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MANAGERIAL PERCEPTIONS OF
TRAINING PROVIDED FOR
ENTRY-LEVEL MANAGEMENT TRAINEES

A Thesis
Presented to the
Faculty of
California State University,
San Bernardino

In Partial Fulfillment
of the Requirements for the Degree
Master of Arts
in
Education: Vocational

by
Dale Leroy Sullivan

June 1994

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Approved by:


Joseph L. English, Ed.D., Chair
First Reader


Date


Ronald K. Pendleton, Ph.D.
Second Reader

ABSTRACT

This study was designed to determine the extent that retail organizations in Southern California had provided managerial training for entry-level managers, the perceptions of management regarding that training, and the support by executive management.

Three levels of management, per company, were interviewed (executive of training, store manager, and entry-level manager) from five retail firms. After completion of the interviews, the data was recorded in the form of transcripts and notes.

Research tended to indicate upper management supported the necessity for training managerial skills and perceived these to be included in their training programs; however, significantly different perceptions existed among lower managerial levels as to the amount of emphasis actually placed on these skills. It was concluded that the management skills being taught were more technically oriented and, in most cases, managerial skills were learned on the job.

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TABLE OF CONTENTS

ABSTRACT	iii
ACKNOWLEDGMENTS	iv
LIST OF TABLES	viii
<u>CHAPTER</u>	
I. INTRODUCTION	1
Background	1
Nature of Problem	2
Significance of Problem	3
Statement of Problem	4
Purpose of Study	4
Overview of Research Questions	5
Limitations	6
Definitions of Terms	7
II. REVIEW OF LITERATURE	9
Introduction	9
History of Training	10
Pre-World War II	10
Post-World War II	11
Employment Projections	12
Industry's Responsibility for Training	13
The Need for Supervisor Training	15
Barriers to Implementing Training Programs	17

An Overview of 1993 Employee Training in Retail Industry .	18
Summary	22
III. RESEARCH DESIGN AND PROCEDURES	24
Introduction	24
Theoretical Constructs	24
Research Design	25
Population and Data Collection	26
Methods - Treatment of Data	27
Pilot Study	28
Data Treatment Procedures	28
IV. FINDINGS AND DISCUSSION	30
Findings	30
Research Question #1	31
Research Question #2	31
Research Question #3	33
Discussion	36
V. CONCLUSIONS AND RECOMMENDATIONS	37
Conclusions	37
Recommendations	38
Recommendations for Further Study	39
REFERENCES	40

APPENDICES	42
A. Letter Read to Employers	44
B. Data Gathering Questionnaire	46
C. Codes List	50

LIST OF TABLES

Table 1									
	Averages Per Organization by Industry								
	(In dollars)	.	.	.	.	.	.	.	20
Table 2									
	Reported Changes in 1993 Budgets								
	(Compared to 1992)	.	.	.	.	.	.	.	21
Table 3									
	Budget Predictions for 1994	.	.	.	.	.	.	.	21
Table 4									
	Organizational Information	.	.	.	.	.	.	.	30
Table 5									
	Educational Allowance	.	.	.	.	.	.	.	35
Table 6									
	Career Counseling Program	.	.	.	.	.	.	.	35

CHAPTER I

INTRODUCTION

Any function of a business has to be based on sound principles of management. One of which must be the training of employees, whether labor or management. An important management consideration should be the fact that the same principles that apply to the administration of such business functions as production, marketing, and finance also apply to training and development. "As we approach the 21st Century, we face new challenges. . . .Whole new kinds of interpersonal learning and problem-solving skills are needed to be successful in the new institutional and technical environment." (Carnevale, 1990, p. 26)

As employers organize to increase their own flexibility, they will demand a more flexible work force. As a result, the nation's job-training system will be increasingly critical to the employer. (Carnevale, 1990)

Background

It is obvious from the above there are few businesses that can afford the luxury of chance availability of the necessary managerial skills. In addition to the technical skills that may be required by supervisors, greater human resource and administrative skills will be needed. Management development will have to become a way of life in industry and it can no longer be assumed that leaders are born or will become managerial efficient while on the job.

The training of employees has broad implications for any company that undertakes it on a wide scale. First of all, management has to recognize that training is a continuous process. It is not something given to a new, transferred, or promoted employee in some capsule form and then forgotten. Training implies a formal program utilizing expert knowledge,

competent teachers, suitable educational facilities, and the necessary controls and follow-up to determine the total effect of the company program. (Dephillips, 1960, p. 39)

Nature of Problem

American management, even though fully aware of the transitional work force in this country, quite often shows little concern about employee turnover. They do little to address the major problem, which is to understand the reasoning and then implement an effective preventive program. The movement of the American work force may never be completely stopped, but until management begins showing concern for the needs of employees by creating challenging work environments and developing opportunities through training for advancement will they ever create a more stable and productive work force.

More than 40 million Americans are in a career transition status. The majority of in-transition adults are employed full-time at semi-skilled or unskilled jobs. Most adults in transition are now employed and wish either to change fields or to change the level or status in their present fields, financial need being the prime motivating force. Though the desires to seek more interesting work and to advance professionally are also considerations. (Arbeiter, 1978, p. 1)

Dephillips (1960) suggested what created some of these problems in business was that, "few organizations would admit that they can service without training....yet, some act as though they could" (p. 5). Peters (1989) reinforced this remark when he stated:

We should train people in general problem-solving techniques to contribute to quality improvement. Trained people are vital for an organization,

because they can add something to the product. Most of the time, initial training is not sufficient and extra training should be provided by the organization (p. 10).

Significance of Problem

The objectives of company training, whether technical, managerial, or executive development, should remain the same, - namely increased personal efficiency, professional growth, and a more effective company operation. The areas that this study focused on were the opportunities and needs for training employees in supervisory skills, both technical and managerial, that would help them make a smooth transition from the labor force into management. This area of training appears to be in need of additional development.

In a recent spot-survey of personnel executives, it was found that "more than 25 percent indicated that supervisory training programs were ineffective" (AMA, 1961, p. XI). The survey explained that as long as there are entry-level supervisors, as long as their job is to get work done through people, and so long as the pressures and demands on this group continue to grow, industry will continue to suffer morale and production problems that can be attributed, at least in part, to inadequate or unskilled supervision (p. XI).

Dunlops (1992) described the problem: "It is the failure to develop appropriate institutions to educate, to train and retrain, to maintain health, to manage and elicit productive and cooperative services from its work force that is our country's most critical failure" (p. 50).

Statement of Problem

Traditional education rarely personalizes or individualizes training classes in the field of management which would relate to any one business. Business, on the other hand, can train on a more personal and individual basis, but most often, will not allow for adequate training facilities or budget specific allowances for program implementation, especially for transitional training programs that help labor move into management. The American Management Association (1961) made the following observation about the induction process for supervision:

The "sink or swim" method of learning the supervisor's job is no more in favor today than the nineteenth century tycoon's "school of hard knocks" was considered a substitute for a solid educational background, plus exposure to a good company development program. Bosses can no longer slap the newly selected foreman or supervisor on the shoulder by way of inspiring the necessary self-confidence, "Go to it, boy....we know you have what it takes!" and let it go at that. (p. 385)

Therefore, upper management must become more involved in the educational development of transitional employees, either through in-house instruction or the higher educational system.

Purpose of Study

Industry training programs, though effective for delivering short-term goals, need to address a much wider scope. Business must look to and emphasize training opportunities for career development and lifetime employment. The programs need to be structured around the expressed needs of the worker and not just the job needs of a particular operation or company. Besides placing emphasis on technical training there needs to be a focus on managerial skills.

This approach then becomes a major contributor to the lifetime career development and the international work flexibility of the employee.

The starting point in training programs should include what each worker needs and expects for a lifetime of work. It is the aspirations, desires, and needs of the participant that should shape a training program rather than the immediate needs of the job market. The objective should be to empower the participant and let him/her shape the work future through their own choices (Fossum, 1990, p. 136)

Therefore, the purpose for this study was to show the importance of full participation by business in the training and education of employees in their transitional development, and determine if any areas exist that need to be addressed to accomplish this goal. Most present company training programs appear to be specifically interested in only the internal labor market and in making the company more competitive by increasing the present required technical skills of its workers.

Overview of Research Questions

The idea of human resource development with emphasis not only placed on industry's immediate needs but on the additional development of the transferable needs of employees is a fairly new idea in the United States. In many areas, we see an either or situation where all the training comes from private/public institutions or separately through industry. Little emphasis is placed on joint ventures, other than for specific needs, where both work in unison to help employees develop transferable skills, particularly in the field of management.

It is this researcher's position that training in the development of future management personnel should first, include managerial as well as the technical

skills presently being taught; and second, receive maximum support from upper management in the training and utilization of these skills. Fossum (1990) supported this position when he argued:

Learning transfer has been a major problem in industrial training programs, particularly for supervisory training. Many supervisory training programs have been designed to equip trainees with new behavioral skills in negotiating, problem solving, conflict resolution, and the like. While these may be behaviorally modeled and learning may be reinforced in the training program, there may be infrequent support for the new behavior in the work place. Subordinates may be the focus of newly desired behaviors and may resist them, while superiors may neither understand nor support the program (p. 137).

Limitations

This study was limited, in most cases, because of the requirement that interviews be conducted while the management members were located in their work environment. This situation, because of periodic interruptions, created a problem of concentration for both the researcher and interviewee. Due to the difficulties and the interview time constraints imposed by the work environment, answers to some questions were limited and not as specific as the researcher would have preferred.

Prior to conducting this research, there were three foreshadowed problems discovered during the pilot study: a reluctance by upper management to be tape recorded, a negative attitude toward education, and a tendency by upper management to say one thing, but actually do another in regard to providing training. It was anticipated that vice presidents of large retail firms did not want to

be tape recorded because of the general tendency these days to avoid any possibility of having such information make its way into the public eye and the possibility of embarrassment, even with assurances to the contrary. Because retail firms have traditionally been more involved with technical training and selling a product or service, there appeared to be a negative attitude toward education in general. It was also observed that upper management thought they were providing managers with managerial skills when, in fact, they were not, as indicated by poor service, high employee turnover, and confusion of responsibilities.

Definitions of Terms

For this study, the following terms are defined:

1. Technical training refers to teaching skills required by managers to physically operate within their work environment; that is, to open and close the store, cash register operation, floor displays, inventory control, and security.
2. Managerial training refers to non-technical training of skills required by managers to effectively manage a work force and includes such managerial skills as leadership, conflict resolution, motivation, communication, and dealing with difficult people.
3. Retail industry (or retail firms/organizations) includes establishments organized to service the public by offering to sell consumer products at a retail or discount price. for this study's purpose, these firms had to have 1000 or more employees.
4. Entry-level managers are those individuals who have been selected as management trainees and recently begun their training. This study

also uses the term "new managers" or management trainees to identify entry-level managers.

5. Educational allowance is a monetary allowance given to employees to continue their education in either private or public institutions for the purpose of increasing their knowledge in managerial skills.
6. Career counseling program relates to ongoing company counseling given to trainees for improvement of managerial skills and career guidance.
7. On-the-job-training is training that is conducted while working.
8. Classroom instruction is sit-down instruction conducted separate from the work area.

CHAPTER II

REVIEW OF THE LITERATURE

Introduction

It is commonly acknowledged among most executives in the United States that the supervisor's position, even though the lowest position on the managerial ladder, plays one of the most critical roles in the success or failure of a company. It is the supervisor's responsibility and main purpose to "convert certain available resources into desirable, valuable end products and services. The effectiveness of their efforts - their performance - is judged by how well they manage the conversion process, and by the value of the end products or services produced" (Bittel, 1976, p. 11).

One area where skill development is in desperate need of new programs is in the training of transitional workers moving from the labor pool into managerial positions. "Very few employers look upon training as their responsibility. Self development has furnished enough skilled employees they say. Those workers who seem capable or seem to know the most about the job are promoted to management" (Dephillips, 1960, p. 27).

A recent survey tells that business executives in many nations are actually aware of a looming skills shortfall and that corporations must take up new responsibilities in areas such as job training in order to secure an adequate supply of qualified workers. In the last decade of the twentieth century they said human capital will become the prime source of wealth and power for corporations. Corporations will take much more direct responsibility for education and training (Hewlett, 1991, p. 131-133).

History of Training

Pre-World War II

The following history was intended to acquaint the reader with the development and reasons for present attitudes by industry toward training in general.

Many factors have contributed to the growth of the United States, one of the most important being training. In order to understand the evolution of business training, there first must be an understanding of the philosophy and background of the leaders in business at the beginning of the 20th Century. The typical business during this period was a relatively small, simple operation utilizing few methods which are familiar today. The operators were usually self-made men who had started their own business and personally nursed its early growth.

Men to run the machines were necessary, but incidental. They were easy to obtain and paid the lowest possible wages for the maximum hours possible. The machine did the skillful operations and the man became merely an extension of the machine. The businessmen's efforts were directed toward production and profits.

Government, during this early period, allowed business to develop unhampered by regulation. The population was largely uneducated. The businessman felt that what he did was his own business and that his success was in direct ratio to the amount of effort he put forth. The owner--manager was largely self-taught, and he saw no reason why his men should not follow his examples. If they did not meet his requirements, he replaced them.

Supervisory training was not thought necessary, for the supervisor's job was to set the pace. He was a straw boss who often was chosen because he was the best worker and could force the others to keep his pace (Dephillips, 1960).

Post-World War II

The emphasis on job-skills training really gathered impetus during World War II, as a result of the need to replace with unskilled and inexperienced labor, the thousands of workers called to serve in the military. Industry was still largely family-owned and progression in management was mainly a question of heredity. Both men and machines were viewed as more or less replaceable components of the line (Romiszowski, 1990).

With the war, labor markets declined in both quality and quantity, making it necessary to give more attention to the training of personnel.

As we entered into the 1970's, the days of full employment were over, and many basic skills requirements could be met more economically by means of recruitment and selections, than by training. By the mid-1970's, corporate training shifted from job skills to management and supervision training needs. The task of managing the work force became progressively more demanding, requiring better preparation and higher levels of personal and interpersonal skills on the part of management and supervision (Romiszowski, 1990, p. 23).

A more "humanist" model of organization was promoted. Business became more of a cooperative effort of workers and management. Management style was seen as an important factor in the success of the enterprise. There was a generalized belief that if a body of managerial skills and knowledge were mastered, the results would be a more effective managerial performance.

The 1970's did not pay off as handsomely as corporations had hoped. Part of the reason for these disappointing results was that top management tended to send lower levels of the hierarchy for external training and development, without making any real effort to change the climate of the organization to be receptive to this general change in management style (Romiszowski, 1990). It was believed by others because of this lack of corporate cooperation that the emphasis in management and supervisory training should be job related, just as much as operative skills training is job related (Rockham and Morgan, 1977).

The 1980's brought the concept that organizational development cannot be a partial approach and that the training and retraining of managers required total commitment of top management for its success. With the 1990's and computers taking over an ever increasing part of lower "routine thinking," the role of human resource focused more on creative reflection and higher order decision making. The implication for training and development was to prepare people to take on this new role effectively (Romiszowski, 1990). Romiszowski (1990) continues that the aims of the next century's human resources development specialist may have to include the following: "Effective and communication technologies - promotion of the acceptance of change - developing the skills of learning to learn" (p. 39).

Employment Projections

Kutscher (1987) summarized a Bureau of Labor statistics study on the projections of the labor force, economic growth and industry and occupational employment, along with some important implications of the projections.

He states that the labor force was expected to expand by nearly 21 million over 1986 to the year 2000 versus the 31 million growth over the period from

1972 to 1986. It was also projected that the work force would become increasingly minority and female. Of the 21 million new jobs projected, 20.1 million were expected to be non-agricultural wage and salary jobs.

Large job growth was projected for both wholesale and retail trade; more than 1.5 million wage and salary jobs were expected in the wholesale trade and 4.9 million in the retail trade. The service industries would increase by more than 10 million jobs altogether. Five occupational groups were projected to experience faster than average employment growth over the 1986 to 2000 period; technicians, service workers, professional workers, salesmen, and executive and managerial employees. The projections showed a growth in the share of jobs requiring most workers to have an educational level of at least one year of college, and a sharp decline in the share of jobs for those with less than a high school education. (p. 10-12).

Industry's Responsibility for Training

As previously projected, employment will be growing, with most of the growth expected among service-producing industries. Employment declines were projected for agriculture, mining, and manufacturing. Consequently, workers are expected to continue to be displaced. Although some displaced workers are expected to obtain related jobs, others may require further training or education, or both.

The expected continuation of employment changes in service-producing industries has several important implications. Firms in some of these industries are likely to be small. Because small firms have a higher turnover rate, they may, as a consequence, be less likely to provide a lifetime employment opportunity for workers. Workers will need to be prepared through education and training for

more frequent changes of employers and occupations. Shifts in industry employment and changes in the staffing patterns of industries are expected to affect the occupational structure of employment. Generally, occupations in which current participants have the most education are projected to have the most rapid growth rates. (Kutscher, 1987).

Dunlop (1992) explained that it is the failure to develop appropriate institutions to educate, to train and retrain, to maintain health, to manage and elicit productive and cooperative services from its work force that is our country's most critical failure. a new set of relationships is required among labor, government, and business, especially for the task of developing trained, productive and adaptable human resources (p. 10).

Hewlett (1991) said that the human capital deficit seems to be considerably worse in the United States than other countries because it differs from them in the degree to which the emerging skills shortfall has been exacerbated by public policy. Spending on preschool, primary, and secondary education in the United States is lower than in most other countries. Only 73% of American teenagers graduate high school, compared with 95% in Japan and 90% in Germany (p. 32)

She continues by explaining that to deal with this human resource deficit four principles should guide corporate strategies for the 1990's:

1. Human resource development must move up the scale of corporate priorities.
2. A family-friendly work place will be central to corporate effort to recruit and retain qualified labor.

3. Corporations will take much more direct responsibility for education and training.
4. Industry must become increasingly involved in promoting public investment in the social infrastructure (p. 30).

It seems to be the opinion of most researchers in corporate training that there are few enterprises left in this country that can afford the luxury of chance availability of necessary labor or managerial skill. In the area of management, there seems to be a wide opinion that as we enter into the 1990's, human understanding and greater administrative skill will be required to cope with the complexities involved in managing a modern business.

Continuing success seems possible only when business is fully aware of the need for budgeting for employee training generally and for managerial development and advancement specifically.

It is particularly important that business organizations recognize that management development is a way of business life. The fact is that all too few business organizations apply this principle and a good many people still believe that leaders are born and not made. Probably every business executive has his own pet theory as to the development of subordinates for greater responsibility. This theory is usually based on the way the particular individual concerned reached his position (Dephillips, 1960, p. 51).

The Need for Supervisor Training

At this point, it is necessary to discuss, in more detail, why present supervisory training programs should be reviewed, and point out the present lack of general support for these programs.

Generally speaking, there are three levels of management in most business organizations, top management, middle management, and first-line management. Even though supervision on each of these levels have much in common, each requires a variety of approaches for training because of their education and experience. It is this writer's experience, after thirty years in management, that first-line supervisors require much more explanation of management theories, concepts, and principles than the higher levels.

Dephillips (1960) describes supervision and the training of supervision in the following way:

Supervision is a complex job and required abilities other than outstanding work performance and longevity. The first-line supervisor is frequently chosen on short notice and in a haphazard manner. Very often the man or woman is a worker one day and a supervisor the next day, with little or no orientation to the responsibilities of supervision. When one considers the amount of money spent on training, it seems prudent to devote some effort, time, and money to the choice of participants and programs in order to realize a greater return on the training dollar investment (p. 331).

Kutscher (1987) makes the following observation in regards to training in the United States: "Policy making will need to focus on ensuring that all youth, particularly minorities, are given sufficient education to ease--either entry into the job market and to equip them with the skills needed to advance to better jobs" (p. 4).

Dunlops (1992) talks about the national program this way:

Our national labor policy is in a disastrous state. It is my sincere belief that it is the failure to develop appropriate institutions to educate, to train and

retrain, to maintain health, to manage and elicit productive and cooperative service from its work force that is our country's most critical failure (p. 53).

Barriers to Implementing Training Programs

Dephillips (1960) explains that if the knowledge that is obtained by trainees in training programs is not able to be used, a negative reaction could occur:

If the trainee is not able to utilize his newly acquired knowledge and skill, it is the side of training that can be very frustrating to the employee. If he cannot use his training, he may become dejected and regress to a level of performance that is less efficient than his achievement was before he was exposed to training. If the company will not give him the opportunity to utilize the training, then it must not be very worthwhile. The employee might very well quit to find another position where his effort will be appreciated.

When an employee has been given supervisory or management training which he successfully completes and then he is not given responsibilities that are commensurate with his training, frustrations seem even more apparent. No employer likes to have the reputation of being a good school that trains employees for its competition. In fact, many companies hesitate to start comprehensive training programs for this very reason (p. 49-50).

With the vast amount of money being spent by industry for ongoing education and training of employees, along with their fear of training and losing the employee after investing in their upgrading, many industries are demanding that schools take on more of this training. Mincer (1990) calculated that:

In sum, given the limited data available, a reasonable guess of what employee training currently costs is nearly \$300 billion a year as of 1987.

This figure includes close to \$50 billion for the direct cost of delivering formal training and \$150 billion for trainees' time (p. 10).

The most authoritative estimates of rate of return to employee training and development have been calculated by Mincer (1990) who found rates of return ranging from 8.5 to 31 percent for employees. Despite these rather high numbers, Mincer draws no firm conclusion about whether employers are investing too much or too little.

On the other hand, industry must worry that training policies are acceptable to their employees. Vandersyde (1990) explains:

The aims of training policy are necessarily linked directly to the aims of the organization. This means that the objectives of the training function will always be derivative aims. Training courses must be developed and administered with a view to help realize the strategic goals of the organization in question (p 147).

If the above observation by Vandersyde is correct, that the aims of the corporation are without concern for the human element, then problems that arise between organizational aims, executive aims, and trainee aims are understandable. Dephillips (1960) explains that:

Probably the most frequent criticism of any supervisory training expressed by participants is related to the usefulness of the subject matter. Very often the material learned in the course cannot be applied on the job because it differs from the ideas and practices of the man's supervisor (p. 335).

An Overview of 1993 Employee Training in Retail Industry

All 1993 figures in this section were based on a survey conducted by

Lakewood Research, a division of Lakewood Publication. The lower chart in Table 1, shows the average training budgets for particular types of organizations based on industry. The wholesale/retail trade had the lowest average budget this year among industrial groups (Filipczak, 1993).

However, training in the wholesale/retail trade is not completely hopeless. As Table 2 indicates that compared to 1992, the industry registering the most widespread surge in spending this year is wholesale/retail trade, in which category the highest percentage of respondents (61 percent) said their '93 budgets increased from 1992 levels (Filipczak, 1993).

Table 3 offers the information about the immediate future-predictions of next year's budgets. According to the tables, next year's budgets seem to lean toward the conservative (Filipczak, 1993). But if the 44 percent who predict their budgets will increase are proved correct, the training of wholesale/retail trade could see another banner year in 1994.

TABLE 1

Average Categorical Spending by Industry for Education (In Thousands)

<u>Industry</u>	<u>Seminars/ Conferences</u>	<u>Hardware</u>	<u>Outside Services</u>	<u>Custom Materials</u>	<u>Off-The Shelf Materials</u>	<u>Total Outside Expenditures</u>	<u>Facilities/ Overhead</u>	<u>Trainer Salaries</u>	<u>Total Budget</u>
Manufacturing	30,818	20,194	16,468	12,524	16,222	96,226	34,145	401,727	532,097
Transportation/ Communication/ Utilities	30,015	21,970	18,777	17,768	17,722	106,252	61,668	396,029	563,948
Wholesale/ Retail Trade	15,017	10,117	8,263	10,397	11,408	55,202	12,714	176,766	244,683
Finance Insurance/ Banking	20,908	12,579	8,389	10,431	15,002	67,309	15,874	184,858	268,040
Business Services	14,427	14,427	10,346	9,520	9,218	60,355	31,529	244,565	336,450
Health Services	20,863	11,127	9,061	6,812	10,624	58,486	9,129	206,050	273,665
Education Services	15,377	17,550	9,528	7,520	12,865	62,841	61,705	153,672	278,218
Public Administration	22,861	15,220	7,829	11,584	7,873	60,571	30,874	405,290	496,735

TABLE 2
REPORTED CHANGES IN 1993 BUDGETS
(COMPARED TO 1992)

INDUSTRY	% Predicting Greater than 1992	% Predicting Same as 1992	% Predicting Less Than 1992
Manufacturing	39	47	14
Transportation/ Communication/Utilities	47	36	17
Wholesale/Retail Trade	61	35	4
Finance/Insurance/Banking	42	44	14
Business Services	36	47	17
Health Services	30	56	14
Educational Services	31	53	16
Public Administration	17	58	25
All Industries	36	46	18

TABLE 3
BUDGET PREDICTIONS FOR 1994

INDUSTRY	% Predicting Greater than 1993	% Predicting Same as 1993	% Predicting Less Than 1993
Manufacturing	42	52	7
Transportation/ Communication/Utilities	36	48	16
Wholesale/Retail Trade	44	52	4
Finance/Insurance/Banking	37	57	5
Business Services	49	43	8
Health Services	43	48	9
Educational Services	30	52	18
Public Administration	22	59	19
All Industries	38	49	13

Summary

The need for the development of transitional training programs for beginning management personnel has never been in more demand than now. So radical are the scientific and technological advances in the world that it was stated by the United States Department of Labor, "the transformation we are now seeing will make the 18th Century Industrial revolution look like a pink tea" (Dephillips, 1960, p. 4).

It should be obvious then that management will require highly skilled people not only in the labor pool, but also in management. Dephillips (1960) explains: "the discovery and development of executive potential is one of the most pressing problems of industry today" (p. 5). Osterman (1990) goes a little further when he says: "A common explanation of poor American productivity growth relative to international competitors is a general deficiency in American human resources policies" (p. 18).

Romiszowski (1990) appropriately explained the challenge industry faces going into the 21st Century: "The task of managing the work force becomes progressively more demanding, requiring better preparation and higher levels of personal and interpersonal skills on the part of management and supervision" (p. 23). He continues that the 1970's brought managerial changes and how the: Paternalistic and neo-militaristic styles of management are no longer adequate. Theory 'y' replaced theory 'x.' Management accepted, perhaps unwillingly, a general management skills philosophy. A generalized belief there is a body of managerial skill and knowledge which, if mastered, will result in generally more effective managerial performance" (p. 25).

He goes on to explain that organizational development must start from the top-most levels of the organization and requires commitment of top management to its success (p. 37).

Fossum (1990) explained how General Electric approached their managerial training program:

New lower-level managers attend formal training courses six to twelve months after their promotion to their new positions, in order to become familiar with upper management's goals and objectives. These courses emphasize communications skill-building, creation and leadership of work teams, candid and effective communication, planning, network building, problem solving, leadership, coaching, and applying corporate values (p. 147).

It became obvious that industry will no longer have the luxury of hiring and firing their work force as needed. The training dollars that in the past have been haphazardly spent will have to be focused on a shrinking and more valued work force that will be trained in more depth and be more flexible to meet the fast-changing technologies. From the managerial trainee's standpoint, training and development will be considered effective when the opportunities are realized and satisfaction is increased. On the other hand, the organization must show evidence that managerial training programs contribute to better performance, as seen through improved sales, customer satisfaction, and employee morale.

CHAPTER III

RESEARCH DESIGN AND PROCEDURES

Introduction

This study was designed to determine the extent to which large retail firms in Southern California provide management training for entry-level managers, the perceptions of three levels of management regarding that training, and the amount of support by upper management for the development and implementation of training programs for managerial skills.

Theoretical Constructs

Industry is looking for individuals with higher levels of education to be trained and placed in supervisory and executive positions (Fryer, 1956). Customer service is a trait that sets retailers apart from their competitors. Some highly successful regional chains have built their market image around intensive servicing of customers by store personnel. Nordstrom is the most prominent example. Each sales employee is trained to develop their own list of clients and to call on them when new articles are brought into the store. The results speak volumes. Average sales per employee at Nordstrom are double the industry average. As a result, the company is one of the most profitable retail organizations in the region.

Improvement in customer service cannot be achieved without improving staff performance through quality training programs. For over thirty years, retailers have increasingly relied on part-time labor to fill service-related jobs. In the past, such workers were considered temporary; management invested little training which was restricted to information about company policy and about

particular jobs. In the 1980's, firms began learning that customer service and sales became crucial to company image and market share. Workers must have broader skills in areas such as the ability to communicate with customers, knowledge about other products, and store services, a wider knowledge about how products and services are used, and whether or not offered by other companies. Successful firms have discovered that such skills are needed by all, no matter whether full-time or part-time employees, because each customer-employee interaction reflects upon the company's image in the marketplace.

The emphasis on customer service requires all employees to have better communication skills and a broader knowledge of store and back-office operations. Managers at all levels are demanded not only to keep daily operations running smoothly, but to act as trouble-shooters and problem-solvers, trainers, and human resource managers.

The retail industry is typically perceived as "low skilled." However, evidence suggested that successful firms must compliment the limited, but nevertheless sizable, training of their main labor force with a very substantial investment in extensive managerial training (Kakabadse, 1984). Such training forms the basis for the application of a given firm's specific know-how, which serves to set the company apart from its competitors in the marketplace.

Research Design

The data generated from fifteen interviews within five large retail firms in Southern California, were used to answer the following research questions concerning managerial training:

1. What is the nature of curricula designed for new management trainees in Southern California's retail industry?

2. Is there a perceptual difference between management levels relating to the structure and emphasis of training being provided to manager trainees?
3. What types and amount of company support, other than job training, is being offered to help managerial trainees grow or improve?

Population and Data Collection

The sampling strategy used for this study was typical case sampling technique where typical characteristics of a group were known. This strategy was selected because it allowed for interviews with knowledgeable people at different levels within each organization who could provide needed information.

The sample size was determined to be fifteen management personnel spread across five different retail organizations. The subjects were five entry-level managers, five store managers, and five executive officers in human resources or training.

The employers were local or national retail firms with stores located in San Bernardino County and Riverside County. The entry-level managers had been in their position from three months to two years, the managers from two to twenty years, and executives from ten to twenty-five years. The size of their businesses varied from 1000 to 360,000 employees, with multiple stores all located nationally, with the exception of one, which had multiple stores regionally located. The stores were chosen randomly with the understanding they employed 1000 or more employees.

The data collection sample consisted of fifteen interviews. Permission to interview was obtained verbally, in person, or by telephone, from the vice president of human resources in each retail organization. The subjects - three

levels of management - were carefully selected to be representative of each retail organization's management structure and to provide meaningful data because of their particular roles in the organizations and their exposure to management training.

This researcher conducted fifteen interviews. The interviews were conducted at the locations where the interviewees worked, or in some cases, when the executive office was located out of state, by telephone. The interviews were taped, when permission was given, along with the use of extensive notes to record the interviewee's responses. The researcher's role in this study was observer/participant.

The interviews took from fifteen minutes to one hour. This researcher took field notes on the expressions, gestures, and verbal responses of the interviewees as they responded to questions. After collecting all interview materials, notes, and transcripts, the data was coded and chunked. From this data, the findings were developed.

Methods - Treatment of Data

The sequence of events leading up to development of the instrumentation for data collection went as follows: The researcher developed three major objectives which addressed the proposed oral history study. Several topics or questions were then developed which addressed the objectives. As literature reviews were conducted, these topics or questions were further defined. It was decided that an interview guide would be followed; one where topics are selected in advance and the interviewer decides the sequence and the wording of the questions during the interviews. Because the researcher felt uncomfortable

having nothing but topics going into the interviews, sample sets of questions were developed.

The instrument used in this study (see Appendix B) used a combination of semistructured and unstructured questions giving the interviewer a degree of latitude in asking broad questions in whatever order seemed appropriate for the question's clarification.

During the pilot, the interviewer took special note of the respondents reaction and understanding of questions and revised them where necessary to enhance their intent and clarity. This period also allowed the interviewer the opportunity to assess the length of the interview as well as its value for summarization and evaluation of research data.

Pilot Study

A pilot study was developed with one retail establishment with 160 stores located in multiple states. Permission to interview store personnel was requested from the Vice President of Personnel. Interviews ranging from thirty minutes to sixty minutes were made with an entry level manager, store manager, and the Vice President of Training. It was determined from these sample interviews that future interviews would be more productive if general questions were developed that would help the researcher cover all areas desired. It was also determined that small talk prior to the interview questions allowed for a more relaxed environment.

Data Treatment Procedures

Data treatment began after all data was collected. The code and chunk method of data treatment was utilized. Codes were developed for three major

categories which were further broken down into sixteen subcategories consistent with interview questions. (see Appendix C) The three major coding categories, curricula, perceptions, and support corresponded with research questions one, two, and three.

Research question one was answered by evaluating the data collected from the following nine subcategories: formal structure, informal-no structure, on-the-job training, leadership, motivation, communications, resolving employee conflicts, dealing with difficult people, and percentage of managerial training.

Research question two was answered by evaluating the data collected from two categories: extent of training and educational approaches.

Research question three was answered by evaluating the data collected from five subcategories: company allowances, counseling programs, recruitment policy, career service advice, and company encouragement.

The data collected from the interviews were reviewed and a decision was made as to which codes should be used. The transcripts or field notes were then coded. During the actual coding, the researcher decided the appropriateness of codes as applied and determined that some of the initially-designated codes were of no use to the research questions; that is, they provided no information pertinent to the research questions identified earlier, so they were discarded.

Following coding, the data were interpreted using inductive logic and presented in the next section of this thesis as findings.

CHAPTER IV
FINDINGS AND DISCUSSION

Findings

The data accumulated from the oral interviews with the various managers from five Southern California retail organizations were analyzed and used to answer three main research questions. Comments of the interviewees were quoted in context when required to effectively represent a point of view.

The organizational information in Table 4 provides a comparison of each retail company's annual sales, number of employees, and whether the company is a regional or national organization. Four of the five companies are considered to be among the largest retail concerns in the United States - Kmart, Walmart, Target, and Thrifty Drug Stores. Harris Department Stores was the only regional organization interviewed.

TABLE 4
ORGANIZATIONAL INFORMATION

<u>COMPANY</u>	<u>ANNUAL SALES</u>	<u>NUMBER OF EMPLOYEES</u>	<u>LOCATIONS</u>
A	115 MIL	1,700	REGIONAL
B	3.80 BIL	320,000	NATIONAL
C	2.20 BIL	366,000	NATIONAL
D	3.25 BIL	360,000	NATIONAL
E	3.00 BIL	300,000	NATIONAL

Research Question #1:

"What is the nature of curricula designed for new management trainees in Southern California's retail industry?"

It was determined that each organization interviewed developed training manuals for entry-level managers containing both technical and managerial curricula. Although this researcher was not provided with copies of the training manuals, they were described by management as devoting approximately 75% of the curricula to technical skills and 25% to managerial skills.

The curricula in the manuals were divided into several chapters allowing the trainees to relate the material to their work assignments. The chapters relating to the technical responsibilities of the trainees explained the opening and closing of the store, merchandise organization, forms control, cash register operation, customer service, and security. The chapters relating to managerial skills explained the human resource skills required of a manager in the directing of a work force.

Research Question #2

"Is there a perceptual difference between management levels relating to the structure and emphasis of training being provided manager trainees?"

An analysis of data indicated an obvious perceptual difference between the three levels of management as they perceived the structure and emphasis of training being provided for entry-level managers. The study indicated that executive-level management believed that managerial skills, versus technical skills, were of major importance and were being given considerable emphasis in company training programs. The executive in Company A for example explained that: "Immediately after promotion we give twenty-four hours in training plus a

follow-up of twenty-four hours at a later time. . .mostly managerial skills.

Promoted employees already have the technical skills, I concentrate on the non-technical ones."

The executive employed by Company B explained that 70% of the training of entry-level managers were spent on learning managerial skills. Later, in the interview she explained that: "Most of these managerial skills are learned on the job. We do not promote a person unless they display leadership and communication skills. Most people either have these qualities, or they do not."

On the other hand, store managers perceived managerial skills as important, but placed emphasis on the training of technical skills. The store manager working for Company A explained: "A formal in-store managerial training program is not necessary. People are promoted according to performance. It becomes obvious through their work if they have the necessary leadership and 'people skills' required for promotion."

The store manager for Company C made a similar statement: "More concentration is placed on the human resource skills after you become a store manager. Most of these skills are learned while on the job. We look for these skills in our trainees before they are promoted."

In most cases, it was determined that entry-level managers viewed the majority of their training as relating strictly to the technical aspects of their job with minor emphasis on managerial skills as seen in stores B and C.

An example of disagreement occurred in Company A between the three levels of management. The executive level stated that the company supplied twenty-four hours of formal managerial skills training for new managers, followed with an additional twenty-four hours within six months. The store manager,

however, was unaware of the corporate training program and expressed his feelings about corporate training in the following way: "It is my opinion that a formal training program is wasted, especially when handled by a corporate training department. Training must come directly from store management."

On the other hand, the entry-level manager from Company A who had held her position for over a year, explained that she had never participated in, or was aware of any corporate training program.

Research Question #3

"What types and amount of company support, other than job training, is being offered to help managerial trainees grow or improve?"

An analysis of the previous data indicated there was support by upper management for job-skills training programs for entry-level managers. In most cases, this was where the agreement ended. It became obvious there was a difference in opinions between the three levels as to the nature of curricula developed and the structure and emphasis placed on administering the training.

Relative to the education allowance each level of management was asked if the company supplied monetary assistance which could help support the entry-level manager in obtaining additional education from the public or private sector. With the exception of Company D, all the levels of management in all stores agreed that no allowance was provided. The executive-level manager and the store-level manager in store D both agreed that an allowance existed for entry-level managers, but the entry-level manager at that store was unaware of such a program, even though he had been with the company for one year.

When the executive-level managers were questioned on why allowances were not provided to help the trainees seek external training, the answers varied

from "were looking into it," to "we believe the best training for our needs can be accomplished in-house." There appeared to be a negative desire by upper management to supply an educational allowance. It was stated: "College graduates do not make good entry-level managers. The work is long and hard. We do not want to pay for their education and then have them leave us." This sentiment was expressed more than once.

When the various managers were asked if a formal career counseling program existed which could help improve their skills or help guide and direct manager trainees toward career goals, again, there was a variance in opinions between the three managerial levels. When the executive and upper level managers were questioned about the structure of these programs the answers seemed to indicate that first, for the trainee to receive such counseling, the burden was on him or her to ask for it, and second, that periodic follow-up or review of the trainee's work performance was considered career counseling. (see Table 5 and 6) On the other hand, entry-level trainees believed that career counseling programs were not available to them.

TABLE 5

**MANAGEMENT'S PERCEPTION AS TO AMOUNT OF
EDUCATIONAL ALLOWANCE PROVIDED
ENTRY-LEVEL MANAGERS**

EDUCATIONAL ALLOWANCE*			
COMPANY	ENTRY-LEVEL MANAGER	STORE LEVEL MANAGER	EXEC. LEVEL MANAGER
A	NONE	NONE	NONE
B	NONE	NONE	NONE
C	NONE	NONE	NONE
D	NONE	SOME	SOME
E	NONE	NONE	NONE

* Monetary supplement given to trainee which would allow them to improve skills by attending private or public institution.

TABLE 6

**MANAGEMENT'S PERCEPTION AS TO AMOUNT OF
CAREER COUNSELING PROGRAMS PROVIDED
ENTRY LEVEL MANAGERS**

COMPANY	ENTRY-LEVEL MANAGER BELIEVES	STORE LEVEL MANAGER BELIEVES	EXEC. LEVEL MANAGER BELIEVES
A	NONE	SOME	SOME
B	NONE	NONE	NONE
C	NONE	NONE	SOME
D	NONE	NONE	SOME
E	NONE	NONE	SOME

Discussion

This study indicated that the training of entry-level managers was considered desirable by all levels of management and thought by executive-level managers to be essential to the future success of their companies. Even though it was universally accepted that training was important, it was also observed that training held a second-place status to sales. The store managers seemed to rationalize the lack of training time by explaining that the best way for a manager trainee to learn was on the floor.

The training manuals were developed at corporate level, then sent to store managers to be used for instructing manager trainees. The curricula was designed to teach the trainee both technical and managerial skills. The executive-level managers believed that emphasis was being placed on helping the trainee master managerial skills, when actually, concentration was placed on the technical or sales skills.

Executive level managers seemed to perceive a more structured training program being administered than did the middle or entry-level managers. They pictured quality time spent in classrooms and closely monitored instruction by experienced managers. In practice, most of the actual training responsibilities for entry-level managers was left to the discretion of store managers. The store manager's approach was to assign the manager trainee, if he or she were not promoted from the ranks, to an experienced clerical employee, who instructed them on the technical requirements of their responsibilities.

The data accumulated during this research indicated that upper management's intentions for training entry-level managers were praise-worthy, but in practice, revealed a desire to minimize training costs and maximize profits.

CHAPTER V

CONCLUSIONS AND RECOMMENDATIONS

Conclusions

The results of this study supported the following conclusions:

1. Research indicated that entry-level management training programs were being developed by all five retail organizations interviewed. The largest percentage, 75%, of curricula in the manuals was devoted to the technical skills, with 25% of training material being devoted to human resource skills. Based on this information, it was determined that the retail organizations interviewed were attempting to satisfy the training needs of entry-level managers.

2. It was determined that perceptual differences did exist between management levels relating to the structure and emphasis of training material presented to management trainees. It can be concluded that the executive levels are not accomplishing their initial goal of quality instruction with emphasis on the training of managerial skills. On the other hand, store managers are receiving immediate and additional floor coverage, but appear to be failing in their efforts to develop quality managers. The manager trainee, unless aggressive toward self training, may soon become discouraged and quit.

3. Research tended to indicate that educational support in the form of allowances and career counseling generally had a low priority within most companies. Again, there appeared to be a perceptual difference between the executive level and the two lower managerial levels. In most cases, it could be assumed that a communication breakdown exists as to the availability of this

help. It can also be assumed that if the executive level managers really wanted to supply this service to their manager trainees it should be obvious to them and corrective action would be taken.

4. It was concluded that opinions varied by manager and company concerning the best location to train entry-level managers. Of the fifteen managers interviewed, over 75% believed that the best approach for learning managerial skills was while performing the job. It was determined that the majority of trainees felt that more quality classroom time would be helpful and that educational allowances would be desirable for improving their skills.

Recommendations

As previously noted, a variance of opinion existed between the levels of management within each company regarding their perceptions of the curricula, structure, emphasis, and support of managerial training in the retail industry. It is therefore recommended by this researcher that:

1. The executive level management in the retail organizations must develop regional training departments, staffed with certified trainers that meet with the manager trainees on a periodic, but regular basis, to thoroughly review contents of the company manuals and to determine managerial skills development progress.

2. If training of entry-level employees remains the responsibility of store managers, definite guidelines and reports must be developed and evaluated by executive-level managers to determine the trainees' progress.

3. Each company must conduct a pilot study involving several stores within the chain where additional emphasis is placed on providing managerial training. Then, after a period of time, make a comparison study with stores not receiving the additional training to determine differences in employee turnover, sales, and shrinkage. This process can determine if additional training expenditures are justified.

4. A determination should be made as to whether closer coordination between business, education, and the state would improve vocational education and technical preparation programs at the secondary and post-secondary levels.

Recommendations For Further Study

1. Demand continues to exist in all industries for managerial training that will prevent morale and production problems from affecting productivity in a negative way. Therefore, a study of similar industries comparing employee turnover to the amount of managerial skills training provided would be helpful.

2. From the data collected, it was determined that billions of dollars annually are being spent by industry for training. Further study is suggested to determine what percentage of these training dollars are being dedicated to managerial skills and what method seems to be most effective for developing successful managers.

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APPENDICES

APPENDIX A
Letter Read to Employers

Dear Employer:

I am requesting your assistance in answering several questions relative to your company's managerial training program. My interest is in determining the nature of curricula designed for entry-level managers, the perceptions of various levels of management as to results obtained, and the degree of support given these programs by upper management.

Since you are a professional in the field, your opinion will be very helpful. Your feedback will be used in the development of a thesis project. It is my hope that this study will contribute to the understanding and progress of managerial training practices in the retail industry.

Sincerely,

Dale Sullivan
Graduate Student
Univ. of California,
San Bernardino

APPENDIX B
Data Gathering Questionnaire

My name is _____ and I am interviewing

We are at: _____

Today is: _____ It is _____ o'clock

For the record, Mr./Ms. _____ would you give me permission to tape-record this interview?

PART A: GENERAL INFORMATIONAL QUESTIONS:

1. How many full-time non-management personnel does your company employ?
2. How many part-time non-management personnel does your company employ?
3. How many management personnel does your company employ?
4. What percentage of your management staff was promoted from internal, non-management positions?

PART B: SPECIFIC INTERVIEW QUESTIONS:

1. What kind of training do you offer to management trainees?
2. Please describe for me the type of training you offer in the following areas:
Leadership
Motivation
Discipline

Communications

Group Behavior

Time Management

Resolving Employee Conflicts

Dealing with Unions

Dealing with Difficult People

3. Please describe the training you offer to managers, such as refresher training.
4. Who provides the training?
5. Where is the training conducted?
6. Do you feel the training is extensive enough? Why, why not?
7. Please describe for me your company policy on providing allowances for training. For company training? For outside training?
8. Which of the following educational approaches do you believe to be the most appropriate for managers to gain increased knowledge in managerial skills and why:

4 years of college/2 years of college

Business/trade school

Adult education

Company training program

On-the-job training

9. What percentage of your managerial training program do you feel is dedicated to teaching non-technical management skills?

10. If your company has a counseling program to advise employees of outside educational opportunities where they can improve management skills, please describe it for me.

11. Please describe your company's recruitment policy or program that searches for employees who can be advanced into management.

12. If you have a formal written program which gives career service advice to non-management personnel for transitional opportunities into management, please describe it for me.

13. If you think your company encourages its managers to seek training, please explain how it does that, or why you think it does.

Comments: _____

Comments: _____

APPENDIX C

Codes List

CODES LIST

Curricula

	= CU
Formal Structure	= FS
Informal - No Structure	= IF
On-the-Job Training	= OJ
Leadership	= LT
Motivation	= MT
Communications	= CT
Resolving Employee Conflicts	= RT
Dealing with Difficult People	= PT
Percentage of Managerial Training	= %

Perceptions

	= PC
Extent of Training	= ET
Educational Approaches	= EA

Support

Company Allowances	= CA
Counseling Programs	= CP
Recruitment Policy	= RP
Career Service Advice	= CS
Company Encouragement	= CE