

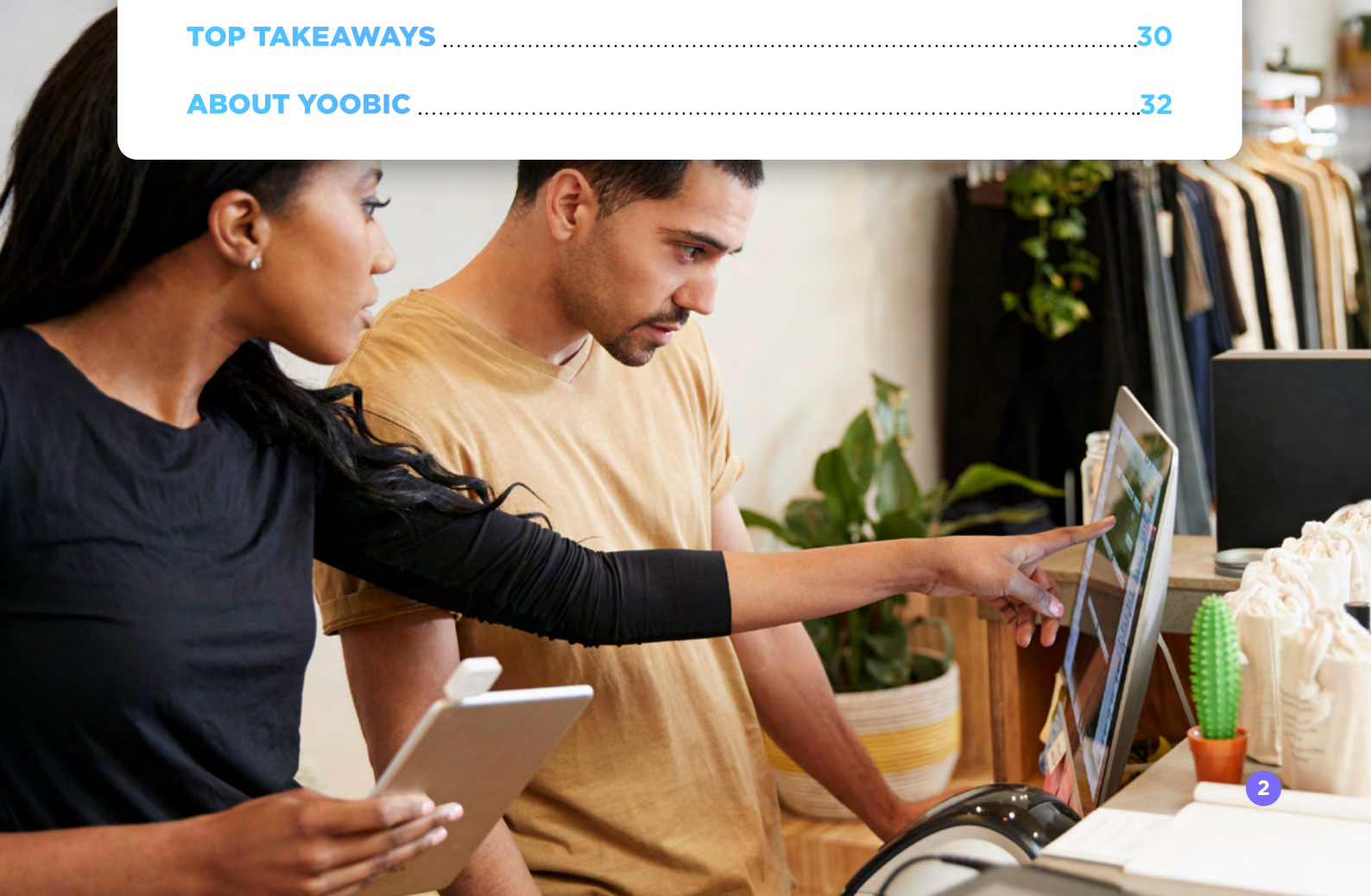


THE ULTIMATE GUIDE TO **IMPROVING RETAIL STORE VISITS**

YOOBIC

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A woman with dark braided hair, wearing a white short-sleeved button-down shirt and dark pants, is looking down at a tablet computer she is holding. The background is a blurred store interior with shelves. A large, light blue abstract graphic shape is overlaid on the left side of the image.

1. THE STATE OF THE STORE VISIT IN 2022

The Soul-Destroying Performance Reviews of Retail

How do you feel when an invite for a performance review pops up on your calendar? If irritation and pure dread are the first things that come to mind, you're on the same page as 95% of people surveyed by the Society of Human Resources Management.

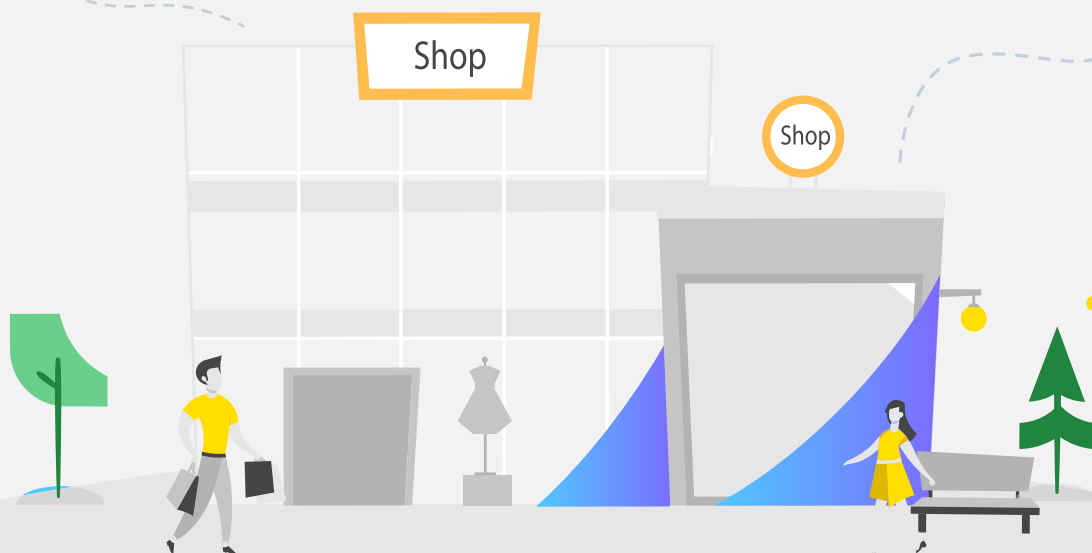
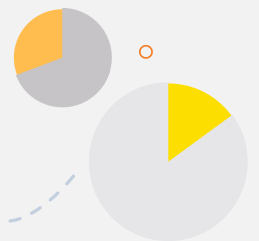
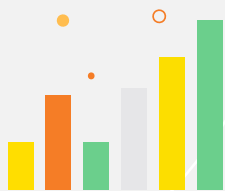
Performance reviews are time-consuming, awkwardly formal and sometimes even soul-destroying. Chances are you return to your desk defeated, discouraged and maybe even ready to find a new job.

And if you're the manager, you dread having to spend hours filling out reports for every one of your employees. Giving negative feedback is tough - what if an employee cries or flips the desk and rage quits?

Traditional performance reviews don't help us do our job better or help the company improve.

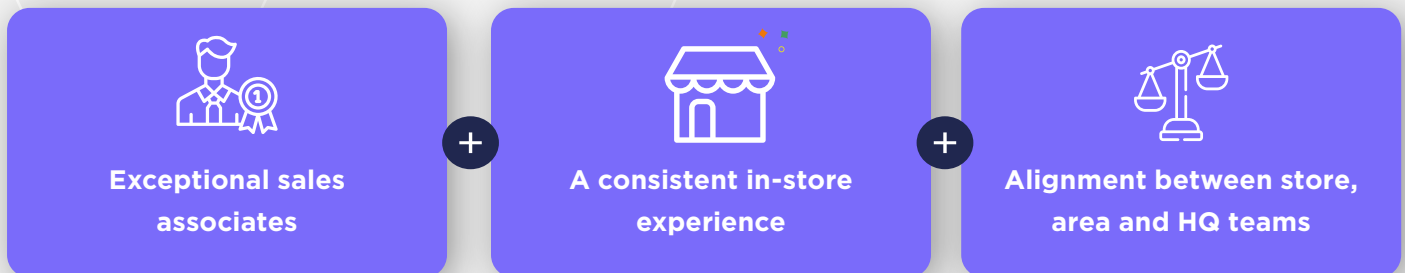
And in the retail world, their counterpart is the store visit. In our experience with retailers, we've found that store visits don't help store teams do their jobs better or help the retailer improve.

But we think they're necessary. More so in 2022 than ever before.



That's because the age of "oh but we've always done it that way" is over, and the era of experiential retail has begun. In this new era, the physical store needs all the help it can get to stand out.

Experiential Retail in a Store Requires:



When used correctly, store visits can improve all 3 of the above. Unfortunately the store visit is stuck decades behind other more innovative areas of retail.

By overlooking it, retailers are missing a huge opportunity to improve the in-store experience.

What the Store Visit Is Now:

- ✗ An exercise in low-value admin tasks
- ✗ Focused on policing stores
- ✗ Often pointless because no improvements are made afterward

What the Store Visit should be:

- ✓ An exercise in seeing the store objectively and improving store performance
- ✓ Focused on coaching, motivating and empowering store teams to be autonomous
- ✓ A link between HQ, area and store teams that makes collaboration easier

But by fixing the 5 most common problems with outdated store visit procedures, retailers can **improve the in-store experience and ultimately increase sales.**

This eBook will help retail executives identify and fix **5 common problems with retail store visit procedures.**

You'll also find an inspiring interview with the Head of Retail Support at one of the UK's leading retailers about why and how they changed their store visit procedures.

But First, What's the Point of a **Store Visit to Begin With?**

Here's what a store visit isn't about: policing stores instead of helping them.
Each store visit has 2 purposes:



To See the Store from the Customer's Point of View



To Improve Store Performance and Customer Experience

Most visit procedures make it impossible for area managers to do either of the above.

Why? Keep reading for an interview with Halfords, as well as the 5 most common problems we've seen with store visits in our 8 years working with retailers.



2. AN INTERVIEW WITH HALFORDS ABOUT WHY STORE VISITS MATTER?

Interview: Why Store Visits Matter.



Louise
O'Keeffe

halfords

Halfords has been making journeys better for over 125 years with their unbeatable range of bicycling and automotive products. The customer journey - and supporting their stores to constantly improve it - is at the heart of everything they do.

We sat down with **Louise O'Keeffe, Head of Retail Support at Halfords**, to chat about why Halfords digitized their store visit procedures, and how store visits impact everything from area manager engagement to customer experience.





What were store visits like at Halfords before they were transformed?

Louise: There was no formal structure. Area managers were creating their own paper visit reports on an individual basis and filling in the forms themselves. Procedures were very manual and inconsistent across the store network.

However, there was a desire on the part of area managers to have a formalized procedure in place. The feedback we heard from them was that they wanted something that simplified accessing previous visit information and made benchmarking store performance easier, and so would support them during the store visit.



What were the biggest challenges you ran into when transforming your store visit procedures?

Louise: Transforming our visit procedures was not so much of a challenge. We work in a listening culture, so we listened to the area managers and asked them what they'd like and what they'd find most useful.

One question that came up was: if a digital tool was to be used, would that mean the dashboards would be monitoring area managers on an individual basis?

But being open and transparent, as well as getting area managers fully involved in the process, was assurance that the new procedure was built for them to do store visits faster and more easily, and not a "big brother" tool.



What was your motivation behind re-evaluating store visit procedures?

Louise: We needed consistency across the entire organization and across our 455 shops. Consistency starts at the store level.



How did you go about changing your store visit procedures and what does a typical store visit look like now?

Louise: We went out to all our field teams and asked them what questions they'd want answered during each store visit. We got 200 questions back from the teams, all of which were important, but having 200 questions would be unrealistic.

We narrowed the questions down and grouped them into themes like first impressions and marketplace offers.

The procedure our area managers use now consists of 35 questions around each area of the shop, but with the flexibility to take a deep dive into individual areas of stores to build up more detail.





How has transforming store visits impacted store performance?

Louise: The engagement from our area managers since transforming our store visit procedures has been fantastic, and collaboration has improved.

Consistency across the store network provides focus and direction for store managers. It's easier to take action or give recognition depending on what happens during the store visit.

Consistency also facilitates an understanding if there are problems with in-store execution on a national scale.



Why do you think store visits are overlooked by most retailers, and what, do you think, are the biggest missed opportunities?

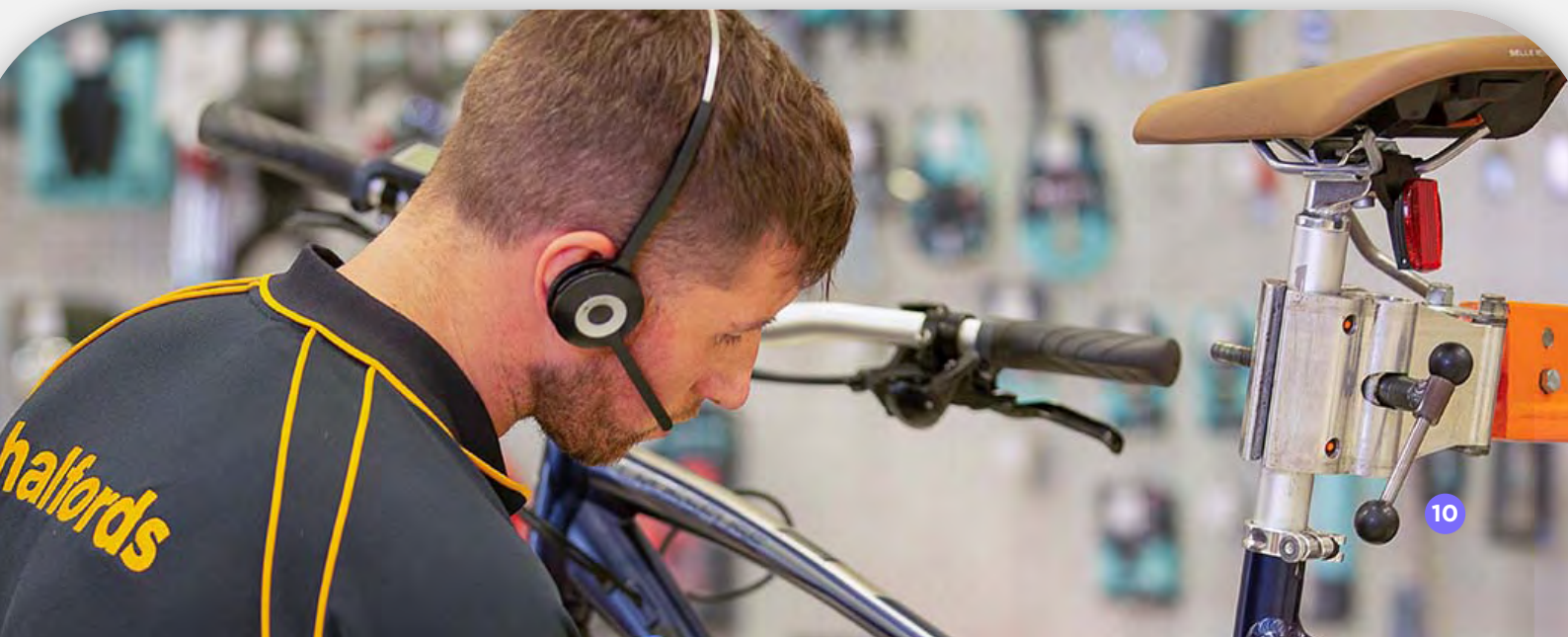
Louise: Decision makers just aren't embracing the digital side of things. But for area managers, the desire is there to have more consistency in the way store visits are done. Many are trying to design their own procedures.

Area managers were having to write things down in their diaries to remember when visits were done and what happened, so digitizing procedures is a huge time saver. Retailers can gain clarity for the store manager and set clear expectations by making store visit procedures work for everyone.



In today's experience-based retail climate, why do you think the store visit is so important?

Louise: Shoppers are savvy nowadays and have high expectations. They want to come into the store, find what they need quickly and buy it, but complexities behind the scenes make this complicated. A clear understanding of what stores need to provide will only make things easier for shoppers.



A woman with blonde hair, wearing a white shirt and a gold watch, is looking at a tablet in a crowd. The background is blurred, showing other people. There are blue decorative lines on the left side of the image.

3. PROBLEMS AND FIXES

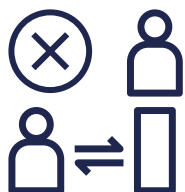
Store Visit Problem #1: No Uniform Procedure Across The Store Network.

Store visits have been around for decades. Most retailers don't give them a second thought, so there's no uniformity to the procedures area managers use.

So what exactly is a uniform store visit procedure?

- ✓ An exercise in seeing the store objectively and improving store performance
- ✓ Focused on coaching, motivating and empowering store teams to be autonomous
- ✓ A link between HQ, area and store teams that makes collaboration easier

Why it's a problem:



Inconsistent Store Visit Procedures Create Inconsistent Customer Experiences

Without guidance, area managers will create their own store visit procedures. Varying procedures mean that each store is evaluated inconsistently.

Consider this scenario: Experienced area managers have stronger relationships with store managers. It's possible they'll fall back on these relationships and overlook errors in store look and feel. Less experienced area managers lack the strong relationships with store teams. It's possible they'll be too focused on look and feel and overlook the store team's interpersonal skills.

The result? An inconsistent store experience.



A Lack of Continuity Between Visits Is Confusing for Store Teams

A new area manager has to start from scratch.

This gets confusing for store teams, because the area manager could be evaluating them completely differently than their predecessor.



The Retailer Has Limited Visibility Into Why Stores Perform Well or Poorly

Area managers are sitting on a goldmine of data that's wasted because there's no uniform way of recording it. Using the area manager's knowledge of what goes on in stores, retailers can replicate best practices across the store network and better support stores who need help.

What do top performers have in common? Do the poor performers all score badly on the same thing? These are just a few questions a uniform procedure can answer.

How to fix it:



Listen

The first step in designing a uniform procedure is to understand the ones that are already being used. Without consulting area managers it's impossible to get the full picture.



Give Store Visit Procedures a Champion

That doesn't mean the champion will have unilateral say in what visit procedures are like, but it does mean it will be far easier to make changes across the entire store network when there's a single point of contact. Your store visit champion could be a Retail Operations Manager, Head of Retail or another similar title.



Ask Questions

Information gathered during a store visit should help the retailer identify issues that are cropping up on a regional or national scale, so it's important to ask how visit information can be collated. Giving each store a score after a visit is a great way to make spotting problems on a wider scale easier.

Store Visit Problem #2: Store Visit Procedures Are Paper-Based.

Most retailers we speak with rely on checklists and forms that area managers fill out as they walk around the store with a clipboard. This aspect of the store visit hasn't changed in decades.

The 90s gave us so many things to feel nostalgic about, but paperwork shouldn't be one of them.



Why it's a problem:



Paper-Based Visit Procedures Are Time-Consuming

Forms and checklists are a hassle to print off before the visit, not to mention bad for the environment.

They're also time-consuming to manually scan back to HQ after the visit is over. All this time spent organizing and filling out paperwork would be time better spent coaching and motivating store teams.



Paper-Based Visit Procedures Aren't Accurate

Mixing up pages, illegible handwriting and mistakes when compiling reports in the car are all ways that human error goes hand in hand with paper forms and checklists.

The feedback from every store visit should help the retailer understand how to support its stores. This is a lost cause without a reliable level of accuracy.



Paper-Based Visit Procedures Limit Productivity and Prevent Effective Preparation

If area managers can quickly check which strengths and weaknesses were identified during the last visit, they can get the visit done faster by tailoring their approach. They can also plan out their day and prioritize the stores that need the most help.

If the area manager has to sift through a big stack of reports to find the right one, they'll either lose time finding it or give up and go into the visit blind.



Paper-Based Visit Procedures Don't Capture the Full Picture

A picture is worth a thousand words. This couldn't be more true when it comes to store visits.

Forms and checklists can't capture the qualitative experience a store offers, and that's what actually matters to shoppers.

How to fix it:



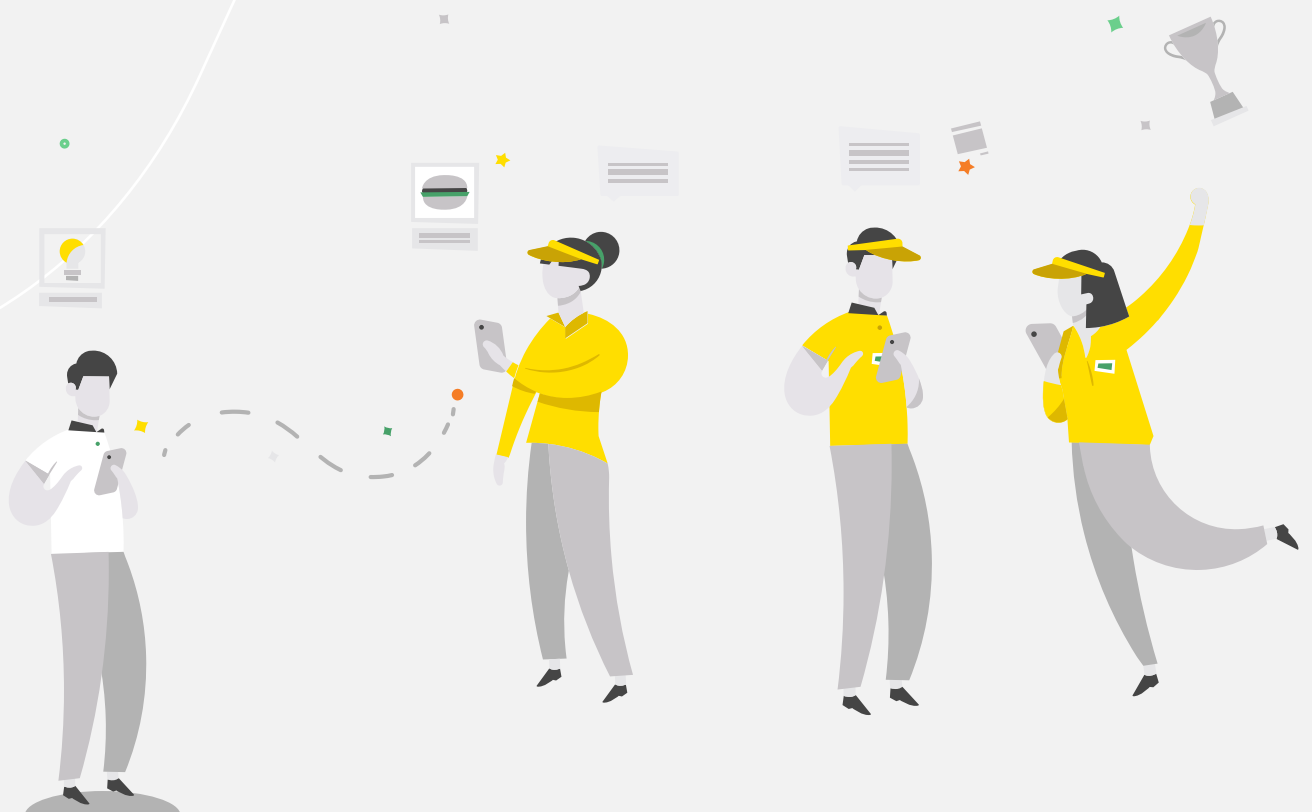
Digitize Store Visit Procedures

Get rid of the clipboards, checklists and forms. Give area managers a digital tool to complete store visits. Digitizing store visit procedures saves time, improves accuracy and makes area managers better at their job. Ideally the tool should be a mobile one, so area managers can use their phones or tablet as they walk around the store.



Make Full Use Of Pictures

It only takes a second to snap a picture of a front window. Imagine how many yes/no questions this saves an area manager having to answer. Remember, procedures have to make everyone's day easier if they're going to be fully adopted.



Store Visit Problem #3: Store Visit Procedures Don't Mimic The Customer Journey.

How the area manager completes the store visit determines what they find. Remember, purpose #1 of the store visit is to view the store as objectively as the shopper sees it.

This is a challenge for area managers without a customer-centric framework for guidance.



Why it's a problem:



It's Difficult to See the Store Objectively

Shoppers are far more objective than area managers. They aren't on a mission to find errors in execution unless they've already had a negative shopping experience.

Area managers see stores so often that they automatically zone in on errors that might not be noticeable to shoppers, or overlook something that could be losing the store sales because they're so used to seeing that something as the store's default state.



Area Managers Can't Tailor Their Approach Depending on the Store

Different stores have different customer bases, who shop in different ways. One store's customer base might value getting in and out as fast as possible, while another might be open to stopping for a chat and being upsold.

A customer-centric framework takes different locations and customer bases into account and guides the area manager accordingly.

How to fix it:



Observe

Take time to step back and observe where the customer journey starts, how it progresses and where it ends. Understand that this journey might be different between stores.



Implement a Framework That Mimics the Customer Journey from Start to Finish

The people who understand the customer journey best are your store teams and even area managers themselves.



Ask Questions

Keep in mind that the customer journey starts before arriving at the store. Divide the visit procedures into different parts, focusing on different aspects of the store as the customer sees it. Ensure that the new procedures give area managers the flexibility to hone in on the areas that differ between stores.

How to fix it:



Store Visit Problem #4: Store Visit Procedures Aren't Focused On Coaching Store Teams.

Area managers spend most of a store visit on low-value admin tasks. That leaves little time left for interacting with store teams in the form of training, coaching, sharing best practices from other stores and their own experience in retail, and plain old pep talks.

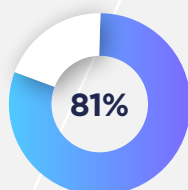


Why it's a problem:

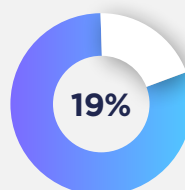


Customer Experience

Sales associates are a huge part of the in-store shopping experience. When area managers don't have time to spend with them, it damages the customer experience.



of shoppers surveyed last year ranked knowledgeable and available sales associates as important for their shopping experience.
(1)



found recommendations and advice from sales associates to be satisfactory.
(2)



Deskless Workforce

High turnover, part-time hours, a younger workforce and the stress of a retail job make continuous learning a must, but area managers don't have time to provide it.

Store managers have hundreds of other competing priorities, so it's understandable that they don't always have the time to focus on training their team.

The problem is, unmotivated and unknowledgeable employees put out a negative vibe that shoppers pick up on. It damages the customer experience and can even lose sales. That's where the area manager can make a difference - if they have time.



Unmotivated Store Teams

A store visit fills most store teams with dread. Can we blame them? A stressed-out store manager tells them all to be on their very best behavior for the entire day. The area manager lurks in the aisles scribbling notes and watching how they interact with customers - anyone would feel nervous in that situation. Feeling like you're being big brothered doesn't improve performance.

A positive relationship with the area manager is motivating for store teams. It boosts engagement in an industry where engaged employees aren't the norm.

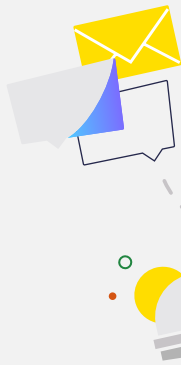
Why it's a problem:



Unmotivated Management

A visit without coaching is demotivating for area managers too. More often than not an area manager has been promoted up from a store manager position.

They've accumulated years of expertise, tips and tricks - all of which is wasted on filling out forms and compiling reports. Take a look at job postings for area managers, like these ones we found on Indeed. What do they have in common?



“

Engaging and persuasive, you'll inspire your team to perform and achieve the objectives you set them.”

“

Being a great coach and developer of businesses and people.”

“

We're looking for leaders who will engage, inspire and coach their store teams to deliver.”

So if coaching, inspiring and persuading is what area managers sign up for, it's not what they're doing day-to-day.

That's demotivating.

How to fix it:



Automate Time-Consuming Visit Procedures

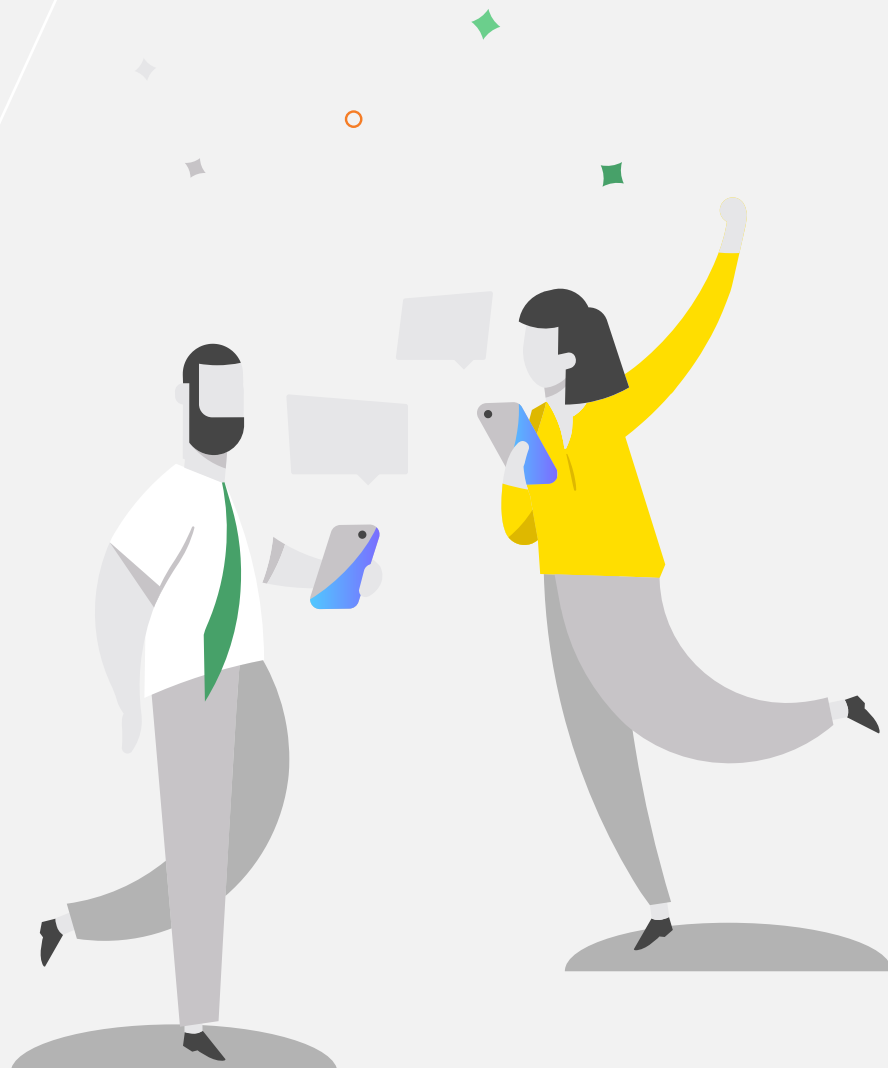
Give area managers more time for what really matters by using a digital tool that automates low-value admin tasks. Identify low-value tasks by looking at which procedures:

- Don't directly add value for shoppers or employees
- Take up a disproportionate amount of time



Make Coaching and Training a Requirement for Every Store Visit

When giving feedback is a mandatory part of the store visit, area managers are far more likely to make time for it.



Store Visit Problem #5: Store Visit Feedback And Follow-up Procedures Waste Time And Prevent Improvement.

No matter how many boxes an area manager ticks and how many reports they compile in their car afterwards, store visits are often a complete waste of time for everyone involved because no meaningful improvements are made.

That's because there's no structure for identifying errors and tracking their resolution.



Why it's a problem:



Unstructured Feedback Is Demotivating for Store Teams

Too much negative feedback from area managers can leave store teams feeling overwhelmed and discouraged.

But what's even more demotivating than bad feedback? No feedback at all.

If you had zero input from your boss about how you can improve and recognition for what you've done well, how would you feel? Complacent. Bored. Undervalued.

Complacent employees don't make a store environment welcoming.



Unstructured Feedback Is a Time-Waster

Unstructured feedback is unclear for store teams, and the resulting back-and-forth to clarify is a huge time-waster.

When store managers need clarification on feedback, their only options are a back-and-forth by phone, email or WhatsApp. All this wastes time that could be spent fixing the issues. When issues aren't fixed, store performance and sales suffer.

How to fix it:



Make Sharing the Negative and Positive Requirement After Every Visit

Every store deserves recognition for what they do well.

Focusing feedback on improvement and recognition prevents store teams from becoming unengaged and unmotivated.



Give an Action Plan

Action plans are focused on making progress.

They help the store manager understand how the issues can be fixed.

Every action plan should include which issues need to be fixed, how they should be fixed and when they need to be fixed by. This creates clear expectations for the store manager, resolves issues faster, and improves the in-store experience.



Get Rid of Follow-Ups and Be Transparent and Collaborative

Following up is passive and not focused on action. Area managers shouldn't have to hunt down every store manager to find out what has and hasn't been done since the store visit.

Avoid this by making it easy for store teams to report on their own progress, making full use of pictures.



Digitize Action Plans So They're Easily Accessible to Area Managers On the Run

Ironically, digital action plans that the area manager can pull up on their tablet or mobile provide a better paper trail of what's happened than paper itself.

Area managers can track store progress, manage their time more effectively and focus on the stores that need their help the most. Transparency into store progress is a goldmine of data for retailers.

6 Steps to Design a Store Visit Procedure Your Area Managers Will Actually Use



A woman with dark hair, wearing a light blue button-down shirt and a dark skirt, is looking at a tablet computer. She is standing in what appears to be a warehouse or industrial setting, with shelves and equipment visible in the background. The lighting is soft and focused on her. There are decorative white lines on the left side of the image.

4. TOP TAKEAWAYS

Top Takeaways

Often, the key to achieving our goals is perfecting the processes we're already using every day. The store visit - overlooked, underestimated and misunderstood - has been here the whole time. Retailers can use it to transform the physical store and push their customer experience to new heights.

But only if they give store visits the attention they deserve.

To do that, retailers must:

- Make store evaluation criteria uniform
- Digitize procedures to get rid of low-value admin tasks
- Allocate more time to Coaching
- Create a visit framework that mimics the customer journey
- Change the way feedback is given and improvements are made and measured



It's time to bring store visit procedures out of the 90s, because relying on what worked in the past is a recipe for the retail apocalypse.

So by bringing store visit procedures into the 21st century, retailers can help their stores thrive - instead of hindering them.

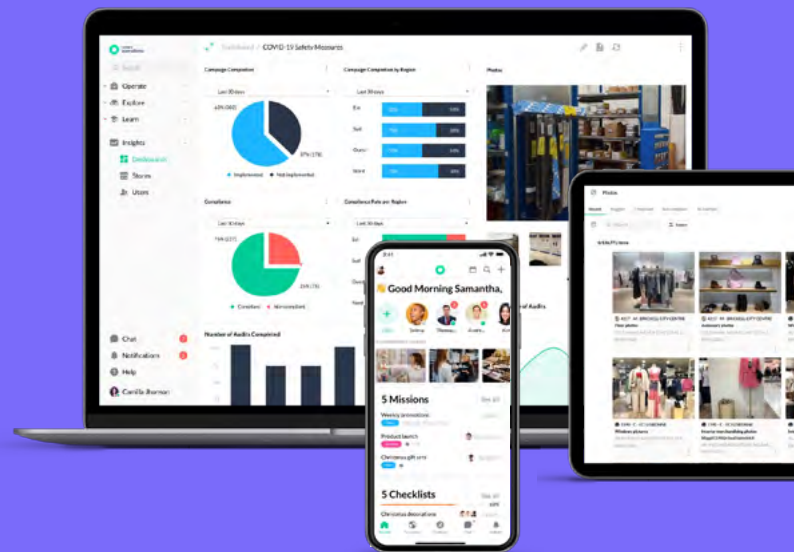
ABOUT YOOBIC

YOOBIC's digital workplace helps retailers like Lacoste, Boots, The Kooples, Peloton and Redner's Markets drive store performance at scale by giving retail teams the tools to learn in the flow of work, communicate and manage tasks.

With YOOBIC, retail teams spend 40% less time executing store tasks and boost in-store conversions by 22%, with 100% adoption rates.

See for yourself how YOOBIC can help you rethink retail operations and skyrocket store performance.

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