



Walmart Academy

Facilitator Guide



Pathways

Week 1
Core Training

Performance Conversations

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Course Goal

The goal of this course is to provide you with the skills to hold performance conversations such as coaching for improvement and performance evaluations.

By the end of this course, you should be able to:

- Define the purpose for coaching for success
- Define the purpose for coaching for improvement.
- Explain the differences between coaching for success and coaching for improvement.
- Encourage professional development.
- Identify your role in Pathways.
- Provide feedback and support open communication.
- Identify poor performers.
- Provide tailored support based on performance expectations.
- Maintain consistent and accurate documentation.



NOTES

What is Coaching for Success?

Coaching for Success is an informal process used to provide constructive feedback with the intention to teach, train, and develop associates. In essence, it's a method of training and developing associates in the moment versus having a formal conversation.

When should you use Coaching for Success?

Use Coaching for Success when you want to:

- Provide constructive feedback to correct improper execution of a process or direction.
- Provide feedback on a decision
- Give guidance to achieve the next level of productivity in the associate's performance.

Coaching for Success provides associates with feedback that helps them understand what to do differently and what actions to keep repeating.

Teachable Point of View 1

Refer to Page 2 in your Participant Guide.

Share an example of when you were given constructive feedback on the job. Describe how it made you feel and the result it had on your work performance.

 What are some examples of coaching for success that you've experienced?

Invite participants to share examples and allow five minutes for a few responses.



Specific Issues

There are many situations where Coaching for Success can be a powerful tool for helping your associates improve on the job and enhance their careers within Walmart.

Implementing effective Coaching for Success will:

- Enable associates to deliver superior customer service.
- Drive engagement and ownership.
- Help associates strive for excellence with a more “total store” thought process.



 **Specific Issues Activity**

Length of Activity: 15 minutes

Refer to Page 4 in your Participant Guide.

 What are situations where Coaching for Success would be beneficial?

Have the participants get into groups of 3-4 and come up with a few specific circumstances where they think Coaching for Success would be beneficial. Give them 2-3 minutes to write down potential answers to the question and then ask for responses.

Some possible responses include:

- A sudden or unexpected change in performance
- A lack of time management skills
- A desire to move to the next level or another position, but needing guidance
- A lack of people skills



Main Components

Coaching for Success is a powerful tool when used correctly. Here are some tips that will help you get the most out of it.

Relationship

Develop the relationship needed for an open, honest, and receptive environment for feedback.

- Develop it well in advance of having to give feedback.
- Develop a history of giving recognition for good performance. It sets the tone for openness to constructive feedback.

Feedback

Provide consistent and timely feedback.

- Have discussions on the salesfloor where you can show the desired action. This will make the learning more impactful.

Be Specific

Provide specific examples of:

- How the associates' performance or decision is not meeting expectations.
- What "good" looks like, as a way of setting clear expectations.

Provide the "why" so they are able to make informed future decisions, instead of just the ability to repeat tasks.

Respect for the Individual

Give the associate your full attention during the conversation.

- Make eye contact.
- Minimize distractions.
- Ask questions.

Tools, Guidance, Timeframe, and Resources

- Provide what is needed to help the associate be successful.
- Choose the tools and resources that are the best fit for the situation.
- Get to know your associates in order to understand specifically what they need.

Follow-up

Make sure you schedule and then do the follow-up.

 What are some ways you can give the associate your full attention during the conversation?

- Take off your headset.
- Silence your cell phone.
- Don't answer emails during the conversation.

When you give your full attention, you let the associates feel that they are important to you.



Coaching for Improvement

Coaching for improvement is a tool used to provide instruction and assistance when:

- Job performance fails to meet expectations and standards.
- Conduct violates a company policy or creates a risk of interfering with the safe, orderly, and efficient operation of our business.

This approach provides you with an opportunity to identify, acknowledge, and change unacceptable job performance. It enables us to retain associates who demonstrate the interest, ability, and desire to be successful.

NOTES

 **Teachable Point of View 2**

Think of when you first started your job. Was there something you struggled with? Did someone reach out to you and offer help?

Take a few minutes to ask for volunteers to relate their experiences to the group.

From your own experiences, you know how important it is for someone to offer a helping hand. Being able to coach and mentor others is a fantastic way to pass on the knowledge you've gained from your own experiences.



NOTES

Breaking It Down

There are three steps to coaching for improvement.

First written coaching

The supervisor may use a first written level of coaching to notify the associate that their job performance or conduct does not meet our expectations. This helps to communicate what they need to do to correct the behavior.

Second written coaching

The supervisor may use a second written level of coaching to notify the associate if:

- Their job performance or conduct still does not meet our expectations.
- They have failed to correct an issue despite a prior first written level of coaching.

Third written coaching

If the associate receives a third written level of coaching, the supervisor will meet with them to:

- Discuss the unacceptable job performance or conduct and explain the improvements that they must make.

NOTES

Attendance Policy

There have been some recent changes to our attendance policy. As an hourly supervisor it's important that you keep up with any changes to our policies. You are the front line and are there for associate support when questions arise.

Let's review the attendance policy changes.

The process for keeping track of the attendance has also changed. You may or may not be involved in the process, but knowing what has changed better prepare you to answer questions.

Policy

Past	New
Rolling six months	Rolling six months
3 Consecutive = 1 Occurrence.	1 Occurrence = 1 Occurrence.
Tardy & Leave Early = 1/3 Occurrence.	Tardy & Leave Early = 1/2 Occurrence.
Tardy at 15 min, Leave Early at 10 min.	Tardy & Leave Early at 10 min.
No Call/No Show = Coaching	No Call/No Show = 4 Occurrences.
New Hire same standard	4 Occurrences = Termination for new hires.
7 Occurrences = Termination	9 Occurrences = Termination

Process

Past	New
Coaching at 3, 4, 5 & 6.	No coaching(s).
Manually tracked on paper.	Systematic tracking & reporting.
3-4 people required for documentation.	Assistant manager documents with one click.
Scan sent weekly to market.	Reporting available.
Exceptions can go unresolved.	No management action within 14 days auto-approves exceptions.
Record does not move with associates who transfer.	Record tied to associates moving to another store.

Coaching for Success versus Coaching for Improvement

Coaching for Improvement is a formal documentation tool used to provide instruction and assistance, when the associate's job performance or conduct fails to meet the expectations and company policies. We sometimes confuse Coaching for Success with Coaching for Improvement.

When to use Coaching for Success:

- When associates need to clarify and reset expectations.
- In the moment, on the salesfloor.
- To let associates know how they are performing and offer resources to correct performance.

When to use Coaching for Improvement:

- When a policy has been violated or when there is a serious concern with behavior.
- If the behavior or performance will lead to the formal coaching, then you need documentation to support your actions.
- In private, with documentation to support the decision to have a formal coaching.
- During evaluations.

 **Role Play Activity**

Length of Activity: 15 minutes

Refer to Page 11 in your Participant Guide.

Let's practice having a Coaching for Success conversation. Refer to the Role Play Activity in your Participant Guide.

Find a partner and select who will play the hourly supervisor and who will play the associate for the first round. You will choose one of the scenarios and begin the role play. When finished, switch roles and go over the other scenario.

We'll discuss the results as a group.

Look at the two role play scenarios in your Participant Guide:

Scenario 1

Sarah has been with the company for about a year. She learns quickly and seems to have a good understanding of her job. She is also great with the customers and tends to anticipate their needs. They think she's great and have let you know several times. Her work is very thorough and rarely contains any mistakes, but she has difficulty getting all of her daily tasks done on time. How would you use Coaching for Success to help her?

- Give Sarah recognition for her outstanding performance and care of the customers.
- Set up a time to share with Sarah time management tools.

Scenario 2

Joe is a long-term hourly associate who recently transferred to your store. He is very knowledgeable and does his tasks well, but customers are not high on his priority list. They have complained to you and your store manager about having to wait in the department for service, aisles being blocked by freight, and sometimes a rudeness when he does offer help. How would you use Coaching for Success in this situation?

- Recognize that Joe is very knowledgeable.
- Address customer concerns.
- Discuss safety, cleanliness of the department, and ways to improve.

Facilitate the role play activity. Be sure to walk around and observe the role plays. Allow five minutes for each pair to role play, each taking a turn to play the supervisor role.

Debrief the role play with the following questions:

-  What part of the Coaching for Success conversations went well?
-  What was challenging about the Coaching for Success conversation?
-  What will you do differently the next time you perform a Coaching for Success conversation?

Allow as many pairs as possible to respond. Be aware of the time and adjust the discussion time as necessary.

What is Pathways?

Pathways is a training program that will provide associates the opportunity to learn and grow in their current role while better preparing them for success in their future role.

Pathways provides visibility to clear career paths. Allowing associates to learn, grow and build a career. The trainings consist of relevant on-the-job and computer based training.

Throughout the training, hourly supervisors and their associates will have required touch bases to provide leadership guidance and feedback.

The training gives associates the right skills and behaviors for success in their roles.

What does Pathways offer?

Upon successful completion of Pathways foundations (pay grade level A), associates may be eligible for the following benefits:

- Hourly pay rate increase up to \$10/hr.
 - Associates currently at \$10/hr will not receive a pay rate increase.
- Eligible for MyShare.
- Eligible for general annual pay increases.
- Eligible to promotional opportunities.

NOTES

My Role & Responsibilities

As an hourly supervisor you play a critical role in the Pathways program. You ensure associates are demonstrating their learnings on-the-job and provide constructive feedback throughout the program.

Throughout the Pathways program you, the hourly supervisor will have responsibilities along the way. Let's reviewing each step that you are responsible for:

- Preparation - Understanding and executing Pathways.
- Welcome to Walmart - Introducing yourself to you new associate on day 1.
- Work Skills 1 - Engage and follow up with your new associate as they learn their new job.
- Work Skills 2 - Ensure your new associate is demonstrating expected behaviors in their

daily routine.

- Graduation - Observe and rate your new associates performance..

Make sure your associate has enough time to train.

NOTES

My Role & Responsibilities

Preparation	<ul style="list-style-type: none"> + Complete Executing Pathways in GLMS. Required for PC/TCs, hourly supervisors, and ASMs. + Review Pathways Toolkit on the WIRE.
Welcome to Walmart	<ul style="list-style-type: none"> + Schedule introductions for supervisors and management. + Conduct Welcome to Walmart. + Assign new associates to an hourly supervisor (Grade Level D and CSM) based on the supervisor's availability.*
Work Skills 1	<ul style="list-style-type: none"> + Explain Works Skills 1 and provide guidance throughout the process. + Monitor, print and communicate Portal reports for store management and hourly supervisors to review. <ul style="list-style-type: none"> - Reference the Reporting Instructions on the Pathways Toolkit "Navigating the Portal" tab. + Inform associates, hourly supervisors, and management of late Pathways actions. + Acknowledge completion of Aisle in place of hourly supervisor when needed.
Work Skills 2	<ul style="list-style-type: none"> + Explain Works Skills 2 and provide guidance throughout the process. + Monitor, print and communicate Portal reports for store management and hourly supervisors to review. <ul style="list-style-type: none"> - Reference the Reporting Instructions on the Pathways Toolkit "Navigating the Portal" tab. + Inform associates, hourly supervisors and management of late Pathways actions.
Graduation	<ul style="list-style-type: none"> + Explain Graduation and provide guidance throughout the process. + Monitor, print and communicate Portal reports for store management and hourly supervisor to review. Notify management of late actions and associates who have graduated. <ul style="list-style-type: none"> - Reference the Reporting instructions on the Pathways Toolkit "Navigating the Portal" tab. + Reassign the associate to an assistant manager if the hourly supervisor is not available to rate the associate for the Performance Sign Off. + Ensure the commendation form is signed and submitted for associates who successfully graduate Pathways Foundations and are eligible for a base pay increase.

 **Pathways Activity**

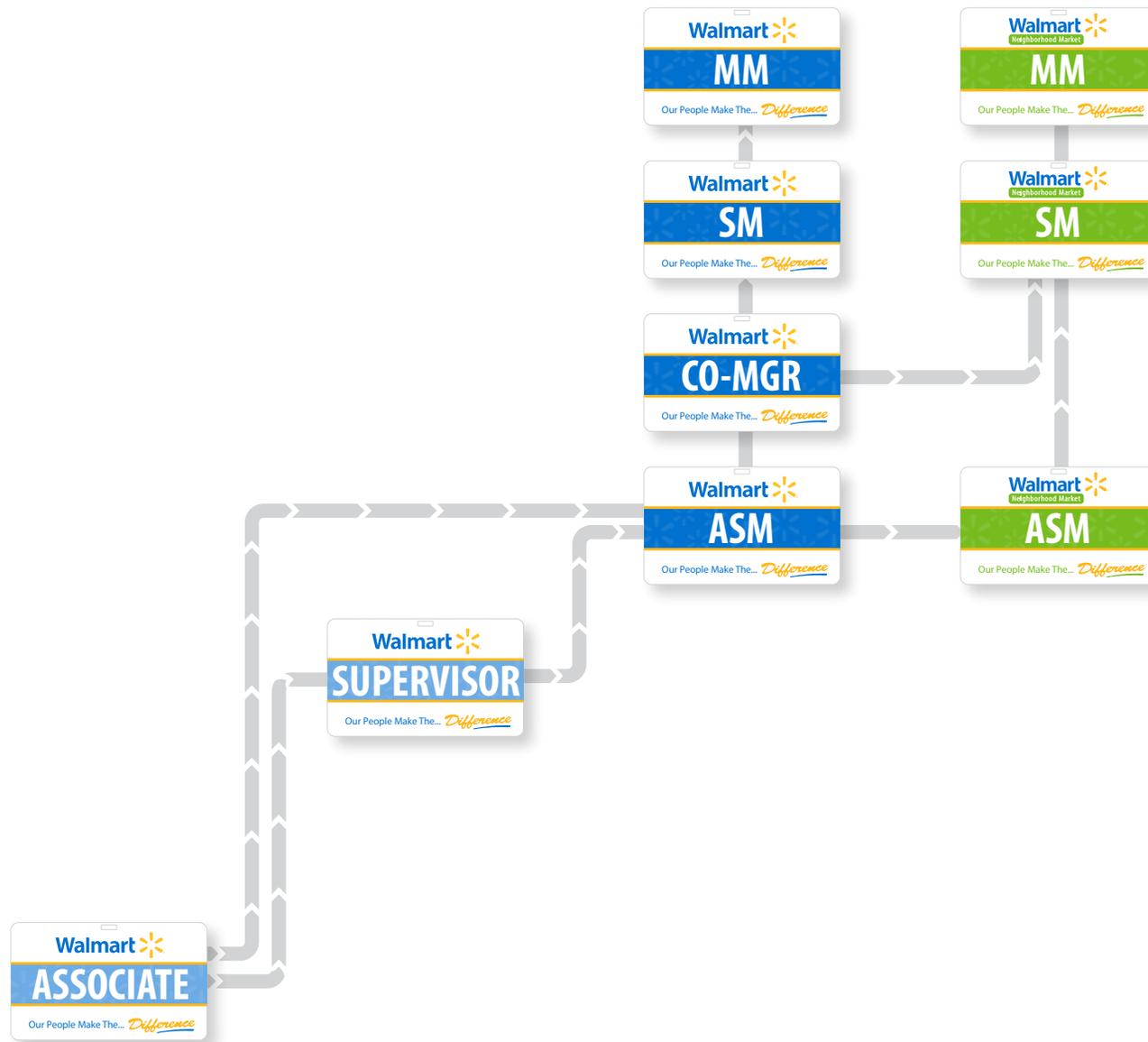
Length of Activity: 15-20 minutes

Refer to Page 15 in your Participant Guide.

Look at the diagram in your Participant Guide (Next page). Pick a career path you would like to achieve. Then, answer the following questions.

-  What career would you like to have?
-  What skills will you need to continue to advance your career?
-  How could you help others to achieve their career goals?

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Your Role in Evaluations

One way we help associates to develop their skills is through performance evaluations. Evaluations only happen once per year, so give each associate your full attention during this time.

Provide positive feedback that encourages associates to repeat and improve upon their performances. Make an effort to show associates you are committed to their success and development. When sharing constructive feedback, encourage more conversation about how this can improve and correct behaviors.

The performance conversations are one of our best tools for developing our associates. These conversations help to grow our associates, lower turnover, and create future leaders.



How will you commit to and develop your associates?

Benefits of Participating

Everyone benefits from participating in the evaluation process. Associates have more interaction with hourly supervisors and management by:

- Receiving clear expectations.
- Specific feedback to be successful in their careers
- Hourly supervisors develop skills for their next roles.
- Associates receive consistent feedback in the evaluation process.

Evaluation Overview

Evaluation forms have been simplified by:

- Focusing on key competencies and career goal discussions.
- Entering information and point values from the WIRE more easily.
- Evaluating associate performance using the Tier Rating Scale.
- Rating each competency as:
 - Above Standard
 - Solid Performer
 - Needs Improvement
- Automatically calculates the overall rating based on how you rate each competency.

It's often easy to only recall the most recent behaviors and performance. Write down specific behaviors and keep track of their Pathways touch bases throughout the year to help you monitor associate performance.

Refer to the guidelines for Tier Rating to determine ratings for each category. For the career conversation, remind associates that they are in charge of their career, and development, but inquire about their future interests.

Evaluation Tips

Tips to help prepare for an evaluation:

- Keep observation-based notes during the evaluation period.
- Anticipate needing 15 minutes to write each evaluation; and 15 minutes for each associate evaluation session.
- Before the evaluation session, discuss with your ASM what your speaking role will be.
- Find a private, quiet area off the salesfloor for the conversation to reduce interruptions.
- Notify the associate at least one day in advance before their evaluation.

Here are some career conversation questions to ask your associates:

-  How do you see yourself progressing in your role at Walmart over the next year? The next three years?
-  What are your professional and personal development goals?

Avoiding Errors When Evaluating

There are five common errors that are often made when evaluating associates. Most of the time, it's done without even realizing it. Understanding these errors will allow for a more accurate and fair evaluation for our associates.



NOT LOOKING AT ALL BEHAVIORS

The first common error is to decide an associate's evaluation just based on one big strength or weakness. Maybe you know an associate is good at one thing and so you evaluate them as good overall. Or maybe they are not good at one thing so you give them a poor rating overall. Both are wrong.

EXAMPLE

Anna is good at customer service so you evaluate Anna as good overall and forget that she is not good at teamwork. It is important to evaluate each behavior separately.



TOO EASY OR TOO HARD

The second common error is evaluating either too easy or too hard. Both are wrong. Evaluate whether an associate's behaviors do or do not meet expectations. Having one expectation for everybody means all associates are treated fairly.

EXAMPLE

Mabel is a new supervisor and wants others to take her seriously. She evaluates everyone's behavior too hard. Ian has been a supervisor for years and has become good friends with his associates and rates too easily. Both supervisors need to evaluate associates' performance using the standards in the Performance Sign Off Behavior List.

Avoiding Errors When Evaluating (Cont.)

**COMPARING ASSOCIATES TO EACH OTHER**

The third common error is when you compare associates to each other instead of to the expectation.

EXAMPLE

Rachel is your best associate and does a good job at most of the behaviors.

When you are evaluating Shannon, you compare her to Pedro and not to the behaviors on the list. This is incorrect. Shannon could still be performing the behaviors correctly, just not as well as Rachel.

**THE LAST THING YOU SAW**

The fourth common error is evaluating someone based on the last thing you saw them do.

EXAMPLE

Jamie is known for great customer service. Right before you finish her Performance Sign Off, you see her walk by a customer who needs help. When you evaluate her, you give her a "Does Not Meet Expectations" in Customer Service because that was the last thing you saw her do.

**OUTSIDE THEIR CONTROL**

The fifth common error is to lower an evaluation based on the result of an event outside of the associate's control.

EXAMPLE

Chris is giving great customer service at the register. No matter how hard he tries, the customer is upset because their favorite baby food is out of stock. This is not Chris' fault because he did all he could do to give good customer service.

Whether it's during a Pathways Performance Sign-off or their annual evaluation, be aware of these possible errors when rating your associates' performance.

Evaluation Writing and Role Play Activity

Length of Activity: 15 minutes

Items Needed: Evaluation Forms

Follow the WIRE path to print the sample evaluation forms.

[WIRE > Initiatives > Associate Opportunity Toolkit](#)

For this activity you will be filling out the evaluation form and taking turns role playing. Get with a partner and decide who will play the first role of the supervisor and who will be the associate. Then, switch turns.

Writing an evaluation

Writing an evaluation is a skill we all have to practice at. When writing an evaluation it's important to focus on performance behaviors not opinions. Keep this in mind as we practice with this role play activity.

Remember, this is practice not a real evaluation.

The Situation:

You are providing feedback to an associate who has demonstrated excellent customer service, but struggles to complete tasks.

Allow participants to evaluate each other, then switch roles and allow the other participant to have a turn (3-4 minutes per turn). Walk around the room and listen to the conversations.

Once the evaluation are complete debrief the class with these follow up questions.

Having the Conversation

-  What was easy about the evaluation conversation?
-  What was challenging, and how did you overcome the challenge?
-  What will you do differently next time?
-  How will you prepare to write evaluations?

Summary

Being able to have effective performance conversations is a crucial part of being a leader, and being able to develop your team.

Have the participants write down their key takeaways from this module.

Let's review what we covered:

Coaching for Success

- The three steps of coaching for improvement give you and the associate a clear process for fixing and developing the associates performance.

Coaching for Improvement

- The three steps of coaching for improvement give you and the associate a clear process for fixing and developing the associates performance.
- Developing Others
 - By providing time to regularly discuss goals, and reviewing detailed performance evaluations, you encourage the professional development of your associates.

Pathways

- Ensure associates are demonstrating their learnings on-the-job and provide constructive feedback throughout the program.

Performance Evaluations

- Providing Feedback
 - When providing feedback, be specific, lead the discussion with a positive attitude, and support open and clear communication.
 - Determine the proper time for feedback and summarize the discussion at the conclusion.
- Identifying Poor Performers
 - You are responsible for knowing the difference between misconduct and poor performance.
- Providing Tailored Support
 - Once you've identified the poor performers on your team, communicate your expectations, identify specific facts about the situation, and develop an action plan to correct the situations.
 - Maintain consistent and accurate documentation, especially during formal counselling.

Term	Meaning
AES	Associate Engagement Survey: An important part of the Grass Roots Process.
APM	Asset Protection Manager
ASM	Assistant Store Manager
BAM	Be a Merchant
BOB	Bottom of Basket
BTS	Back to School
CAP	Customer Availability Process: CAP is designed to simplify how we stock our shelves and help you improve on-hand accuracy.
CBWA	Coach By Walking Around: CBWA is when managers walk through a department just to visit with associates and get a feel for how things are going.
CFF	Clean, Fast, and Friendly
COE	Correction of Errors
CREF	Cross-Reference
CSM	Customer Service Manager also known as CSS or Customer Service Supervisor.
CSS	Customer Service Supercisor, also known as CSM or Customer Service Manager.
CVP	Customer Value Program
DC	Distribution Center: Warehouse that receives merchandising from vendors and distributes it out to stores. This warehouse will hold some stock on shelves.

Term	Meaning
DM	Department Manager
DSD	Direct Store Delivery
EDLC	Every Day Low Costs. EDLP and EDLC promise our customers their everyday needs, brands they trust, and quality products at low prices every day. This helps us to deliver our goal to save our customers money so they can live better.
EDLP	Every Day Low Prices. EDLP and EDLC promise our customers their everyday needs, brands they trust, and quality products at low prices every day. This helps us to deliver our goal to save our customers money so they can live better.
FIFO	First In, First Out
GLMS	Global Learning Management System
GM	General Merchandise
GRS	Global Replenishment System: Computer system that notifies the distribution centers to send stock.
HVDC	High Velocity Distribution Center: Warehouse that receives merchandising from vendors and distributes it out to stores. This warehouse has more of an automated system and less on hands stock.
ID	Identification
II	Inventory Increase: used to increase the inventory for mislabeled items that were received.
IR	Inventory Reduction: used for any other inventory reductions that do not apply to one of the previous categories.

Term	Meaning
KIS	Keep it Stocked
LISA	Look Inside Always
LW	Last Week
LY	Last Year
MPP	Merchandise Protection Plan: guideline for preventing shrink.
MTR	Merchandise Transfer Reports
MU/MD	Markup/Markdown
OSCA	On-Shelf Customer Availability
P&L	Profit and Loss
PI	Perpetual Inventory: The Inventory Flow Process is made up of three components: Replenishment Process, Perpetual Inventory (PI), and Customer Availability Process (CAP/Topstock). This cycle is how we maintain availability. We call it the PI cycle because it's constant.
POS	Point of Sale: The point of sale (POS) replenishment system determines what to order based on sales information and other factors
RDC	Regional Distribution Center.
SK	Shrinkage
SMART	Store Merchandising Through Applied Retail Technology

Term	Meaning
SSB	Super Sandwich Bale: The Super Sandwich Bale program is designed to increase the amount of recyclable material produced at your store, while improving your store's profitability.
ST	Shortage: merchandise not received on a Walmart truck or a concealed shortage on a common carrier.
SOTC	Store of the Community: Its purpose is to make sure each store has the right merchandise to serve its local population.
SWAS	Store Within A Store: is about planning what you buy based on sales, profit, presentation, and the community where you live.
TIP	Towel in Pocket
TY	This Year
UPC	Universal Product Code
USERID	User Identification
VM	Vending Machine: Used when floor stock is pulled to fill vending machines.
VPI	Volume Producing Item
WoW	Week over Week
WTD	Week to date.
YBM	Year Beginning Meeting
YoY	Year over Year