



Daniel's
jewelers
Own the dream

MANAGER NAME

EMP #

STORE #

STORE MANAGER TRAINING CHECKLIST

Reference Guides: See Store Intranet, Operations Manual, Employee Handbook, Promotional Planner, Human Resources, Loss Prevention, RDM or Helpdesk	MGR Initials	TRAIN. Initials	Completion DATE
<p>1. LEADERSHIP</p> <ul style="list-style-type: none"><input type="checkbox"/> I am your mentor and will help you be successful; we'll work and make decisions together.<input type="checkbox"/> Open and honest communication is going to be the key to our relationship and your relationship with your people.<input type="checkbox"/> Create a safe environment that leads to open communication between yourself and your team.<input type="checkbox"/> You must ask for help, raise your hand, we have resources to support and train you.<input type="checkbox"/> You are responsible for creating a strong high-performing team that achieves quota and the goals of the district and company.<input type="checkbox"/> Up to you to create a fun selling atmosphere.<input type="checkbox"/> Choose your battles, focus on what matters the most and will have the most impact on your success.<input type="checkbox"/> Mistakes will happen, challenges will need to be overcome, must put together a plan of action to fix the future.<input type="checkbox"/> Must lead by example, show them how everything is done.<input type="checkbox"/> Don't ask your team to do anything that you wouldn't.<input type="checkbox"/> Delegate tasks and responsibilities to others, you cannot do it all yourself.<input type="checkbox"/> Time management, need to take notes on your TO-DO's, organize and prioritize your time, plan ahead and have a system to accomplish required tasks and goals.<input type="checkbox"/> You cannot motivate each person the same, uncover what drives them individually.<input type="checkbox"/> Be a strong listener and clearly state your expectations.<input type="checkbox"/> Dare to give feedback, what you allow you encourage.<input type="checkbox"/> Evaluate who is not performing in any given focus area and train encourage, hold them accountable to change.<input type="checkbox"/> Provide direct, clear feedback and expectations to drive each person and let them achieve it in their own way.<input type="checkbox"/> Take time to thank and recognize individual areas where they are doing well.<input type="checkbox"/> Must be proactive, plan and work ahead of deadlines and sales events.<input type="checkbox"/> One Minute Manager book, new manager gift from the company, inform me when you've read it and we'll discuss further.			

<p>2. THREE STEPS TO CONSISTENT QUOTAS – <i>The primary responsibility of a store manager is to make quota. Store quotas are more easily made when each associate makes their personal quota. A store manager can get all associates to make their quota by doing these 3 steps.</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> TRAIN- each associate to always follow the company expectations ASSOCIATE TRAINING EVALUATION FORM. (see Handout) <input type="checkbox"/> PRAISE- the associate when the task is properly done. TRAIN and COUNSEL when it isn't, using the Sandwich technique. <input type="checkbox"/> CORRECTIVE ACTION- the associate that is unwilling to properly do the task, have concerned conversation, and then speak to RDM about further corrective action. <input type="checkbox"/> Importance of Managers' Personal Sales. <input type="checkbox"/> MIP program. (see Handout) <input type="checkbox"/> Commission Program. (see Handout) <input type="checkbox"/> Create a selling atmosphere. (attitude=altitude) 			
<p>3. RECRUITING</p> <ul style="list-style-type: none"> <input type="checkbox"/> Surround yourself with a winning team of associates. <input type="checkbox"/> What type of associates are you looking for? What are the needs of the store? <input type="checkbox"/> Catch someone doing something right. (smiling, maximizing sales, being aggressive and persistent, great at the lease line, etc) <input type="checkbox"/> Good places to go recruiting/ Best time to go. <input type="checkbox"/> Let's find a good example. Mall field trip, walk the mall to identify and recruit potential candidates. <input type="checkbox"/> Review the interviewing process: <ul style="list-style-type: none"> - Pre-Interview Questions - 2nd Interview Notes - Final Interview Results and RDM Approval <input type="checkbox"/> How to complete and process Employee Change of Status. (see Handout) <input type="checkbox"/> Prepare the recruit for onboarding. What paperwork to bring, what to wear, where to go, etc. (see Handout of all forms) <input type="checkbox"/> Registration for UltiPro. (UKG) (available 3 days after DOH) <input type="checkbox"/> Appointment acknowledgment form, Background Content Form and Take Charge of Your Pay. (Direct Deposit or Money Network) (see Handout) <input type="checkbox"/> What not to ask or say during an interview. (see Handout) <p>* * TRAINING & DEVELOPMENT OF NEW & EXISTING ASSOCIATES - <i>see Store Intranet contact SMC HR/TRN x5621 or x5617)</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> *UltiPro (UKG Learning and UKG Pro Classic)– registration available 3 business days after DOH, Pay statements are available to view, download or print online. Questions on how to access contact Payroll Dept. x 5217, 5219 or HR Dept x 5618. <input type="checkbox"/> Step-By-Step Guide for your New Hire (UKG Learning or Pro Classic /Sunbit iPad) – Curriculum to complete (Orientation Training 101, Diamond Dream Maker, Associate Training, Credit 2, Product Knowledge 2) <input type="checkbox"/> Requirement - Lead and Keyholder Training <input type="checkbox"/> Monthly Store Team Meeting - Regular Associate Meetings – Specific topics or Saturday Meetings <input type="checkbox"/> Compliance - Harassment Prevention Seminars 			

<p>4. MANAGING YOUR SALES FLOOR</p> <ul style="list-style-type: none"> <input type="checkbox"/> What to do during down time. <input type="checkbox"/> Eyes and Ears on the sales floor not the back office. <input type="checkbox"/> Follow up, Train, and continue to develop associates. <input type="checkbox"/> Observe your associates and identify their strengths and weaknesses. <input type="checkbox"/> Using the available reports to make a plan of action and stay on track with your goals. (Effort Stats, Sales Performance charts, RDM faxes) <input type="checkbox"/> Demonstrate how to work the lease line. <input type="checkbox"/> Continue to motivate and review all the available money that associates can earn. (All incentives, Commission, Spiffs, Champions, Overtime, etc.) <input type="checkbox"/> Create friendly competition by using 109's, Sales Charts, RDM Reports, etc. <input type="checkbox"/> How to properly coach, role play, and have weekly and mandatory monthly meetings. <input type="checkbox"/> 100% completion of all UltiPro Learning courses. <input type="checkbox"/> Identify Performers and Non- Performers. <input type="checkbox"/> Daily Work Bag Review. <input type="checkbox"/> Following Up on Pending/Lost deals. <input type="checkbox"/> Telemarketing all Company Lists. <input type="checkbox"/> How to delegate tasks and not do everything yourself. 			
<p>5. CREDIT – MAXIMIZE OUR CREDIT POGRAMS</p> <ul style="list-style-type: none"> <input type="checkbox"/> Understand the Daniel's credit process <input type="checkbox"/> SIX STEPS: <ul style="list-style-type: none"> - Synchrony - Fortiva - Daniel's - Sunbit - Uown - Progressive <input type="checkbox"/> Use the iPad. (an option is to have the customer fill out Daniel's/Synchrony while associate fills out Progressive/ Sunbit) <input type="checkbox"/> The importance of AutoPay (Plus \$10 Spiff) <input type="checkbox"/> Dos and Don'ts of Credit. (see Handout) <input type="checkbox"/> Green Credit Overview. (see Handout) <input type="checkbox"/> 3 Key Phrases to use with your customer and when to use them. <input type="checkbox"/> Upfront commitment on terms and D.P. <input type="checkbox"/> Leveraging Synchrony, Fortiva and Sunbit approvals to D.P. on a Daniel's account. <input type="checkbox"/> Importance of Synchrony, Fortiva and Leasing on add-ons. <input type="checkbox"/> Rules of cash prices on Synchrony. <input type="checkbox"/> Faxing sales slip as early as possible after the application is input. <input type="checkbox"/> Thoroughly completing Dealmaker forms. <input type="checkbox"/> What to say when calling the Credit Department: <ul style="list-style-type: none"> - How much D.P. - Payment History - Reference Account - How much can they afford per month - Know what to avoid 			

<ul style="list-style-type: none"> <input type="checkbox"/> The proper steps to a BIG sale: <ul style="list-style-type: none"> • Creative customer greetings. (Other than how can I help you?) • LISTEN to what your customer is asking for • Show big, romance, open account, complete sales slip, get D.P., shorter terms, congratulate and end with proper talk-off. <input type="checkbox"/> Don't pre-judge any customer <input type="checkbox"/> Sunbit: Explain the importance of adding/ deleting associates, portal training, decline due to insufficient funds. <input type="checkbox"/> How to do submit a Sunbit, Uown or Progressive return on Help Desk (New ticket; Credit; select the proper credit vendor) <input type="checkbox"/> How to look at your Sunbit stats in the Portal on the iPad. (HUB) <input type="checkbox"/> How to request new user Sunbit training on iPad. <input type="checkbox"/> Managing credit approvals, getting involved when necessary. <input type="checkbox"/> Offering Purchase Commitment or selling down on unapproved deals. <input type="checkbox"/> Using the Help Desk for 2nd Opinion for un-approved deals. <input type="checkbox"/> Merchandise break-ups on Progressive. <input type="checkbox"/> Entering the customer's information on a cash sale, including email. <input type="checkbox"/> Review of the Credit Effort poster. <input type="checkbox"/> Conversion Rate and how to improve it. <input type="checkbox"/> Creating mock accounts to have record of large cash purchases. <input type="checkbox"/> Credit Auditing. (Must follow all approvals, last approval must match what you are ringing up) 			
<p>6. SALES</p> <ul style="list-style-type: none"> <input type="checkbox"/> Quota Setting and Adjustments. <input type="checkbox"/> Associates + Your Quota = 110%. <input type="checkbox"/> Maintaining and posting the Store and Personal Performance charts and any RDM driven faxes. <input type="checkbox"/> Champion Qualifications and 17 Steps to Becoming a Champion (see Handout). <input type="checkbox"/> Creative opening lines, closing during the sale and assumptive close. <input type="checkbox"/> Correct pricing, maximizing Registry sales, how to sell Registries and Repairs. <input type="checkbox"/> Using Purchase Commitment to make a future sale. <input type="checkbox"/> Purchase commitment: A-Z how to properly do & cancel, DS3, payments, 6-month agreement. <input type="checkbox"/> Turning Ear Piercing, Watch Batteries, Free CZ Earrings into sales. <input type="checkbox"/> Turning a small sale into a bigger one by offering it free for a larger qualifying purchase. <input type="checkbox"/> Review of the Promotional Planner, have everyone read and sign off. <input type="checkbox"/> Importance of reading the Daily Bulletin and sharing it with everyone in your store. <input type="checkbox"/> Importance of sharing all tracking reports and RDM faxes with everyone in your store. <input type="checkbox"/> Importance of good customer reviews, asking customers to respond to their email. <input type="checkbox"/> Web Orders: <ul style="list-style-type: none"> - Fielding Questions from customers - How to process cancellations - Trade ins/Exchanges <input type="checkbox"/> Rules for processing refunds. (checking correct item, testing diamonds, etc) 			

<p>7. PERSONNEL, HUMAN RESOURCES AND LOSS PREVENTION</p> <ul style="list-style-type: none"> <input type="checkbox"/> Who's who in the SMC directory and who to call for what you need. (see Handout) <input type="checkbox"/> Building relationships with all departments and proper communication. <input type="checkbox"/> Confirm all associates know and understand how to use "210" security code properly. <input type="checkbox"/> Confirm the knowledge of A-BOX shipment, including merchandise in the A-Box, pending drawer, trade-ins, store stock, etc. <input type="checkbox"/> Review bank deposit guidelines and policy. <input type="checkbox"/> Review of the Recall Process (see Handout). <input type="checkbox"/> Confirm all Managers and Keyholders have a list of emergency numbers (Mall security, RDM, LP team). <input type="checkbox"/> Review company dress code and name badge guidelines. (see Handout) <input type="checkbox"/> Harassment prevention- Professional Behavior, No Inappropriate Behavior- Pass the Ball to HR. <input type="checkbox"/> Immediately report all suspected and known losses – get a partner. <input type="checkbox"/> How to find mistakes. (Case counts, Drawer over/ shortages) <input type="checkbox"/> What POS transactions don't you understand? (Returns, break-ups, transfers, add new employees, purchase commitment cancelations, etc.) <input type="checkbox"/> Jewelry Cleaning rules. 			
<p>8. ADMINISTRATIVE/ STORE OPERATIONS/ VISUAL SALES SUPPORT</p> <ul style="list-style-type: none"> <input type="checkbox"/> Merchandise/ Spiff Control Report/ Free Gift Reconciliation. (right ticket number, call Loss Prevention if you have zero) (see Handout) <input type="checkbox"/> Phone usage. (proper greeting, no personal calls, no cell phones on sales floor, etc.) <input type="checkbox"/> Introduction to proper usage of the HelpDesk. <input type="checkbox"/> Reporting maintenance problems through Helpdesk/Follow up/1 item per ticket/Detailed explanation <input type="checkbox"/> Legal Postings, Network Poster, Contact HR and Safety Manual. <input type="checkbox"/> SMC Supply Order and Visual Supply Order. <input type="checkbox"/> Complying with current sign package. <input type="checkbox"/> Case display maintenance. (clean jewelry, tagging merchandise, plugging holes, higher ticket items in front of case) <input type="checkbox"/> Make sure all electronic signage and Daniella are working properly. <input type="checkbox"/> Visual Sales Quick Checklist (see Handout). <input type="checkbox"/> Review of Operations and Transfer Drawer including how to handle transfer paperwork. <input type="checkbox"/> Share specific issues pertaining to THIS store. <ul style="list-style-type: none"> • Pending maintenance issues • Who controls the air-conditioning system? • Alarm • Gate • Local authorities <input type="checkbox"/> Share specific issues pertaining to THIS mall. <ul style="list-style-type: none"> • Specific contacts at the mall • Update malls contacts lists • Marketing opportunities 			

9. PAYROLL AND SCHEDULING <ul style="list-style-type: none"> <input type="checkbox"/> Store payroll budget. <input type="checkbox"/> How to make a proper schedule, Smart scheduling, scheduling to budget, submit 2 weeks in advance. <input type="checkbox"/> UltiPro Timekeeping, Meal periods and break policy. <input type="checkbox"/> UltiPro corrections and approvals. (How to and deadline of Monday at 11:00am) <input type="checkbox"/> Attaching all Time Punch Correction cards with schedules. <input type="checkbox"/> Manager's work schedule. (see Handout) 			
10. REPAIR DEPARTMENT <ul style="list-style-type: none"> <input type="checkbox"/> How to read and understand Repair price sheet. <input type="checkbox"/> How to properly check merchandise being left for repair. (testing diamonds, noting scratches and wear and tear) <input type="checkbox"/> How to correctly complete repair envelope. <input type="checkbox"/> Maximizing sale opportunities. <input type="checkbox"/> Maximizing profitability. (goal = 3x mark-up) <input type="checkbox"/> Store jeweler(s) / Store Price List. <input type="checkbox"/> Approving Jeweler Invoices. 			
11. RDM'S TOPIC OF CHOICE <ul style="list-style-type: none"> <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ 			

On _____, the Field Operations Trainer or my RDM completed reviewing this Store Manager Training Checklist with me.
My signature below indicates that I understand and will comply with these company expectations.

Store Manager's Signature

Employee #

Field Operations Trainer/RDM Signature

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