

A RETAIL REALITY LENS™ GUIDE FOR HOLIDAY

The Holiday Store Performance Readiness Guide

Six risks retail leaders should diagnose before holiday
volume exposes them.

For Chief Retail Officers, Heads of Stores and Senior Field Leaders
Running Great Stores | Rachel Williamson, Founder & Principal

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THE STRESS TEST

Holiday doesn't create most store problems. It exposes them.

Most retail organizations enter holiday with a plan: sales, marketing, labor, promotions, merchandising, hiring and communication.

But having a holiday plan and having a store organization capable of executing that plan are two different things.

The real test begins when the strategy reaches the field.

Can District Managers translate enterprise priorities?

Can Store Managers turn a target into a plan for the day?

Can leaders adjust when traffic changes?

Does the customer experience hold up when the store is under pressure?

THE KEY QUESTION

Does the organization operate consistently enough that performance is not dependent on having your very best leader in the building?

THE MODEL

Holiday readiness requires more than a plan.

A retailer can look ready for holiday on paper and still be vulnerable in stores.

Store performance lives at the intersection of three realities:

1

BUSINESS PERFORMANCE

What are the numbers telling us?

Sales, traffic, conversion, average transaction, UPT, labor productivity and performance versus plan.

2

STORE REALITY

What is actually happening in stores?

Customer behavior, staffing, product availability, workload, friction and competing priorities.

3

LEADERSHIP CAPABILITY

Can leaders see and respond?

Can DMs diagnose performance? Can Store Managers translate goals into action?

EXECUTIVE DIAGNOSTIC

Put your holiday plan through the Retail Reality Lens™.

Rate each area from 1–5: 5 = consistently true; 3 = depends on market, store or leader; 1 = rarely true.

BUSINESS PERFORMANCE

Earliest measures are clear	1	2	3	4	5
Store leaders understand metrics	1	2	3	4	5
Field leaders can explain why	1	2	3	4	5
Leaders know which behaviors influence the metrics	1	2	3	4	5

ASK YOURSELF *If sales begin missing plan, how quickly will we know why?*

STORE REALITY

Priorities translate clearly	1	2	3	4	5
Stores know what matters most	1	2	3	4	5
Staffing reflects capability	1	2	3	4	5
Peak customer experience is realistic	1	2	3	4	5

ASK YOURSELF *Is the corporate holiday plan executable in the stores we actually have?*

LEADERSHIP CAPABILITY

SMs turn goals into action	1	2	3	4	5
SMs adjust deployment and priorities	1	2	3	4	5
DMs separate store issues from capability issues	1	2	3	4	5
DMs develop rather than rescue	1	2	3	4	5

ASK YOURSELF *Would the operating system still produce strong stores without our strongest leaders?*

THE REAL RISK

Don't just total the score. Look for the disconnect.

The greatest holiday risk may not be your lowest score. It may be the gap between what corporate believes is happening and what stores are actually capable of executing.

Strong data + weak store reality

You know what is happening but may not understand why.

Clear store reality + weak capability

You can see the issue, but leaders may not be able to change it consistently.

Strong leaders + weak clarity

Your best people may be compensating for weak systems through individual effort.

Strong plans + inconsistent execution

The strategy may be sound, but translation varies by market, district or store.

Six risks to diagnose before volume
magnifies them

WHAT TO DIAGNOSE IN OCTOBER

Six Holiday Performance Risks

Each risk connects back to business performance, store reality and leadership capability.

- 01 Strategy loses clarity on the way to the store
 - 02 DMs fix stores instead of building Store Managers
 - 03 Store Managers become the most expensive associates
 - 04 Stores know the number but not how to change it
 - 05 Customer experience disappears under pressure
 - 06 Operating rhythm collapses when it is needed most
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RISK 01

The strategy is clear at corporate. It becomes less clear on the way to the store.

Most retailers do not suffer from a lack of priorities during holiday. They suffer from priority accumulation.

Marketing needs something

Merchants need something

Operations needs something

HR, visual and omnichannel need something

If I walked into ten stores and asked, “What are the three most important things this week?” would I hear a recognizable answer?

EXECUTIVE CHECK

Ask three DMs independently: What are the three most important things your stores need to execute this week?

Then ask: What have you told Store Managers they can deprioritize?

TOOL 1

The Holiday Priority Translation Test

Choose one current enterprise priority. Translate it down to the behavior level.

WHAT CORPORATE SAID**WHAT THE DISTRICT MANAGER NEEDS TO UNDERSTAND****WHAT THE STORE MANAGER NEEDS TO DO****WHAT THE ASSOCIATE NEEDS TO DO DIFFERENTLY****HOW WILL WE KNOW IT HAPPENED?**

Could someone at every level explain this priority without seeing the original presentation or email?

RISK 02

Your District Managers are fixing stores instead of building Store Managers.

A DM walks into a struggling store and starts helping: recovering product, fixing schedules, solving customer issues and correcting execution.

Two hours later, the store is better.

But is the Store Manager better?

ASK YOUR DISTRICT MANAGERS

- 01 Which Store Managers can accurately diagnose their own business?
- 02 Which Store Managers still depend on you to identify the biggest opportunity?
- 03 Which problem are you repeatedly solving for the same leader?
- 04 What capability are you intentionally building before peak?

TOOL 2

The 20-Minute Holiday Store Visit Test

Before the District Manager starts fixing anything, spend 20 minutes with the Store Manager.

BUSINESS

What is happening in your business?

DIAGNOSIS

What is the biggest opportunity?

EVIDENCE

What tells you that?

ACTION

What are you doing about it today?

PEOPLE

Who on your team are you developing to help address it?

FOLLOW-THROUGH

What should be different when I return?

A strong store visit should not make the DM more necessary. It should make the Store Manager more capable.

RISK 03

Your Store Managers become your most expensive associates.

It often looks productive: the Store Manager is ringing, folding, running product, covering breaks, handling issues and working incredibly hard.

But no one is truly leading the store.

LEADERSHIP REQUIRES ALTITUDE

- 1 Where is traffic building?
 - 2 Where are customers waiting?
 - 3 Which associate needs support?
 - 4 What is not converting?
 - 5 What requires intervention now?
-

TOOL 3

Who is actually running the store?

Picture a peak Saturday at 2:00 PM. Who owns each responsibility?

RESPONSIBILITY	OWNER
Overall floor leadership	
Sales progress	
Conversion	
Customer flow	
Associate deployment	
Break management	
Replenishment	
Recovery	
Customer escalation	
Coaching	
Checkout / queue	
Communication	

If one person's name appears everywhere, you do not have role clarity. You have dependency.

RISK 04

Your stores know the sales number. They do not always know how to change it.

“Make the number” is not a strategy. Store Managers should be able to explain the opportunity, the metric behind it and the behavior that could influence it.

A STORE MANAGER SHOULD BE ABLE TO SAY:

- 1 Where is our biggest opportunity?
- 2 Which metric is driving it?
- 3 What customer behavior needs to change?
- 4 What associate behavior could influence it?
- 5 What are we doing differently today?

The difference between reporting performance and leading performance is behavior.

PERFORMANCE LEVERAGE

What will your team do differently to earn the next two transactions?

Same traffic. Different outcome.

100 customers enter the store

25% conversion = 25 transactions

27% conversion = 27 transactions

\$180

additional revenue from exactly the same traffic at a \$90 average transaction

ACROSS 50 STORES × 30 DAYS =

\$270,000

Illustrative calculation: 2 additional transactions × \$90 × 50 stores × 30 days.

TOOL 4

Don't stop at the metric.

The leadership question is: Which component of the business must change, and what behavior will change it?

TRAFFIC IS DOWN

How will we maximize the opportunity from the traffic we do have?

CONVERSION IS DOWN

Where are customers disengaging? What behavior could influence it?

AVERAGE TRANSACTION IS DOWN

Are associates solving the customer's complete need?

UPT IS DOWN

Are customers being shown enough relevant product?

SALES ARE DOWN

Which component of the business has to change?

NOTES

RISK 05

The customer experience disappears when the store gets busy.

Many retailers have a customer experience philosophy. Far fewer have defined what that experience looks like under pressure.

If your customer experience only works when the store is fully staffed, perfectly recovered and moderately busy, it is an aspiration, not yet an operating standard.

HOLIDAY FRICTION

Longer waits

More customers needing help

Messier stores

More new associates

More out-of-stocks, returns and pickups

TOOL 5

The Holiday Customer Experience Walk

Walk several stores through the customer's eyes. Score each area from 1–5.

AREA		SCORE	NOTES
ENTRY	Is the customer quickly acknowledged?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	
SHOPPING	Is help easy to find?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	
SELLING	Are associates actively discovering customer needs?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	
PRODUCT	Is merchandise available, understandable and shoppable?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	
SERVICE AREAS	Are high-friction areas actively managed?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	
CHECKOUT	Is the queue organized and acknowledged?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	
EXIT	Does the interaction end with connection?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	

WHICH PARTS OF THE EXPERIENCE VARY MOST BY STORE?

RISK 06

Your operating rhythm collapses just when you need it most.

When volume increases, leaders often abandon routine. Huddles disappear. Coaching disappears. Store walks become rushed. Communication increases. Everything becomes reactive.

Holiday is not the time to abandon operating discipline. It is the time you discover whether you actually have one.

A STRONG RHYTHM CREATES MOMENTS TO:

1 Prioritize

2 Diagnose

3 Adjust

4 Coach

5 Communicate

6 Follow through

TOOL 6

A simple peak-day operating rhythm

The purpose is not more meetings. It is creating predictable moments for leaders to lead the business.

1 BEFORE OPEN	2 MIDDAY RESET	3 BEFORE CLOSE
Yesterday's result	Where are we versus plan?	What worked?
Today's goal	What is conversion telling us?	Where did we lose opportunity?
Traffic expectation	Where do we redeploy?	What needs recovery?
Staffing + capability	What needs coaching?	What needs attention tomorrow?
Top product opportunity	What can wait?	What did we learn?
Biggest operational risk	What needs to change?	What should tomorrow's team know?
What matters most today?		

EXECUTIVE REVIEW

Before peak volume arrives, can you confidently answer yes?

-
- ☐ Can senior field leaders name the three priorities that matter most right now?
 -
 - ☐ Can Store Managers translate sales goals into daily actions?
 -
 - ☐ Can DMs distinguish capability gaps from store execution gaps?
 -
 - ☐ Are DMs developing leaders instead of repeatedly rescuing stores?
 -
 - ☐ Can Store Managers explain why their business is performing the way it is?
 -
 - ☐ Do leaders know which behaviors influence conversion, average transaction and UPT?
 -
 - ☐ Have we defined which parts of customer experience must survive peak?
 -
 - ☐ Do stores have clear leadership ownership during the busiest periods?
 -
 - ☐ Do stores have a simple daily operating rhythm?
 -
 - ☐ Are priorities and standards showing up consistently across locations?

Which answer makes you least comfortable? Start there.

THE 7-DAY RETAIL REALITY CHECK

Do not launch another initiative. Gather evidence.

DAY 1 Ask three DMs to name the top three field priorities.

DAY 2 Ask five Store Managers how they plan to make their number.

DAY 3 Review the same operating standard in several stores.

DAY 4 Ask DMs which Store Manager capability they are actively developing.

DAY 5 Review traffic and conversion with several SMs. Ask what they would change.

DAY 6 Walk the holiday customer experience.

DAY 7 Look for the pattern.

Where does performance depend more on individual talent than on the operating system?

THE BIG IDEA

Great stores should not require heroics.

Your best Store Manager should not have to carry the store. Your best District Manager should not have to rescue the district. Your Head of Stores should not need to increase communication every time execution slips.

Strong retail organizations create enough clarity, capability and operating discipline that people know:

- 1 what matters
- 2 what good looks like
- 3 what they own
- 4 how the business is performing
- 5 what to do next

October is one of the best times to find out whether the system is working.

NEXT STEP

What would the Retail Reality Lens™ reveal across your stores?

Running Great Stores helps retail leaders identify where performance variability is being created across the field organization, and what needs to change.

HOLIDAY STORE PERFORMANCE DIAGNOSTIC

A focused working session for Chief Retail Officers and Heads of Stores to identify:

- where strategy is being lost in translation
- where Store Manager capability may be limiting performance
- whether DMs are solving problems or developing leaders
- where execution varies across stores
- whether operating rhythms can withstand peak volume
- where leadership attention will have the greatest impact

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