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# IMPROVING THE EMPLOYEE TRANSFER EXPERIENCE WITHIN AN ORGANIZATION

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## Abstract

This Organizational Improvement Plan examines how to improve an employee's experience when transferring between departments within an organization. This Organizational Improvement Plan includes a historical review of a Canadian retail organization. Based on this historical review, I identify gaps between current and future visions to show where problems with existing training and development practices need to be resolved to reduce front-line employee turnover within an organization. The strategies within this paper support leaders through LEAD: Listen, Explore, Act and Develop, Change Management Model. The LEAD Change Management Model is an adaptation of Cawsey, Deszca, and Ingols' (2016) Change Path Model, wherein each step supports the change process. I propose three possible solutions to improve an employee who is transferring between departments. The best solution to resolve the problem of improving an employee moving between departments experience is creating a Training Manager position within the retail store. A Training Manager position could support both employee and leadership with training and development of staff who are moving between departments. I am the HR Manager and change agent within this Organizational Improvement Plan and I create an implementation plan using the TransX Model. The TransX Model is a hybrid of Leader-Member Exchange Theory and Transformational Leadership Theory, to facilitate this organizational change within an organization by creating a common vision. Finally, this Organizational Improvement Plan provides next steps as well as future considerations to enhance the Training Manager role within an organization.

*Keywords:* employee transfers, employee engagement, human resources, employee induction, LEAD Change Management Model, TransX Model

## Executive Summary

This Organizational Improvement Plan (OIP) considers the importance of creating and communicating an effective implementation change plan to support an employee who is transferring between departments. Based on the high employee turnover occurring within the organization covered in this OIP, the Problem of Practice (PoP) was uncovered: when employees transfer between departments, the employee becomes disengaged in their new role. This PoP raised the question, how can an organization improve when an employee transfers between departments?

Because an employee transferring between departments can be an exciting and rewarding experience, a Political, Economic, Social, Technological, and Environmental (PESTE) analysis helps to determine both internal and external factors which influence this problem. By understanding the internal and external factors, as I am the HR Manager and change agent for this OIP, I use both Bolman and Deal's (2013) Four Frame Model and Galbraith's (2014) Star Model to structure this problem. Bolman and Deal's (2013) Four Frame Model frame the Structural, Political, Human Resources and Symbolic issues of an employee transferring departments. The Galbraith's (2014) Star Model supports an HR Manager by understanding, at a macro (organizational) and micro (individual) level, the Strategy, Structure, Process, Rewards, and People problems of an employee moving between departments.

Three ethical considerations in deploying a Training Manager within a store are establishing trust, creating a safe workplace and building commitment within this OIP (Burke, 2006). These ethical considerations directly align with both Transformational Leadership Theory, specifically Charismatic Leadership (CTL) and Leader-Member Exchange Theory (LMX) that I use as a preferred leadership style using a hybrid model called the TransX Model.

The TransX Model approach can support change within an organization with the support of LEAD Change Management Model that utilizes Cawsey, Deszca, and Ingols' (2016) Change Model. By using LEAD and two organizational assessments tools from Cameron and Quinn (2011) called the Organizational Culture Assessment Instrument (OCAI) and Management Skills Assessment Instrument (MSAI), I can confirm that this organization was ready for change.

With this organization ready for change, three issues that impact this PoP is the lack of training and development, how to conduct regular check-ins, and how to formulate effective succession plans. By acknowledging these three issues, a change process is established to resolve this PoP. This process can provide an opportunity for other sectors beyond retail to create effective transferring for employees. Based on three possible solutions offered to improve employee transfers: implementing a Training Manager for each store, creating Leadership Development training, and creating Business Development training, one solution provided both longevity as well as support to both an employee and members of management. An implementation strategy was made to implement a Training Manager position within a store to improve employee transfers. Within this implementation strategy, a monitoring and evaluation plan is offered to track and measure this change within any environment where employee transfers occur. By supporting an employee who is transferring between departments, a hope is for continued employee engagement within an organization.

This plan serves to support a Training Manager in being successful within his/her role, thus supporting employees who are transferring between departments. By doing so, a Training Manager supports front-line staff who are moving between departments resulting in stabilizing the employee experience and enhancing the customer service!

## Acknowledgements

Woohoo I see the finish line! I strongly relate to an African proverb, “it takes a village to raise a child.” I could not have completed this quest to becoming a Doctoral graduate without the help, love, and support of my many cheerleaders. I am truly blessed to have an amazing husband Steve “Goldie”, brother Steve, sister (in-law) Andrea, and parents who often would check-in on me and be curious how I was progressing. I also have an extended family on both sides who are prepared to celebrate this achievement with me. Throughout my journey I have collected amazing friends and colleagues who challenge my status quo My “Wynd” family who would pull me away from my desk to ensure I took a break, my ‘bride tribe’ Audrey, Sandra, Jennifer, and Marie who made sure my wedding day (occurring in the middle of this program) was a complete success and finally, the BNI Marinaside business group I am now seeing every Tuesday morning who welcomed me with open arms to offer HR consulting services. My Western colleagues Heather Gordon, Alexandria Fortier, Erin Courtney-I remember our first Collaborate session and I love how our friendship has prospered over the years. Anthony Meloche, Evan Wick, and Victor Jimenez, I always appreciated your feedback. Finally, thank you to Dr. Phillipa Meyers, Holly Jezovit, and Dorothy Troughton for supporting me through the editing stages of this OIP.

Finally, a bit of self-love. I was told at a young age that I should just “settle” and be content with what I had at the time. I knew what I was capable of and this OIP represents what I can do and, more importantly, give back to the village that raised this child!

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## CHAPTER 1: INTRODUCTION AND PROBLEM

Within the retail sector, there are multiple areas of growth and opportunity to enhance both customer and employee experience. An employee's experience is an area that could receive support when he/she transfers between departments because poor employee experience impacts the potential for an amazing customer experience. A poor shopping experience can result in a customer going elsewhere to purchase their products (Bersin, Flynn, Mazor, & Melian, 2017; Liang, 2012). Offering an opportunity for employees to receive training in multiple departments could result in a seamless customer experience, because that single employee can help with any query or help with any product within the store.

Measuring customer experience can be completed in multiple ways. An example of a customer experience could be engagement with an employee completing a transaction who asks if a customer has had a good shopping experience, or an interaction with a leader within a retail store asking for feedback (Kumar 2005; Liang, 2012). Offering an online survey, which includes anonymity, of a customer's experience leads to feedback, as the aspect of anonymity for the customer to convey his/her experience (Liye & Deng-hua, 2016).

In 2015, WorkBC Retail Trade published that 24% of retail employees are under the age of 25, and of that 24%, one-quarter of the population are working part-time (WorkBC, 2015). A part-time retail job can lead to a career for some, as there is an opportunity for an employee to grow within an organization by gaining experience through transferring between departments. Transferring between departments can broaden an employee's knowledge about store operations (Bent & Freathy, 1997). Unfortunately, this growth opportunity of learning multiple departments may cause lower employee engagement, while employees adjust to their new department, leader,

team, and acquire new knowledge. This paper explores the complexities of the process of an employee transferring between departments, and how leaders can support this transfer process.

### **Organizational Context**

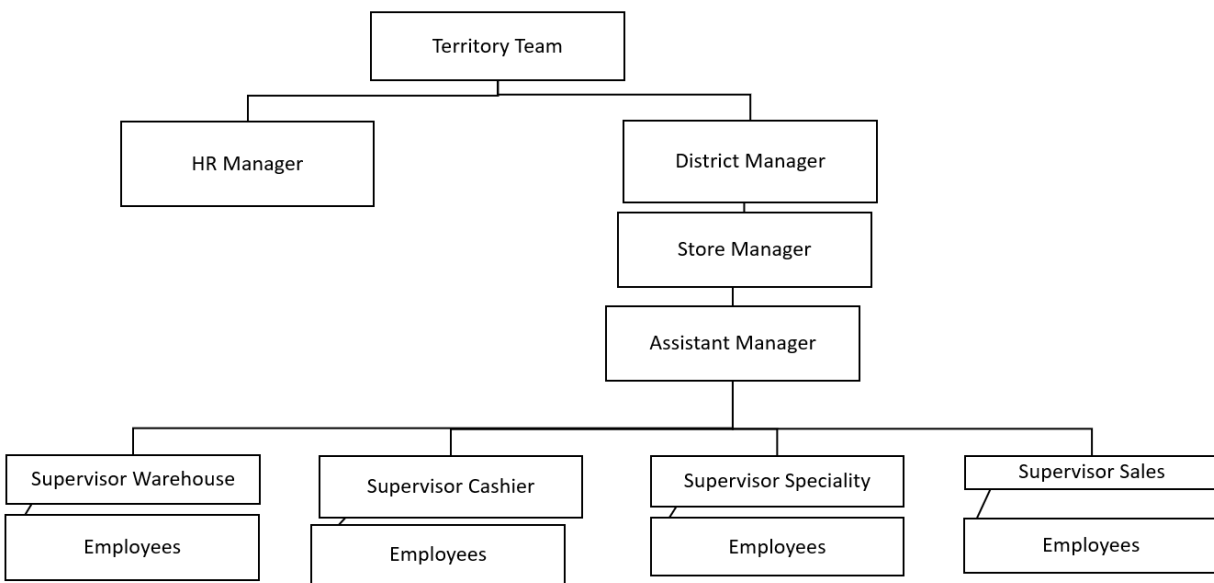
With over 100 stores across Canada, the organization Hot Finds (a pseudonym), is a mid-sized publicly traded non-unionized retail company. To understand Hot Finds' organizational structure, I will review the vision, mission, values, purpose and goals, organizational structure and hierarchy of a store-front location, political structure, economic position, social state, and cultural state of Hot Finds.

### **Vision, Mission, Values, Purpose and Goals**

As Hot Finds continues to grow its retail presence across Canada, Hot Finds vision to be one of Canada's Top 100 employers and utilizes the mission, vision and goals that are updated annually via a corporate strategy developed by Senior Leadership at Corporate Headquarters (Hot Finds, 2018). The vision of Hot Finds is that every household has a Hot Finds product (Hot Finds, 2018; Selnes, 1993). Hot Finds annually reviews the mission and strategy to improve as an organization (Hot Finds, 2018). The mission is to ensure that customers are aware of Hot Finds by thinking of it as a top retailer of choice in Canada. The values that drive the corporate strategy are: We Grow by Learning, The People are our Power, and Be True to Yourself (Hot Finds, 2018). Hot Finds takes great pride in its purpose which is to connect customers with their family and friends with the support of technology (Hot Finds, 2018). In the past, Hot Finds has created goals that align with the growth of technology such as creating a Smart Home, as well as, with technology that supports a healthy lifestyle. For example, with the evolution of wearable technology, Hot Finds' focus is on how wearable technology will benefit a customer's health (Kirk, 2014).

### Understanding the organizational structure and hierarchy of a store-front location.

To provide context to the reader about the workforce within a specific location, and understand the dynamics of a retail store, there are, on average, 100 employees within a location. Each location has a blend of full-time and part-time employees, with on average, 60% being part-time, and 40% working full-time (Maxham, Netemeyer, & Lichtenstein, 2008). The average employment tenure of an employee ranges from 12 to 36 months prior to an employee self-selecting termination (Hot Finds, 2018d). A typical store has an influx of 20-30 temporary staff between August to January, as this is the busiest time of year in retail with back to school and holiday shopping (Lennon, Johnson, & Lee, 2011).



*Figure 1.* Hot Finds store hierarchy. From “Hot Finds Corporate Hierarchy Structure,” by Hot Finds Canada, 2018. SharePoint Site.

As *Figure 1* shows, Hot Find’s Corporate Headquarters is at the top of the hierarchy. Corporate Headquarters’ staff support the day-to-day functions of all stores across Canada (Hot Finds, 2018a). Hot Finds has sizeable retail store districts that are within Territories established by Corporate Headquarters across Canada. These Territories and Districts report

directly to Corporate Headquarters. Each district has a District Manager and Human Resources (HR) Manager. I am a Human Resources Manager for a Hot Finds district. The HR Manager manages the employee experience which includes recruitment and onboarding, training and development, compensation, succession planning, and performance coaching (Wirtz & Jerger, 2016). Each store has one Store Manager, an Assistant Manager, and a Supervisor within each department. There are four departments in each store: cashiers, sales, warehouse, and specialty. The specialty department focuses on supporting customers with repairing his/her technology.

***Political structure.*** Hot Finds has a rigid hierarchy that is responsible for making decisions. All decisions are made from the Corporate Headquarters to guarantee consistency across Canada (Kubal, Baker, & Coleman, 2006). When working with an individual who is transferring between positions, Corporate Headquarters' Training and Development team will be part of this process, as this team focuses on ensuring training is consistent across all Hot Finds stores. Training is an example of how the political structure works within Hot Finds. There are multiple training manuals readily available for both manager and employees to work through, and these training manuals are updated through Training and Development staff only. If additional resources are required, this Training and Development team would seek to understand where any problems may arise during a transfer and determine what additional training would be required. While there are training manuals to support an employee, who is transferring between departments, there is no standardized training process or timelines that determines the length of time required for an existing employee to complete a training manual, rather, a 90-day check-in between employee and his/her Supervisor to review progress of a training manual (Hot Finds, 2018b). To address this situation, there is a corporate Retail Division at Corporate Headquarters that will monitor the training process. While my portfolio as the HR Manager requires that I

conduct training and development for each store, I need to gain approval from the Training and Development team if I find it necessary to add to the training manual content to effectively train staff<sup>1</sup>.

***Economic position.*** As consumers shift to purchasing products online, a Hot Finds store employee needs to be aware that customer loyalty is not what it once was (Forrester, 2017). Hot Finds competes against both brick-and-mortar retail stores and online companies. With Hot Finds competing with both brick-and-mortar and online companies, employees within a store need to be knowledgeable about products they sell to customers (Corbitt, Thanasankit, & Yi, 2003). Additionally, staff need to be effectively trained on how to close a sale before a customer decides to take their business elsewhere (Koukova, Srivastava, & Steul-Fischer, 2012). With more opportunities for a customer to purchase products elsewhere, this could result in lower sales at a store causing fewer working hours and income potential for hourly front-line employees.

***Social state.*** There are two aspects to the Social part of Hot Finds. While Hot Finds has a rigid hierarchy structure, an individual can contact senior management at Corporate Headquarters, bypassing his/her managers within the store, as Hot Finds hosts “Town Hall” meetings throughout the year (Gamble, 2003). With an employee transferring between departments, he/she may be concerned about not receiving what is adequate training. As a result, an employee may decide to connect with an individual higher up in the hierarchy to receive support, as Corporate Headquarters’ leadership freely provides his/her personal contact details for staff to feel comfortable contacting them. Finally, another part of Hot Finds’ social component is to encourage a customer-centric environment using social media. Hot Finds

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<sup>1</sup> Following the terminology at Hot Finds, I will use the term train/ training to align with Hot Finds. For the purposes of this OIP, train/training refers to the development of staff through on-the-job training.

encourages employees to share their work experience and customer interactions via popular mediums like WhatsApp, LinkedIn, and Instagram in both store-only groups, as well as public sites.

***Cultural state.*** The culture of this organization is customer-centric, meaning, a focus on ensuring a customer has a positive experience (Zhang, Li, & Zhang, 2010). Hot Finds encourages a customer-centric environment by permitting an employee to go beyond a customer's expectations, even if that employee is overriding a policy or procedure. The leadership at Corporate Headquarters believes that if the customer is taken care of, policies and procedures can be overlooked (Hot Finds, 2018b). This belief results in having the policy or procedure reviewed and updated where applicable to ensure consistency across the stores (Hot Finds, 2018b). Finally, goal setting is part of Hot Finds' culture, as Corporate Headquarters creates goals that are agreed upon by the leadership team. When an employee reaches a goal, he/she typically receives rewards (Gonring, 2008). The rewards can vary based on both tangible and intangible rewards (Galbraith, 2014) which are discussed in greater detail within framing the problem of practice section.

### **Leadership Position and HR Lens within Hot Finds**

As the HR Manager for a Hot Finds District, my position can influence how an individual move between departments, as I have direct contact with all employees within a store as well as part of my portfolio is the training and development of staff within a Hot Finds store. Within this role, I can encourage regular succession planning meetings with the management team of a store as this process can encourage the management team to be proactive with any upcoming staffing changes within a team. This succession planning process is important to the success of this Problem of Practice (PoP) to ensure that managers are reviewing performance of all staff on an



ongoing basis. Another responsibility I have as the HR Manager is scheduling regular check-in with a District Manager on any future staff movement within a District. By having these regular meetings, both the District Manager and I are kept abreast of any upcoming changes as the Store Manager has monthly meetings with a District Manager (Hot Finds, 2018b). Another facet to the role of the HR Manager is the opportunity to connect with the Training and Development team at Corporate Headquarters and provide feedback about the transfer process between departments. Within this opportunity, I can share with the Training and Development team any gaps noted within a training process to create a seamless process for an employee to transfer within departments with success. A final responsibility within my role is to promote employee engagement and support the needs of an organization by collaborating and fostering growth with employees, as this builds collaboration to achieve a goal (Bersin, Flynn, Mazor, & Melian, 2017). To support the growth of an employee moving between departments, I need to work alongside a Department Supervisor to support the growth of his/her team and ensure that their staff have the necessary tools to succeed (Wirtz & Jerger, 2016). When the Supervisor and employee collaborate on a training process, as the HR Manager, I can ensure the success of both the transferred employee and organization. In the next section, I describe how I conduct my responsibilities as the HR Manager.

To support the Organizational Improvement Plan (OIP), the TransX model (see *Figure 2*) created by Courtney, Fockler, Fortier, and Meloche (2017) is how the HR Manager can support an employee transferring between departments.

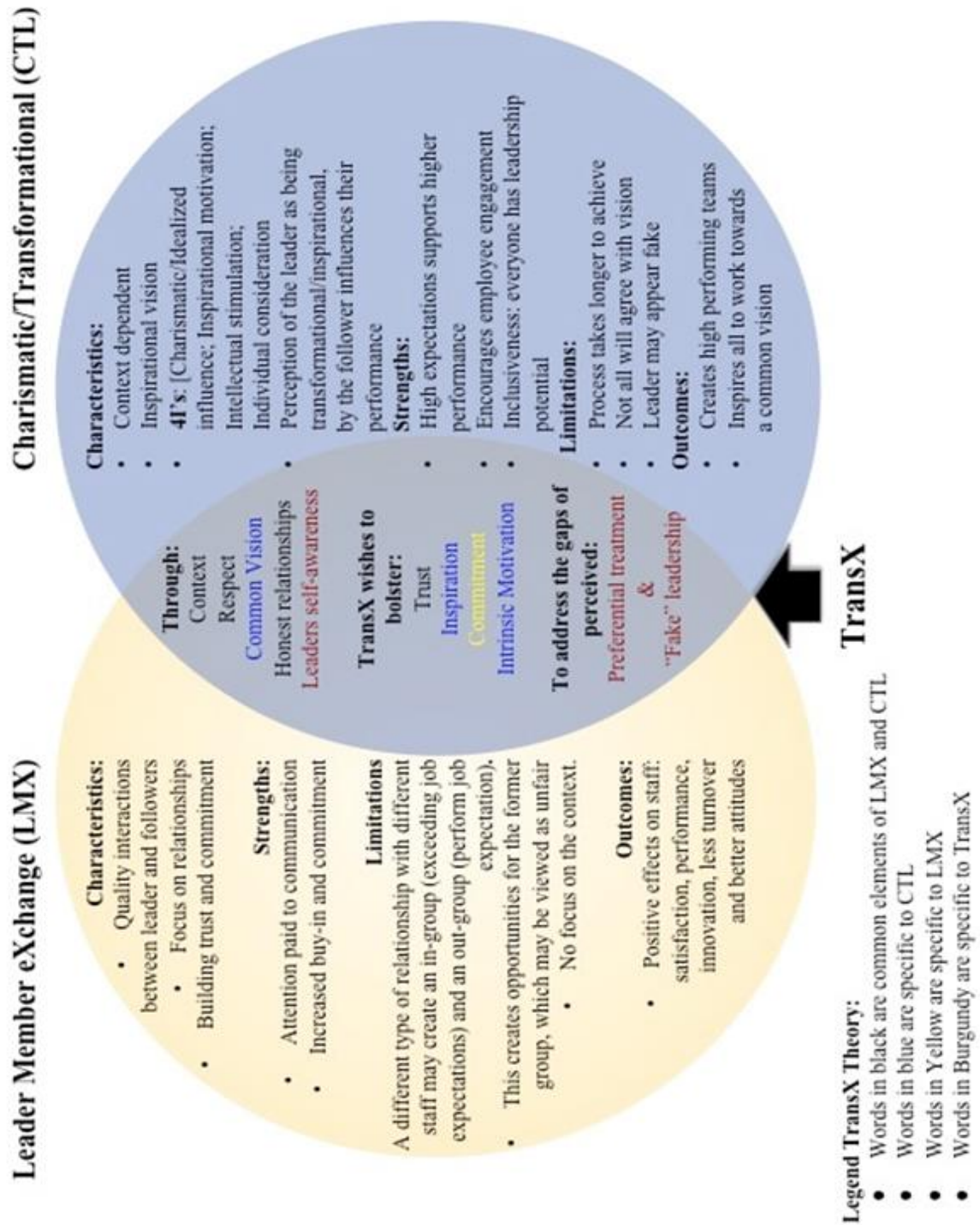


Figure 2. The Emergence of TransX model From “From Multiple Ideas to an Innovative One: A Hybrid Theory Stemming from New Genre Leadership and Leader-Member Exchange Theory,” by E. Courtney, A. Fockler, A. Fortier and A. Meloche, 2017.

Courtney et al. (2017) use the Charismatic/Transformational Leadership theory (CTL) and Leader-Member Exchange theory (LMX) (Northouse, 2016) to layer both theoretical styles of leadership support an employee transfer. A manager using CTL is charismatic by inspiring his/her team with vision and through creating common goals (Bass, 2008; Liao & Chaung, 2007; Northouse, 2016; Schriesheim, Castro, Zhou, & DeChurch, 2006). The Charismatic/Transformational Leadership theory encourages all parties to have an equal voice when a decision is being made, which reinforces commitment towards achieving a goal (Bass, 2008; Bass, Avolio, Yung & Berson, 2003). LMX theory utilizes a relationship between a leader and an employee to grow an individual, team, and organization (Northouse, 2016). A vital piece of the LMX theory is how critical each relationship between a leader and his/her followers<sup>2</sup> (Northouse, 2016) is different. Each follower will have differing needs, since a need to understand how a leader can best support a follower (Avolio, Walumbwa, & Weber, 2009; Schriesheim, Castro, Zhou, & DeChurch, 2006).

With these two theories, the TransX model can be used. As *Figure 2* depicts, this model utilizes both LMX theory and the attributes of CTL theory to build trust, inspiration, commitment, and intrinsic motivation to form relationships. The TransX model approach is the best choice of leadership model for this PoP, as the LMX portion requires the building of the relationship, which needs to be established between an employee and his/her new leader. As well, the LMX theory fosters a strong work environment, which is likely to improve the relationships needed to support the training and development of a transferred employee (Northouse, 2016). Conversely, CTL inspires an employee to grow and develop his/her skills, which results in creating high performing teams (Northouse, 2016). By bringing together the two

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<sup>2</sup> Followers is the terminology utilized by Northouse (2016). I continue to use the term followers, to align with Northouse. For the purposes of this OIP followers refers to front-line employees.

complementary leadership theories to create the TransX model, a leader of a department and an employee both benefit on the strengths of CTL and LMX theories.

### **Leadership Problem of Practice (PoP)**

The PoP is: How can an organization improve employee transfers between departments to support an employee's experience? Transferring from one department to another department within an organization can be an exciting experience, as an employee may be interested in a new learning opportunity, but also could be a stressful experience for some employees who struggle with change (Higón, Bozkurt, Clegg, Grugulis, Salis, Vasilakos, & Williams, 2010). Regardless of whether an employee chooses to transfer departments on his/her own, or if the transfer is mandated, the transferred employee may experience discomfort and stress, because a change is not often easy (Ashforth & Saks, 1995; Pollitt, 2009). These feelings can occur even when an employee understands a company's values, organization goals and vision; however, he/she may not have specific knowledge and skills about the new department (Bersin, Flynn, Mazor, & Melian, 2017). It is essential to understand what specific issues are occurring so that I can identify the current gaps to address them.

### **Understanding the Gaps Between Current and Future Vision**

The current vision is how the HR Manager, can support training and development as employee training and development is part of my responsibility within my role at Hot Finds. Employee training and development includes employees who are transferring between departments in an organization, or when new equipment or processes are introduced from Hot Finds' Corporate Headquarters. With these changes occurring for an employee, training and development can be a noticeable gap in performance of an individual who is new in a position, resulting in training and development becoming an organizational issue (Bersin, Flynn, Mazor,

& Melian, 2017). Therefore, this organizational issue becomes a concern, because an employee may become disengaged in this new role, which may result in poor customer service (Lin, Po, & Orellan, 2010).

Because of the current state of employee disengagement when transferring into a new department, the future vision is to increase employee engagement by enhancing an employee's experience when an employee transfers between departments (Ashoforth & Saks, 1995). Addressing this gap of an employee transferring between departments and being trained in his/her new role is an area of responsibility where the HR Manager can assist. The goal would be to ensure that a transfer process is smooth, so that an employee has all the tools and resources to be successful (Higón, Bozkurt, Clegg, Grugulis, Salis, Vasilakos, & Williams, 2010; Wirtz & Jerger, 2016).

To ensure a smooth employee transfer between departments, multiple check-ins using a training manual as a guide is the current practice at Hot Finds. This training manual serves as a guide to create structure in the training process with a goal of an employee being competent in their new role (Sniehotta, Schwarzer, Scholz, & Schüz, 2005). This training manual is used as a tool during an employee's 90-day check-ins with their Department Supervisor to gauge the progress within the training period (Lindeman & Anderson, 1927). Based on the check-ins, if there is no noticeable progress in relation to the pre-established training guidelines by the Training and Development departments at Hot Finds Corporate Headquarters, an HR Manager, along with a Department Supervisor would review the gaps remaining within the current training. After the HR Manager and Supervisor acknowledge the remaining gaps, the HR Manager can create an alternative training pathway to ensure the training manual is complete. The current training manuals are designed for new employees of Hot Finds and not specifically

for employees moving between departments. By not having training and development training plans specifically for an employee moving between departments creates a gap in how an employee transfers between departments as Hot Finds (Pollitt, 2009). The next section will provide historical overview for, and a framing of the problem of practice to address this issue.

### **Framing the Problem of Practice**

To best understand the PoP of how an organization can an organization improve employee transfers between departments to support an employee's experience, two models could be used to assist a leader in supporting a transferring employee. Bolman and Deal's (2013) Four Frame model provides the HR Manager with a macro view of the PoP whereas Galbraith's Star Model (2014) provides a micro view of the PoP. Both models are discussed. As well, I provide recent theory and literature on an employee transferring between departments to share scholarly work on the subject matter. Finally, I provide a political, economic, social, & technological (PESTE) review on the PoP to shed insight on the factors contributing to an employee transferring between departments.

### **Historical Overview of the Problem**

Corporate Headquarters' policy was that staff are knowledgeable specific to their hired department only so that a staff member became a subject matter expert (Hot Finds, 2018b). As a result, the growth of an individual is linear to a department of hire, rather than a lattice growth approach (Pollitt, 2009). A lattice growth approach means that an employee could learn multiple departments before advancing to a leadership role (Hot Finds, 2018b). Addressing the issue when employees don't transfer well, is one area of this organization that needs improvement—this is called cross-training (Leighton & Bent, 1997). Cross-training is a new concept at Hot Finds, which is utilized only at the supervisory level to understand the four departments but is

not scaffolded down to front-line employees. Issues that stem from an employee transferring between departments are customer experience, turnover rate, and an employee's experience (Maxham, Netemeyer, & Lichtenstein, 2008; Ramaseshan, 1997).

The initial excitement occurs before the transfers takes place and within the initial induction into a new position (Higón, Bozkurt, Clegg, Grugulis, Salis, Vasilakos, & Williams, 2010). An HR Manager working within a company like Hot Finds can support an employee's growth by navigating an employee through the training process established by the corporate headquarters (Gamble, 2003).

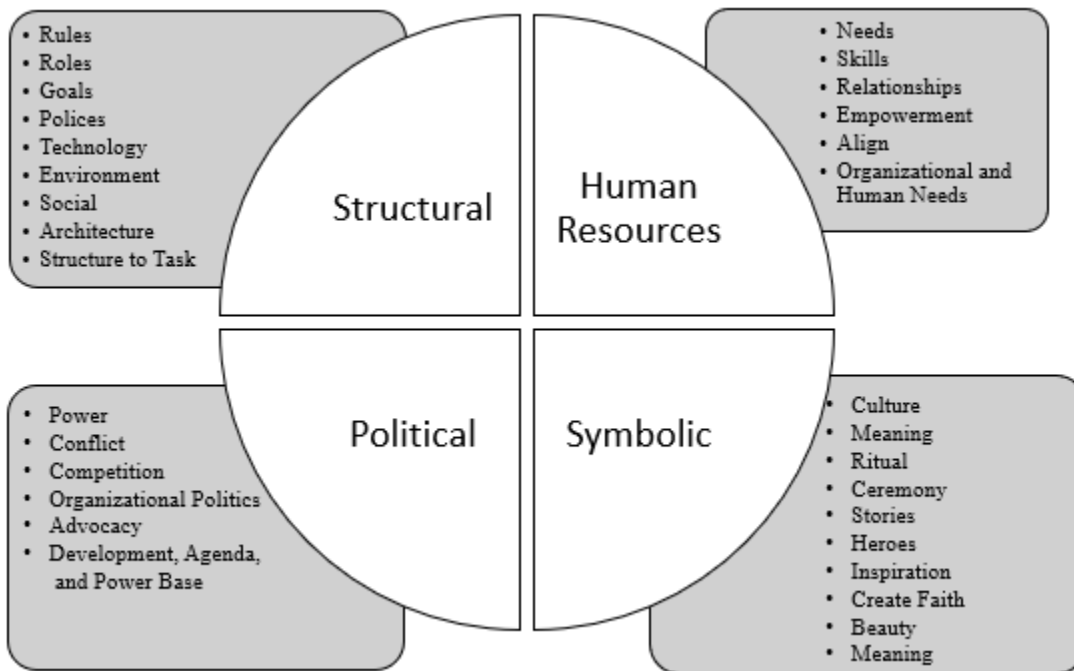
### **Frameworks to understand PoP**

Within this section, I explore two models to assist in framing my PoP. The first model is Bolman and Deal's (2013) Four Frame Model and how this model provides an understanding of how the problem impacts an employee who is transferring between departments. The second model, Galbraith's (2014) Star Model further deepens how this PoP impacts the employees who are transferring between departments through the five areas of focus.

### **Bolman and Deal's Four Frame model**

Bolman and Deal (2013) created a Four Frame Model that can support leadership in producing an environment that all employees can relate to and can feel connected to in an organization regardless of what department they work in. *Figure 3* provides an overview of Bolman and Deal's (2013) Four Frame Model that includes Symbolic, Structural, Political, and Human Resources Frames to provide an ability to reveal issues that result when an employee transfers within departments. Understanding each frame can assist the HR Manager in

understanding a problem.



*Figure 3.* Bolman and Deal's Four Frame Theory. Adapted from *Reframing organizations:*

*Artistry, choice, and leadership* (5th ed.) by Bolman & Deal, 2013, Copyright 2013 by Jossey-Bass.

**The Symbolic Frame.** In a Symbolic frame, creating an organization's culture that an employee can relate to, even when an employee transfers to a new department is important. Within this Symbolic frame, Bolman and Deal (2013) finds that a focus of creating a unique mission and vision of an organization is the basis of creating organizational culture. Al-Alawi, Al-Marzooqi, and Mohammed (2007) noted in their research on organizational culture, that to reduce corporate cultural inconsistencies, such as those created when an employee is transferring between departments, through a Symbolic Frame, an entire team needs to ensure that a visible culture (see *Figure 3*) is a dimension utilized to guide a transferring employee. When an employee transfers to a new department, using a Symbolic Frame an employee needs to



understand how the values and philosophy of an organization are implemented within a new department (Ngo-Henha, 2017). As the HR Manager, I need the Symbolic Frame to infuse culture and meaning when an employee transfers between departments.

**The Structural Frame.** Owen (2017) states that the role of a leader is to “make things happen through other people: [by] delegating to your team [department]” (para. 3). The importance of delegating to a team is to ensure that the goals of a team are transparent, so that a team does not lose sight of their organization's objective (Bolman and Deal, 2013). Consider the example of an employee transfer, each role within an organizational hierarchy needs to ensure consistency of providing customer service (see *Figure 3*). When an employee moves between departments, the employee needs to uphold the same level of customer service by ensuring that he/she can offer exemplary customer service experiences through his/her training. Because of this added stress placed on an employee by a customer, I need to use the Structural Frame to encourage proper training rules/procedures to be implemented to ensure exemplary customer service (Bolman and Deal, 2013).

**The Political Frame.** A characteristic of the Political Frame is power and the ability to make decisions. Bolman and Deal (2013) argue that “alliances form because members have interests in common and believe they can do more together than apart” (p. 195). For an employee transferring to a new department, the ability/power to make decisions (see *Figure 3*) falls to all members of a team, including a new team member (Kubal, Baker, & Coleman, 2006). By ensuring that decision-making is distributed to all members of a department, I need to enforce to all employees who transfer between departments that they have the power to make decisions within their new role as he/she are tenured employees of Hot Finds.

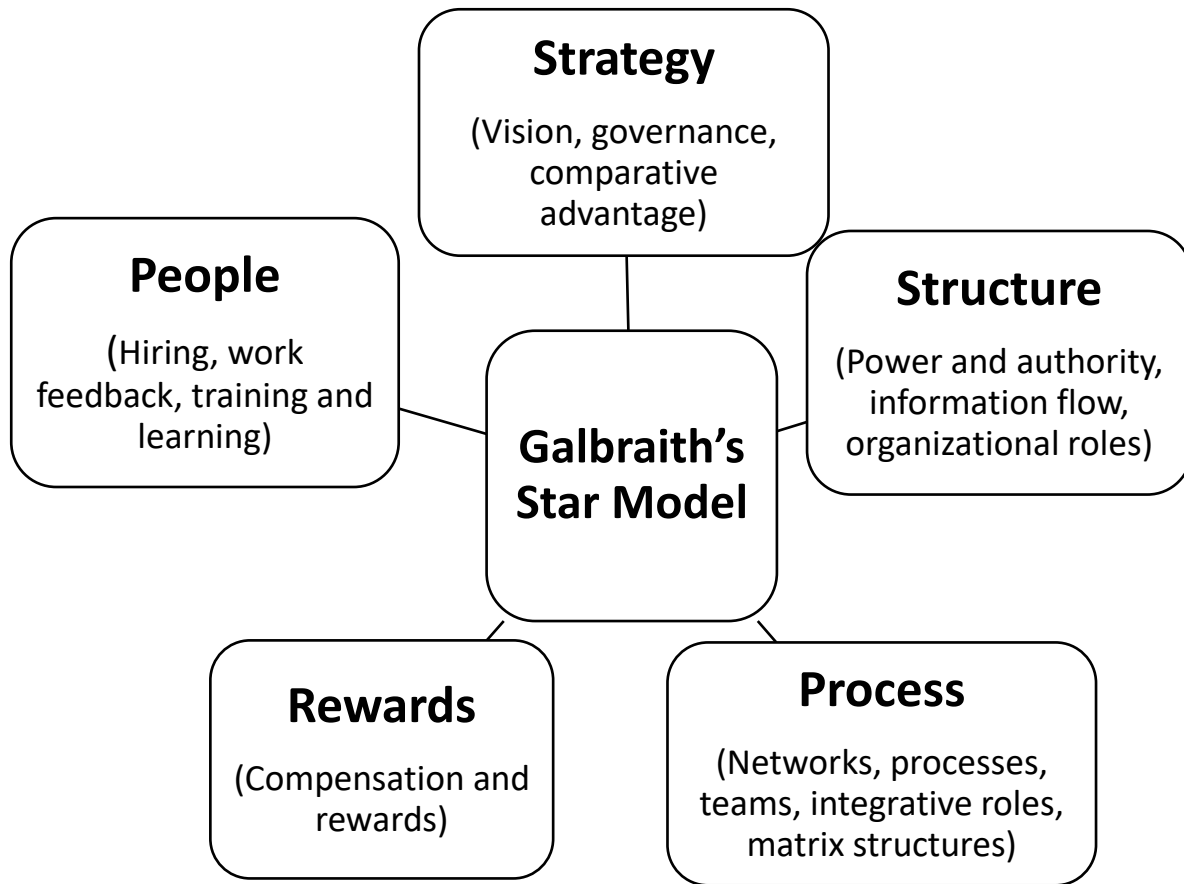
**The Human Resources Frame.** Within the Human Resources frame, the focus is on the people within an organization (Bolman & Deal, 2013). People are an integral part of an organization and, hiring the right people/skill (see *Figure 3*) for a position and developing these individuals creates a stable organizational culture. Exploring the needs and desires of organizational staff, Grant (2016) shares the attributes of two styles of employees: givers and takers. Grant finds that givers tend to support a company's best interest by being engaged in the workplace, whereas a taker, tends to take from a company and look out for their own interest by being disengaged in the workplace (Grant, 2016). Finally, the Human Resources frame encourages empowerment. As the HR Manager, I can empower employees to take ownership of his/her own training and development through the usage of the existing training manuals (Bolman & Deal, 2013).

Based on the four frames, the HR Manager can better understand how to support an employee moving between departments using both Bolman and Deal's (2013) Symbolic and Human Resources frames. However, the HR Manager could benefit from using Bolman and Deal's Four Frame model to understand the factors that impact an employee transferring between departments. By understanding Symbolic frame of creates a culture of supporting employees who have transferred between departments. Structure Frame establishes proper policies and procedures on how an employee transfers between departments. Political Frame re-establishes that an employee has the power to make decisions as he/she is a tenured employee of Hot Finds. Finally, Human Resources Frame supports the hiring for the right skills needed when an employee transfers between departments are apparent problems to the existing process of having an employee transfer between departments. Within the next section, I explore how Galbraith's (2014) Star Model could further deepen an HR Manager's understanding of an employee

transferring departments by offering a macro and micro insight of this PoP as each section of the Star model audits the current practices of an organization.

### Galbraith's Star Model

Galbraith's (2014) Star model is used to capture information, as well as, act as a decision-making support tool for the HR Manager to better understand a situation (see Figure 4).



*Figure 4.* Galbraith's Star Model. Adapted from *Designing organizations: Strategy, structure, and process at the business unit and enterprise levels* by Galbraith, 2014, Copyright 2014 by Jossey-Bass and Pfeiffer Imprints, Wiley.

This model provides a design for an HR Manager to conduct an audit and understand the situation of an employee transferring between departments on a micro level, through five areas:

Strategy, Structure, Process, Rewards, and People. Each area influences the success of an employee transferring between departments.

**Strategy.** The Strategy of an organization is characterized by the direction a company is striving to achieve (Galbraith, 2014). Within Strategy, a leader ensures there is a plan of action that will support the transferring employee's success and feelings of competence in his/her new role (Bell, Mengüç, & Widing, 2010). By creating an action plan to assist an employee, which is linked to the organizational vision, a leader takes the needs of an employee into account, so that an employee's transfer is successful.

**Structure.** Similar to Bolman and Deal's (2013) Structural Frame, Galbraith's Star Model utilizes Structure as an area of focus that a department leader needs to review as part of the employee's training program when an employee moves between departments (Bolman and Deal 2013; Galbraith, 2014). The HR Manager needs to review the structure of a store's organizational chart and determine which positions within a store would be best suited to support an employee's transfer process to ensure a successful transfer (Galbraith, 2014). Within Structure, a Supervisor has the authority to ensure that an employee has the necessary tools to become successful in his/her new role. Galbraith's Star model aligns with Bolman and Deal's (2013) Four Frame model, since both models support development through a hierarchy that needs to help an employee who transfers between departments.

**Process.** Within the Process section of the model, the HR Manager would need to understand what actions need to be taken to ensure that an employee is comfortable with a transfer to his/her new role (Galbraith, 2014). This involves making sure the HR Manager encourages that, the employee transferring between departments, understands his/her current

roles and responsibilities. As well, this knowledge assists a transferred employee with an understanding of the dynamics within a department at a Hot Finds store.

**Rewards.** The Rewards section of Galbraith's (2014) Star Model focuses on providing tangible rewards such as a pay increase, employee performance bonuses in his/her new role, an ability to leave early from a shift with pay based on positive customer service feedback, increased vacation times, and additional discount programs with both company and third-party vendors to an employee when transferring between departments (Galbraith, 2014). Intangible rewards can include providing praise/ positive feedback to an employee on a job well done or, sending an email thanking them for his/her contributions (Galbraith, 2014). Rewards can act as a motivator and encourage an employee to take the lead in his/her training and development (Bent & Freathy, 1997).

**People.** The People section of Galbraith's (2014) Star Model is reflective of Bolman and Deal's (2013) Human Resources Frame in that it focuses on developing an individual through training and development. To ensure that an employee has a successful transfer between the departments, a Store Manager would benefit in utilizing an HR Manager to determine if there are any learning gaps in the training manual or training process (Bell, Mengüç, & Widing, 2010).

Based on Bolman and Deal's (2013) Four Frames and Galbraith's (2014) Star Model, a key component within both models is the Structure component that facilitates a foundation on how to frame a transfer of an employee moving between departments. By creating a Process to ensure that an employee is successful in his/her new role, both models draw from a need to create not only Structure but also encouraging that the People aspect of Galbraith's (2014) Star Model and Bolman and Deal's (2013) Symbolic frame are incorporated. It is through both Galbraith's (2014) Star Model and Bolman and Deals (2013) Four Frames that an employee has

an opportunity to grow within an organization. However, within Bolman and Deal's (2013) framework, the Symbolic frame could be the best frame for analyzing the PoP. Using the Symbolic frame inspires employees to grow and develop themselves via intrinsic motivation, which aligns with my leadership theory that I review under Leadership Theories.

### **Research Theory/literature on the PoP**

Research and theory based on an employee moving between departments was first introduced in 1984 by Nicholson. Nicholson (1984) researched possible variables that would influence an employee and an organization adjusting to a transferred employee's new role. He found that each person needs to be motivated to accept a new position within an organization, as well as, time to integrate into a new team (Nicholson, 1984). Ashforth & Saks (1995) conducted a longitudinal examination of Nicholson's original findings. The findings of this study discovered that an employee transferring between departments is a complex process that stresses both individual and organization (Ashoforth & Saks, 1995). To provide a smooth and seamless transfer into a new position, training and development of new job tasks is a primary focus (Leighton & Bent, 1997). As a result of the stress to both employee and organization during a lateral move within a store, the HR Manager, in communication with a Department Manager, should arrange a training and development timeline to ensure the employee becomes knowledgeable and confident in the new role (Eldor & Harpaz, 2016). Effectively training employees transferring between departments aligns with Nicholson's objective of having an employee learn multiple roles within a store which encourages empowerment of an employee being able to support a customer's experience (Ackfeldt & Coote 2005; Nicholson, 1984).

**Political, Economic, Social, Technological, Environmental (PESTE) Review**

A PESTE review can shed light on an issue to aid an HR Manager in determining what could be influencing a current situation (Liao & Chuang, 2007; Yurchisin & Park, 2010). This PESTE review acknowledges external factors that can impact an employee transferring between departments (Sammut-Bonnici & Galea, 2015; Yurchisin & Park, 2010). Even though each store is different based on the size, and geographic location, the importance is to ensure that all levels of leadership within a store would be supportive of an individual transferring within departments.

**Political.** A political review occurs when a government enacts a policy that can impact an organization (Sammut-Bonnici & Galea, 2015). The Political aspects of supporting an employee who moves between departments would be meeting the requirements of federal and provincial regulations where Hot Finds' organization operates. The Employment Standards Act (ESA), protects the interests of an employee through government legislation. ESA covers concerns of hours of work, as well as, ensuring staff are paid at least a minimum wage when conducting his/her role is a concern the HR Manager needs to be aware of and uphold (Employment Standards Act, 2018). Additional impacts can be tariffs, free trade agreements and government positions that can impact the stability of the economy.

**Economical.** Economic factors impact the profitability of a company (Sammut-Bonnici & Galea, 2015). The growth and decline of an economy weigh heavily upon the retail world. When there is an economic decline, customers are less receptive to purchasing non-essential items (Bersin, Flynn, Mazor, & Melian, 2017; Liang, 2012). Conversely, when the economy flourishes, customers are more receptive to purchasing products. Scheduling of employee hours is reliant upon the economy being in a growth state, as a trained employee-to-customer ratio can support sales within a store (Bent & Freathy, 1997). With cross-training and

helping an employee who moves between departments, providing more hours for training enhances the development of an employee, which has a direct impact on positive customer experiences (Forrester, 2017). Cross-training supports an employee transferring between departments as he/she will be knowledgeable of multiple departments through on-the-job training.

**Social.** Social factors showcase any trends that are occurring outside of an organization (Sammut-Bonnici & Galea, 2015). With society using social media, “fads” and trending products last until a new trend is created. Social factors directly impact an employee to grow within an organization based on learning about “hot” products that Hot Finds sells. When an employee transfers between departments, and experiences career growth, the transferred employee gains the flexibility to work between multiple departments after cross-training is completed (Al-Alawi, Al-Marzooqi, & Mohammed, 2007). As a result of gaining additional skills, an employee can take on additional responsibilities and align with current fads. At present, Hot Finds offers cross-training as a means for a Supervisor to be promoted within a store. Acknowledging that cross-training can benefit front-line staff who may not have a desire/need to become a manager, but a desire for personal development. As training and development is part of the HR Manager’s role, I can encourage cross-training within a store, thereby resolving any external social factors so a store can focus on training of products and services that are trending.

**Technological.** Technology is the focus on how tech has impacted the way society does business (Sammut-Bonnici & Galea, 2015). With the growth of technology, retail stores which have an electronics department need to have employees who understand the various products that are within their store. By utilizing websites like YouTube.com, where any individual can post their reviews and share their insight of products employee can gain valuable knowledge about a



wide array of products. Additionally, technology can be utilized in completing a sale. Hot Finds utilizes YouTube resources, as well as, one-page summaries of many products as part of the training plan, so that staff understand popular products within the store. Technology is also a part of a sales transaction process and a tool, such as Hot Finds' employee portal, which can support an employee transferring between departments, as this portal can be an added resource for an employee to reference when assisting a customer (Hot Finds, 2018c).

**Environmental.** Creating a learning environment is an essential area for the growth of the employee. Each employee is going to have a perception of what an ideal learning environment looks like; therefore, I need to adapt to different learning styles within a learning environment that is easy to navigate (Merriam, Caffarella, & Baumgartner, 2007; Wirtz & Jerger, 2016). An HR Manager needs to do his/her best to create a comfortable place for an employee to learn, and respect that learning styles vary amongst staff. Once an environment is created where an employee is comfortable in learning and working, an employee can continue onward to meet the demands of a new role.

Based on this PESTE analysis, I see that both Economic and Environmental factors have a larger impact on an employee transferring between departments. Economic, as Hot Finds' customers are less receptive to purchase non-essential products during periods of financial recession, resulting in lower staff population numbers, which creates a need to have staff trained in multiple departments (Ackfeldt & Coote 2005). Environmental, as during such times when overall store traffic is diminished, a leader is unable to predict customer traffic in a store. Training when customers are not present in the store may be an ideal time for staff to apply their learning (Merriam, Caffarella, & Baumgartner, 2007). Another concern is that the staff who are working may already be up to date with his/her training.

**Relevant internal data and external data**

The customer experience, turnover rate and employee experience are three areas that are undoubtedly critical for an organization's success because without enhancing a customer's experience, reducing turnover rate and improving the employee experience such as internal data, a company may not thrive and subsequently close business from external data (Arndt, Arnold & Landry, 2006; Bersin, Flynn, Mazor & Melian, 2017; Carson, Shanock, Heggstad, Andrew, Pugh & Walker, 2012; Dalton & Tondor, 1993; Forrester, 2017; Freund, 2005; Gonring, 2008; Jacka & Keller, 2009; Maxham, Netemeyer & Lichtenstein, 2008; Ngo-Henha, 2017; Patterson & Baron, 2010; Ramaseshan, 1997; Siebert & Zubanov, 2009; Zhang & Zhang, 2010).

**Internal data.** Customer experience becomes an issue when an employee is unfamiliar with his/her new role, causing frustration for the customer when a product or service is not explained clearly or thoroughly (Patterson & Baron, 2010). Hot Finds' turnover is around 40% to 60% on an average month-to-month turnover, with a year-over-year reporting structure (Hot Finds, 2018d). The turnover rate occurs when an employee becomes disengaged within their role and may stop showing up for his/her shift, giving up his/her shift to another employee that may not have a similar experience, or an employee may quit without notification (Arndt, Arnold, & Landry, 2006).

**External data.** The issues presented within the internal data section have external ramifications that negatively impact on customer experience (Forrester, 2017). External data from Work BC (2015) acknowledges that a retail position is an entry point for many individual's first jobs. With retail being a first job for some, this results in having lower employment tenure than other industries (Pollitt, 2009; WorkBC, 2015). It is from this external data from WorkBC

(2015) on employment tenure for all industries in British Columbia that an employee may not see the retail sector as their career goal.

### **Guiding Questions Emerging from PoP**

Issues that stem from an employee transferring between departments affect customer experience, turnover rate, and employee experience (Arndt, Arnold, & Landry, 2006; Lambert, 2008; Siebert & Zubanov, 2009 & Yurchisin & Park, 2010). There are two questions to be asked that focus on customer experience when an employee moves between departments: What happens when a customer's experience becomes misaligned with Corporate Headquarters expectations, because an employee is unfamiliar with his/her new role? While an employee may try to assist a customer to the best of his/her ability, what happens when a customer's needs are not met when an employee is unfamiliar with a product or service of interest? Along with these questions that stem from a poor customer experience, another issue that stems from an employee transferring between departments are turnover rates.

Turnover rate occurs when an employee who transfers between departments and becomes disengaged within his/her role, can result in an employee no longer showing up for work (Arndt, Arnold, & Landry, 2006; Lambert, 2008; Siebert & Zubanov, 2009 & Yurchisin & Park, 2010). There are two questions that focus on turnover rates that the HR Manager can ask about an employee who is transferring between departments: Why is a recently transferred employee giving up their shifts? Another impact from employee turnover is when an employee quits without notification, resulting in fewer staff working, which can negatively impact a customer's experience due to being short-staffed resulting in a customer going elsewhere for customer service. Employees quitting without notification leads to the subsequent question about turnover rates—how does an employee quitting impact customer service (Jolson, Dubinsky, & Anderson,

1987)? An existing employee's experience becomes an issue when he/she are both supporting a colleague in his/her new position, while at the same time assisting customers, as this causes workload issues (Kim, Knight, & Cruisinger, 2009). Another issue for existing employees is if an employee perceives the new role having more responsibility without being rewarded/compensated, will an employee want to take on this new role? This issue can be a systemic issue as employees want to feel valued for their contributions to an organization and not feel abused (Grant, 2016). The HR Manager needs to ensure that Hot Finds offers tangible and intangible rewards that align with Galbraith's (2014) Star Model.

A final key factor that contributes to an employee successfully transferring between departments is the development of a succession plan. A succession plan encourages an organization to be proactive to change rather than Two questions that focus on succession planning and an employee who transfers between departments are: How can the Store Manager and HR Manager create an effective plan to limit the reactiveness of transfers due to an employee terminating employment? This plan addresses the issues of an existing employee's workload, and the issue of more responsibility without being rewarded/compensated (Burke, 2006). A final question that can be poised is what can be done to ensure a succession plan is utilized to reduce any customer issues due to lack of trained staff on the sales floor? A succession plan also has the potential to increase the customer service of a Hot Finds store, as employees who are trained in multiple departments can be placed in other departments where customers need assistance. A succession plan also has the potential to increase the customer service of a Hot Finds store, as employees who are trained in multiple departments can be placed in other departments where customers need assistance.

**Challenges emerging from an employee transferring between departments.** A challenge that emerges from an employee transferring between departments is the longevity of an employee staying at a store (Jolson, Dubinsky, & Anderson, 1987). Employees who work only part-time, are likely to have a lower tenure. These part-time employees may not view the retail industry as a long-term occupation (Kim, Knight, & Crutsinger, 2009). An alternative factor impacting success may be customer interaction varying from day to day, resulting in an employee not having an opportunity to utilize all newly learned skills. Challenges that can complicate an employee transferring between departments include employee tenure and customer interaction.

**Benefits to transferring an employee between departments.** The short-term benefits of providing more training and development may not be immediately recognized within a store, as training takes time, because adults learn at different speeds (Stokes & Wynm 2007; Vadi & Suuroja, 2006). Training can take longer when the subject matter may be difficult to grasp. The training process requires patience and commitment, which aligns with both LMX and CTL leadership theories (Bersin, Flynn, Mazor, & Melian, 2017; Leighton & Bent, 1997; Liang, 2012; Northouse, 2016). A macro-benefit to an employee transferring between departments are the long-term benefits which include having a more effective workforce that is knowledgeable in many departments within Hot Finds (Pollitt, 2009). A micro-benefit to an employee transferring between departments is when an employee is engaged and has a sense of accomplishment in knowing multiple departments within an organization. Furthermore, employees are more likely to remain with their employer, resulting in an improvement to a customer's shopping experience (Arndt, Arnold, & Landry, 2006; Lambert, 2008; Siebert & Zubanov, 2009 & Yurchisin & Park, 2010). These benefits produce significant return on investment for both employee and

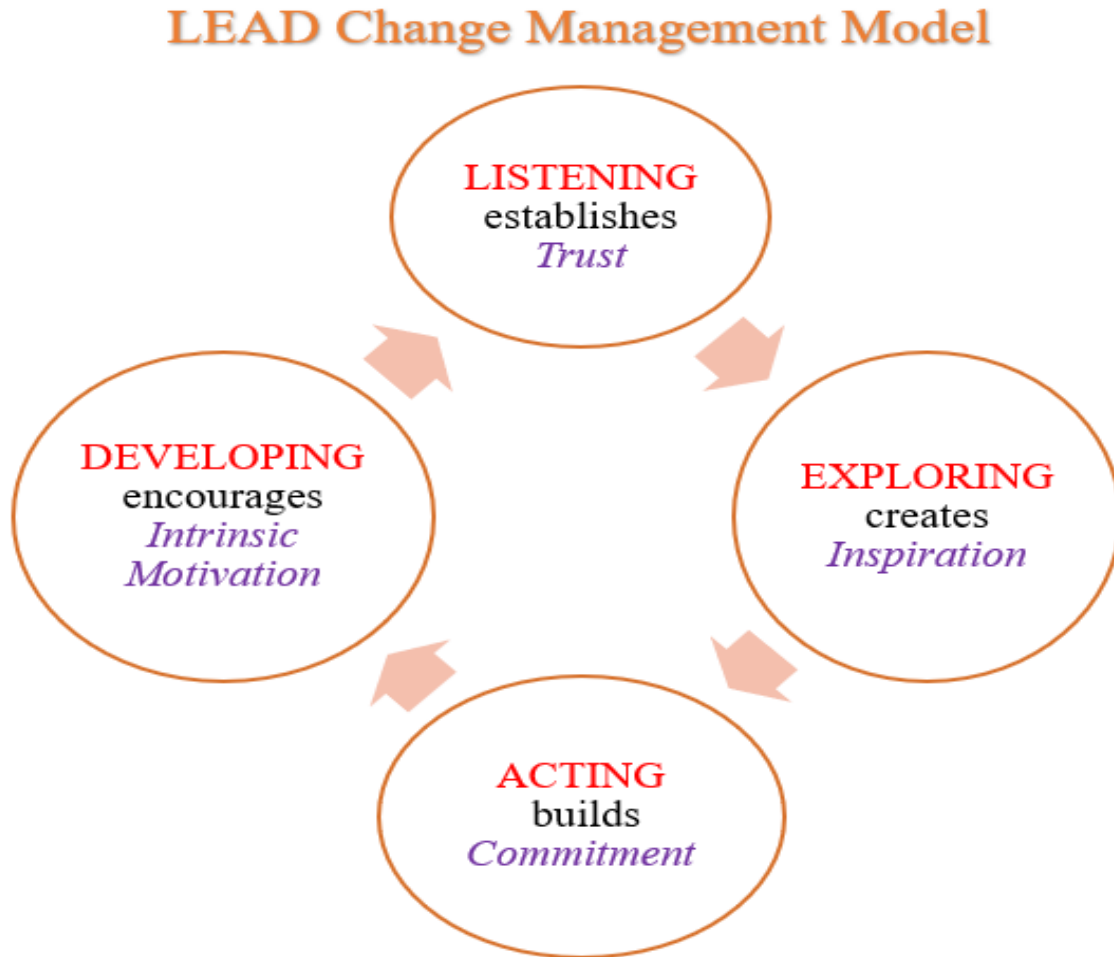
organization at both macro and micro levels. I will now review my leadership approach to change as it relates to an employee transferring between departments.

### **Leadership Focused Vision for Change**

A generic training manual is the current process used when an employee transfers between departments. Each training manual is built with module sections by the Training and Development team at Corporate Headquarters to facilitate this transfer. Within each training module, there are milestones that requires sign-off by his/her immediate supervisor. The training manual does not support all types of learning. A concern I noted is that the process could feel rushed as the employee may not learn through modules resulting in creating a stressful learning experience. The desired outcome to this organizational state is to reduce the transfer stress on an employee while he/she learns a new role (Ashoforth & Saks, 1995). A Supervisor can ease this stress by connecting with his/her new staff on their first shift to establish what tools beyond a training manual are needed. The current process is a Supervisor can determine how much time the employee may need to complete the training manual. An employee and Supervisor can use the HR Manager as a resource to finalize a training plan. The goal of finalizing a training plan would be that the transfer process is smooth to ensure success in the employee's new role (Higón, Bozkurt, Clegg, Grugulis, Salis, Vasilakos, & Williams, 2010; Wirtz & Jerger, 2016).

**Priorities for Change.** To seek balance with stakeholders and organizational interests, an organizational goal of Hot Finds is to be one of Canada's Top 100 Employers (Hot Finds, 2018). A part of the selection process to be considered is Training and Skills Development (Canada's Top 100 Employers, 2019). Hot Finds has an organizational interest with employees transferring departments with Training and Skills Development being a part of the selection criteria to be considered a Top 100 Employer. To support the transfer of an employee moving between

departments at Hot Finds, a HR Manager utilizes the LEAD (Listen, Explore, Act, and Develop) Change Management Model (see *Figure 5*) (Fockler, 2017).



*Figure 5.* LEAD change management model integrated with TransX model, by Fockler, 2017.

Appendix 1 shows how the LEAD Change Management Model draws on the Cawsey, Deszca, & Ingols (2016) Change Path Model of Awakening, Mobilization, Acceleration, and Institutionalization steps to support a leader by providing a step-by-step process to aid a transferring employee into his/her new role. Each stage of the LEAD Change Management Model (see *Figure 5*) works towards supporting both an employee and a leader by blending each stage of the LEAD Change Management Model (in upper-case with red text in *Figure 5*) to stages of the TransX Model (in italics with purple text in *Figure 5*). The LEAD Change

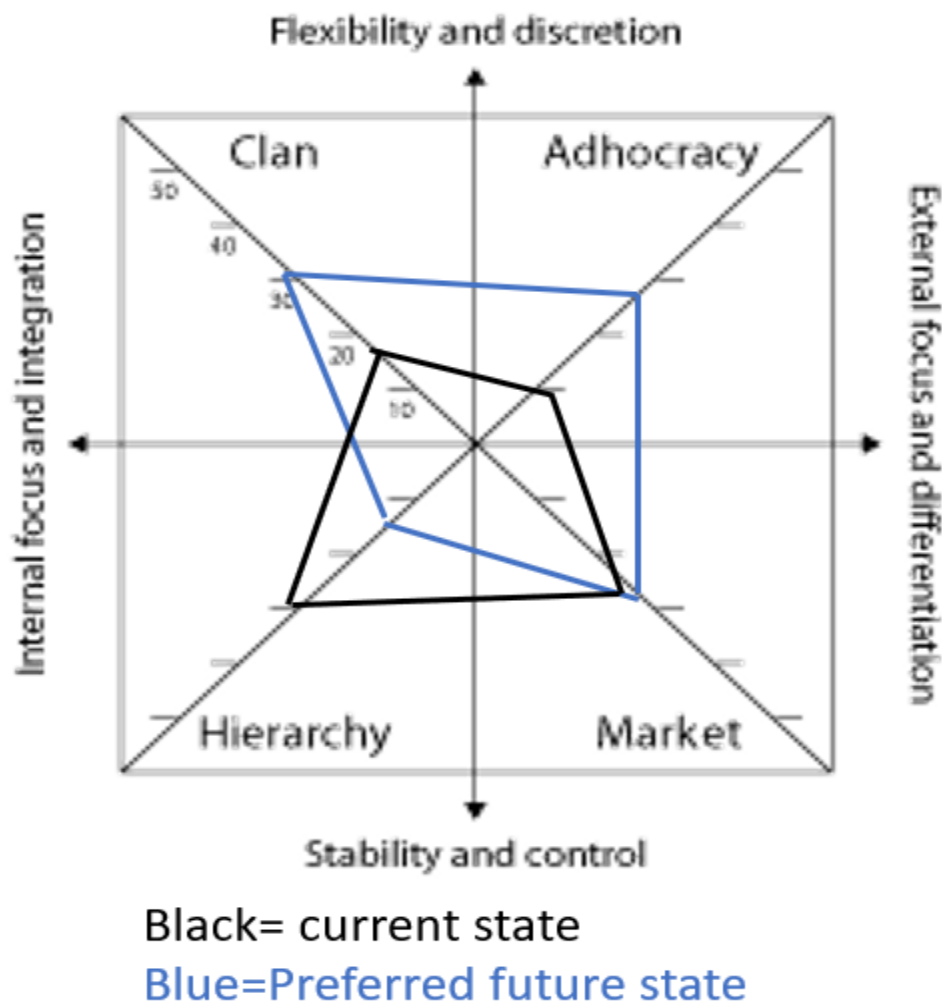
Management Model blends with the TransX model by an HR Manager utilizing Listening skills to establish Trust, Exploring an issue which creates Inspiration, Acting builds the Commitment, and Developing thereby encouraging Intrinsic Motivation. When using the LEAD Change Management Model, an HR Manager looks to reduce a training gap in learning needs for an employee moving to a new department by Listening, to an employee's concerns/needs, as well as, his/her manager's concerns/needs for change (Cawsey, et al, 2016). After understanding both employee and leader's concerns and needs, a HR Manager can Explore, thereby creating options that were brought forward in the Listening stage. By Exploring options, the HR Manager is empowering an employee to determine what tools and resources could be used to support his/her training in their transfer process (Cawsey, et al., 2016; Fockler, 2017). From Exploring options that are present, the HR Manager, along with an employee, can then Act on a plan. The Act stage would create the desired outcome where the employee is successful in their transfer into a new role. Once a plan is executed, the HR Manager can Develop both employee and leader by reviewing the outcomes of a training program (Teare & Rayner, 2002). A key priority for change is to review Hot Finds' existing training program to support employees who transfer between departments thereby reducing any issues in the transfer process. This change can have a positive impact within the employee engagement thereby creating a future state of engaged employees providing excellent customer service. The next section will explore if Hot Finds is ready to implement a change in supporting an employee transferring between departments.

### **Organizational Change Readiness**

Two lenses are used to understand Hot Finds' readiness for change. Organizational change through culture will be discussed using Cameron and Quinn's (2011) Organizational Culture Assessment Instrument (OCAI) and Management Skills Assessment Instrument (MSAI)



to determine if management skills are available to support a change. While I did review a PESTE analysis earlier, an organizational culture assessment can assist the HR Manager with what type(s) of culture(s) are present and could help address the current high turnover that occurs within the retail industry (Arndt, Arnold, & Landry, 2006). *Figure 6* provides a visual aid to the Organizational Culture Assessment Instrument (OCAI) created by Cameron and Quinn.



*Figure 5.* OCAI results for Hot Finds June 2018. Reprinted from Cameron and Quinn, 2011, Copyright 2011.

The OCAI assessment requires 39 questions to determine if there is a Clan Culture, Adhocracy Culture, Market Culture or Hierarchy Culture present in a department (Cameron & Quinn, 2011; Steinhoff & Owens, 1989).). Clan Culture focuses on people and customers, Adhocracy Culture focuses on individuality and flexibility, Market Culture focuses on being competitive within an industry, and Hierarchy Culture focuses on stability and control (Cameron & Quinn, 2011). Depending on which culture(s) is/are present, I can determine if the culture is internally/externally focused, and if the culture is flexible/stable based on the results of the OCAI (Cameron & Quinn, 2011; Owens & Steinhoff, 1989). As the HR Manager, it is essential to understand what culture is present within a department to equip a transferring employee with information on their new team (Kargas & Varoutas, 2015).

I completed an informal assessment of Hot Finds' OCAI in May 2018, as shown in *Figure 6*, where the black ink represents a current state and blue ink acknowledges what a preferred state would look like. I found that Clan Culture and Hierarchy Culture were the two dominant cultures within a department. The Clan Culture is an area that connects an employee and customer experience, whereas a Hierarchy Culture represents clear lines of management (Cameron & Quinn, 2011; Sensuse, Cahyaningsih, & Wibowo, 2015). With this result, I can argue that a Hot Finds department is Internally Focused and has an Integration mindset which encourages growth within a department through the support of both management and front-line staff (Cameron & Quinn, 2011). The two other culture groups of Market Culture and Adhocracy Culture scored low whereas the OCAI results show that Hot Finds has a concern with Market Culture, as the economic state drives Hot Finds' business. Adhocracy Culture is an opportunity for Hot Finds, because the organization needs to be flexible when faced with retail companies

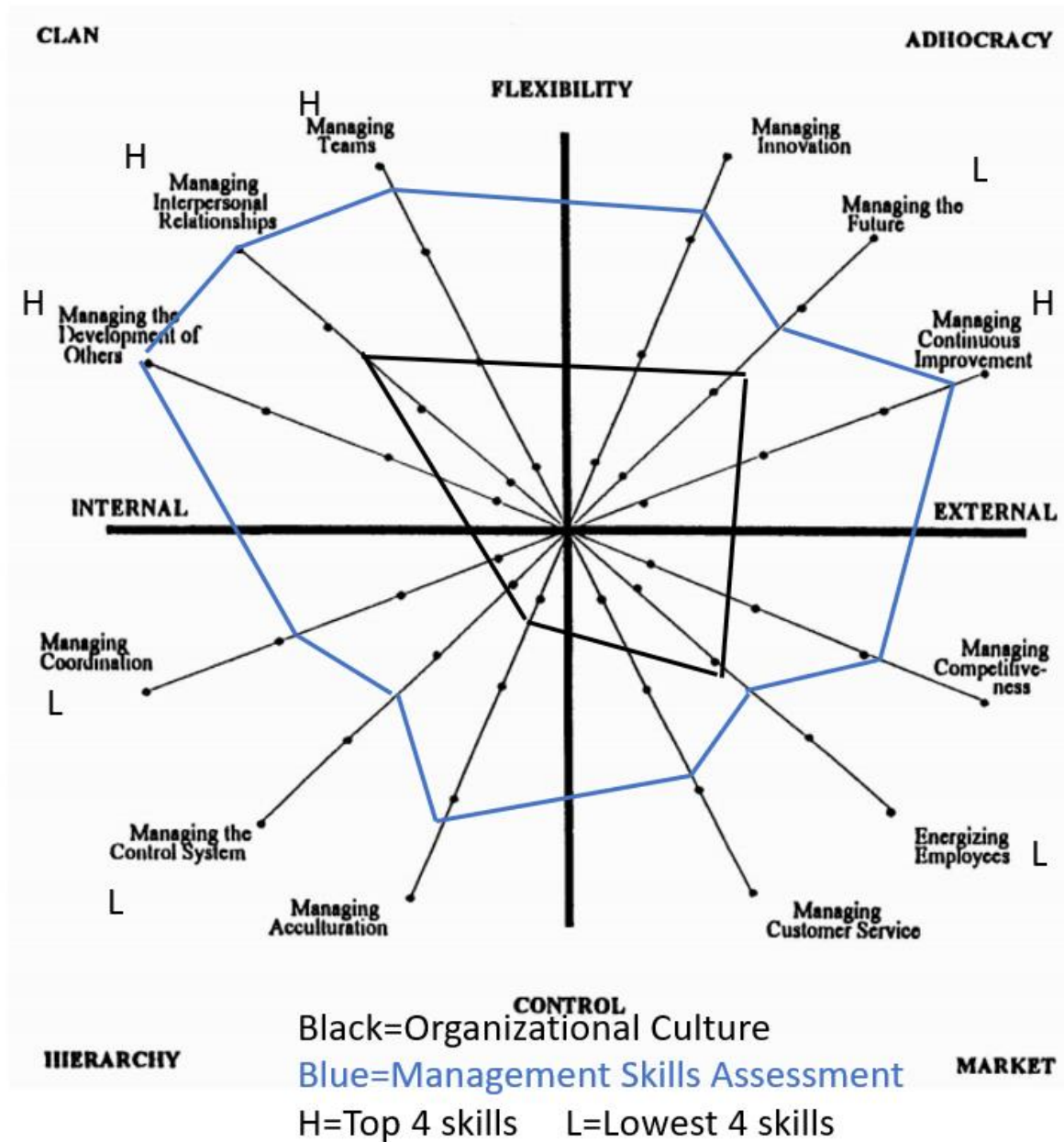
being both online and brick and mortar (Senseuse, Cahyaningsih, & Wibowo, 2015). From the OCAI results can assist the HR Manager in now applying the results to the OIP.

### **Analysis and Implications of the OCAI results within my OIP**

The HR Manager could offer insight on the culture that is present within a department. Thus, an employee transferring between departments can be prepared for their new position by understanding their team's culture, which reduces the risk of an employee self-selecting to terminate employment (Kargas & Varoutas, 2015; Zavyalova & Kucherov, 2010). The OCAI also finds that the Clan Culture focuses on the growth and development of staff, which is present based on the outcomes of the May 2018 assessment I conducted (Cameron & Quinn, 2011). Having a Clan Culture is desirable for an employee transferring department as both a Clan Culture and an employee's focus are to develop their skills for their new role (Zavyalova & Kucherov, 2010). I see a need to have consistency in how employees take care of their team (Zavyalova & Kucherov, 2010). Encouraging a strong Clan Culture of training and development, as well as, an Adhocracy Culture that focuses on individuality, has combined approach benefit of training and developing staff for success in their new role (Han, 2012).

**Organizational change through People.** The Management Skills Assessment Instrument (MSAI) provides another view to determining organizational readiness for change through existing management skills present in a department. I conducted this MSAI assessment in July 2018, and the results are noted in *Figure 7*. The MSAI tool is an extension of OCAI, which creates sub-categories within each organizational culture by linking management skill sets that align within each culture group. *Figure 7* is a visualization of how I perceive a Hot Finds store's management skill set through Cameron and Quinn's (2011) MSAI tool. Within this visualization, I noted using an "L" where the low scoring management skills are not present, and

“H” for high scoring management skills. The findings from *Figure 7* suggest that Clan Culture is high within Hot Finds, which follows the axis of Internal/Flexible, meaning, management are flexible in their execution of tasks and focus on internally growing a team (Cameron & Quinn, 2011).



*Figure 6.* MSAI results for Hot Finds in July 2018 Reprinted from Cameron and Quinn, 2011, Copyright 2011.

Having the Clan Culture score high in MSAI affirms that the necessary skills required, specifically managing the development of others, are present at Hot Finds. One result from both OCAI and MSAI is that Clan Culture was the strongest affiliation (Pierce, 2004). Additionally, Hierarchy Culture scored low in MSAI and had the weakest results within sub-sectors of Managing Coordination, as well as, Managing the Control System. This would align with Hot Finds' current state, as employees transferring between departments are becoming disengaged in their new roles.

The MSAI results show that Clan Culture is the culture that I resonate most with as an HR Manager. I also found that Adhocracy Culture is an area that I resonate with because the skill of managing continuous improvement connects to succession planning of employees (Elsbach, 2009). I do not resonate with a Hierarchy Culture, and I need to remain vigilant on this culture group to ensure that employees who are transferring between departments, who need stability and control, receive this support. By doing so, I can reduce instances of employee's deciding to terminate employment by supporting both a Supervisor and employee in learning his/her new role (Cameron & Quinn, 2011). A final reflection is that Clan Culture speaks to my OIP, because an employee needs the support and development of others (teammates and management team) for them to succeed in any environment.

An employee moving departments can be an exciting and rewarding experience. Given that customer experience, succession planning and training and development are three issues within my PoP, planning to implement and develop an effective change process is critical to an employee transferring between departments. Overall, the company is doing well, but is ready for a change in the process of how an employee transfers between departments. At this point, Hot Finds turnover is consistent with current retail market conditions (Hot Finds, 2018d). Because of

the turnover, I believe that the organization is ready to make a change. The OCAI results of having a Clan Culture present which can support employee growth. As well, a strong Hierarchy Culture which is present at Hot Finds can support a change in how an employee transfers between departments. Cameron and Quinn (2011) argue that having both a Clan Culture and Hierarchy Culture present in an organization creates an internal force that can support change.

Chapter Two explores how Hot Finds can plan and develop a change by utilizing a leadership theory called the TransX Model, discuss the LEAD Change Management Model to support this change, as well as review three possible options to support an employee transferring between departments.

## **CHAPTER 2: PLANNING AND DEVELOPMENT**

Planning and development of an employee transferring between departments is a complex issue because of the multi-dimensional impact on stakeholders, customers, and employees as demonstrated in Chapter One. In this chapter, I review a change model for leading change within a Hot Finds store, conduct an organizational analysis to determine what type of changes are suitable to an employee transferring between departments, and offer possible solutions to address my PoP. Once I identify a solution, I share how I utilize my leadership approach and support change within Hot Finds. Within this leadership approach I acknowledge the ethical and organizational considerations that support this OIP.

### **Leadership Approach to Change: TransX Model**

The Leader-Member eXchange theory (LMX), and Charismatic/Transformational Leadership theory (CTL), together form the TransX Model. While the TransX Model draws from the merits of both theories this model is an effective leadership approach to support an employee transferring between departments in Hot Finds. The TransX Model has nine key characteristics: context, respect, common vision, honest relationships, leader self-awareness, trust, inspiration, commitment, and intrinsic motivation that presents this hybrid of both LMX and CTL theories (Northouse, 2016). LMX and CTL theories are discussed in-depth to show how the TransX Model can be utilized by the HR Manager to resolve the PoP of an employee transferring between departments.

### **LMX Theory**

In LMX theory, the primary goal is to establish high-quality relationships. A secondary goal is to generate trust and commitment from followers (Babic, 2014; Northouse, 2016). The central principle of the LMX theory is that Leaders (L) develop unique eXchange (X)

relationships with Members (M) (front-line employees.). The quality of this relationship positively impacts staff well-being, productivity, and the work environment, which results in LMX theory being an effective tool at Hot Finds. These relationships align with the OCAI results previously discussed in Chapter One regarding the Clan Culture environment that fosters growth in others (Cameron & Quinn, 2011; Tordera & Gonzalez-Roma, 2012). The different eXchange relationships that Leaders produce in-group and out-group cliques of their members. Leaders need to be aware of their relationship with both in- and out-groups since they may be viewed as unfair and appear to be discriminatory to out-groups (Colquitt, Lepine, Wesson, & Gellatly, 2010; von Hippel, 2006). Conversely, in-groups could receive greater benefits, such as more opportunities to grow within an organization (Colquitt, Lepine, Wesson, & Gellatly, 2010; von Hippel, 2006). When Leaders form high-quality relationships with all staff, this results in strong, trusting relationships between Leaders and all. Trusting Member-Leader relationship can produce long-tenured trusted Members within Hot Finds. In this OIP, LMX theory fosters a strong relationship between Leaders and Members when the employee is transferring between departments to ensure that the employee feels connected to both the Leader and Members of their team.

### **CTL Theory**

CTL rests on 4Is foundational to this theory: charismatic/idealized **influence**, **inspirational** motivation, **intellectual** stimulation, and **individual** consideration (Northouse, 2016). Additional characteristics of CTL theory include: considering context, inspiring a common vision, and building relationships (Bass, 2008; Bass, Avoilo, Jung & Berson, 2003; Northouse, 2016). CTL's leadership approach is similar to LMX theory as it promotes employee engagement and inclusiveness within a department when an employee transfers between



departments (Liao & Chang, 2007). One limitation of CTL theory is the follower's perceptions of his/her leader's transformational abilities (Northouse, 2016; Wang & Rode, 2010). Leaders who utilize charismatic/inspirational can sometimes be perceived as "superficial" (arrogant, overbearing, and all-talk), and can create a negative outcome. By using the TransX Model approach, the Leader needs to foster trust through building relationships so their employees can see the Leader as genuine (Bass, Avolio, Jung & Berson, 2003). In this OIP, CTL theory facilitates organizational change to support an employee transferring between departments by encouraging leaders within Hot Finds to be charismatic and to create a common vision.

The LMX theory and the CTL theory form the TranxX Model. Through the TransX Model approach, I have agency to support an employee transferring between departments at both a macro and micro level (Huisman, Louwerse, & Wagelmans, 2014). The TransX Model creates a foundation of a collaborative environment that uses the training manuals as a guide rather than a focus of training which can enhance an employee transferring between departments. At a macro level, I can ensure a department is prepared to accept a new employee. I can prepare by having the training manuals available for the employee and make sure they have time allocated to complete the training. From a micro level, I can frequently connect with both leader and employee to check-in on an employee's progress to ensure that he/she has a smooth transfer which builds commitment and is another aspect to the TransX Model. Thus, using the TransX Model builds positive relationships and can propel change that can support this OIP during the implementation and communication strategies that are discussed in Chapter Three. Within Chapter Three, I share how the monitor and evaluation stages will use the TransX Model approach when I work with the implementation stakeholders.

### **Framework for Leading the Change Process**

Reactive change, anticipatory change, and incremental change are three ways to frame change. This section defines each style of change and analyzes three ways to frame the change of an employee transferring between departments. I discuss how an anticipatory change and incremental change theory can best support this OIP to prevent the need for a reactive change in an employee transferring between departments.

#### **Reactive Change**

A reactive change is when an outside entity creates a need for change (Freund, 2005). For example, a reactive change is when Corporate Headquarters reduces staff hours to combat a decline in sales. This is an example of reactive change as a store has no control of the labour hours allocated to a store. Another example of reactive change occurs when a government imposes minimum wage increases that result in a reduction of hourly staff hours due to budget constraints. As a store's focus is on customer interaction, when a reduction of hours occurs, this results in a lack of training and development hours allocated for staff. Additionally, a reactive change example occurs when an employee quits without giving notice. When an employee is transferring between departments, a reactive change model is not a preferred style of change for this OIP as a department/organization requires stability in order to support consumers and maintain a knowledgeable team (Dalton & Todor, 1993; Freund, 2005; Kampkötter, Harbring, & Sliwka, 2018; Paillé & Grima, 2011; Pamentier, 1994; Ramlall, 2006; Weiner, 2009).

#### **Anticipatory Change**

An anticipatory change occurs when the Store Manager is aware of an upcoming employee movement within their store (Dalton & Todor, 1993; Ramlall, 2006). An example of an anticipatory change is when an employee gives their resignation notice. As well, an

anticipatory change is when a supervisor conducts a regular check-in with their employee and finds out that the employee will be applying for a vacancy in another department (Sniehotta, Schwarzer, Scholz, & Schütz, 2005). Another example of an anticipatory change occurs when a change is made to the department layout resulting in an increase of staffing or creating more check-out locations to enhance the customer's experience (Brown & Eisenhardt, 1997; Carter, Armenakis, Feild, & Mossholder, 2013). An anticipatory change is supportive of this OIP as the Store Manager and the HR Manager are prepared for when an employee is transferring between departments. For an anticipatory change to work at Hot Finds, the leader needs to foster the TransX Model approach to establish trust and build commitment with their employees. By establishing trust and building commitment, a positive attribute to an anticipatory change is that both the HR Manager and the Store Manager can anticipate when employee transfers will occur within a store by hosting regular check-ins with their staff. These regular check-ins can result in a smooth transfer process by knowing any future changes that their staff may share during these meetings. If a manager is unable to establish trust and build commitment with staff, a negative aspect of the anticipatory change is that not all employees may be forthcoming with information as he/she may not be comfortable in sharing their goals with their manager. The TransX Model encourages intrinsic motivation via developing staff and an anticipatory change can benefit both the employee and manager to support an employee who is transferring between departments (Hong & Rui-min, 2012).

### **Incremental Change**

An incremental change occurs when subtle changes are made from Corporate Headquarters to enhance a customer's experience. An example of an incremental change occurs when the Store Manager changes the work schedule to align with business needs (e.g., vacation

schedules). An incremental change is a process and can take time to implement as these subtle changes are part of an implementation process. As a result, a positive component of an incremental change is that a change does not make any significant alteration of the routines within a store, rather, enhances the workflow by potentially removing redundancies (Carson, Shanock, Heggstad, Andrew, Pugh, & Walter, 2012; Mazutis & Slawinski, 2008). Another facet of an incremental change is to re-evaluate existing policies/procedures (Mazutis & Slawinski, 2008). These subtle changes create inspiration as employees may see how the Leader is using the TransX Model approach by Listening to feedback provided by customers and staff to make changes to reduce hardship in the employee's role (Hot Finds, 2018b). A negative aspect to an incremental change is the time required is elongated to match the change required by reducing impact to the customer's experience (Brown and Eisenhardt, 1997). An incremental change is supportive of this OIP as I need to ensure that proper steps are in place to ensure a smooth transfer for an employee transferring between departments. A smooth process may take time to re-evaluate how policies and procedures impact an employee transferring between departments.

To support an employee who is transferring between departments, being anticipatory of the needs of a business and customers as well as, providing continuous improvement via incremental change is paramount (Freund, 2005). Both anticipatory change and incremental change can be used to support this OIP since they both acknowledge the need to prepare for a change rather than reacting to change. I now explain how the LEAD Change Management Model establishes an effective framework for understanding, planning, and leading change that are both anticipatory and incremental by nature.

### **The LEAD Change Management Model**

The LEAD Change Management Model can be used to anticipate change as well as implement incremental changes within a store. Both anticipatory change and incremental change are the approaches I use in this OIP. I now explain the specific aspects of this LEAD Change Management Model. The LEAD Change Management Model assists the manager in a step-by-step process which includes how to Listen for Change, Explore options of the change, Act on the change option, and Develop based on the outcome from the change.

**Listen.** Listening is the early stage of change. When an employee transfers between departments, they may be apprehensive or have a fear that they may not be successful in a new position (Dalton & Todor, 1993). The HR Manager can anticipate change by following the LEAD Change Management Model by Listening to employees' verbal and non-verbal communication (Cawsey, Deszca, & Ingols, 2016; Ramlall, 2006). Listening to employees wants/needs/interests occurs when the information gathered create the knowledge to anticipate a change that may occur within a department—or a change that needs to be addressed. During this Listening stage, I need to be aware of/understand the problem, which is an employee transferring between departments (Paillé, & Grima, 2011). Through Listening, a manager also aligns with Hot Finds's value of The People are our Power as a manager acknowledges that their employees make Hot Finds operate (Hot Finds, 2018). As well, I need to Listen to what an employee is not saying by noting non-verbal cues. An example of a non-verbal cue is when an employee is checking their cell phone and not engaging with nearby customers (Carson, Shanock, Heggstad, Andrew, Pugh, & Walter, 2012). From Listening, I need to record my observations of how an employee is progressing/not progressing to establish common ground to start resolving this PoP (Hot Finds, 2018b).

During this Listening stage I need to encourage open and honest communication by creating a trusting environment as this aligns with the TransX Model. As HR Manager, I genuinely care about how an employee progresses in a new role. Creating a positive workplace environment will look different for each employee as they transfer between departments. I need to be adaptive to change and consider how I can be open and honest during a conversation with either the Store Manager or front-line employee. For example, I may share my previous experience moving between departments to highlight both roles of a manager and front-line employee while transferring between departments. Finally, by Listening to an employee's concerns, I establish trust and respect when I take notes of all information without bias or prejudice.

**Explore.** The important part of the Exploration stage is to ensure a decision is supported by all stakeholders. I need to inspire both employee and self by thinking “outside of the box” to find possible solutions. By thinking of possible solutions to a problem/concern noted by an employee who is transferring between departments, I can inspire using the TransX Model approach, to have collaboration on a possible solution (Carlile, 2002; Chang, Lee, Wei, & Huang, 2017; Deluga, 1990). Within this Exploration stage, I need to also connect with the stakeholders that include Supervisor, Assistant Manager, Store Manager, and front-line staff who are part of the transfer process to encourage collaboration beyond the front-line employee. When Exploring for possible solutions, employees often have good ideas about how to improve their department or the store. I can analyze each possible solution that was presented when I connect with all stakeholders. This collaboration process is important to align with incremental changes that can support an employee who is transferring between departments. Once a possible solution is agreed upon, the Act stage of the LEAD Change Management Model can be executed.

**Act.** Action is the next stage in the LEAD Change Management Model where the HR Manager is now building commitment for a decision made within the Exploration stage. Additionally, by Acting on a possible solution, the TransX Model encourages that commitment is shared and made by all stakeholders involved with a goal to achieve a positive outcome (Braun, Avital, & Martz, 2012; Chai, Hwang, & Joo, 2017). Within the Act stage, the HR Manager needs to utilize all resources available to ensure success. By utilizing resources, (e.g., employees supporting another employee or specific tools or actions available to Hot Finds staff), a leader needs to anticipate what the change outcome will be and ensure that all available tools are available to commence training (Chai, Hwang, & Joo, 2017). The Act stage is important as one of Hot Finds' value is The People are our Power (Hot Finds, 2018). This corporate value encourages all stakeholders to have the necessary resources to succeed in their role. Once an outcome / transfer is achieved, the final step within the Act stage is that the HR Manager must debrief with all stakeholders to maintain the commitment found within the TransX Model approach. The HR Manager reviews the outcome to determine what wins, misses, and opportunities occurred during the Act stage. If the outcome is unsuccessful, I can note any incremental changes that occurred and anticipate future changes that may happen to increase the chance of a successful implementation of this OIP. Even though the outcome is unsuccessful, it is important to continue to the Develop stage of the LEAD Change Management Model (Carlile, 2002; Chang, Lee, Wei, & Huang, 2017; Deluga, 1990). If the outcome is successful, all stakeholders can celebrate the successful transfer of an employee between departments within the Develop stage of the LEAD Change Management Model.

**Develop.** Incremental changes occur within the LEAD Change Management Model during the Develop stage. This stage is aimed at overall growth and development of participants

by using the TransX Model approach to foster intrinsic motivation by encouraging staff to develop their skills based on the outcome of this LEAD Change Management Model's cycle. As well, this OIP can also grow via incremental changes as a result of an Action. When an incremental change happens, the macro and micro changes within an organization can enhance and reduce any redundancies within an organization. Once a solution is found, (i.e., an employee is successful in a transfer to a new department), the HR Manager needs to encourage ongoing training and development of their team and reward the team for meeting their objectives (Ramlall, 2006). If a solution to an employee transferring between departments was not found, a manager needs to revisit the Listening stage and recycle the LEAD Change Management Model until a successful outcome. I need to utilize all ideas generated within the Listening and Exploratory stages so that the organization and employees benefit from both incremental and anticipatory changes and continue to grow as a learning organization that aligns with the OCAI Clan Culture (Cameron & Quinn, 2011).

The goals of the LEAD Change Management Model are to Listen to all issues and ideas, Explore all options for a positive solution, Act on a possible solution, and finally Develop staff to support an overall growth of an organization. While this LEAD Change Management Model can guide an organization through a change, organizational changes take many forms and require many considerations. One consideration is that an effective employee transfer takes time and leadership support, which are explored next.

### **Critical Organizational Analysis of Hot Finds**

A critical organizational analysis helps the HR Manager analyze what options are available to resolve the PoP: how can an organization improve employee transfers between departments to support an employee's experience? Within this section, I conduct a critical



organizational analysis of Hot Finds using both a macro organizational level and micro individual level approach of an employee transferring between departments (Easton, 2011; Rodriguez, 2016). The results of the analysis show that the gaps are; training and development, the need for regular check-ins, and a focus on a proper succession plan. The next sections analyze each gap with a macro- and micro- lens closely.

### **Training and Development**

Based on Cameron and Quinn's (2011) MSAI informal assessment, training and development falls within the Adhocracy Culture specifically, managing continuous improvement and Clan Culture which is managing the development of others. Adhocracy Culture can assist in this PoP by adapting to change through managing continuous improvement. Clan Culture focuses on employee development. Bell, Mengüç, & Widing, (2010) argue a need to foster an environment where learning is encouraged in the workplace. The MSAI results are excellent indicators that Hot Finds, at a macro level can achieve success in transferring an employee between departments through the usage of the existing management skills.

At a micro level, when an employee transfers between departments they need to learn new knowledge and skills. When an employee is in their new role, I need to be cognizant that each employee has different learning needs/styles which can result in different timelines to complete their training (Hot Finds, 2018b). A desired future outcome will be one of reduced stress of an employee who is transferring between departments (Huisman, Louwerse, & Wagelmans, 2014). A gap identified within the MSAI Hierarchy Culture results was that managing coordination scored low. The translation of the MSAI results shows that I need to ensure that there is better coordination and that the existing skills of managing continuous improvement and managing the development of others are effectively utilized.

Before the transfer takes place, I need to secure a replacement for the previous position the employee held and ensure that the new/transferred employee is trained in their new role (Bersin, Flynn, Mazor, & Melian, 2017; Leighton & Bent, 1997; Liang, 2012).

### **Regular Check-ins**

Another gap to address is the lack of regular check-ins to support and evaluate an employee transferring between departments. The manager which includes: Supervisors, Assistant Manager, Store Manager, and HR Manager need to conduct regular check-ins with an employee to ensure that the employee is progressing based on established training timelines. At a macro level, a manager can understand where there may be gaps in an employee's training and development. A manager can see these gaps by going through the training manual and evaluating the employees progress to identify specific knowledge/procedures gaps. During this check-in, a manager needs to record and note any discrepancies during this evaluation process to determine if there is progress or delay in an employee's training (Ackfeldt & Coote 2005). Within a micro level, a manager's focus is to have open communication utilizing the TransX Model approach. A manager can share their experiences with an employee transferring between departments and offer solutions/suggestions on how to alternatively approach training on a subject matter. The manager can use the training manual as a supportive tool to keep the employee engaged and on track with their training. The MSAI (Cameron & Quinn, 2011) informal assessment notes that regular check-ins scored as an area of opportunity within the Hierarchy Culture section, specifically managing acculturation, which is when an employee knows what is expected. Encouraging a manager to have one-on-one check-ins with their employees can enhance support, resulting in an employee being able to smoothly transfer into a new role.

### **Succession Planning**

Succession planning is used to determine who can fill positions within a store when the incumbent leaves (Elsbach, 2009). Cameron and Quinn 's (2011)OCAI and MSAI show that Hot Finds is in a position of change. Based on bothOCAI and MSAI results, there are opportunities for growth within Hierarchy Culture, specifically managing coordination, (Cameron & Quinn, 2011; Pollitt, 2009). At a macro level, succession planning aids a leader in knowing about upcoming transfers within a store (Elsbach, 2009). Succession planning identifies any potential impacts/changes that can occur resulting from changes in a store. Finally, succession planning also reduces a negative customer's experience as a customer is working with trained staff. At a micro level, a leader needs to minimize the impact of change for front-line staff by ensuring that a department can operate smoothly without interference of staff movement. The organization can benefit from using the positive results found in Cameron and Quinn's (2011)OCAI section of Market Culture, specifically, employee engagement through energizing employees and Clan Culture of managing interpersonal relationships.

As previously discussed, Hot Finds is ready for a change. Within the scope of both macro- and micro-levels of enhancing training and development to meet employee's needs, conducting more effective regular check-ins, as well as creating a succession plan that can support the growth through cross-training. Within the next section, I explore three possible solutions to these three existing issues.

#### **Possible Solutions to Address PoP**

Three possible solutions are presented in this section: create a Training Manager position within each store, propose mandatory Leadership Development training, and offer Business

Development training. Within each possible solution, a breakdown of the resource needs to implement each idea are identified.

### **Create a Training Manager Position for Each Store**

A solution to the problem that arise with an employee transfers between departments is to have a singular Training Manager committed to training and development of all staff within a store (Kim, Knight, & Cruisinger, 2009; Wirtz & Jerger, 2016). A Training Manager would be highly knowledgeable about the organization and has been cross trained in various departments and positions. In addition, this Training Manager would also be working alongside a Store Manager to ensure that he/she is familiar with all new and upcoming changes within the organization (Ackfeldt & Coote 2005). By being informed of these changes within a store, the Training Manager can anticipate any changes that will happen at an employee level and be able to target incremental training for employees and/or departments (Pollitt, 2007; Tan, Fu, & Yi, 2016).

**Resource needs.** Because of this staffing increase of one Training Manager per store, a salary would need to be paid as well as benefits allocated to this role. This new position requires a job description that outlines role, responsibility, and adult education training principles. As the incumbent would need to be an expert in Hot Finds' policies and procedures, an internal candidate would be ideal as internal searches demand less capital expenditure to find a suitable candidate. Once an employee is selected, training would be required for the successful incumbent to ensure that he/she understands the new position. A member from the Headquarters' Learning and Development team would need to create a training manual to match the role and responsibilities of a Training Manager to ensure consistency across Hot Finds. Next, I need to be concerned of the cost for a training budget. A study by Muehlemann and Strupler-Leiser (2018)

found that to be trained in a new role takes about sixteen weeks of wage payments for both trainer and trainee (p.131). The average training timelines offered by Hot Finds is twelve weeks, which aligns with the corporate probationary periods (Hot Finds, 2018b). Technology/computer resources is another resource needed to ensure the training is a success. The Training Manager would be trained on-the-job with the support of an HR Manager as well as a Store Manager. Within each store, there are three computer terminals committed to staff training. A computer terminal would be reserved for the Training Manager to ensure that can complete any online training of their duties as required. A Training Manager can access all necessary tools not found online and in-store by asking their Store Manager for additional support (Forrester, 2017).

### **Leadership Development Training**

Solution Two involves Leadership Development training for both Store and Assistant Manager. A specific component to the Leadership Development training is a section on how-to support regular check-in meetings with staff. A section of this training could target how to conduct regular check-ins with an employee who is transferring between departments. This Leadership Development training involves establishing what a check-in entails and how to monitor its progress. In addition, professional business writing is another aspect on an employee's training progress needs to be recorded (Hot Finds, 2018b). Leadership Development training can assist Management by improving skills on how to build trust with employees which is an aspect of the TransX Model. This Leadership Development training could be executed by the HR Manager. Two helpful resources the HR Manager can utilize are Personality Dimensions (PD) (Personality Dimensions, 2015). To understand an employee's personality via PD, the HR Manager can facilitate monthly workshops for employee to attend. An employee completes an assessment within a half-day workshop. Based on the outcome of the assessment, the

participants explore how they utilize their primary temperament which are characterized as Authentic Blue, Organized Gold, Resourceful Orange, and Inquiring Green (Personality Dimensions, 2015). The Store Manager and Assistant Manager can use this training to help support the employee who is transferring between departments by conducting this assessment. Another anticipated outcome is that the Store Manager and Assistant Manager improve their relationships with their employees as they understand each personality type. They can structure the regular check-ins to align with the employee's personality. Another tool the Store Manager and Assistant Manager can utilize is Lencioni's (2018) Five Behaviours of a Cohesive Team. Five Behaviours of a Cohesive Team focuses on teambuilding by going through a series of topics on Trust, Conflict, Accountability, Commitment, and Results (Lencioni, 2018). This Leadership Development training can enhance both the Store Manager and Assistant Manager abilities by increasing their knowledge on how-to conduct effective check-ins on an employee transferring between departments.

**Resource needs.** To create Leadership Development training, this would require staff within the Training and Development team at Corporate Headquarters to create content about how-to facilitate effective regular check-ins with employees through the knowledge of PD and teambuilding exercises utilizing Lencioni's (2018) Five Behaviours of a Cohesive Team. As noted, a section of this training would focus on an employee who is transferring between departments. This training is for both the Store Manager and Assistant Manager on how to connect with staff effectively and could be a full-day workshop. These workshops would be covered monthly via in store by the HR Manager and then is an annual refresher workshop for the Store Manager and Assistant Manager to complete. An incremental change would be that both managers attend these events as a "refresher" course annually to ensure these skills are

maintained. The cost associated to this training would be the booklets with the content, additional labour hours for the training to ensure that the store is adequately covered while both The Store Manager and Assistant Manager are away.

### **Business Development Training**

A final possible solution to resolving this PoP is Business Development training. A component of Business Development training is to create an effective succession plan within a store. Business Development training can provide education on customer service and how to market and sell products/services. Business Development training differs from Leadership Development training as Business Development training focuses on best practices of an organization whereas Leadership Development training focuses on how a Leader manages their team (Cabanillas, Resinas, & Ruiz-Cortés, 2018). This Business Development training can be created by the Training and Development team at Corporate Headquarters. The Store Manager and Assistant Manager would be in attendance as these two positions run the daily operations of a store. A topic on succession planning within the Business Development training can focus on succession planning guides as part of a store's continuous improvement (Forrester, 2017). Succession planning would fall within best practices of an organization as the focus of this training impacts departmental and store-level operations, as well as the customer experience (Elsbach, 2009). Succession planning involves many different employee actions that need to be considered when an employee transfers between departments: termination, department transfers, and career development (Wirtz & Jerger, 2016). Within Business Development training, both the Store Manager and Assistant Manager are anticipating future ongoing considerations that occur within the store rather than being reactive to change. It is through anticipating changes that the Store Manager and Assistant Manager are now intrinsically motivated which is a characteristic

of the TransX Model by encouraging themselves as leaders to continually grow through their own training and development. By conducting Business Development training that has a focus on succession planning management can prepare for inevitable changes within a store (Zavyalova, & Kucherov, 2010).

**Resource needs.** Like creating Leadership Development training, Business Development training would require content to be created by the Training and Development team as the purpose of this training would focus on the store's continuous improvement. The Training and Development team at Corporate Headquarters can create this training. Due to the various reasons why a transfer would be initiated, creating a succession plan is a complex process (Wirtz & Jerger, 2016), this workshop would be a full day. The HR Manager can facilitate the content onsite provided by the Training and Development team in the morning. The afternoon would consist of the Store Manager and Assistant Manager discussing how to effectively implement a succession plan within their store. The resources required would be travel, accommodations of the HR Manager if the store is in a remote location, materials, food and store coverage for the absent managers.

### **Similarities/differences of three possible solutions**

Based on each possible solution, there are multiple similarities and differences between them all that can resolve this PoP. The main similarity between the three solutions is that both Leadership Development training and Business Development training solutions connect to the training and development of both the Store Manager and Assistant Manager as self-improvement workshops (Carlile, 2002; Zavyalova & Kucherov, 2010). The possible solution of creating a Training Manager for each store would have one position with a dual focus of both regular check-ins, which would be covered in the Leadership Development training offered to the Store



Manager and providing effective succession planning in a store which would be the Business Development training to both the Store Manager and Assistant Manager. Other benefits to consider is that this Training Manager role would focus on training and development of staff, thereby aligning with Cameron and Quinn's (2011) OCAI of a Clan Culture environment focused on training and development

Differences between Business Development training and a dedicated Training Manager is the Business Development training is focused on a specific topic, succession planning (Forrester, 2017). Business Development training focuses on a store's needs and interests, whereas Leadership Development training focuses on a manager's growth in personal development (Wirtz & Jerger, 2016). The Training Manager solution is different as this position can perform both conducting regular check-ins and offering feedback on the succession planning process. A key difference between the three possible solutions is that the Training Manager role has a financial resource of the creation of a salaried manager position which includes benefits and eligibility for bonuses. Next, I review the benefits and consequences of each possible solution and how a solution connects back to supporting an employee who is transferring between departments.

### **Benefits / consequences of each possible solution**

**Implementing a Training Manager for each store.** The benefits of having a Training Manager<sup>3</sup> in each store are having a dedicated training manager is that each store can train an employee transferring between departments via one-on-one support (Kargas & Varoutas, 2015). Another benefit to this position carries much responsibility for understanding how adults learn,

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<sup>3</sup> Training Manager is a term used within Hot Finds Corporate Headquarters for staff who train others at the Corporate Headquarters. As such, this term is transferred into the retail stores to offer consistency with position titles currently in use at Hot Finds.

supporting employee development and facilitating a relationship between a store and Corporate Headquarters (Gamble, 2003). Because of the three levels of management (Supervisor, Assistant Manager, and Store Manager) potentially placing demands and pulling a trainee away from learning, a Training Manager needs to support the employee who is transferring between departments by making the primary goal to complete the induction into the new role (Leighton & Bent, 1997). As a result, when implementing a Training Manager for each store, this role would report to both the Store Manager and the HR Manager to ensure that they are connected to the store leadership team and HR resources. Another benefit to having a Training Manager role is the ability to lighten the workload of the Store Manager, Assistant Manager and the HR Manager by taking care of the training and development of staff. A goal is reducing turnover in a store which means less time will be spent on training new staff and the focus can shift to ongoing training and development of existing front-line staff (Lambert, 2008; Pollitt, 2007; Tan, Fu, & Yi, 2016). A final benefit of having a Training Manager focused on growth and development benefits the department team, a store, and the organization thereby connecting back to the TransX Model approach by encouraging intrinsic motivation (Bersin, Flynn, Mazor, & Melian, 2017). A consequence to having a Training Manager within a store is the financial commitment to paying the salary and benefits of the incumbent. Another consequence to this solution is that training would require an initial commitment of the Store Manager to train the incumbent. Finally, a consequence to this possible solution is that the process to implement this solution would take time and multiple human resources from Corporate Headquarters and store management.

**Creating Leadership Development training.** The benefits of having Leadership Development training is that training can help leaders increase their knowledge and experience

on leading employees (Kim, Knight, & Cruisinger, 2009). Another benefit of Leadership Development training is this training can become a continuous and evolve to include other aspects of leadership that are not specific to conducting regular check-ins. This Leadership Development training can include regular check-ins with the Store Manager and the Assistant Manager. Finally, this Leadership Development training can include the use of online learning as Hot Finds does provide online training modules for some training. A consequence of having Leadership Development training is that training and development take time and that leaders/managers are busy with other roles and responsibilities (Kargas, & Varoutas, Wirtz & Jerger, 2016). By removing a manager for training, another task the manager is responsible for is potentially not completed due to time constraints. Finally, leadership training may not be an appropriate tool for all as in-class training is only one of many ways an adult may learn.

**Creating Business Development training.** There are many benefits of having Business Development training to support both the Store Manager and Assistant Manager. Like Leadership Development training, there are multiple aspects of Business Development training and is not limited to succession planning. Business Development training supports a team by training about customer service and how to market and sell products/services. A consequence to Business Development training is that not every individual is at a similar place concerning growth and development (Bersin, Flynn, Mazor, & Melian, 2017). Another drawback is that not all managers are interested in business training which may result in disengagement of some Store Managers and Assistant Managers. Finally, a consequence of not offering Business Development training like succession planning could mean that a store could be reactive to change rather than anticipating change. This could result in the poor performance of a store due to the continuous changes caused by high employee turnover.

**Best Solution.** Based on the three possible solutions (implementing a Training Manager within each store, creating Leadership Development training or, creating Business Development training), the best solution to support an employee transferring between departments is a Training Manager within each store. This solution presents a win-win scenario for a store. The Training Manager would be able to cater to the specific needs of an employee when an employee transfers between departments. As well, a Training Manager would reduce the workload of the Store Manager and Assistant Manager as this Training Manager role can act as a conduit for all training and development, conduct regular check-ins of an employee's progress in their training and formulate a succession plan based on their training interactions.

### **Leadership Ethics and Organizational Change Issues**

As part of my leadership ethics, I utilize the TransX model as a leadership approach as a supportive environment is essential and crucial so that an employee feels comfortable in a new department. There are three ethical responsibilities that Hot Finds will adhere to when implementing this change can establish trust, create a safe workplace, and build commitment. Part of the TransX model's approach is building trust. One area of my role as HR Manager is the duty to accommodate every employee's need within the Labour Act (O'Brien & Linehan, 2014); when an employee shifts positions, proper accommodation needs to be offered to ensure his/her success (CLAS BC Human Rights Clinic, 2018). By using the TransX model to establish trust, I can make employees feel comfortable in discussing their needs / interests regarding what accommodations would be required of Hot Finds. Benefits of trust include an employee feeling comfortable discussing a sensitive topic with a manager, approaching an HR Manager about issues within a department/store, and knowing that a manager will support his/her transfer by offering feedback and development as an employee. Challenges to building trust are the

timelines to achieve a trusting relationship (Burke, 2006). This varies by each employee; however, when trust is formed, maintenance is required to ensure that the trust is sustained.

Creating a safe workplace environment is another area of responsibility for me. Another facet of the TransX model is to lead via inspiration (Northouse, 2016). I can create a safe, ethical workplace by adhering to the health and safety policy. As Hot Finds could be an employee's first working experience (Hot Finds, 2018d), I can inspire by leading by example so employees can understand the importance of the Health and Safety policy and required behaviours of a Hot Finds employee. By inspiring employees to learn, I am encouraging them to grow and develop skills to enhance not only themselves but also their team and the store.

Commitment is a facet of the TransX model approach which encourages an employee to follow-through with established timelines to ensure success in a new role. By achieving commitment to learning a new role, an employee has agency to ensure personal/professional success. A challenge to building commitment is one's availability and timeline to complete a task. Different activities can be utilized to develop and maintain team effectiveness such as Lencioni's (2018) Five Behaviours to a Cohesive Team discussed in Chapter Three.

In using the TransX Model as the leadership approach to change, three ethical responsibilities are required of the Store Manager and I: establish trust, build commitment and create a safe workplace through intrinsic motivation. While it is the Store Manager's responsibility to understand an employer's duty to accommodate, creating a safe workplace, and offering enough time for training, I need to support the Store Manager and Training Manager by being an accessible resource and the Training Manager (Bisschoff & Govender, 2007). To support these ethical issues, I offer the solutions of host regular team meetings, encourage regular communication, provide training timelines, and create a supportive environment.

**Host Regular Team Meetings**

Within this team meeting, the Store Manager can support all staff by understanding their positions at Hot Finds and how the Training Manager role will enhance their experience (Hot Finds, 2018b; Pollitt, 2005). During a regular team meeting, the Store Manager can announce if there is/are employees who are transferring between departments to encourage intrinsic motivation of having their team members support them in learning his/her new role (Hot Finds, 2018b). By hosting regular team meetings, the Store Manager is engaging in an altruistic ethical approach to leadership through genuine concern for the interest of others resulting in developing trust through the TransX Model approach by creating a common vision (Northouse, 2016).

**Provide Regular Communication**

Regular weekly communication from the Store Manager to front-line staff will provide excellent information for staff to understand what they can do (for example, a tenured employee encourage new team member to observe a customer transaction) to support an employee transferring between departments. Another benefit to offering regular communication is having one consistent message being shared with all employees. One message also provides a sense of community as all employees understand what needs to be accomplished which, aligns with Cameron and Quinn's (2011) Clan Culture of creating a learning environment for front-line staff. By using the TransX Model within regular communication, commitment is built. A challenge with regular communication is to ensure that, even when the Store Manager is away, a weekly message is relayed to all team members.

**Offer Training Timelines**

With sharing employee training timelines, a timeline establishes a goal for both parties to reach. Providing specific training timelines to help understand the Store Manager's commitment

to the success of an employee transferring between departments is required to ensure employees success (Northouse, 2016). Consistency with messaging about training timelines and time allocated for training is also important so that a front-line employee understands how he/she is held accountable for maintaining progress in achieving the goal of an employee successfully transferring between departments (Bisschoff & Govender, 2007; Kubal, Baker, & Coleman, 2006).

### **Create a Supportive Environment**

By creating a supportive environment, it shows empathy and understanding that transferring between departments is not an easy process, an employee who is transferring between departments requires a supportive workplace. Through empathy, the Store Manager is showcasing ethical leadership by having an employee assess what he/she needs to complete their transfer and successfully integrate into their new role (Northouse, 2016). It is through hosting of regular team meetings, providing regular communication and creating a supportive environment that the Store Manager uses the TransX Model approach to establish trust, build commitment and encourage intrinsic motivation within their team. By using the TransX Model approach to develop trust, commitment, and intrinsic motivation the Store Manager can ensure a supportive environment when implementing a Training Manager in the store.

Within this chapter, leadership considerations of an employee transferring between departments is presented as complex, demanding, yet a critical process. I reviewed the need to utilize the LEAD Change Management Model to explore the change needed to support an employee who is transferring between departments while aligning back to Hot Finds' corporate values and the TransX Model approach. Based on the three possible solutions to resolving the PoP of: How can an organization improve employee transfers between departments to support an

employee's experience, creating a Training Manager role is the best solution to this PoP. I can ensure that I lead ethically via an altruistic approach using the TransX Model to encourage the Store Manager to host regular meetings, provide regular communication to their employees and create a supportive work environment. While using the TransX Model, I can also use the LEAD Change Management Model to Listen, Explore, Act, and Develop within hosting of regular meetings, providing regular communication and creating a supportive working environment to ensure I am held accountable through this collaboration process. Traditionally, a Plan, Do, Study, and Act (PDSA) model is used to implement change. Within Chapter Three, I show a Plan to implement this change that outlines the stakeholders required to execute the Training Manager role within each store. I then create timelines that Do/implement the Training Manager within the store. Next, I Study the plan using a 30-60-90-day monitor and evaluation review cycle. Finally, I Act during the 30-60-90-day cycle to ensure the implementation of the Training Manager within the store.



## **CHAPTER 3: IMPLEMENTATION, EVALUATION, AND COMMUNICATION**

Chapter Three is the heart of this OIP as it presents the plan to resolve the PoP, which involves improving the employee transfer process between departments. The best solution chosen to resolve for this PoP is to create the position of the Training Manager within a store. There are three main sections within this chapter: a detailed change implementation plan, how to monitor and evaluate the training of the Training Manager process, and a communication strategy. This OIP concludes with a synthesis of the entire OIP, next steps, and future considerations.

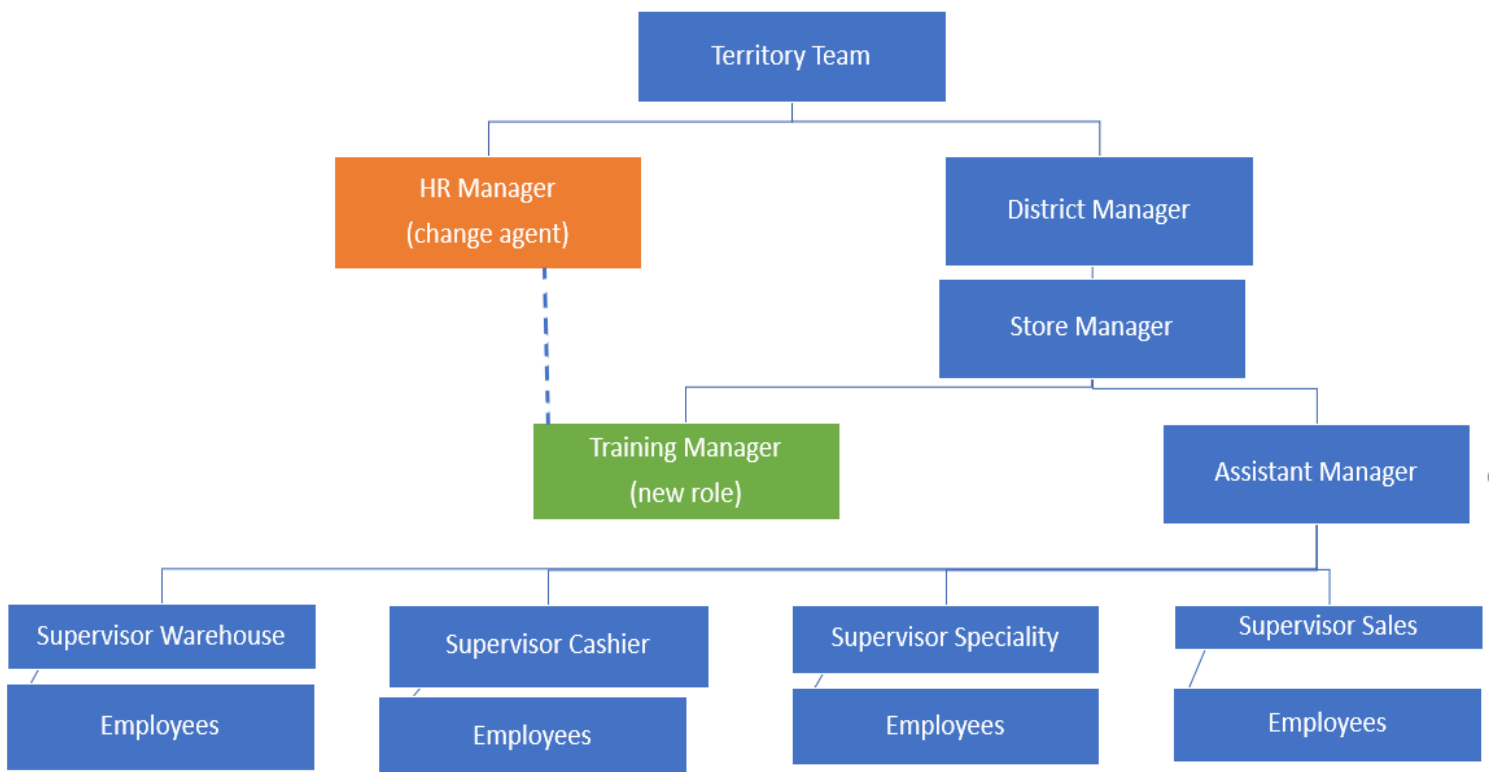
### **Change Implementation Plan**

This section describes the change implementation plan which includes creating goals from the organizational analysis in Chapter Two and outlining a plan for managing the transition process.

#### **Creating Goals from the Organizational Analysis in Chapter Two**

Implementing a Training Manager position aligns with one of Hot Find's goal to become one of Canada's Top 100 Employers (Hot Finds, 2018). This goal to be Canada's Top 100 Employers supports employee growth and development by creating a Training Manager role improves employees transferring between departments. The goal of the Training Manager role is to lower employee turnover and create a more efficient customer experience through training. As well, I acknowledge in Chapter Two that this new role can focus on creating higher customer satisfaction. With the addition of a Training Manager within a store's organizational hierarchy, the Store Manager and Assistant Manager need to be brought into this change early as active supporters to achieve Hot Find's goal of being one of Canada's Top 100 Employers (Hot Finds, 2018).

For the purposes of executing the change implementation plan, the stakeholders within are the HR Manager, Store Manager, Training Manager, District Manager, Recruitment Team, Training and Development Team and the Headquarters leadership/Territory Team (Hot Finds, 2018b). Creating a Training Manager role would be both an anticipatory change as well as an incremental change to support an employee who is transferring between departments (Carson, Shanock, Heggstad, Andrew, Pugh & Walter, 2012; Dalton & Todor, 1993; Mazutis, Slawinski, 2008; Ramlall, 2006). *Figure 8* proposes a revised Hot Finds store organizational chart which places the role of the Training Manager at an Assistant Manager level. This position reports to a Store Manager with a dotted line reporting to an HR Manager.



*Figure 7.* Hot Finds Hierarchy Introducing a Training Manager Position.

To outline how this Training Manager position is implemented, Appendix B charts the details of both stakeholders and actions using a RASCI (Responsible, Approver, Supporter, Consulted and Informed) responsibility matrix (Jacka & Keller, 2009). RASCI models are

frequently used at Hot Finds to execute a project by determining each stakeholder's task. This chart identifies which role is Responsible for an action, an Approver for an action, a Supporter of action, who needs to be Consulted, and finally, individuals that need to be Informed of how the Training Manager position is progressing (Jacka & Keller, 2009). It is important to note that, within a RASCI chart, a stakeholder can hold multiple roles within a task as identified in Appendix B.

Across the top of Appendix B in blue coloured font are the positions/departments within Hot Finds which are part of executing a Training Manager position. Along the left-hand side in green coloured font are the actions required to execute this new position. These tasks include creating a Business Plan to warrant a need for a Training Manager role within a store, generating a job description that aligns with the roles and responsibilities of this position, developing a training manual that has timelines that outlines specific duties to learn, interviewing and creating an employment offer that would be the best fit for this role, and who will be responsible for the training of the Training Manager. In orange coloured font, conducting 30-60-90-day reviews of progress and providing weekly progress reports, are needed to monitor and evaluate progress. Within each section, there is a position/department that is Responsible, Approver, Supporter, Consulted, and Informed within a process (Jacka & Keller, 2009). With the multiple stakeholders that are needed to implement a Training Manager role within a store, I need to understand the reactions that some positions may have. I am the change agent for the entire process to ensure success of implementing a Training Manager within a store. I will be Responsible for developing the Business Plan that details the existing gaps within the training and development of employees who are transferring between departments and offering the solution of the Training Manager role within each store. This Business Plan needs to be Approved by the Corporate Headquarters

leadership/ Territory team. During the approval process, I would need to be readily available to answer any questions regarding the Business Plan. I can discuss the details within the plan that need to be executed along with additional stakeholders who need to be part of the implementation process. Once the Business Plan is approved, I can meet with the stakeholders to discuss the implementation process. Within each meeting, I will collaborate with each stakeholder group by utilizing the TransX approach to establish trust (Burke, 2006). Within this next section, I outline a plan for managing the transition process.

### **Outlining a Plan for Managing the Transition Process**

As managing coordination scored low on Cameron and Quinn's (2011) MSAI results, to ensure success in the implementation of a Training Manager within a store, I need to create an implementation plan to manage the transition process as the change agent. Within this section, I cover how I plan to influence stakeholders, determine appropriate personnel to engage/empower others, determine what supports and resources are needed to execute this plan, identify implementation issues and address each issue, build momentum through goals of what is a desired future state, and acknowledge limitations of this implementation plan.

**How to influence the Stakeholders within the plan.** It is through the customer service lens and employee experience lens that I plan to utilize the LEAD Change Management Model to influence stakeholders on how vital this implementation plan needs to be successful. By improving an employee's experience when they transfer between departments at Hot Finds with the support of a Training Manager aligns with Cameron and Quinn's (2011) OCAI Culture Clan of developing others. The front-line staff who are a vital stakeholder to this entire process. Using the TransX Model, I will need to establish trust by using the LEAD Change Management Model to Listen to all the stakeholder's concerns (Burke, 2006). Establishing trust takes time and

this is another factor that all stakeholders will need to be mindful of when this plan is executed. I can also influence stakeholders with this plan using the LEAD Change Management Model by Exploring any issues that the stakeholders bring forward as a concern. When I Explore issues that are presented, I can utilize the TransX Model to inspire the stakeholders by having them create solutions to address the concern (Carlile, 2002; Chang, Lee, Wei, & Huang, 2017; Deluga, 1990). Once a solution is reached, I can use the next step in the LEAD Change Management Model and Act on the possible solution offered. By Acting on a solution, I am influencing the group using the TransX Model by creating a common vision and building commitment via collaboration (Braun, Avital, & Martz, 2012; Chai, Hwang, & Joo, 2017). Finally, I use the LEAD Change Management Model step of Develop by encouraging intrinsic motivation of the stakeholders involved. By creating an appropriate training plan/process results in better-trained employees by learning how to conduct all tasks associated with this new role.

**Personnel to Engage/Empower Others.** Once the Training Manager completes their training, a Training Manager can engage with the Assistant Manager identifying individuals requiring development. Additional training and development can also lead to a reduction in employee turnover as a Training Manager can offer one-on-one support to an employee transferring between departments (Arndt, Arnold, & Landry, 2006; Lambert, 2008; Siebert & Zubanov, 2009 & Yurchisin & Park, 2010). When employees are transferring between departments, the Training Manager would know in advance any staff movements because of their interactions with the Store Manager during regular weekly leadership meetings. With a Training Manager working within every department, he/she could also see where morale is lacking, or staff are not fully engaged. Another benefit to having a Training Manager within a

store is the connection to the HR Manager. Through this connection, the Training Manager can learn how to best support a team reach / maintain its goals.

### **Supports and Resources**

This section acknowledges training timelines, technology, financial resources, training manual, and tools and resources to implement a Training Manager position within a store.

**Training timelines established.** Timelines established by the Training and Development team at Corporate Headquarters need to be met by Training Manager. These timelines are part of the monitor and evaluation stages discussed in Appendix C (Merriam, Caffarella, & Baumgartner, 2007). Hot Find's current store approach to training is mostly self-directed via training manuals with support from the Store Manager. Based on this process, the Store Manager is removed from their duties, requiring the Assistant Manager to take on additional responsibilities while the Store Manager focuses on the training needs for one employee. With this new Training Manager role being implemented, self-directed learning of an employee who is transferring between departments is no longer a focus of the Store Manager, rather there are regular meetings with the employee and the Training Manager to ensure that the training manual is completed. A regular meeting would be conducted at the completion of every week (Merriam, Caffarella, & Baumgartner, 2007). The Training Manager can utilize the LEAD Change Management Model to Listen to the needs of the employee, Explore any gaps in the training for that week, Act on correcting any gaps by providing additional tools and resources, and Develop the front-line employee by rewarding them on their success through praise and recognition.

**Technology.** Technology is needed for training for the self-directed portion of the training manual as some knowledge is obtained via training software found within the employee portal. Also, the Training Manager needs to ensure that an employee has proper knowledge and

training of departmental equipment such as the computer skills needed to navigate the on-line learning. A Training Manager will continue to utilize technology as a source of knowledge to stay current with Hot Finds procedures. In relation to this implementation process, technology will be used in conjunction with the Store Manager offering on-the-job training with the Training Manager (Bell, Mengüç, & Widing, 2010). Technology can enhance certain aspects of the training as well by providing additional examples and exercises for the Training Manager to complete (Kirk, 2014).

**Financial.** A financial component to implement this new role is developing a budget for the new position of a Training Manager that includes salary and benefits, resources such as training manual printed, equipment, time of other staff to train, and time required for the Training Manager's development of the role (Galbraith, 2014). An additional resource found under time would include having additional labour budget allocated for a Store Manager to train the Training Manager.

**Training Manual.** Training manuals are developed by the Training and Development Department team. A training manual needs to be created for the Training Manager role. The training manual has two functions. The first function is as a resource for a Training Manager to learn his/her role (Sniehotta, Schwarzer, Scholz, & Schüz, 2005). The second function is for an HR Manager to monitor and evaluate progress within the training manual during the three stages of Learning, Applying and Transferring. Learning, Applying and Transferring stages are discussed within the upcoming monitor and evaluation section (Merriam, Caffarella, & Baumgartner, 2007).

**Tools and Resources to implement a Training Manager Position.** There are many tools and resources accessible to all stakeholders involved. The Store Manager and I can use the

LEAD Change Management Model to undergo each stage of change by Listening for any problems/gaps in the training process, Explore possible solutions to resolve the training gaps, Act on a possible solution, and Develop the process through incremental changes (Carson, Shanock, Heggstad, Andrew, Pugh, & Walter, 2012; Mazutis & Slawinski, 2008). The TransX Model can be utilized within each stage of the LEAD Change Management Model by establishing trust through Listening, creating inspiration while Exploring options, building commitment when Acting on a possible solution, and encouraging intrinsic motivation when Developing the Training Manager in their training. As well, the Store Manager can learn about opportunities for growth of a new inductee and utilize the Personality Dimensions training offered by the Training and Development team at Corporate Headquarters (Personality Dimensions, 2015). The Training Manager will also access to Personality Dimensions training to support future staff to learn their new role by understanding the Personality Dimensions of an employee.

**Identifying Potential Implementation Issues and Addressing Concerns.** Based on the MSAI results that managing coordination scored low as a skill set for managers, this section identifies possible implementation problems. A problem that may arise with this implementation process plan is an inability to secure a replacement person for the previous role thereby delaying the training process. Another potential issue is the training timelines may not be as precise which could extend the training timelines beyond the three review cycles of 30-60-90-day reviews (Merriam, Caffarella, & Baumgartner, 2007). While there is a training manual that all parties can utilize, each Training Manager may have differing training needs. With my support, the Store Manager can adapt the training to the needs of a Training Manager to ensure success of this implementation plan. Finally, by creating a welcoming environment through regular



interactions, the Store Manager is building trust using the TransX Model with the Training Manager by creating a safe learning environment.

### **Short- Medium- and Long-term Goals to Build Momentum**

Throughout this implementation process, there are short-, medium-, and long-term goals established using the training manual to support the Training Manager's induction process.

Short-term goals are found within the weekly emails sent by the Training Manager to the District Manager and I that summarize the weekly training progress. These weekly emails ensure that the Training Manager is following the training manual. This weekly progress aligns with

Galbraith's (2014) Star Model of creating clear and concise Structure of their new role by creating a conduit for information to flow between the organizational roles. Mid-term goals are

found within monthly review cycles that are hosted by the HR Manager. As described in the RASCI chart, there are 30-60-90-day check-in meetings facilitated by the HR Manager to

establish progress of the Training Manager's transition into role. Within these meetings, I can celebrate successes using Galbraith's (2014) Star Model section of providing Rewards to the Training Manager (e.g., providing a Visa gift card based on my allowable training budget).

Finally, a long-term goal for this role is for front-line staff to be successfully trained in their new department. A desired future state would be a Training Manager's feels comfortable offering training and development to all front-line staff that are transferring between departments.

### **Limitations: Challenges, Scope, Methods, and Priorities**

Through the implementation process of inducting the Training Manager within a store, it is important to anticipate any concerns that may arise throughout this process. Within this section, I will review the challenges that can occur in the implementation process, scope of the

role and responsibility of the Training Manager, methods used to ensure a successful implementation, and priorities to implementing a Training Manager within a store.

**Challenges.** A challenge of this OIP is the high turnover rate of an employee who transfers between departments. This is a challenge once the Training Manager is in role as he/she may not be able to spend time with all employees within a scheduled shift. As well, some employees may not be scheduled during a Training Manager's hours due to the front-line employee's availability. Eaglen, Lashley, & Thomas, (2000) argue that students who are part-time employees can be a challenge to facilitate in-house training due to their limited availability. Another challenge is that staff learn at different paces as well as have different styles of learning. Bell, Mengüç, & Widing, (2010) assert the need to create a learning environment within the workplace that is conducive to all employees. The preferred style of the front-line staff's learning may not be through a training manual. While a training manual acts as a guide in a learning process, a Training Manager may need to change how the front-line staff is trained on a subject to align with their learning needs (Merriam, Caffarella, & Baumgartner, 2007). Finally, within a retail environment, other business needs may delay an employee's opportunity to learn. An example of a business need is to help a customer when the sales floor is short-staffed. These business needs may compress the training session resulting in an employee not having adequate time to learn a new role. With each challenge noted in this section it creates an opportunity to utilize the LEAD Change Management Model where the HR Manager can collaborate with the stakeholders and employees to resolve each challenge. It is through the LEAD Change Management Model that I can utilize the TransX Model approach to Listen to the challenges to establish trust that the parties want to find a solution, Explore to create inspiration on how the

resolve the problem, Act on a solution to build commitment and Develop to encourage intrinsic motivation to ensure that the challenge does not resurface.

**Scope.** In the context of this implementation plan, the scope determines what role and responsibility the Training Manager will perform. Barker (1997) argues the need to understand the scope of the role and how this role impacts staff. While a Training Manager may have tasks assigned that could include new staff induction workshop, staff training and development meetings, facilitate workshops, and performance reviews, other expectations could also arise. The Training Manager's scope of his/her role may evolve while training is in progress based on the demands of the organization such as training staff on a new product, policy, or procedure. The Training Manager would also be focused on sustaining the Clan Culture and creating a culture of training (Gustafson, Pomirleanu, & John-Mariadoss, 2018). These additional demands would require that the Training Manager connect with staff to ensure that each employee understands and can perform/understand the new job requirements. A focus for a Training Manager would be specific to a store, and the Store Manager would need to identify/ direct what needs to be prioritized. A review of the duties and responsibilities would need to occur annually between the HR Manager and the Training and Development team at Corporate Headquarters (Hot Finds, 2018).

**Methods.** A Training Manager has access to all training manuals, the HR Manager and their Store Manager. Hot Finds has a Training and Development Department that accesses adult training practices that go beyond a training manual. There are two main tools that can assist the Training Manager in performing their duties which are Personality Dimensions and Five Behaviours of a Cohesive Team which can lay a foundation on how to work with each employee. Personality Dimensions assists a Training Manager in understanding how an employee likes to

learn and how to best provide training information (Personality Dimensions, 2015). Five Behaviours of a Cohesive Team can support team development by the Training Manager learning how to build a team by facilitating Trust, Conflict, Commitment, Accountability and Results exercises (Lencioni, 2018). Personality Dimensions and Five Behaviours of a Cohesive Team are some of the readily available tools for the Training Manager. Once the Training Manager learns these tools, he/she can then support a front-line employee in completing their training manual for their new role.

**Priorities.** While training and development is a priority for a Training Manager, ensuring a good fit between the employee who is transferring departments and the Training Manager role is essential. A Training Manager can work to ensure an employee is comfortable and competent within their new position and that a learning environment is formed (Bell, Mengüç, & Widing, 2010). The training timelines is another priority that needs to be addressed. The timelines offered within the training manual need to ensure that the Training Manager will learn all necessary roles and responsibilities to perform their role (Merriam, Caffarella, & Baumgartner, 2007). The next priority is to make sure that the Training Manager is successful in their training. If the Training Manager is having difficulty with learning the content, they may become disengaged and quit as a result (Burke, 2006). I need to connect with the Training Manager to see what I can do to reduce the training challenges and make the content more enjoyable (Chan, 2010). Once the training is completed, another priority is the need to review the training outcomes of the training manual to make sure that the Training Manager is ready to perform their duties (Teare & Rayner, 2002). Finally, a key priority of the Training Manager is to forge a strong relationship among the management team which consists of the Training

Manager, Assistant Manager and the Store Manager. Building trust through building strong relationships are characteristic of the TransX Model for leading staff.

Overall, managing this organizational improvement plan requires the commitment and involvement of many stakeholders. I need to utilize both the TransX Model approach and the LEAD Change Management Model to support the implementation process of the Training Manager role within a store. This OIP's success is critical to resolving the problem of practice at Hot Finds to encourage employee engagement with all employees (Eldor & Harpaz, 2016). The next section explores the application of a monitor and evaluation plan that can ensure the successful induction of the Training Manager within a store.

### **Monitor and Evaluation of the Change Process**

The monitor and evaluation stages are essential within this OIP because these stages ensure that the Training Manager is inducted into their role without issue and can support employees who are transferring between departments. Like a PDSA cycle, both the monitor and evaluation stages help my role as the change agent to understand the progress in the implementation of a Training Manager position within a store. The 30-60-90-day review cycles are mapped out once the Training Manager is in position. The 30-60-90-day review cycle meetings are the Planning cycle of the PDSA model and are scheduled with the HR Manager on the Training Manager's first day. Each review cycle is scheduled and used within this OIP as three distinct phases that align to Learning, Applying and Transferring of knowledge stages (Merriam, Caffarella, & Baumgartner, 2007). The Do section of the PDSA model is the execution of each training timeline as noted in Appendix C. The 30-day Learning stage review and 60-day Applying stage review align with the monitor stages of this implementation plan. The 90-day Transferring stage is used to evaluate the training plan. Within Appendix C, the training

timelines are outlined for a Training Manager's induction. Appendix C outlines the tools and resources of a training manual, the one-on-one meetings with the Store Manager, and connecting with the HR Manager during the end of each stage to monitor/evaluate the training progress. These progress meetings align with the Study position of the PDSA cycle as the HR Manager is reviewing the process (Merriam, Caffarella, & Baumgartner, 2007). As well, Appendix B identifies that the Training Manager sends weekly updates via email on his/her progress of the training manual. Before the Training Manager can send this email, the Store Manager needs to approve the progress. This weekly email is sent to the District and me. It is crucial for me to review a Training Manager's weekly email as I need to Act within the PDSA model by noting any deviation from the training and connect with the Store Manager or Training Manager to discuss any divergence noted.

This section discusses the monitor plan within the 30-60-day review cycles of the Learning stage and the Applying stage of training a new staff member (Merriam, Caffarella, & Baumgartner, 2007).

### **Monitor Training Progress**

**30-Day Learning Stage Progress Review.** At the completion of the Training Manager's initial 30-days in role, I schedule a 30-minute meeting with the trainee to review progress. At this stage, the Training Manager is focused on learning their role and not yet interacting with employees who are transferring departments (Merriam, Caffarella, & Baumgartner, 2007). I will review progress using the training manual to guide the conversation. Within this scheduled meeting, I review each goal outlined in Appendix C with a Training Manager to see what his/her takeaways are on the subject matter. For example, within the Learning stage, a Training Manager needs to learn how to train and develop staff. I would use open-ended questions to

determine how this person would envision training an employee who has recently transferred between departments. Based on their response, I would gauge if he/she is progressing well within each goal, or, if there is a need to revisit a section of the training manual. Upon completion of our meeting, I would check-in with the Store Manager to see how they view the development of the Training Manager. During this check-in, I want to offer the Store Manager support to ensure success of the Training Manager's training by reviewing any concerns that are noted which fosters the TransX Model of building commitment (Bass, 2008; Bass, Avolio, Yung & Berson, 2003). Based on the needs of the Training Manager, I can conduct one-on-one training to bridge gaps within the Training Manager's learning. Finally, once I have met with the Training Manager and the Store Manager, I will provide an email update on my 30-day review of the Training Manager's progress to the stakeholders noted as outlined in Appendix B.

**60-Day Applying Stage Progress Review.** During the 60-day review of progress, I monitor the Application stage of a Training Manager's progress (Merriam, Caffarella, & Baumgartner, 2007). Now that this Training Manager is in this role for eight weeks, the Training Manager is starting to work with employees who are transferring between departments based on the knowledge gained from the training manual. As a result of the Training Manager now Applying what they have learned, I conduct a more in-depth 60-minute meeting to determine if the Learning completed in the first stage is being used to Apply within their role (Markiewica & Patrick, 2016). Before this meeting, I can request that I observe the Training Manager conducting a check-in with an employee who has moved between departments. Once this check-in is complete, I would ask the Store Manager to attend this debrief meeting so I can provide feedback on the Training Managers progress based on observations made. I would challenge the Training Manager on how they intend to support the staff who are transferring between

departments with his/her new breadth of skills (O'Brien & Linehan, 2014). As well, I would ask the Store Manager to identify two areas of strength that the employee is showing in the new role and one growth opportunity (Merriam, Caffarella, & Baumgartner, 2007). A 60-day review is the conclusion of the monitoring phase. I need to consider if I am seeing any issues that are impeding the Training Manager in completing his/her training manual. With the guidance of the Store Manager, we would map the final 30-days of the Transferring stage with the Training Manager present to ensure that all parties are collaborating on the goal to complete the training on-time (Bersin, Flynn, Mazor, & Melian, 2017). All parties can inspire each other to explore options which is a leadership characteristic of the TransX Model. During this discussion, I would expect both the Training Manager and the Store Manager to be active participants. Upon completion of this meeting, I would share the results with all stakeholders mentioned in Appendix B. Within the contents of this email, I would offer a training progress report based on the training timelines outlined in Appendix C.

Within both the 30- and 60-day review I use the LEAD Change Management Model, I am Listening for incremental and anticipatory changes and Exploring via collaboration on the best solutions to Act upon based on the needs of the Training Manager. From this LEAD Change Management Model, I can then Develop the process to this implementation plan to achieve success. Part of the monitor stage of this OIP is to review results, accountability, additional learning, program improvement, and decision-making aspects to ensure that this implementation is a success (Markiewicz & Patrick, 2016). The next sections review each consideration.

**Results.** Results occur throughout the implementation process as the Training Manager starts to work with employees who are transferring departments in the Applying stage. I need to look for expected and unexpected results during the monitor stage of the Training Manager's



training timelines. By implementing a Training Manager position, I plan to see results from his/her weekly reports and from the 30-60-day scheduled meetings that I will have with the Training Manager as outlined in Appendix B. During the 60-day review, I would observe the Training Manager conducting a check-in with an employee who has recently transferred between departments to see how the Training Manager is the Applying stage of their knowledge (Markiewicz & Patrick, 2016). Unexpected results such as a Training Manager adapting to his/her new role faster resulting in expediting the induction training may occur. Within the weekly e-mail that the Training Manager will summarize how they are progressing in the training, I can note any unexpected results that happen and notify stakeholders if necessary. A final way to determine results is connecting with front-line staff who are working with the Training Manager (Bersin, Flynn, Mazor, & Melian, 2017). I can informally chat with front-line staff who are currently working by asking them how their training is progressing. Within the conversation I am using the LEAD Change Management Model to Listen for any concerns that are being noted, Explore each concern with the employee to determine how to best resolve, Act on a possible solution to each concern, and finally Develop by encouraging the employee to connect with the Training Manager during the regular check-ins to discuss progress.

**Accountability.** Accountability aligns with the value section of the solution to this OIP in creating a Training Manager within each store. As the HR Manager and change agent of this OIP, I need to accept responsibility if any problems arise during the implementation process (Wirtz & Jerger, 2016). Because there are multiple factors to consider when implementing a plan, I need to be aware of the budget spent on this new position, and that time plus the resources are being utilized effectively. While training takes time, the Applying stage that is witnessed at the 60-day review cycle can determine if the induction process is working. It is important to

ensure that the training budget spent is being utilized effectively, that is sufficient time to conduct each lesson within the training manual, and that the Training Manager has accessibility to the resources required such as a computer terminal to work on their training are available (Wirtz & Jerger, 2016). If there are any discrepancies, I need to conduct incremental changes to resolve accordingly and anticipate these issues for future consideration. Another aspect of accountability is taking ownership of the implementation.

**Additional Learning.** In the monitor stage, I am also learning how the Training Manager role/position is implemented. I need to determine if the Training Manager is resolving the PoP with the implementation of a Training Manager to support employees who are transferring between departments through the training manual exercises and witnessing the Training Manager perform a check-in (Merriam, Caffarella, & Baumgartner, 2007). With the support of the Training and Development team at Corporate Headquarters, I also need to consider what additional education / training efforts may be required to ensure that this Training Manager does complete the training timelines. It is through the collaboration efforts of the Training Manager and the Training and Development team that we can ascertain what additional training may benefit the Training Manager to better equip them in working with employees who have transferred departments.

**Program Improvement.** Once a Training Manager is successful in training within the Learning stage and Applying stage, I need to review the training process by using the LEAD Change Management Model (Markiewica & Patrick, 2016). I need to connect with all stakeholders and Listen to any program improvements that are offered. Next, I need to Explore what worked and what did not work in the training timelines and consider other ways to implement a Training Manager role within a store if necessary (Bisschoff & Govender, 2007). I

can then Act on other implementation solutions by connecting with the Training and Development team at Corporate Headquarters with the feedback provided on how to enhance the induction of a new Training Manager within a store (Eaglen, Lashley, & Thomas, 2000). Finally, I need to Develop the implementation further by reviewing each new implementation to ensure that the induction process is effective for each inductee to support employees who are transferring between departments.

**Decision-Making.** Decision-making on the progress made of the Training Manager is the final step to monitor this OIP plan that I need to consider. From the program improvement opportunities, I need to find any changes that can enhance the quality of the Training Manager's role and the training manual used. With my role of being the change agent of this solution, I need to be active in the implementation process and determine if the OIP is working. I can determine if the implementation process is working by meeting with employees who are transferring between departments. I can review their training manuals and ask if the regular check-ins with the Training Manager are helpful. Being active participant in the implementation process allows me to anticipate changes in the process by fostering the TransX Model and be intrinsically motivated to provide the best training for this new Training Manager position at Hot Finds (Hong & Rui-min, 2012).

Through understanding of the 30- and 60-day monitoring stages, accountability, learning, program improvement, and decision-making can equip me in the implementation of a Training Manager within a store. Next, I evaluate the implementation process of a Training Manager position within a store during the final 90-day Transferring stage review.

### **Evaluation of Training Progress**

Evaluation is a vital process to ensure that I reflect on the implementation of a Training Manager role/position and how this role impacts an employee transferring between departments. This next section is the 90-day review cycle which is the Transferring stage (Merriam, Caffarella, & Baumgartner, 2007).

**90-Day Transferring Stage Progress Review.** As the Learning and Applying stages within the monitor stages are now complete, the Training Manager is now completing the 90-day Transferring stage by engaging with front-line staff who are transferring between departments. During the final 90-day review meeting, I am looking at how the Training Manager is Transferring the knowledge gained into their role (Merriam, Caffarella, & Baumgartner, 2007). I schedule a 90-minute meeting with both the Training Manager and the Store Manager. My first step is to review the Training Manager's training manual. Within this step, I am checking for 100% completion of this manual. Within each stage of Learning, Applying, and Transferring, I am challenging, in a positive manner, within each stage. I am asking open-ended questions to give the Training Manager an opportunity to showcase the theory and knowledge gained as they now apply the training to front-line staff. During this meeting, I am also seeking validation from the Store Manager to affirm that he/she has witnessed the Training Manager's progress. I can also observe a check-in hosted by the Training Manager with an employee who has transferred between departments to validate the training outcomes as well. If I start to notice gaps in the theory or practice areas, I offer feedback to the Store Manager and the Training Manager (Kumar, 2005; Liang, 2012). By offering feedback to the Store Manager and The Training Manager I am intrinsically motivating them using the TransX Model to encourage them to work on their goals (Bent & Freathy, 1997). In addition to reviewing the training manual to evaluate

progress, I also discuss the weekly emails provided by the Training Manager to give praise on his/her growth over the past twelve weeks (O'Brien & Linehan, 2014). A final stakeholder that can evaluate the Training Manager's performance are the front-line staff who have transferred between departments and now in their new role. I can conduct informal conversations with these employees to seek out additional feedback on the training program.

Upon completion of my review of a Training Manager's 90-day induction, I ask if either Store Manager or Training Manager has anything to share to make sure that I utilize both LEAD Change Management Model and the TransX Model within my final evaluation of training. Based on the feedback provided, I then can either deem the Training Manager to have "passed" the training or, if more training is required based on this review, extend the training timelines further to ensure success is reached (Bent & Freathy, 1997). Finally, I would submit a report to all stakeholders on the completion of training of a Training Manager. Once the evaluation process of the Training Manager is completed, I can review Markiewicz & Patrick's (2016) evaluation domains of appropriateness, effectiveness, efficiency, impact, and sustainability to ensure I have a holistic view of the implementation of the Training Manager (Markiewicz & Patrick, 2016).

**Appropriateness.** Within the appropriateness section of the implementation of the Training Manager role within a store, I need to consider if the implementation plan created solves the PoP of how can an organization improve employee transfers between departments to support an employee's experience? If the PoP is resolved, then I can determine if the OIP does resolve the PoP thereby, improving employee transfers between departments. If the PoP is not resolved, I need to consider other possible solutions by utilizing the LEAD Change Management Model (Cawsey, Deszca, and Ingols' 2016; Fockler, 2017). By determining alternative options

ensures that an employee who is moving between departments receives a proper induction into his/her new role and continues to be engaged at Hot Finds.

**Effectiveness.** I need to determine if the solution of implementing a Training Manager within a store is effective in resolving my PoP. I need to make sure that the goals and priorities of decreasing employee turnover and improving the employee experience are met (Burke, 2006). The goals and priorities were originally established by the high turnover occurring with employees and low employee engagement. In this OIP, I want to ensure that an employee who is transferring between departments is trained and feels comfortable in his/her new role. The priorities to consider is if an employee who has transferred between departments is successfully engaged in his/her position. Finally, I need to ensure that the Training Manager is confident in their new role and supporting employees who are transferring between departments (Eldor & Harpaz, 2016). I can review the turnover data to determine if there is an improvement to the turnover rates occurring within a store.

**Efficiency.** By implementing a Training Manager role within a store, I need to review each resource utilized to determine efficiency. In this instance, considering the time spent in training and development, financial resources to pay for salaries while training occurs, and human resources needed to conduct training it is essential to ensure that the process is smooth and efficient (Merriam, Caffarella, & Baumgartner, 2007). Through efficiency, I need to understand if the tools and resources used were effective in the implementation process, or, if I need to request additional resources to bridge any training gaps. Resources can mean the Training Manager having extra training time with the Store Manager, or I can offer additional training support if the Store Manager is away on vacation or illness.

**Impact.** With understanding the effects of the Training Manager role being implemented within a store, I need to consider the long-term implications of this role (Elsbach, 2009). As training and development can take time based on conflicting schedules and employees learning at different paces, I can appreciate any anticipated impacts and possible unanticipated impacts. Anticipated impacts can include an improved customer experience noted through customer surveys, the employee experience and management experience are increased as employees are well-equipped to perform his/her roles (Liye & Deng-hua, 2016). As well, that employees who are transferring between departments continue to be fully engaged in their work as they receive support from the Training Manager. Finally, unexpected impacts could be a talented staff repository as many staff are no longer limited to the knowledge of one department which increases the ability to promote staff from within thereby increasing the popularity of employees wanting to transfer between departments as an opportunity to grow within Hot Finds.

**Sustainability.** Finally, sustainability is vital to consider determining the longevity of having the Training Manager role within a store. I need to determine if having a Training Manager within each store resolves the PoP and makes business sense for Hot Finds (Arndt, Arnold, & Landry, 2006). As well, I need to ensure that a Training Manager position is appropriately placed in a hierarchy. The reality of implementing a Training Manager role within Hot Finds is that training is a process. Training takes time to see a direct correlation between an employee who transfers between departments and the impact of the Training Manager. These suitability concerns can be addressed during the annual review of this Training Manager position to determine if the position should be placed elsewhere within the store's organizational hierarchy (Hot Finds, 2018b).

Stakeholders within an evaluation stage of implementing the Training Manager within the store are front-line employees who are transferring between departments and the Training Manager. I need to connect with employees who have transferred between departments to determine if they are comfortable within their new position based on the training acquired from the one-on-one meetings with the Training Manager (Ackfeldt & Coote 2005). To learn how comfortable an employee is within his/her role, I can ask the employee how their training is coming along and if he/she has any questions regarding the process (Stokes & Wynn 2007; Vadi & Suuroja, 2006). The final stakeholder to consider is the Training Manager. This evaluation timelines of the Training Manager's role will be an ongoing process as each employee takes time to absorb the training and apply his/her new skills within their new department resulting in a delay in determining if this Training Manager role provides value within the store.

Having an effective 30-60-day monitor and 90-day evaluation cycle that aligns with the Learning, Applying and Transferring stages can assist me in providing effective communication on the implementation of a Training Manager. Within the next section, I discuss how to communicate the implementation of a new Training Manager role to the front-line staff.

### **Communication Plan**

Within this communication section, I summarize a plan to communicate the acknowledge progress with implementing this new role. Finally, I explore what communication mediums I use to share any information of the Training Manager's progress using the TransX Model.

#### **Overview of Communication Plan**

Based on the implementation plan, Corporate Headquarters staff, the Store Manager, and Assistant Manager agree that there needs to be a change to improve how employees transfer between departments. Since the implementation of the Training Manager position is approved by



Corporate Headquarters and involves management, I only need to ensure that front-line staff and the Supervisors within the store are aware of the Training Manager position (O'Brien & Linehan, 2014). I can encourage the Store Manager and Assistant Manager to have interactions with all supervisors to promote discussion and enthusiasm of having a new role implemented in a store. The supervisors can then assist in the delivery of the Training Manager by having informal discussions with their staff on the upcoming addition of a new management position within the store (Ackfeldt & Coote 2005). In terms of communication that is made to front-line staff, a formal announcement of the Training Manager will be made via email and a memo posted in a staff only location, for example, the break lounge. The communication plan will share the common vision of how the Training Manager will make life easier for front-line staff because of the customized training for each employee when they are transferring between departments (Ackfeldt & Coote 2005). As well, when I am in the store, I can also engage the supervisors to energize their teams about this new role. By sharing this information to supervisors before announcing the new position to the store, I am using the TransX Model by building commitment through sharing the common vision to ensure success in implementing the Training Manager position within the store.

**The Communication Strategy.** This communication strategy focuses on establishing trust, an aspect of the TransX Model through sharing the common vision with all employees. Establishing trust with front-line staff important too as they are the clientele of the Training Manager. As part of the store management, the Training Manager is a leader within the store. Before the Training Manager starts at a new store, I can attend the weekly store meeting and explain to all staff about the purpose of the Training Manager role (Ackfeldt & Coote 2005). As well, I need to be readily available post-meeting to answer any questions and

concerns that may arise, I am fostering the TransX Model approach by building commitment to ensure that the Training Manager is successful in their new role (Bass, 2008; Bass, Avoilo, Jung & Berson, 2003; Northouse, 2016). Unfortunately, not all staff are able to attend the weekly store meetings (for example, an employee can be sick, or booked the day off). I would encourage the supervisors to communicate via one-on-one meetings with the absent. These one-on-one meetings will ensure all employees are aware of the new Training Manager role being implemented. During these one-on-one meetings, the Supervisor can create buy-in to this position based on how a Training Manager can provide individual support for each employee who is transferring between departments.

A final way to guarantee communication flows is to post a memo in a staff room beside the timecard system. The timecard system is in the employee lounge area and an employee needs to utilize the timecard system when they start and end each shift. This memo will detail the creation of the Training Manager role, what the role encompasses, when to expect a new Training Manager, and how the new position supports Hot Finds' front-line employees (Eldor & Harpax, 2016). There would also be a short biography introduction about the successful candidate with a bit of his/her working experience at Hot Finds. A final note within this memo would be to encourage any staff member to relay any questions/concerns to the Store Manager/Assistant Manager.

Once the Training Manager is in role and they are now attending the weekly store meetings, an update on their training progress will showcase how the Training Manager is progressing in his/her induction. Also, any milestones of employees transferring departments with the support of the Training Manager can be shared. This plan provides an opportunity to use

both meetings and memos to ensure all personnel who are not already part of the implementation process are knowledgeable about the new Training Manager role being implemented.

This OIP considers the importance of creating and communicating an effective implementation change plan. Within this section, I provide a plan to execute each task that will be required for each position that needs to be involved in delivering a Training Manager for a store. Once the Training Manager commences their role, Appendix C provides a training timeline that a Store Manager and Training Manager can follow. The training time include three milestones that the HR Manager will review progress (Merriam, Caffarella, & Baumgartner, 2007). The first two stages of Learning, which occurs at the 30-day review cycle and Applying, which occurs at the 60-day mark are part of the monitor stages. The Transferring stage occurs at the 90-day mark which is used to evaluate progress. Finally, a communication plan is shared with front-line staff and supervisors about the role of the Training Manager and the Training Manager's induction process as all other stakeholders are part of the execution process (Merriam, Caffarella, & Baumgartner, 2007). This communication is important as the TransX Model establishes trust with all stakeholders that work with the Training Manager. This plan serves to support a Training Manager in being successful within his/her new role. By supporting the Training Manager with their onboarding process, this Training Manager can support front-line employees who are transferring between departments by offering one-on-one support. The next and final section of this OIP is to consider next steps and future considerations.

### **Conclusion**

Throughout this OIP, a key facet to employee engagement is their training experience. Improving an employee's transfer process is a part of the training and development process that requires extra attention to ensure an employee continues to be engaged in their work to reduce

employee turnover within a store. Furthermore, when employees are engaged and supported, the training process is a critical component for a business to be financially successful. As the HR Manager, I need to improve an employee's work experience and training when learning about transferring to a new department. The solution of introducing a Training Manager role within a store supports an employee who is transferring between departments, which ultimately supports the customers' shopping experience.

### **Next steps**

To ensure continued growth and development within Hot Finds, a Training Manager's roles and responsibilities need to be reviewed annually. This position is a new leadership position and careful evaluation is needed on how this role impacts employees. As mentioned, training an employee takes time as each employee learns differently. Within this annual review, I need to reflect that progress within the store has taken place and that there is a reduction in employee turnover. I need to ensure that this organizational change benefits both employees and customers. Finally, I can conduct regular check-ins with employees who have transferred between departments and review their performance. This review process can happen during the transferring progress. I will gather employee feedback on the training process and the Training Manager role. I can then incorporate this information in the annual review and note any area of the process that require a review.

### **Future Considerations**

Based on the success of the implementation of a Training Manager within each store, future considerations is to determine if a more specialized training program that is specific to employees transferring departments within a store is suitable. Another consideration to this OIP is that this implementation is specific to a non-unionized environment. Should this OIP be

considered for a unionized environment, Union leadership would be additional stakeholders and communication would need to be relayed to this group. A final consideration is to make sure that a Training Manager has all the tools and resources available for success. Regular check-ins with the Store Manager, Training Manager, and HR Manager to determine if any additional tools/resources are needed for the Training Manager to succeed. Each future consideration noted in this section helps to further enhance the OIP. Finally, these issues are not specific to the retail sector and the solution found within this OIP is applicable to other industries.

Ultimately, the purpose of this OIP is to remind all management of the need and importance to guarantee all stakeholders support an employee who is transferring between departments. Also, with customers having the opportunity to purchase products online, it is important to ensure that the customer has a good in-store experience, resulting in them coming back for future purchases. A positive in-store customer experience is directly related to the training and expertise of the front-line staff. The Training Manager can ensure that the staff have the best skills to ensure this success. All employees who transfer between departments are going to have different needs. With the creation of the Training Manager position can bridge those training gaps to encourage a repeat customer. The creation of the Training Manager role can improve the employee's transfer experience resulting in enhancing the customer experience and employee experience.

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## Appendix A.

Change Path Model versus LEAD Change Management Model	
Cawsey, Deszca, & Ingols' Change Path Model (2016)	LEAD Change Management Model (2017)
Awakening	Listen
<b>Identify need</b> for change	Seek to understand the problem
<b>Articulate gap</b> between current and future state	Encourage open and honest communication by creating a positive environment
<b>Develop vision</b> for change	Build trust and respect with the stakeholders by taking in all information presented without prejudice
<b>Disseminate vision</b>	Explore
Mobilization	Review the information collected to inspire 'outside the box' thinking
<b>Make sense of desired change</b> in existing structures	Engage stakeholders to gain commitment
<b>Assess power and cultural dynamics</b>	Analyze each option as a possible solution
<b>Communicate</b> the need for change organization-wide	Accept the need to attempt a solution with the reality that the problem may not be resolved
<b>Leverage change agent personality</b>	Act
Acceleration	Execute a possible solution provided
Systematically reach out to <b>engage others</b> in support, planning, implementation of the change	Utilize resources available to ensure success with option chosen
<b>Use tools and techniques</b> to build momentum	Debrief and review to determine where are the wins, misses, and opportunities that occurred
Manage the transfer, <b>celebrating small wins</b>	Develop
Institutionalization	Determine if the solution was found
<b>Track change</b> , gauge progress and modify as needed	If solution was found, encourage training and development of team with the new-found skills established and reward for meeting objective
<b>Deploy new structures</b> , systems, processes and knowledge, skills and abilities	If solution was not found reward for finishing the task and revisit Listen stage and recycle the model

## Appendix B.

RASCI Chart to implement Training Manager role							
Stakeholders  Actions  Monitor/  Evaluation	HR Manager (my role)	Store Manager	Training Manager	District Manager	Recruitment Team	Training and Development team	Headquarters leadership/ Territory team
Business Plan creation for a Training Manager	R			I/C	S/C	S/C	A
Create Job description + post	A			I/C	R	S	
Create a training manual for Training Manager	A			I/C	S	R	
Interview candidates and offer position	A	R		I/C	S	C	I
Training of Training Manager	S	R		I/C		S	I
Conduct 30-60-90 day review of progress	R			A	I	I	I
Provide weekly progress reports of training	I	A	R	I			

**R**esponsible for an action, an **A**pprover for an action, a **S**upporter of action, who needs to be **C**onsulted and finally, individuals that need to be **I**nformed of how the Training Manager position is progressing.

*Appendix C.*

Training timelines for Training Manager induction			
Stages of progress	Weeks/days	Tasks	Tools/Resources
Learning Stage	Weeks One-Four 1-30 Days	<ul style="list-style-type: none"> <li>- Learn about roles within a store</li> <li>- Learn how to train and develop staff</li> <li>- Learn store operations</li> <li>- Learn policy and procedures</li> </ul>	<ul style="list-style-type: none"> <li>- Training manual</li> <li>- Weekly meetings with Store Manager</li> <li>- Meeting with HR Manager at the end of Week Four (30-day monitor)</li> </ul>
Applying Stage	Weeks Five-Eight 31-60 Days	<ul style="list-style-type: none"> <li>- Work with store management team to establish a plan of training and development for employees moving between departments</li> <li>- Understand training and development needs of a department by connecting with Supervisors who had new employees within department</li> <li>- Create a training plan for employees moving between departments</li> <li>- Schedule time alongside employees who have moved between departments</li> </ul>	<ul style="list-style-type: none"> <li>- Training manual</li> <li>- Weekly meetings with Store Manager</li> <li>- Meeting with HR Manager at the end of Week Eight (60-day monitor)</li> <li>- Training manual</li> <li>- Weekly meetings with Store Manager</li> <li>- Meeting with HR Manager at the end of Week Twelve (90-day evaluation)</li> </ul>
Transferring Stage	Weeks Nine-Twelve 61-90 Days	<ul style="list-style-type: none"> <li>- Meet with employees who have moved between departments</li> <li>- Conduct one-on-one training with employees to complete his/her training</li> <li>- Check-in with store management team on progress of employees</li> <li>- Monitor employee's progress in new role</li> </ul>	