards are usually set by a survey of the present managerial staff. Through the information received from managers, the traits to be looked for in the people sought to fill a manager's job can be established.

Dr. Jennings says the leaders we are looking for need to possess three traits:

> It is dangerous to talk in universals, but I would say that the three most important characteristics for success are the initiative and willingness to take risks--guts; the ability to find and

develop the right kind of talent: and the willingness to make decisions.[4]

The jobs performed by retail managers vary considerably. Likewise the necessary qualities needed to perform the jobs vary. One manager must be the personnel director, another is expected to be a certified public accountant, and another should be a promotion and display man.

There are several sources from which retail applicants are attracted; and most firms employ more than one, depending on what skills are needed. The four major sources from which manager caliber people may be recruited are discussed in the ensuing paragraphs.

Advertising. Advertising is the most common form of recruiting when one considers overall employee selection, and this form is practiced by most firms seeking employees from outside company ranks. Most readers of "Help Wanted" columns in the newspapers are really looking for work. Advertising is a powerful technique, and a large number of applicants may apply who are not even vaguely suited for the work for which they are applying. Therefore, much valuable time is taken up in even brief screening interviews.[5]

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[4]Dr. Eugene E. Jennings, "What Makes A Winner?" Dun's Review (September, 1968), p. 74.

[5]Dale Yoder, Personnel Management and Industrial Relations (Englewood Cliffs, New Jersey: Prentice Hall, Inc., 1962), p. 312.

Employment agencies. Employment agencies are a very satisfactory method of recruiting. An employer looking for a managerial caliber employee can usually do very well by contacting both the private and the state employment agencies. Open communication lines between the store and the agencies are very important. Through this personal contact some criteria can be established which will assist the agency in selecting the right applicants to apply for the key jobs.

High schools and colleges. Students are a good source of part-time employees. These part-timers generally make good employees and many continue with the company after they are graduated, especially if they are shown the opportunities in the field of retailing. The vocational guidance counselor in the local school is a very good person to keep informed about a company's needs. Career day at school is a very important time to be available for personal interviews with the graduates who will soon be ready to enter the world of work. Some companies make regular visits to college campuses to find ambitious business students who are interested in management careers.

Present employees. Present employees who have the potential ability to become managers should be the first source to look at when new blood is desired. This source is one of the best morale builders. A good personnel

policy is to promote present employees into the manager's job and not go outside the organization. This method of selection takes a great deal of pre-planning and training.

> The most effective policy is that of having a planned program whereby an adequate supply of candidates who have the necessary personal qualifications, training, and experience is being developed for key management positions of greater responsibility.[6]

In most companies the executives look for managers within their ranks. This system of selection magnifies the individual's incentive to assume the responsibility for his own development by encouraging him to learn and develop toward the manager's job. However, a few executives who were interviewed by the researcher said, "We go out and steal good employees from our competitors."

The ambitious employee who is coming up through the ranks probably stopped his formal education after completing high school. He would be at a disadvantage compared to the college student who has been hired for manager training. The rank and file employee would be operating under an educational handicap, although this shortcoming could be overcome by the employee with ambition, determination, and drive.[7]

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[6]Robert Livingston, The Manager's Job (New York: Columbia University Press, 1960), p. 360.

[7]Harold Koontz and Cyril O'Donnell, Principles of Management (third edition; New York: McGraw-Hill Book Company, 1964), p. 414.

Methods and Devices Used in Screening

After the seeking and attracting part of selection has been accomplised, it is time to decide if the applicant can pass the tests and other employment hurdles. This thesis was concerned with the selection of potential managers only; therefore, it is assumed that some preliminary screening would have eliminated some of the applicants.

Application and interview. Almost universally, retailers selecting managerial personnel will use an application form. Most of the applicants will be interviewed by some executive of the company, and some stores use tests. The information supplied by the application that would help form an opinion of the applicant would be used in discussing his or her work experience. Views of and reasons for leaving other employers, draft status, dependents, and management of personal affairs are considered important guidelines in the evaluation of a potential manager.[8] Business and personal references supplied on the application are usually checked in order to help form a more complete picture of the applicant.

The main purpose of a personal interview is to stimulate a discussion between the applicants and interviewer,

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[8]Wendell French, The Personnel Management Process (Boston: Houghton Mifflin Company, 1964), pp. 131-132.

and to encourage the applicant to talk about himself in a pleasant and conversational manner. Some employers use an interview worksheet so that the important points will not be overlooked. The Walgreen Drug Company uses such an interview worksheet, an example of which you will find on the following page. It is used to get the necessary information about an applicant's work history, education, health, training, financial status and prejudices.[9]

Testing. Testing is often used as an aid in manager trainee selection. Interest tests, aptitude tests, and personality tests are the most popular ones used in selection. These tests help to evaluate a person's acquired abilities and his aptitudes more specifically than could be done by personal interview alone. As stated in the Training and Development Handbook, "The tests most often used in business have been the general mental or learning ability tests. These tests measure the level of learning."[10]

Tests are of material aid in the selection of supervisory personnel. "Tests are an integral part of such a

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[9]Walgreen Drug Company, Interview Work Sheet, Form No. 890 (Chicago, Illinois).

[10]Robert L. Craig and Lester R. Bittel, Training and Development Handbook (New York: McGraw-Hill Book Co., 1967), p. 58.

INTERVIEW WORK SHEET

Walgreen
DRUG STORES

Date _____ 19 __

Name _____ Sex: M__ F__ Date of Birth _____ Soc. Sec. No. _____

SUMMARY

Rating: A B C D Comments _____
In making final rating, be sure to consider applicant's stability, loyalty, ability
_____
to get along with others: Also, domestic, financial and health situation

Interviewer: _____ Considered for: Dept. _____ Job _____

Address _____ How long at this address? _____

Previous Address _____ How long there? _____

Friends or relatives employed with WALGREEN COMPANY No ___ Yes___ Names _____ Dept. _____
Will this help stability?

How long to get to work from home____ Min. What transportation? _____
Is this reasonable? Will it make for stability?

Willing to work evenings? Yes____ No____ (Saturdays? Yes__ No__) (Sundays? Yes__ No__)

PREVIOUS WORK EXPERIENCE
List all positions. Check any breaks in employment. List any military service.

	Job 1 Last or present position	Job 2 Next to last position	Job 3 Second to last position
Name of Company			
Address of Company			
Employment dates	From 19__ to __19__	From 19__ to __19__	From 19__ to __19__
Period unemployed	Do dates check with application? Is record complete? Any breaks? From 19__ to__19__	From 19__ to__19__	From 19__ to__19__
How was time spent while unemployed?		Was time spent constructively?	
Starting rate	$ per	$ per	$ per
Rate at leaving	$ per	$ per	$ per
Nature of work	How does Walgreen starting rate compare?	Will his (her) previous experience be helpful on this job?	
		Any work progress made?	
Anything especially liked about job		Has he(she) been happy and content in his (her) work?	
Anything especially disliked about job		Were his (her) dislikes justified?	
Why did you leave?		Are his (her) reasons for leaving reasonable?	

Have you ever drawn Unemployment Compensation? _____ How long? _____ When previously _____ How long? _____
Has he(she) wanted to be employed steadily?

Form 890

SCHOOLING

Last grade completed: 1__2__3__4__5__6__7__8__ High School: 1__2__3__4__ College: 1__2__3__4__

Graduate? Yes___ No___ Graduate? Yes___ No___ Graduate? Yes___ No___

Any special training? _____
Will this be helpful?

How was time spent during summer vacation? _____

How was time spent after school and on Saturdays? _____
Do the above two questions indicate industry and responsibility?

Father living? _____ Mother living? _____

Fathers Name _____

Mothers Name _____

Father's occupation _____

Number of Brothers _____ Number of Sisters _____

Their Occupations _____

_____

_____

Did you aid your family financially? _____
Was he (she) willing to do his (her) share?

How old when fully self-supporting? _____
Has he (she) been self-reliant?

REMARKS: _____

_____

_____

_____

Own home? Yes__No__Room? Yes__ No__
Stability?

Rent: House? Yes__ No__ Apt? Yes__No__

Own furniture? Yes__ No__

When were your wages last garnished or assigned? _____
Is he (she) mature financially?

Why? _____

Have you ever borrowed from a loan agency? _____

If so, why? _____

How much do you still owe? _____

Does your wife (husband) work? _____
Does he (she) depend on her (him)?

What type of work? _____

What hours _____
Do the hours conflict?

Do you carry life insurance? Yes __ No__

Hosp. Ins.? Yes__ No__ Acc. Ins? Yes__ No__

Single? _____ Married? _____

Widowed? _____ Divorced _____

Separated? _____

How many children? _____

Ages? _____

Other dependents? _____

Ever arrested? _____

What were the charges? _____

REMARKS: _____

_____

_____

_____

_____

_____

_____

_____

_____

HEALTH

Have you had any serious illnesses, operations or accidents in last 5 yrs? _____
Are his (her) illnesses legitimate rather than indicating a desire to "enjoy ill health"?

Do you have any physical defects? _____
Is he (she) able to do a full day's work?

How is your health? _____
Is he (she) relatively healthy?

When did you last see a doctor? _____ What for? _____ Are you willing to take a physical exam.? _____

How much time have you lost from work during the past year due to illness? _____ What was the illness? _____

Does anyone in your home suffer from ill health? _____
Effect on his (her) work?

SUPPLEMENTAL INFORMATION: (Example: preferences for shifts, hours, etc.) _____

_____

_____

_____

_____

_____

_____

program but not its entire basis--experience, training, etc., are of utmost importance."[11]

> Some U. S. Companies are already well beyond the Model T stage so far as managerial career planning goes. Today there is little doubt that social scientists clearly demonstrate significant abilities to separate personnel with high probabilities of success in specific management jobs from those who have low probabilities.[12]

Education and Training

Ways of Training Retail Managers

Once a man has been selected as a manager trainee, observations of and training by supervisory personnel should not stop. Developing is a process of growth through experiences. Manager training should be a systematic planned process of continuous learning experiences designed to create new skills, better understanding, and new knowledge of the job of managing.

George C. Houston, in his book, Manager Development, says:

> Manager education and development is a planned, systematic, and continuing process of learning and growth designed to induce behavioral change in individuals through bringing out and cultivating their

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[11] M. Joseph Dooker and Elizabeth Martin, Selection of Management Personnel (New York: American Management Association, Inc., 1957), I, p. 153.

[12] Lawrence L. Ferguson, "Better Management of Manager's Careers," Harvard Business Review, (March-April, 1966), p. 140.

> mental abilities and inherent qualities through the acquisition, understanding, and use of new knowledge, to more effective performance of the work of managing.[13]

The training and experience that gradually unfolds a person's leadership qualities can be learned in a variety of ways. A retail manager has to plan and control many facets of business. In order to gain the understanding needed, he should spend time in each facet studying its unique problems. The most popular of the manager development programs is on-the-job training.

On-the-job training. The concept of on-the-job training is that a person develops from actual experiences. The manager's job cannot be done by the book all of the time. "It is generally conceded that 90 percent of development occurs on the job."[14] A survey on store executive development was conducted by Dr. Marion A. Niederpruem in 1957 and she says:

> Some stores--good ones among them--have no formal development program for trainees and profess none. They candidly tell the candidate that it is up to him to make his way, that his work will be carefully followed and rated and that he will be promoted as rapidly as his performance warrants. At the other

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[13]George C. Houston, Manager Development, Principles and Perspectives (Homewood, Illinois: Richard D. Irwin, 1961), p. 5.

[14]Robert L. Craig and Lester R. Bittel, Training and Development Handbook (New York: McGraw-Hill Book Co., 1967) p. 387.

> extreme are stores which have highly organized trainee programs with formal job rotation and extensive classroom training.[15]

Most of the companies feel that manager development should be in work-centered programs. On-the-job training would describe most of the manager training programs before World War II, but most of the large companies have slowly moved to a more well rounded type of training program. The newer programs include a variety of off-the-job courses; some hold company classes covering specific job areas. Others use outside sources for the more specific techniques and skills to give the potential managers the understanding and knowledge they need to fill the job.

Many retailers prepare training manuals, booklets, pamphlets, etc. These manager training guides are usually compiled under the direction of the personnel department. In many cases business consulting firms are hired to assist with the preparation of the training kits. These booklets usually include the standard operating procedures of the company as well as pertinent information and helpful hints on ways of doing the manager's job.

Harold D. Smiddy, a distinguished authority on the nature and nurture of the modern executive, during an

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[15]Dr. Marion A. Niederpruem and George Plant, Developing Store Executives (New York: National Retail Merchants Association, 1957), p. 1.

interview with an editor of Nation's Business explained that experience alone can no longer be counted on solely to provide appropriate management skills in sufficient time. He also believes while managing is no longer an art, it is not likely to become an exact science, either.[16] When an on-the-job development program has been accelerated by semi-formal training, it is usually considered job rotation.

The importance of coordinating the on-the-job experiences with the off-the-job instruction and learning cannot be overstressed. It has been recognized that the coordination of the two facets increases the understanding and speed of learning greatly. When the off-the-job education opens the mind to new understandings, new ideas and new ways of doing a specific job, the learner should have a chance to incorporate them into experiences by trying them out.[17]

Job rotation. Job rotation is systematic lateral moving of potential managerial personnel into new training situations.

> This technique may be especially desirable when potential first-line supervisors are being considered for promotion from the ranks and when college

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[16]Herbert Harris (ed.), "How Managers Are Made," The Three Steps to More Skillful Management, Vol. II (Garden City, New York: Doubleday & Co., 1955), p. 20-21.

[17]Craig and Bittel, op. cit., pp. 355-356.

> graduates or other well qualified new persons are employed.[18]

If a selected person is going to develop fast enough to step into the manager's job in a relatively short time, one or two years, it is imperative that planned job experiences must take place. Harold Koontz and Cyril O'Donnell disclose two distinct advantages of job rotation:

> First, the trainees obtain actual experience in managing, an important matter since it is the only known means of discovering whether they have leadership ability and good judgment. Secondly, the trainees develop an appreciation of the viewpoints of various departmental personnel and acquire, as well, an understanding of interdepartmental relationships.[19]

The most concise current information that the researcher found on retail manager development is an article in the Discount Store News saying, "The ideal store manager is, naturally, just that--an ideal--and discount chains, like other retailers, usually have to settle for less."[20] The article went on to say that the successful discounters stress both administrative ability and merchandising know-how.[21]

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[18] Ibid.

[19] Harold Koontz and Cyril O'Donnell, Principles of Management (third edition; New York: McGraw-Hill Book Company, 1964), p. 450.

[20] "Chains Differ on Store Manager Qualities," Discount Store News, (March 22, 1965), p. 5.

[21] Ibid.

Eight of the nine discounters interviewed by the Discount Store News said that most of their managers have come up through the ranks, and all of the potential managers need some on-the-job training before they become discount store managers. An executive of Korvette said it this way:

> All came up through the ranks. They advance from department manager to floor manager to merchandise manager to store manager. Some have made the route in two years, but the norm would be about two-and-a-half years for an exceptional person.[22]

Coaching and counseling. This is used when it is practical to accelerate the training of a few trainees. An experienced trainee who has been selected to enter a "crash" program could be trained by the coaching and counseling method. The trainee finds out what the manager's job is and how it is to be done during the education and training processes. He would be offered an overview of the many facets of the specific retailer. The manager trainee should be able to take charge after these brief premises have been fitted into place. College graduates with some retailing experience or managers from other companies might be trained under this type of program.

> The universities cannot teach management in the same sense that they teach chemical research, bookkeeping, and engineering calculations. The manager

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[22]"Graduates of Discount Ranks to Run Units," Discount Store News, (March 22, 1965), p. 5.

> must work through people, and the ability of the potential to do this cannot be discerned without on-the-job experience.[23]

Another authority on manager development has the opinion that companies should provide incentives to instill discontent so that their people will strive to develop their abilities and compentencies to the point where they can perform effectively in jobs other than their present ones.[24] If this form of individual motivation is handled improperly it might force a good potential retail store manager to leave his present employment.

All of the foregoing programs are successfully used by one or another of the retailers for developing their managers. Most companies are looking for a formula with which they can train their people step by step up to the manager's job. However, no formula can be created that will fit every circumstance and every situation. Craig and Bittel sum it up neatly when they say:

> Development is concerned with the growth of the whole man, the expansion of his ability to utilize his capacities fully and to apply his knowledge and experience to the solution or resolution of new and different situations.[25]

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[23]Koontz and O'Donnel, op. cit., p. 400.

[24]Robert Livingston, The Manager's Job (New York: Columbia University Press, 1960), p. 333.

[25]Robert L. Craig and Lester R. Bittel, Training and Development Handbook (New York: McGraw-Hill Book Company, 1967), p. 366.

Appraisal

During the individual development process it is important to determine whether or not the facts, the attitudes and the experiences are forming the right individual. The person's height, breadth and width were measured during the selection process. As this person grows during the educating and training process, it is also necessary to measure him again and again.

> The effects or results of training programs must be measured in some form or other in order to make sure that the training has achieved what it was designed to accomplish.[26]

The mechanics of the appraisal process can take several forms. One common form or method of appraisal is to ask the trainee to fill out an evaluation sheet on himself and then ask his immediate supervisor to fill out the same form on the trainee. By comparing the two forms, it is often evident what facet of the training needs more stressing.

It is difficult to find a reliable device or method of evaluating on-the-job training. Except for determining whether or not the trainee knows the Standard Operating Procedures, he would probably be appraised on initiative, reliability, cooperativeness and ability to handle people,

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[26] Ibid., p. 358.

which are all very difficult to evaluate by written tests. Craig and Bittel reported:

> While future developments cannot be predicted with any certainty, it is possible to identify problem solving or decision points which will help determine future developments.[27]

Very few companies have the personnel who are qualified to evaluate written tests with any degree of accuracy. The job of appraisal is usually delegated to the manager supervisor. Review of the recommendations made by those who have the responsibility of rating managers is a good means of determining the development. Contact between the training department and those who do the ratings should be maintained at all times in order to correct deficiencies as soon as possible after they are discovered. The periodic progress review seems to be a sound and logical approach to the process of determining development needs.[28]

Periodically informing your managers on how they are measuring up is a very important part of the process. Virgil K. Rowland, in his book, Manager Performance, has this to say, "Every management person needs to know how well he is expected to perform the various segments of his job."[29]

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[27]Ibid., p. 264 [28]Ibid., p. 348.

[29]Virgil K. Rowland, Managerial Performance Standards (New York: American Management Association, 1960), p. 31.

The training and appraisal processes of the retail manager have not been the most rewarding endeavors. Businessmen spend a great deal of time and money in developing managers and then lose them to some other firm. An article in The Wall Street Journal reported:

> Firms complain increasingly that they are laying out as much as $10,000 a man to recruit and train talented college graduates for management posts in the $7,500 to $10,000 a year range--and then losing about half of them within three to five years."[30]

The results of a survey showed that 23 percent of the retail manager recruits left within the first year and 51 percent were gone in 3 years.[31]

Summary

The researcher would like to call the attention of the reader to the fact that only a few of the quotations referred specifically to retail managers. The reason is due to the lack of documentary material about retail manager development. It is assumed, of course, that the manager's job in general is similar for most businesses and industries. This chapter has been compiled from secondary sources of information regarding manager development.

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[30] John D. Williams, "Increased Job Hopping by Junior Executives Vexes Personnel Men," The Wall Street Journal (January 21, 1965), p. 1.

[31] Ibid.

The three categories of retail manager development discussed were: (1) selection, (2) education and training, and (3) appraisal. In the selection phase of the development process the newspaper advertisement was found to be the most widely used source in seeking out potential retail managers. Other sources commonly used are employment agencies, high schools and colleges, present employees and other firms.

Through the use of applications, interviews, testing and other forms of checking out applicants, prospective trainees are selected. The application form is used by most retailers. This form gathers alot of pertinent information that is kept on file for reference. The personal contact through the interview is commonly used as a method of screening manager trainees. Tests are used as a selection device by some of the larger chains. The use of tests as a measure of learning ability has increased in popularity.

The individual education and training of the selectee depends on what he or she must know to do the manager's job. On-the-job growth is the most popular way of training retail managers. Others are job rotation and coaching and counseling. Since the retail manager's job cannot be taught by theory alone, the training received by the trainee includes on-the-job experiences. It was concluded that manager development is a work-centered program, but in the last

decade there has been a decided move toward more formal training programs. Remember, the amount of formal, semi-formal and/or work experiences needed by a trainee depends on the trainee.

An appraisal is a measurement of the product and how well the product meets the specifications needed to handle the particular task. Here again, it is a difficult job to evaluate non-specifics. Most of the retailers evaluate by observation of the trainee in his performance of tasks assigned.

The survey that was conducted as a part of this thesis has resolved some of the premises that have arisen in this chapter. The responses received were tabulated, compiled and discussed in Chapters III, IV and V.

CHAPTER III

MANAGER TRAINEE SELECTION POLICIES

Selection is the first step of development of retail store managers. It should therefore be considered very important. This chapter shows the findings of a survey to discover the current practices and procedures used in recruiting and selecting store manager trainees in Houston, Texas. The following chapters concern themselves with survey findings pertaining to training and appraising.

Sources of Recruiting

Basically there are two sources of finding potential managers. First, seek out manager trainees within the company; recognize the potentialities of present employees and develop them. Second, recruit new employees to develop.

Rank and File

Significantly, 93 percent, or 38 out of 41, respondents said that their manager's job is open to the rank and file employee that proves himself or herself. There were 3 out of the 41 respondents that indicated that the individual requirements needed to perform the manager's job were not inherent in the rank and file employee. The ingredients that employers look for in promotable employees are: desire, initiative, personality, and work results.

Of the 38 respondents, 14 stated that 75 percent or more of their manager trainees have come from the ranks; 11 reported that 50 to 74 percent of their trainees have come from the ranks; 9 of the responding managers showed that 25 to 49 percent of their trainees have come from the ranks, and 4 of the 38 said that only 10 to 24 percent of their managers have been promoted up the ladder to the manager's position.

Table I shows that 60.9 percent, or 25 out of 41, of the retail employers stated that at least half of their manager trainees have come from the rank and file employees. The other 39.1 percent, or 16 of the 41, stated that less than half of their manager trainees were developed from the ranks.

TABLE I

PERCENT OF MANAGER TRAINEES COMING FROM PRESENT EMPLOYEE RANKS OF THE 41 RESPONDENTS IN HOUSTON, TEXAS

Percent of Trainees Coming from Ranks	No. of Stores	Percentage of Stores
75 or more	14	34.1
50 to 74	11	26.8
25 to 49	9	21.9
10 to 24	4	9.9
0 to 9	3	7.3
Total	41	100.0

Outside Company Ranks

Business associates and colleges were reported as being the major sources of recruiting retail manager trainees coming from outside the company ranks. The respondents were asked to rank in one, two, three order the sources used in recruiting retail manager trainees. The rank of one was given a weight of three, the rank of two was given a weight of two, and the rank of three was given a weight of one. This weighting was done in order that the most used secondary source would receive the largest numerical value.

Private employment agencies, newspaper want ads, friends of employees, competitive businesses, and Government employment agencies were recognized as good sources of recruiting trainees, in that order. According to the weighting formula given in the preceding paragraph, the recruiting sources surveyed were ranked in the following manner: business associates were highest with a rating of 51 points out of a possible 123; colleges ranked second with 43; private agencies ranked third with 42; friends of employees received 35; want ads received 31; recommended by a friend received 25 points. Two sources receiving very little recognition were Government agencies and competition, although a few personnel managers stated, "Competition is our best source of good men."

Four respondents specified under the caption of "others" that some sources were rank and file and walk-ins. The secondary origin of the manager trainees is tabulated in Table II.

TABLE II

SOURCES USED BY 41 HOUSTON AREA PERSONNEL DEPARTMENTS IN RECRUITING RETAIL MANAGER TRAINEES*

Source Used	Order of Rank 1	2	3	Totals
Business associates	11	5	8	51
Colleges	11	4	2	43
Private employment agencies	8	8	2	42
Friends of employees	3	8	10	35
Want-ads	4	7	5	31
Recommended by friend	1	7	8	25
Competition	1	1	2	7
Gov't. employment agencies	1	0	2	5
Others:				
Rank and file	1	0	1	4
Walk-ins	0	1	1	3
Totals	41	41	41	

*Note: The respondents were asked to rank in one, two, three order the sources used in recruiting retail manager trainees. The rank of one was given a weight of three, the rank of two was given a weight of two, and the rank of three was given a weight of one. This was done in order that the most used source would receive the largest numerical value.

One important factor to consider when recruiting from outside the company is what percent of the manager trainees will stay long enough to become managers. Thirty-nine of the forty-one respondents had enough information to

report the number of graduate managers. Only 28.2 percent, or 11 out of 39, reported more than 75 percent of their trainees stayed for more than one year; 43.6 percent, or 17 out of 39, reported that from 50 to 74 percent stayed for more than one year; 23.1 percent, or 9 out of 39, had less luck holding their manager trainees as only 25 to 49 percent of their managers stayed for more than one year. The remaining 5.1 percent, or 2 out of 39, had taken another job within a year. Two firms did not report.

Another source with a lot of potentiality for obtaining recruits is distributive education programs of high schools and colleges. Sixty-three percent, or 26 out of 41 of the respondents reported that they considered distributive education as a good source of potential manager trainees.

Needed Characteristics

The traits and characteristics needed to do the manager's job were determined by evaluating present managers. According to 78 percent of the personnel managers, the personality and characteristics of proven managers were taken under consideration when setting the criteria for the applicants. The recipients were asked to rank, each in the order of importance from his company's point of view, the characteristics that a trainee should possess for the

purpose of determining what characteristics the average retailer feels are the most needed by those who enter a retail career. A tabulation of, and ranking of, the findings on the desirable characteristics of retail trainees is in Table III.

TABLE III

IMPORTANT CHARACTERISTICS THE HOUSTON AREA RETAIL SUPERVISORS CONSIDERED MOST DESIRABLE IN MANAGER TRAINEES RANKED IN ONE, TWO, THREE, FOUR, FIVE ORDER OF IMPORTANCE*

Characteristics	Order of Rank					Total
	1	2	3	4	5	
Intelligence	13	12	5	7	2	144
Initiative	14	8	5	4	3	128
Personality	4	3	6	6	10	72
Work experience	2	7	5	2	5	62
Human understanding	3	3	4	8	4	59
Communication skills	2	2	6	4	6	50
Resourcefulness	1	4	6	2	3	46
Vision & imagination	0	2	4	6	5	37
Company seniority	0	0	0	1	1	3
Others:						
Attitude	1	0	0	0	0	5
Perseverance	1	0	0	0	0	5
Ability to work with people	0	0	0	1	0	2
Honesty	0	0	0	0	1	1
Combination of above	0	0	0	0	1	1
Totals	41	41	41	41	41	

*Note: The respondents were asked to rank in one, two, three, four, five order the characteristics desired in retail manager trainees. The rank of one was given a weight of five, the rank of two was given a weight of four, the rank of three was given a weight of three, etc. This was done in order that the most desirable characteristic would receive the largest numerical value.

Intelligence and initiative were the characteristics that were rated first and second in importance by most of the respondents. Personality was chosen as third most important and work experience was a close fourth. The other individual characteristics rated by the employers as desirable were: human understanding, communication skills, resourcefulness, vision and imagination, and company seniority, rated in that order. Company seniority received very little recognition as a requirement of manager trainees. The rank of one was given a weight of five, the rank of two was given a weight of four, three was given the weight of three, four was given the weight of two, and five was given the weight of one. By using the formula, intelligence was rated with the highest score, 144 points out of a possible 205 points. This total score would have been possible if all of the 41 respondents would have rated the same characteristic first. Initiative was second with a rating of 128 points, personality received 72 points, work experience received 62 points, human understanding received 59 points, communication skills received 50 points, resourcefulness received 46 points, vision and imagination received 37 points, and company seniority received only three points. Miscellaneous listings included perseverance and attitude, each of which received a first rating; other write-ins were: the ability to work with people which received a fourth rating,

and honesty which received a fifth rating. Women who cultivate the desired characteristics can compete along with the men for the manager's job, according to 68 percent, or 28 out of 41 of the personnel managers.

Testing

Forty-four percent of the participants reported administering tests to manager trainee applicants. Retail store personnel said they are looking for intelligent people to become managers; and in Houston, Texas, the survey showed that 43.9 percent, or 18 out of 41 companies looking for this characteristic give tests to determine aptitude of their applicants. Most of the chains that test applicants indicate that they give more than one type of evaluation test. Recipients were asked to check one or more types of tests that they use during the selection process. Table IV shows that the survey found that of the chains offering tests, 72.1 percent, or 13 out of 18, give an aptitude test; 27.7 percent, or 5 out of 18, give an arithmetic test; 55.5 percent, or 10 out of 18, give a personality test; 33.3 percent, or 6 out of 18, use interest tests. Another 33.3 percent use other specific types to discover the traits and abilities of the applicants, such as Thornton Mental Alertness and Rorschach tests. Two respondents use a language test. The total number and percentage of copanies using

tests exceeds the number of respondents because most of those that test applicants use more than one type of test.

TABLE IV

SELECTION TESTS USED BY RETAIL STORE PERSONNEL DEPARTMENTS IN HOUSTON, TEXAS
Only 18 of the 41 respondents give tests. This table shows how many of the 18 retailers give each type of test.

Kind of Test	No. of Chains Using Tests	Percentage Using Tests
Aptitude	13	72.1
Personality	10	55.5
Interest	6	33.3
Arithmetic	5	27.7
Other*	6	33.3

*Note: Write-ins included: Rorschach, Thornton Mental Alertness, language, functional and combinations of the above.

Educational Requirements

College graduation is not a mandatory requirement for a retail manager trainee. Nineteen, or 46.3 percent of the 41 respondents wanted their potential managers to have some college preparation; and only 19.6 percent, or 8 of the personnel managers, reported that they expected their trainees to be college graduates. The other 34.1 percent, or 14 out of the 41 retail managers said that college was not a necessary factor in their chains. Table V shows the educacational preferences of the chains as indicated by their

responses to the questionnaire. It would appear that the amount of formal education is not as important as the manner in which the individual uses the education he possesses.

TABLE V

AMOUNT OF EDUCATION NEEDED BY MANAGER TRAINEES IN HOUSTON AREA STORES

Education Level	No. of Stores	Percentage of Stores
High school	14	34.1
Some college	19	46.3
College graduate	8	19.6
Totals	41	100.0

Most of the personnel managers wanting college graduates indicated that their present trainees are under 25 years old which would be an indication that these companies probably recruit directly from college campuses. On the other hand, those retailers not requiring college are training men and women in the 25- to 30-year age group. A person must finish high school to meet the minimum educational requirements of the retail chains in the Houston area.

Age Groups

The questionnaire asked for the average age range of the manager trainees in each specific chain of retail stores in order to show the young men and women how long they would

have to wait before they might expect to enter the manager training programs. Of the 41 questionnaires returned, 43.9 percent, or 18 of the respondents, say their trainees are between the ages of 19 and 25. The largest age group is between the ages of 26 and 30, with 46.3 percent, or 19 respondents putting their trainees into this age category. Only 7.3 percent, or 3 of the personnel managers place their trainees in the 31 to 35 age group and 2.5 percent, or 1 chain, has trainees between the ages of 36 and 40. Men and women over 30 years of age are not, as a rule, training to become retail store managers.

It is assumed that the age of trainees preferred by the chains would be the ages of the trainees currently in the training program. The sharp contrast in ages of trainees is obvious by referring to Table VI.

TABLE VI

AVERAGE AGES OF RETAIL TRAINEES
IN HOUSTON AREA STORES

Age Groups	Average Age Per Retail Store	Percent of Total
19 to 25 years	18	43.9
26 to 30 years	19	46.3
31 to 35 years	3	7.3
36 to 40 years	1	2.5
Totals	41	100.0

Remuneration of Trainees

It is common knowledge that beginning salaries in retailing are low compared with starting wages in "big" industry, although salaries in retailing compete very satisfactorily in the long run with wages paid by industry. The retail stores represented in this survey that are hiring college graduates who do not have any previous retailing experience pay them between $95 and $125 per week. Chains not demanding college graduates in their manager training programs are paying approximately that same wage for trainees with two or three years of practical retailing experience. The information received regarding weekly salaries paid to retail manager trainees is very reliable because the information came from all types and sizes of retail chains in Houston, Texas.

The personnel managers were asked, "What is the average weekly wage of your manager trainees?" Five of the respondents gave no answer to the above question. Of the other 36 questionnaires returned, 16.7 percent, or 6 retail chains, pay their trainees from $95 to $109; 36.1 percent, or 13 chains, pay from $110 to $124; 30.5 percent, or 11 chains, pay from $125 to $139; 11.1 percent, or 4, pay from $140 to $154; and 5.6 percent, or the remaining 2 retail chains pay their manager trainees $155 or more per week.

The minimum and maximum weekly salary rates as reported by the Houston retail managers are shown in Table VII.

TABLE VII

AVERAGE WEEKLY SALARIES FOR RETAIL MANAGER TRAINEES AS GATHERED FROM THE STORE MANAGERS IN THE HOUSTON AREA

Salary Per Week	Average Salary Paid Per Store Number	Percentage of 36
$ 95 to $109	6	16.7
110 to 124	13	36.1
125 to 139	11	30.5
140 to 154	4	11.1
155 +	2	5.6
No answer	5	
Totals	41	100.0

Hours Worked

Retail store hours have gotten longer during the last decade, rather than shorter. This does not necessarily mean that the retail manager's work week is any longer, but the trend for a shorter work week is not staying abreast with the work week in industry. According to the respondents, 64.1 percent, or 25 out of 39, said company policy is for their trainees to spend forty-eight to fifty-four hours a week training and/or working on the job. The other 35.9 percent, or 14 out of 39, have their trainees working 40 to 44 hours a week to handle their training assignments. Two

of the 41 personnel managers returning the questionnaires did not answer this question. Table VIII shows a narrower breakdown of the hours worked by trainees.

TABLE VIII

TRAINEE WORK WEEK REQUIRED BY HOUSTON CHAINS

Hours Per Week	Trainees' Work Week Per Chain Number	Percentage of 39
40 hours	12	30.8
44 hours	2	5.1
48 hours	13	33.3
54 hours	12	30.8
No answer	2	
Totals	41	100.0

Supply of Trainees

More personnel with trainee potentialities are needed according to 58.5 percent, or 24 of the stores represented. Selection methods, procedures and policies must be functioning properly in order to provide an adequate pool of potential managers. The lack of an adequate employment pool to choose from could be attributed to the accumulated answers in this survey. Since the recruiting and the initial decisions about the supply and demand of applicants is done during the selection process, it is logical to assume that retail chains evaluate their selection policies and procedures.

Summary

This chapter has been concerned with survey findings in regard to procedures and policies used in recruiting retail manager trainees in Houston, Texas. The primary source of manager trainees is from the rank and file of experienced employees who prove themselves. The other source is new recruits who come through business associates, from colleges, from private employment agencies, and from want ads.

The characteristics needed to do the manager's job were determined by taking a look at the experienced managers. Unquestionably, intelligence and initiative were chosen to be the most important traits and characteristics, with ratings of 144 points and 128 points respectively out of a possible 205 points in any one category. Personality with 72 points, work experience with 62 points, human understanding with 59 points, communication skills with 50 points, resourcefulness with 46 points, and vision and imagination with 37 points were also desirable characteristics. Sixty-eight percent of the personnel managers said that their companies will accept women into the training program.

The survey found that 43.9 percent of the retailers answering the questionnaire use tests in selecting their manager trainees. An aptitude test is given by 72.1 percent of those chains that do use tests as a method of selection

and this is undoubtedly the most popular type of entrance examination. A personality test is the next most widely used, with 55.5 percent of the chains using it. Arithmetic, interest, language and mental alertness tests are also used.

Some college is an important factor according to 46.3 percent of the 41 personnel managers. A college degree is required by 19.6 percent, and 34.1 percent of the respondents did not consider college important.

Of the 41 retail chains surveyed, 90.2 percent of the personnel managers stated that their average trainee is between the ages of 19 and 30, and only 9.8 percent reported manager trainees of an average age of over 30.

The salary range paid to manager trainees in Houston, Texas, was reported by 36 retail managers. Of this total, 16.7 percent pay their trainees from $95 to $109 weekly, 36.1 percent pay from $110 to $124, 30.5 pay from $125 to $139, 11.1 percent pay from $140 to $154, and 5.6 percent pay their trainees $155 or more per week. In 64.1 percent of the cases, the manager trainees work and/or train from 48 to 54 hours per week.

The adequacy of the employment pool depends on the recruiting and selection policies and procedures. If a retail chain is having difficulty maintaining an adequate employment pool to choose from, they might find some of the answers in this chapter.

CHAPTER IV

MANAGER TRAINING PROCEDURES

This chapter presents the information gathered by the survey in order to discover what steps and procedures are used to train and develop leaders in retailing. The caliber and attitude of the men and women selected for the manager training program will have a direct bearing on the quality and quantity of the graduate managers. The question to be answered in this section is: "What types of education and training should be offered to develop good retail store managers?"

The responses to some of the questions in the survey may not agree with past premises. The reader must remember that the training procedures presented in this chapter are probably only that, and not a particular part of a highly organized or formalized manager development program.

Types of Programs

The researcher assumed that all potential managers receive some training before managerial responsibilities are expected of them. Therefore, in order to encourage participation, the recipients were not asked whether they had a manager training program, per se, because it is a known fact that only a few retailers actually have and follow a regular format of manager training. None of the 41 retailers

professed to have a formal manager training program. Only 20 percent, or 8 of the 40 retail managers responding, indicated that they use a semi-formal training program; 80 percent, or 32 of the 40 retailers, use an on-the-job training program; and one respondent did not answer the question.

TABLE IX

TYPE OF PROGRAM USED IN 41 HOUSTON AREA STORES

Type of Program	No. of Retail Stores	Percentage of 40
Formal program	0	0
Semi-formal program	8	20
On-the-job program	32	80
No answer	1	
Totals	41	100

It is quite obvious that the on-the-job training program is the most popular type. The managers that were interviewed by the researcher described the on-the-job program as a self-development process, consisting of job rotation, some group discussions and study work, such as of standard operating procedures. This form of self-development does not mean that work experience is the only type of training given. A large portion, 60.9 percent, or 25 of the 41 retailers replying to the survey said that the manager trainees attend retail classes or meetings before being given an assignment; 26.8 percent, or 11 of the 41

respondents reported that some group information would be given during the schedule of assigned duties; 12.3 percent, or 5 of the 41 respondents, did not answer the question completely.

One out of five chains uses a semi-formal training program. This type of training utilizes some regular classroom training sessions along with job assignments and regular progress reports. The researcher did not ask how many classes the trainee attends.

Length of Programs

The length of the training programs varies considerably among the chains. The lengths of training time required by the 41 retailers are: seven chains plan on from 3 to 6 months of training; 14 chains plan on 7 to 12 months; 7 chains plan on 13 to 24 months; 11 chains spend more than 24 months preparing their trainees to manage. By combining the replies of one year or less, 51.2 percent, or 21 out of 41, of the respondents said that the average trainee should become a manager within a year. One retailer said that his firm's program varied too much among trainees to specify the length of time, and one retailer did not answer the question. The trainee's progress in the development program is definitely an individual process and the length of time that a trainee spends in any one particular training area depends on him or her. The types of training programs

being followed by retail chains, and the expected months that it takes for the average recruit to become a manager, are shown in Table X.

TABLE X

TYPES OF MANAGER TRAINING PROGRAMS IN HOUSTON AREA STORES AND AVERAGE LENGTH OF TIME NEEDED TO COMPLETE

Average Training Time	Semi-formal	On-the-job	Total
Up to 6 months	1	6	7
7 to 12 months	2	12	14
13 to 24 months	2	5	7
Over 25 months	3	8	11
Varies			1
No answer			1
Totals	8*	31*	41

*Note: These types of programs do not equal the number of responses due to the lack of either type of program and one response of "varies."

Educating and Training Process

Finding potential managers within one's ranks promotes good employee relations and this brings up the next question to be answered: "At what level does your manager training commence?" According to 46.4 percent, or 19 out of 41 managers, the managerial understanding process begins with the clerk; 26.8 percent, or 11 respondents, believe management training should begin at the department head

level, and 11 respondents, also representing 26.8 percent, feel that an individual does not need to start any special training until he or she becomes a supervisor. The above data are tabulated in Table XI. Managing a section or a department is fundamentally the same type of training that a retail store manager would need according to the responses of 75.6 percent, or 31 out of 41 managers answering the questionnaire.

TABLE XI

EMPLOYEE LEVEL AT WHICH TRAINING PROGRAM STARTS ACCORDING TO 41 MANAGERS OF HOUSTON AREA STORES

Employee Level	Chains Starting Training for Average Trainee Recruit	
	Number	Percentage
Clerk	19	46.4
Department manager	11	26.8
Supervisor	11	26.8
Totals	41	100.0

Group instruction or discussion is used by 56.1 percent, or 23 out of 41 respondents to the survey; 41.5 percent, or 17, do not use this method; and2.4 percent, or 1, did not answer that particular question. The respondents were encouraged to answer the questions on training procedures even if they do not have a specific training program.

Who Instructs

One of the main responsibilities of the manager is to train future managers. It is understood in retailing that the first prerequisite to getting promoted is to train someone to take your place. An overwhelming majority, 80.4 percent, or 33 out of 41 personnel managers declared that it is a manager's job to develop potential managers; 19.6 percent, the other 8 personnel managers, did not delegate that responsibility to the store manager. The basic organization of the chains that do not use the manager as a trainer varies from the majority, and in their cases they have assigned the training job to supervisors, personnel directors, trainers, and general managers.

The question was asked, "How much of your manager's time is spent in training subordinates?". Eight percent, or 3 of the 38 managers replying to this question, spend one-half of their time instructing subordinates; 31.6 percent, or 12 of those who replied, said that one-fifth of their time was used in that manner; 47.4 percent, or 18 out of the 38 respondents, reported spending one-tenth of their time in instructional duties; and the remaining 13 percent plan on using only one-twentieth of their time training subordinates. Three respondents did not answer this question. The above information was tabulated in Table XII.

TABLE XII

AMOUNT OF RETAIL STORE MANAGER'S TIME SPENT INSTRUCTING SUBORDINATES, AS REPORTED BY 38 HOUSTON AREA CHAINS

Amount of Time Used in Training	No. of Firms	Percent of 38 Who Replied
One-half	3	8.0
One-fifth	12	31.6
One-tenth	18	47.4
One-twentieth	5	13.0
No answer	3	
Totals	41	100.0

Topics Studied

The topics covered during the manager training process are studied during sessions varying from a degree of group discussions to formal classroom methods. These retail subjects are a part of the daily routine for the trainees, although the person who is interested in getting ahead faster than the average will do some studying after his eight hour work day is over. The topics treated during the training phase were rated by the retail chain managers in the following way. The managers were asked to rank in one, two, three, four, five order of thoroughness of coverage the topics covered in their training of retail manager trainees. The rank of one was given a weight of five, the rank of two was given a weight of four, the rank of three

was given a weight of three, etc. This was done in order that the most discussed and studied topics would receive the largest numerical value. By using the above formula, merchandising ranked first with a score of 156 out of a possible 205 points. This total score would have been possible if all of the 41 respondents would have chosen the same topic as the one most thoroughly covered. Store policies was second with a rating of 128 points, sales promotion received 107 points, decision making received 58 points, store maintenance received 49 points, human relations received 40 points, personnel development received 39 points and accounting procedures received 38 points. The retailers participating in the survey were very conscientious in following the instructions in answering the questions, as seen in Table XIII.

Do the retail chains encourage their managers to take college courses in order to stay abreast of the times? This question was answered by all but 2 of the respondents. It is the policy of 48.8 percent, or 20 out of 41 retail stores to encourage their managers to continually improve themselves; 46.3 percent, or 19 managers reported that this is not the policy of their company. Those retailers answering the question positively were asked which business courses they recommended the manager to take. The following list and percentages were prepared by dividing 20 positive

TABLE XIII

TOPICS STUDIED DURING MANAGER TRAINING PROGRAM IN ORDER OF THOROUGHNESS OF COVERAGE BY RESPONDING RETAILERS IN HOUSTON AREA STORES*

Topics Studied	Order of Rank 1	2	3	4	5	Total
Merchandising	20	6	8	3	2	156
Store policies	11	8	7	8	4	128
Sales promotion	4	12	9	4	4	107
Decision making	2	5	3	4	11	58
Store maintenance	1	3	4	6	8	49
Human relations	2	3	3	3	3	40
Personnel development	0	3	4	6	3	39
Accounting procedures	1	1	3	7	6	38
Totals	41	41	41	41	41	

*Note: The respondents were asked to rank in one, two, three, four, five order the topics covered during their training program. The rank of one was given a weight of five, the rank of two was given a weight of four, the rank of three was given a weight of three, etc. This was done in order that the most widely discussed topic would receive the largest numerical value.

responses into the number of times that a course was checked by a respondent, as listed in Table XIV.

Marketing trends was a course recommended by 14 of the 20 retailers; advertising and public relations were each recommended by 8 of the 20; accounting was recommended by 7 retailers; and personnel trends was recommended by 6 of the 20 retailers as a method of individual improvement in order to stay abreast of the times.

TABLE XIV

COLLEGE COURSES RECOMMENDED BY RETAIL CHAINS IN HOUSTON AREA
Example: Accounting was checked by 7 of the 20 respondents.

Course Topic	Number of Respondents	Percentage of chains Recommending
Accounting	7	35
Marketing trends	14	70
Advertising	8	40
Personnel trends	6	30
Public relations	8	40

Note: The total of the percentages will equal more than 100 percent because most firms recommended more than one course.

Seminars, civic groups and other business meetings are also a good source of up to date information that would help to develop managers. Mr. Ed Roberts, group personnel manager of Sears Roebuck Copany gave a talk to the Texas

Mid-Management Teachers' Workshop in Fort Worth, Texas, and said, "Sears' management training program for the four-year college graduate includes:

nine months rotating through various Sears divisions

two years as division manager

alternating between soft lines and hard lines."[32]

One question in the survey was directed toward the discount chains in order to find out whether or not the manager trainers stressed some specific topic or information to their trainees that would be unique. The 3 personnel managers were unanimous in their answers to this question. They stated that merchandising and inventory control would be the two key objectives of their training programs.

Even though much time and expense is exerted during the selecting process, and the training is carefully attacked, step by step, there are still some trainees that "wash out" or take another job for some reason. The survey tabulation indicates that: 14.6 percent, or 6 out of 41 personnel managers say they lose up to 25 percent of their recruits before they are graduated; 26.8 percent, or 11 of the personnel managers reported that from 25 to 49 percent complete the program; 34.1 percent, or 14 of the respondents

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[32]Ed Roberts, Group Personnel Manager, Sears Roebuck Company, Dallas Division, in a report presented to the Texas Mid-Management Teachers' Workshop in Fort Worth, Texas, in February, 1969. Report edited by Jim Godbe, Mid-Management Coordinator, San Jacinto College, Pasadena, Texas.

feel that 50 to 74 percent develop into managers; and 24.5 percent, or 10 of the personnel managers were elated to report that 75 to 100 percent of their trainees would satisfactorily complete the training course. A concise summary of the graduates can be found in Table XV.

TABLE XV

MANAGER TRAINEES COMPLETING PROGRAMS AS REPORTED BY 41 PERSONNEL MANAGERS IN HOUSTON AREA CHAINS

Average Percent Completing Program	Chains Reporting Average of Their Trainee Graduates	
	Number	Percentage
0 to 24	6	14.6
25 to 49	11	26.8
50 to 74	14	34.1
75 to 100	10	24.5
Totals	41	100.0

Summary

The purpose of this chapter was to determine what procedures are being used in training retail manager trainees. The findings in the training section of the questionnaire were tabulated and discussed in this chapter. The procedures used in training the managers were gathered from respondents, whether they professed a specific program or not.

The survey did not find any retail chain presently using a formal training program. Only 20 percent named the semi-formal program as the type being followed. Significantly, 80 percent are using the popular on-the-job type of development. There are some training classes or meetings for the recruits, according to 61 percent of the 41 retailers.

The length of the training time depends on the individual trainee. Twenty-one of the respondents, 51.2 percent, indicated that the average trainee would be graduated within one year. Eleven chains reported that their trainees spend more than 24 months training for the manager's job.

The trainee that is discovered within the ranks starts his or her managerial understanding processes while at the clerk level, according to 46.4 percent of the respondents. The balance of the responses, 53.6 percent, was evenly divided into department manager and supervisory level as the beginning of managerial training.

Group instruction or discussion is a training procedure used by 56.1 percent of the responding retailers. These group discussions would include any type of formal and/or informal meetings in which ideas might be exchanged.

It is the policy of 48.8 percent of the retail chains to encourage their managers to take some college courses. The courses most often recommended were <u>marketing trends</u>, <u>public relations</u>, <u>advertising</u>, <u>accounting</u>, and <u>personnel</u>

trends, in that order. The topics covered during the training sessions were reported as: merchandising with 156 points out of a possible 205; store policies with 128 points; sales promotion with 107 points; decision making with 58 points; store maintenance with 49 points; human relations with 40 points; personnel development with 39 points; and accounting with 38 points. These topics were rated by the store managers as important and therefore receive thorough coverage during the training of the store managers.

The survey showed that 14.6 percent of the chains graduate up to 24 percent of the trainees who start the program; 26.8 percent graduate from 25 to 49 percent of the trainees; 34.1 say from 50 to 74 percent of their trainees graduate; and 24.5 percent were elated to report that 75 to 100 percent of their trainees successfully complete the training program.

Instructing subordinates takes one-half of the manager's time, according to 8 percent of the respondents; 31.6 percent reported that one-fifth of their time is spent in training; 47.4 percent said they train subordinates about one-tenth of their working time; and 13 percent of the managers spend one-twentieth of their time training subordinates. Significantly, 80.4 percent of the respondents reported that the manager is responsible for the development of the manager trainees.

CHAPTER V

MANAGER TRAINEE APPRAISAL

This part of the survey was devoted to the procedures that are being used to evaluate the retail manager trainees. The effectiveness of the training phase will show up in appraisals. The progress reports on trainees gathered from evaluations have two purposes: (1) to indicate the amount of trainee development, and (2) to inform the trainee of this development.

Appraisal Procedures

The chains' executives delegate the job of preparing the progress training reports on manager trainees to different levels of supervisors. As shown by Table XVI, 22 of the 37 responding store managers, or 59.5 percent, said that their trainees are evaluated by the manager; 29.7 percent, or 11, assigned the job to the district manager; 10.8 percent, or 4 out of 37, gave the job of evaluating the trainee to an immediate supervisor; and 4 of the respondents to the questionnaire did not answer the question.

The average retail manager evaluates the trainees under his supervision as often as every six months. Only 5.1 percent, or 2 out of 39 respondents claimed to appraise their manager trainees monthly; 35.9 percent, 14 out of 39, evaluate on a quarterly basis; 48.7 percent, or 19, check up

on their trainees semi-annually; 10.3 percent, or 4 out of 39, conduct an evaluation annually; and 2 store managers did not answer the question. The evaluation frequency is shown in Table XVII. Significantly, 88 percent, or 36 out of 41 of the trainers reported that all of the members of the management team were evaluated periodically.

TABLE XVI

WHO EVALUATES RETAIL TRAINEES ACCORDING TO 41 HOUSTON AREA STORE MANAGERS

Evaluation By	Number	Percentage of 37
Retail store manager	22	59.5
District manager	11	29.7
Immediate supervisor	4	10.8
No answer	4	
Totals	41	100.0

TABLE XVII

HOW OFTEN TRAINEES ARE EVALUATED AS REPORTED BY 41 HOUSTON AREA STORE MANAGERS

How Often Evaluated	Number of Chains	Percentage of 39
Monthly	2	5.1
Quarterly	14	35.9
Semi-annually	19	48.7
Annually	4	10.3
No answer	2	
Totals	41	100.0

Formal tests are not used as a method of evaluating retail manager trainees in the majority of the chains. Only 24.4 percent, or 10 out of 41, of the store managers reported that formal tests were used to appraise the trainees; 75.6 percent, or 31 out of 41, said this was not one of their procedures. The two values of any tests, formal or informal, are to get the information and to use the information. The training managers were in 100 percent agreement that their trainees are periodically informed on how they are measuring up to the expectations of the management. Through the information received during the different tests, some trainees are held up in one or another phase of the training; and accordingly, 95 percent, or 37 out of 39 of the respondents who answered that question, supported the fact that the retail trainee who performs above average in the different phases of training will not spend as much time in training as the average trainee.

Two very important guide-lines commonly used in retail store manager appraisals are sales and profits. The manager is successful in the eyes of some company executives if the store's sales are ahead of the previous year's sales. Other stores put more emphasis on the bottom line of the Statement of Income and Expense, net profit, instead of on the top line, sales. The survey asked the store manager whether his company puts more emphasis on sales or on

profits. Five of the 41 store managers did not answer that question. Sales are stressed by 27.8 percent, or 10 out of 36 respondents; 50 percent, or 18, said their chain put emphasis on profit; and 22.2 percent, or 8 of the 36 managers indicated that their chain considers sales and profits of equal importance, as shown in Table XVIII.

TABLE XVIII

WHICH CRITERION IS USED BY THE HOUSTON AREA CHAINS TO EVALUATE MANAGERS

Criterion	No. of Chains	Percentage of 36
Sales	10	27.8
Profit	18	50.0
Both	8	22.2
No answer	5	
Total	41	100.0

Personal Traits

Most of the retail managerial traits looked for by management can be learned. These are not necessarily the important traits for other careers. The manager does his work through the efforts of others, therefore, the manager's tools are mostly intangible. The retail store managers were asked to rank a list of traits from the hardest to the least difficult for the trainee to master. The respondents ranked the traits in one, two, three order and the researcher

weighted the traits; the rank of one was given a weight of three, the rank of two was given a weight of two, and the rank of one was given a weight of one. This was done in order that the traits hardest for a trainee to master would receive the largest numerical value.

Organization ability received 72 points out of a possible 123 points as the most difficult trait to master. Second, the ability to delegate was rated with 42 points; self-motivation was third with 32 points; to discipline was fourth with 25 points; to think creatively received 22 points; to sell new ideas received 12 points; to express self received 8 points; and to use communications, to create high morale, and to accept reality each received 7 points. The trait receiving only 6 points was the ability to gain respect of others which was chosen by the group to be the easiest of all the above traits to master. The above information is summarized in Table XIX. The personal traits that are rated the hardest to master may be the ones that are the least often found in an individual. But these are the traits that the store managers look for in their potential managers.

The next question in the survey pertained to the traits most important for the trainee to possess. There were two reasons for the survey to take two separate approaches to the same personal traits. First, the researcher wanted to call the participants' attention to the

TABLE XIX

PERSONAL TRAITS DESIRABLE IN TRAINEES AS RATED BY 41 RETAIL MANAGERS IN HOUSTON AREA STORES ACCORDING TO THE DIFFICULTY OF MASTERING*

Traits	Order of Rank 1	2	3	Total
Organization ability	15	11	5	72
Delegate	8	5	8	42
Self-motivation	7	4	3	32
Discipline	4	5	3	25
Think creatively	0	5	12	22
Sell new ideas	2	3	0	12
Express self	1	2	1	8
Use communications	2	0	1	7
Create high morale	0	3	1	7
Accept reality	1	1	2	7
Gain respect of others	0	1	4	6
No answer 1				
Totals	40	40	40	

*Note: The respondents were asked to rank in one, two, three order which traits were the most difficult for the trainee to master. The rank of one was given a weight of three, the rank of two was given a weight of two, and the rank of three was given a weight of one. This was done in order that the most difficult to master trait would receive the largest numerical value.

traits, and encourage thoughtful consideration of the importance of the traits. Second, to see if there is any correlation between the important traits and the ones that are difficult to master. The recipients were asked to rank the traits that they felt were the most important for the manager trainee in one, two, three order. The same formula that was used in tabulating the answers to the preceding question for Table XIX was used in tabulating the answers to this question (which traits are the most important for a trainee to possess) and the findings are shown in Table XX. Organization ability was rated first by the 39 store managers answering this question with 47 out of a possible 123 points; self-motivation received 46 points; to delegate received 31 points; discipline received 28 points; think creatively and use communications each received 19 points; express self received 13 points; create high morale, gain respect of others, accept reality, and sell new ideas each received fewer than 10 points.

It might be noted that the three traits most difficult to master were indicated to be (1) ability to organize, (2) ability to delegate, and (3) self-motivation in that order. These three were also considered most important, but numbers (2) and (3) were rated in reverse order, i.e., self-motivation was placed ahead of ability to delegate.

The value of a process or a procedure is determined by the value of its parts. The products (new managers) of the

TABLE XX

MOST IMPORTANT PERSONAL TRAITS FOR RETAIL TRAINEES TO POSSESS AS REPORTED BY 41 STORE MANAGERS IN HOUSTON AREA STORES*

Traits	Order of Rank 1	2	3	Total
Organization ability	8	8	7	47
Self-motivation	12	3	4	46
Delegate	4	6	7	31
Discipline	3	7	5	28
Use communications	3	4	2	19
Think creatively	2	4	5	19
Express self	2	1	5	13
Gain respect of others	2	1	2	10
Create high morale	1	3	1	10
Accept reality	2	0	1	7
Sell new ideas	0	2	0	4
No answer 2				
Totals	39	39	39	

*Note: The respondents were asked to rank in one, two, three order which traits were the most important for the retail trainee to possess. The rank of one was given a weight of three, the rank of two was given a weight of two, and the rank of three was given a weight of one. This was done in order that the most important trait would receive the largest numerical value.

training program are more qualified managers, according to the ratings of 41 store and personnel managers. The recipients were asked to rank the values received from their training programs in one, two, three order; the results of this ranking are to be found in Table XXI. Significantly, more qualified managers received the highest ranking with 77 out of a possible 123 points; second highest, with 49 points, was better operation; third, with 24 points, was more potential growth. Of lesser importance were: fourth, with 19 points, less turnover; fifth, with 16 points, teach standard operaing procedures; sixth, with 15 points, better morale; seventh, with 14 points, stimulate thinking; and eighth, with 8 points, greater loyalty.

Summary

The appraisal of the manager trainees is a very important phase of the development process. During this phase of development the trainee's progress is determined. The retail store managers are assigned the job of evaluating the trainees under this supervision in 59.5 percent of the cases; the district manager handles this assignment in 29.7 percent of the cases; 10.8 percent expect the immediate supervisor to prepare the progress reports on the trainees; and 4 of the respondents did not answer the question. These reports are usually prepared at three-month or six-month intervals.

TABLE XXI

THE RESULTS OF MANAGER TRAINING PROGRAMS REPORTED BY 41 RETAIL STORE MANAGERS IN THE HOUSTON AREA*

Results	Order of Rank 1	2	3	Total
More qualified managers	18	10	3	77
Better operation	9	7	8	49
More potential growth	1	8	5	24
Less turnover	1	5	6	19
Teach store operating procedures	2	1	8	16
Better morale	2	2	5	15
Stimulate thinking	2	3	2	14
Greater loyalty	2	1	0	8
Communication	0	0	0	0
No answer 4				
Totals	37	37	37	

*Note: The respondents were asked to rank in one, two, three order which results were obtained through their training programs. The rank of one was given a weight of three, the rank of two was given a weight of two, the rank of three was given a weight of one. This was done to determine what results have been obtained.

Formal tests are used to collect appraisal data in only 24.4 percent of the retail chains, according to the 41 respondents. Whether the appraisal is gathered by formal tests or not, the average retailer periodically evaluates the manager trainees. Significantly, 48.7 percent of the chain managers prepare a progress report on their trainees semi-annually. All of the retail managers periodically inform their trainees how they are measuring up according to the survey.

Fifty percent of the respondents judge the manager on the amount of increased profit; 27.8 percent use increased sales as an index of managerial effectiveness; and 22.2 percent of the respondents said sales and profits were of equal importance. Sales and profits are the major criteria used to measure graduate store managers, but there are several personal traits that are used as criteria for determining the level of trainee development.

Organizational ability was significantly chosen as the hardest personal trait to develop, to delegate was the second choice, and self-motivation was rated in third place, according to the difficulty to master. Other traits, discipline, think creatively, sell new ideas, express self, use communications, create high morale, accept reality and gain respect of others, in that order, were also recognized by the respondents as difficult to master.

The personal traits rated as the most important for the trainee to possess were organization ability, self-motivation, and to delegate. Other important traits were listed as the ability to: discipline, use communications, think creatively, express self, gain respect of others, create high morale, and sell new ideas.

The store managers were given a list of possible results or benefits and asked to rank the three they felt were most important from their store's point of view. More qualified managers, with 77 out of 123 points, was ranked first; better operation was ranked second with 49 points; and more potential growth was third, with 24 points. It is encouraging that the store managers feel that the goals of the training programs are being realized.

CHAPTER VI

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Summary

The reason for selecting a study of the selection and development of retail manager trainees was because of the growing demand for salaried managers. This information will be helpful to the retail chains that want to improve their training programs, to the young people wanting more information about a challenging career, and to the schools so that they will know what the retailer is looking for and can better prepare their students for careers in retailing.

The problem was to discover what criteria to use in selecting, training and appraising retail managers. The answers to the following questions were discussed at length in order to satisfy the statement of the problem: (1) what personal qualities should a person have to perform the duties of a retail manager; (2) what source is most commonly used to find these potential managers; (3) what types of education and training should be offered to develop good store managers; and (4) what type of progress reports would indicate managerial abilities and show individual development.

Documentary materials in the Houston City Library and Sam Houston State College Library were used as sources of

secondary data. Due to the lack of specific information about retail store managers, the researcher prepared a questionnaire to obtain primary data. This 39-question survey instrument was mailed or delivered to the managers of 100 prominent retail chains in the Houston area. Forty-one percent of the recipients answered the questionnaire. All of the chains surveyed are managed by salaried personnel. The questionnaire was titled "A Survey of Manager Development Policies" and was divided into three sections: (1) manager selection policies, (2) manager training procedures, and (3) manager appraisal.

The documentary information studied as part of the research was not in conflict with survey findings. The United States Department of Labor reported that between 1955 and 1965 the number of salaried managers increased from 2.8 million to 4.7 million, while the number of proprietors decreased. This indicates the high importance of management recruitment, training, and evaluation.

Manager development is composed of three major sections: (1) pre-manager development, which is the recruiting phase; (2) manager development, which is the educating and training phase; and (3) promotable manager development, which is the evaluating for promotion phase of the total development program. The first step is the most important phase of the development process, since the quality of those

recruited greatly influences the success or failure of the last two.

The new potential managers come from several sources. Most of the authors consulted in secondary research agreed that it is a good idea to select the manager trainees from within the company ranks when possible. When it is necessary to go outside the company ranks, the best sources of manager recruits are private employment agencies, advertisements, college recruiting, and business associates.

Application forms are used by almost all retailers and most applicants are interviewed by some executive of the company. The main purpose of the personal interview is to encourage the applicant to talk about himself. Such information as: previous work experience, rate of pay, reason for leaving previous employment, special training, health history, and family involvement is sought in the interview. Formal tests are also incorporated into the selection process by some companies. Interest, aptitude, and personality tests are the most common types used.

The second step in manager development is the education and training phase, which is almost as important as selection. The quality of the recruits entering training depends on selection. Once the education and training process has commenced, it should be a continuous process of new experiences and learning for the manager trainee.

All of the authorities agree that most of the time of manager trainees should be spent receiving actual job experiences. Some authors say that as much as 90 percent of development occurs on the job. Since World War II, some of the large companies have been developing a well-rounded manager training program of formal discussion coordinated with job experiences. Coordinating off-the-job instruction with on-the-job experiences is the key to a well rounded training program. Job rotation is an accelerated on-the-job training program designed to show and explain the basic procedures and policies of several departments and sections to an experienced individual in a short length of time.

The retail discount chains say that the successful discounters stress both administrative ability and merchandising know-how. Discount chains apparently bring most of their managers up through the ranks.

Coaching and counseling are methods of accelerating the training of a few trainees. College graduates with some retailing experiences or managers hired from other companies could be developed in this manner.

All of the above mentioned programs are presently being successfully used by some retailers. There is no set formula that has been created that will fit every circumstance or individual training situation.

Recruits are selected with a great deal of thought and care in order to choose the most qualified applicants.

During each phase of development the trainee is evaluated, and as these trainees grow it is necessary to measure them again and again. The retail manager trainees are often appraised by a combination of self-evaluation and supervisor evaluation. By reviewing the two evaluating reports, a trainer can determine some strengths and weaknesses. The job of appraisal is usually delegated to the manager supervisor.

The periodic progress review is a sound and logical approach to the process of determining development needs. After the progress, or the lack of progress, has been determined, it is then time to inform the trainee how he is shaping up according to what is expected of him. Every management person needs to know how well he is expected to perform the various segments of his job. A retail manager training program is time consuming and expensive. In general, the cost to a firm is about $10,000 to recruit and train a college graduate for a management post; then about half of those so trained are gone within five years.

Significantly, 93 percent of the respondents to the survey questionnaire used in this study said that the manager's job in their firms was open to the rank and file employee who proves himself. The survey showed that at least 50 percent or more of the manager trainees come from the ranks in 60.9 percent of the retail chains.

The major sources for recruiting trainees from outside the company ranks are: business associates, receiving 51 out of 123 points; colleges, receiving 43 points; private employment agencies, ranking third and receiving 42 points; and friends of employees and want-ads were also good sources.

From a list of desirable characteristics the retail managers chose the five most important. Intelligence was rated first in importance, with 144 out of a possible 210 points; initiative ranked second with 128 points; personality ranked third with 72 points; work experience, communication skills, human understanding, and resourcefulness also received some recognition. Company seniority was rated as not being important.

Forty-four percent of the respondents reported the use of tests as a method of making manager trainee selections. Most of the retail chains using tests give applicants more than one type, with aptitude and personality tests being the most popular.

College graduation is a mandatory requirement of a manager trainee in only 19.6 percent of the chains; 46.3 percent of the store managers wanted their trainees to have some college; and 34.1 percent did not consider college a necessary requirement.

The average age of a chain's trainee is between 19 and 25 years of age, according to 43.9 percent of the

respondents; the largest age group, representing 46.3 percent, are between 26 and 30 years old; and only 7.3 percent are between 31 and 35 years. This leaves only 2.5 percent of the chains reporting an average age of trainees as over 35 years of age.

The survey showed that 16.7 percent of retail chains pay their trainees from $95 to $109 per week; 36.1 percent pay their manager trainees from $110 to $124; 30.5 percent pay from $125 to $139; 11.1 percent pay from $140 to $154 a week; and 5.6 percent pay their manager trainees $155 or more per week. The average retail trainee works and/or trains from 48 to 54 hours a week, according to 64 percent of the store managers replying.

More personnel with trainee potentialities are needed, according to 58.5 percent of the respondents. If a larger selection were available, higher entrance requirements could be set. After the individuals have passed the initial tests, it is time to start their education and training program.

Most, 80 percent, of the retail store managers answering the survey indicated their chains follow an on-the-job training program. A large segment, 60.9 percent, of the retailers using on-the-job or some other similar type of self-development program said that their trainees do attend some training and/or discussion classes during

development. Twenty percent of the chains reported a semi-formal training program.

The length of the manager training programs varies considerably among the retail chains. The greatest number, 14 out of 41 of the store managers reported that their training program lasts from 7 to 12 months; 7 chains plan on from 13 to 24 months' training period; 11 chains spend more than 24 months preparing a trainee to manage; and several of the respondents pointed out that the development time depended solely on the individual trainee.

Selection methods, procedures, and policies must be functioning properly in order to provide an adequate pool of potential managers. That there is a lack of an adequate employment pool to choose from could be assumed from the accumulated answers in this survey. This lack may be attributed to selection methods and policies. The young ambitious employee who gets selected by management to enter the training program might come from any one of several different employee levels. According to 46.4 percent of the store managers participating in the survey, the managerial understanding process begins with the clerk; 26.8 percent look for trainees at the department head level; and 26.8 percent believe the program should begin at the supervisory level. A majority, 80.4 percent, of the personnel managers agreed that it is an important part of the manager's job to train

the future managers. Other members of the training team are personnel managers, district managers, and in some cases, an immediate supervisor.

An overwhelming majority, 87 percent of the store managers, said more than one-tenth of their time is spent instructing subordinates. Merchandising was ranked first on the list of topics studied and discussed in the training program; store policy was ranked second; sales promotion was chosen third in thoroughness of coverage; and decision making was put in fourth place. It is the policy of 48.8 percent of the respondents to encourage the managers to stay abreast of the times by taking college refresher courses. Marketing trends, advertising, public relations, accounting, and personnel trends, in that order, were the courses recommended for managers who wish to stay abreast of the time.

The three personnel managers of the participating discount chains unanimously agreed that merchandising and inventory control would be the two main topics of their training program. The selection of the recruits was approached objectively, the training was thorough, but still the store managers reported that 14.6 percent of them graduate up to 25 percent of the hopefuls; 26.8 percent of the managers graduate 25 to 49 percent; 34.1 percent graduate 50 to 74 percent; and 24.5 percent reported that 75 to 100 percent of their trainees successfully completed the program.

The last section of the questionnaire gathered data on the procedures used to evaluate the retail manager trainees. These progress reports indicate the amount of trainee development and contain the information needed to inform the trainee of his progress.

The survey showed that 59.5 percent of the respondents said that the job of appraising the manager trainees is delegated to the retail store manager. The district manager and the immediate supervisor are assigned the job of evaluating the trainees in some of the retail chains. The progress reports are prepared quarterly, according to 35.9 percent of the respondents; and 48.7 percent indicated that their trainees are evaluated semi-annually.

Only 24.4 percent of the chains use formal tests as a method of evaluating their retail manager trainees. Some trainees stay in one phase of the training longer than the average due to a lack of development determined by some type of an appraisal.

The personal traits that the appraisers look for can be learned. Organization ability not only was chosen by the store managers as the most important trait needed by managers, it was also chosen as the hardest for the trainee to master. Although self-motivation was rated second in importance, it was rated the third most difficult to master. Ability to delegate was rated third in importance and next

to the hardest for the trainee to master. The rest of the traits ranked according to difficulty encountered in mastering fell into the following order: ability to: maintain discipline, think creatively, sell new ideas, express self, use communications, create high morale, accept reality, and gain respect of others.

The most important traits for managers to possess according to the respondents, listed in their order of importance are: organization ability, self-motivation, ability to delegate, discipline, use communications, think creatively, express self, gain respect of others, create high morale, and sell new ideas. These cultivated traits are the tools of the store manager's trade.

The store managers appraised the manager development programs by acknowledging these results: first, more qualified managers are obtained when there is careful selection and training; second, better operation results; and third, potential growth is improved.

Conclusions

The evidence presented in this thesis indicates that the following conclusions appear to be in order:

1. In two-thirds of the retail chains surveyed, at least half the manager trainees come from the ranks.

2. Major sources of recruiting outside company ranks are: business associates, colleges, private employment,

friends of employees, and want-ads, in that order of importance.

3. The characteristics most often looked for in a manager trainee are, in order of importance: intelligence, initiative, personality, and work experience.

4. The most popular types of selection tests used by the retail chains are aptitude and personality.

5. Some college, including a degree, is a prerequisite to manager training in two-thirds of the chains.

6. Ninety percent of the retail manager trainees are less than 30 years of age.

7. Two-thirds of the retail chains surveyed reported that their manager trainees are paid from $110 to $139 per week.

8. A larger employment pool of potential trainees is needed by more than half of the chains.

9. On-the-job training incorporated with some degree of group discussion is offered to manager trainees in 80 percent of the retail chain stores.

10. Manager development, after a recruit has been accepted, usually takes from 1 to 3 years of training and education.

11. The work week of the average retail manager trainee is from 48 to 54 hours per week.

12. The trainee who demonstrates superior qualities will not need to remain in training as long as the average trainee.

13. The clerk who shows leadership qualities and abilities might be accepted as a manager trainee, according to 46 percent of the chains.

14. It is the store manager's job to train future managers in 80 percent of the retail chains.

15. The topics most thoroughly covered in the training program are, in order of their importance: merchandising, store policy, sales promotion, and decision making.

16. Almost half of the stores encourage their managers to keep abreast of the times by taking refresher courses. Marketing trends, advertising, public relations, and accounting were most often recommended, in that order.

17. The discount chains agreed that merchandising and inventory control are the main topics of their training program.

18. The most difficult personal traits for the trainees to master are: organization ability, ability to delegate, and self-motivation, in that order.

19. The most important traits for a trainee to possess are: organization ability, self-motivation, and ability to delegate in that order.

20. More than half of those surveyed delegate the job of appraising the trainees to the manager.

21. Formal tests are not a common tool used by the stores in determining the degree of manager trainee development.

22. A large percentage of the trainees are lost to other companies for one reason or another.

Recommendations

The researcher recommends that the retailer and anyone interested in retail store manager training consider the following suggestions:

1. A major route for one who wishes to be a store manager is simply to begin somewhere within the ranks and work his way upward; firms should not overlook their own employees, especially those in the under 30 year-old group, in seeking managerial talent.

2. The best way to find potential managers from outside sources is to keep business associates and friends informed of the company needs.

3. More firms should use tests as a method of selecting trainees in order to learn more about strengths and weaknesses of the recruits. Any tests or devices, such as personal history and interviews, to determine intelligence, initiative, personality, and experience should be used.

4. Some post-secondary or college courses should be a requirement by more of the retail chains.

5. Chains should be more competitive in salaries paid to manager trainees in order to encourage more and better qualified trainees and retain those attracted.

6. A chain should review their training methods in order to find ways of upgrading the development process and further supplement on-the-job training with a planned training program providing for definite goals to be attained within specified periods over a period of from one to three years with a specified system of appraisal at each level.

7. Those retail stores that expect their managers to work from 48 to 54 hours should consider the shorter work weeks these people might have in most other lines of work since this is probably another reason for lack of adequate retail store management trainees.

8. More managers should take advantage of the availability of college business courses in order to improve their potential and stay abreast of the times and be better prepared to train others in merchandising and related areas.

9. How to organize, delegate, and develop self-motivation should be given more emphasis during the development process.

10. A retail firm should try to determine the reasons for losing so many of its trainees to other firms.

11. A firm should have recruitment policies and procedures that will provide an adequate supply of manager trainees.

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APPENDIX A

A SURVEY OF MANAGER DEVELOPMENT POLICIES

A.
Manager Selection Policies

1. Is the manager's job open to the rank and file employee who proves himself? ___Yes ___No
   If yes, what percent of your trainees come from your ranks?
   ___75 to 100% ___50 to 74% ___25 to 49% ___10 to 24%
2. Which of the following characteristics do you look for most in a manager trainee? (Rank five in 1, 2, 3, 4, 5 order)
   ___Intelligence ___Resourcefulness
   ___Communication skills ___Company seniority
   ___Work experience ___Vision & imagination
   ___Human understanding ___Personality
   ___Initiative ___Other, specify_____
3. Are your managerial positions open to women? ___Yes ___No
4. What must an employee show in self-accomplishment to be considered for the manager development program?_____
   _____
5. Do you administer tests to potential manager-trainee applicants? ___Yes ___No If yes, check those used.
   ___Personality ___Aptitude
   ___Interest ___Arithmetic
   ___Other, specify_____
6. Have the personality and characteristics of your present managers been taken into consideration in setting standards for new applicants? ___Yes ___No
7. How much college do you want an applicant to have before entering your manager-training program?
   ___None ___Some ___Graduate ___Other, specify_____
8. Into which age range would most of your manager trainees fall? ___19 to 25 ___26 to 30 ___31 to 35 ___36 to 40
9. Does your company use high school or college distributive education programs as a way of recruiting manager trainees?
   ___Yes ___No
10. What is the average weekly wage of your manager trainees? From $_____to $____.
11. Which methods of selection prove to be most fruitful for your company? (Rank three in 1, 2, 3 order)
    ___Business associates ___Gov't. employment agencies
    ___Friends of employees ___Private employment agencies
    ___Recommended by friend ___Want ads
    ___Colleges ___Other, specify_____
12. Do you have an adequate employment pool from which to choose? ___Yes ___No
13. What percent of the manager-trainees selected from outside your company stay employed for more than one year?
    ___75 to 100% ___50 to 74% ___25 to 49% ___10 to 25%

B.
Manager Training Procedures

14. How long is your manager training geared to last?
___Months ___Years
15. Do the manager trainees attend any retail classes or meetings before they are given an assignment? ___Yes ___No
If no, are any meetings or classes given concurrently with their work? ___Yes ___No
16. Which of the following types of training describes your program best?
___Formal program ___On-the-job training
___Semi-formal program ___Other, specify_____
17. Which of the topics are covered most thoroughly in your training program? (Rank five in 1, 2, 3, 4, 5 order)
___Merchandising ___Accounting procedures
___Sales promotion ___Personnel development
___Store policies ___Store maintenance
___Human relations ___Decision making
___Other, specify_____
18. Do you use group instruction in your training program?
___Yes ___No If yes, who instructs?_____
19. How much of your manager's time is spent in training subordinates? ___5% ___10% ___20% ___Other
20. Would you say that your program is based on self-development? (That is, without any degree of formal training) __Yes __No
21. At what level does your manager training commence?
___Clerk ___Department Head ___Supervisor
22. Were the duties of your present managers evaluated when setting up the training program for your potential managers?
___Yes ___No
23. What percent of those starting the manager development profram become managers? ___0 to 24% ___25 to 49%
___50 to 74% ___75 to 100%
24. Do you feel that the core of department manager training is the same as store manager training. ___Yes ___No
25. What key element in training does your company stress because it is a discount operation? (Answer if applicable)
_____
26. Does your company delegate the job of training potential managers to a manager? ___Yes ___No
27. How many hours would constitute the average work week of your manager trainees? ____Hours
28. Do you encourage your managers to take college courses in order to stay abreast of the times? ___Yes ___No
If so, check which courses.
___Accounting ___Personnel trends
___Marketing trends ___Public relations
___Advertising ___Other, specify_____

29. Which of the following have resulted from your training program? (Rank three in 1, 2, 3 order)

___Better morale
___Stimulate thinking
___Greater loyalty
___Communication
___Better operation
___Less turnover
___More qualified managers
___More potential growth
___Teach standard operating procedures

C.
Manager Appraisal

30. How often are your trainees evaluated?
___3 months ___6 months ___12 months ___Not at all
31. Who makes the appraisals? 1_____ 2_____
32. Are some evaluations made by administering formal tests?
___Yes ___No
33. Do you evaluate members of your management periodically?
___Yes ___No If yes, how? ___Tests ___Merit
34. Do you periodically inform your manager trainees how they are measuring up? ___Yes ___No
35. If performance of a trainee is of superior quality, is his training period as long as the average trainee's?
___Yes ___No
36. In your training, is more emphasis on increasing sales rather than on increasing profit? ___Yes ___No
37. Which of the following managerial traits do you feel is the hardest for the trainee, or a new manager, to master? (Rank three in 1, 2, 3 order)

___Self-motivation
___Think creatively
___Use communications
___Delegate
___Create high morale
___Gain respect of others
___Sell new ideas
___Accept reality
___Discipline
___Organize
___Express self
___Other, specify_____

38. Which traits in question 37 do you feel are the most important?
1_____
2_____
3_____
39. Would you like a summary of the findings? ___Yes ___No

Comments:

Firm:_____

Signature:_____

APPENDIX B

100 HOUSTON RETAIL CHAINS

Response Yes	Response No	Recipient	Address
	X	A. L. Davis Food City	8106 S. Park Blvd.
	X	A & P Food Store	5440 N. Freeway
	X	Askew Drug Stores	2524 McKinney
	X	B & B Parkway Food Stores	2430 Airline
X		B F Goodrich Tire Co.	2830 Produce Row
X		Baby Giant Food Stores	6241 Westheimer
X		Baker's Shoe Stores	217 Northline Mall
	X	Battlestein's	812 Main
	X	Ben Franklin Stores	1023 S. Broadway
	X	Best Tailors Inc.	812 Preston
	X	Better Foods	529 W. Alabama
X		Bill's Dept. Store	7921 W. Montgomery
	X	Bonds	218 Northline Mall
X		Britts	315 Northline Mall
	X	Brown's Variety Store	6033 Belfort Ave.
	X	Carpet World	4025 Richmond Ave.
	X	Clayton's Super Markets	6612 Fulton
X		Cook Paint & Varnish	2510 Summer
	X	Corrigan Jewelers, Inc.	923 Main
X		Cunningham Drug Store	1500 Yale
	X	Danburg's	8712 Jensen
	X	Epp's Super Market	8313 E. Houston Road
	X	Fairchild's Men's Shop	4214 Ella Blvd.
	X	Fashion Thimble Shoes	1258 W. 43rd.
X		Fedmart	5600 Mykawa
	X	Finger's Furniture	4001 Gulf Freeway
X		Florsheim Shoe Shops	225 Northline Mall
X		Foley's	1110 Main
	X	Food Giant of Texas	2300 N. Shepherd
X		Giant Pharmacy	9001 Jensen
X		Gibson's Discount Center	LaMarque, Texas
X		Globe Shopping City	3030 Woodridge
	X	Goodyear Tire & Rubber Co.	5544 Armour Drive
X		Gordon Jewelers	10009 Homestead
X		Hancock Fabrics	5105 N. Shepherd
	X	Handee Food Mart Inc.	1502 W. Gray
	X	Haverty Furniture	804 Capitol
X		Henke-Kroger	5335 Airline
X		Hi-Lo Auto Supply	5624 Airline
X		Hovas Furniture	3811 Eastex Freeway
X		J. C. Penney Co.	3938 N. Shepherd
	X	J. J. Newberry	144 Gulfgate Mall
X		Joske's	Northline Mall
	X	K-Mart	9929 Homestead

Response Yes	Response No	Recipient	Address
	X	Kraker's Ready-to-Wear	2769 Red Bluff Road
	X	Korner Pantry	6908 S. Park
	X	Krupp & Tuffly Inc.	901 Main
	X	Laufman's Jewelers	1126 Travis
	X	Leonard's Dept. Stores	3016 Little York
	X	Leopold-Price & Rolle	805 Main
X		Lerner's	209 Northline Mall
X		Levine's	2300 N. Shepherd
	X	Levitt's Jewelers	624 Main
	X	Lewis & Coker Super Mkt.	6545 S. W. Freeway
X		Lucky 7 Super Markets	9000 Airline
X		Mading-Dugan Drug Stores	1711 McGowan
	X	Margolis Shoe Store	6506 Gulf Freeway
	X	Minimax Stores	2525 Minimax Drive
X		Montgomery Wards	Northline Mall
	X	Morgan & Lindsey	10066 Long Point
	X	Nation Wide Carpet Co.	5805 Westheimer
X		National Brand Shoes	5312 Airline
X		National Shirt Shops	211 Northline Mall
	X	Oshman's	2302 Maxwell Lane
	X	P. N. Hirsch	4037 Westheimer
	X	Palais Royal	438 Meyerland Plaza
X		Playhouse Toys	12520 Memorial
X		Radio Shack	300 Northline Mall
X		Ralston Drug Store	3147 Southmore
X		Rice Food Market	5900 N. Shepherd
	X	S. E. Teaff	5234 Glenmont
	X	S. H. Kress & Co.	701 Main
X		S. S. Kresge	201 Northline Mall
	X	Sage	8555 Gulf Freeway
X		Sakowitz	1111 Main
	X	Schepps	2447 Rice
	X	Schiff Shoe Stores	8511 Houston Road
X		Sears Roebuck & Co.	4000 N. Shepherd
X		Shoe Box	2268 Holcombe
X		Shoppers Fair	4412 N. Shepherd
	X	Singer Co., The	626 Main
	X	Smith Auto Supply	6615 Tidwell
	X	Soloman Fabric Centers	1311 Richey
	X	Standard Make Shoes	1620 Austin
	X	Star Furniture	5400 Harrisburg
	X	Stein's Men's & Boy's Wear	604 Main
	X	T G & Y Stores	9421 N. Shepherd
	X	Thom McAn Shoe Stores	207 Northline Mall
	X	U-Tote'm, Inc.	1103 Turner
	X	Vogue Shoes, Inc.	5035 Gulf Freeway

Response Yes	Response No	Recipient	Address
X		W. T. Grant	5502 N. Freeway
X		Wacker, G. F. Stores, Inc.	10013 Homestead
X		Walgreen Drug Co.	4300 Peterson Ave. Chicago, Illinois
	X	Wayside Dept. Store	1352 Federal Road
X		Weiner's	1258 W. 43rd.
	X	Weingarten's	402 Telephone Road
	X	White Stores	3910 Call Field Rd. Wichita Falls, Tex.
	X	Woolco Dept. Stores	3900 Bissonnet
	X	Woolworth, F. W. Co.	8423 E. Houston Road
X		Zale's Jewelers	8806 Jensen

Vita redacted during scanning.