

Quota Setting Worksheet Instructions

1. Step #1 – Use the drop down box to select your store. This will help to identify the spreadsheet in case it is prepared and faxed from a different location.
2. Step #2 – Enter the Total Store Quota assigned to the store by your District Manager, Regional Manager or Regional Director.
3. Step #3 – Enter the Allowed WEEKLY hours for your store, NOT including hours for the store manager.
4. Step #4 – Enter the number hours the Store Manager will be on vacation (or otherwise out of the store) for the CALENDAR/QUOTA MONTH, but on an allowance of 40 hours per week. For example, for a two week vacation, enter – 80.00. For the entire month, enter -174.00
5. For EACH associate in your store who will have any hours during the CALENDAR/QUOTA MONTH (enter on separate lines and do NOT enter any lines for the Store Manager):
 - a. Step #5 – associate SLSP NUMBER AND SLSP NAME
 - b. Step #6 – associate HOURLY RATE
 - c. Step #7 – associate AVERAGE STANDARD HOURS PER WEEK. You should be thinking more about the “normal” hours the associate is scheduled to work, i.e., full time = 40 hours, scheduled with over time = 45 hours, part time = 20 hours, etc.). Without adjustment, (other steps to follow), the value entered here times 4.35 weeks for a typical month will be the hours the associate is expected to work during the calendar/quota month (40 hours per week * 4.35 weeks is 174 hours and this is considered “full time”). The values in this column and the total at the bottom will help you to determine if you have enough, or too much, staff that CAN BE scheduled as compared to your weekly allowed hours.
 - d. Step #8 – If an associate is scheduled to be on an on paid leave during the calendar/quota month, enter AS A NEGATIVE NUMBER the TOTAL UNPAID LEAVE [FOR THE] CAL MON as the TOTAL hours for the calendar/quota month that leave is expected to take. For example, if a leave is scheduled for 2 weeks and the associate’s AVERAGE STANDARD HOURS PER WEEK is 40 hours, enter 80.
 - e. Step #9 - If an associate is scheduled to be on an on vacation during the calendar/quota month, enter AS A NEGATIVE NUMBER the TOTAL PAID VACATION [FOR THE] CAL MON as the TOTAL hours for the calendar/quota month that the vacation is scheduled for. For example, if vacation is scheduled for 2 weeks and the associate’s AVERAGE STANDARD HOURS PER WEEK is 40 hours, enter 80.
 - f. Step #10 - If an associate is scheduled to work additional hours to cover vacations or leaves, enter A POSITIVE NUMBER the ADDITIONAL SCHEDULED HOURS [FOR THE] CAL MON as the TOTAL hours for the calendar/quota month that the associate will have added to his/her scheduled hours per month vacation scheduled for. For example (keep in mind that “coverage” may be spread to more than one associate), if an associate is going to be asked to work an additional 40 hours during the month to provide coverage for other associates in the store taking who are on leave or taking a vacation, enter 40. You can also use this column to add hours to associates who will be scheduled to cover trunks or special events.
6. See the button at the bottom of the page to clear all values and start over.
7. There are two print buttons. The first is will hide the hourly rates before the worksheet is printed. The second will NOT hide the hourly rates before the worksheet is printed. Be careful with the second option so that you don’t create paper that has confidential hourly rates that may be left around the store.