Secure

Appriss® Secure Coach is an add-on to the Appriss Secure solution that helps managers identify employees who need additional coaching to overcome specific habits or procedures that may cause loss or degrade the shopping experience.

BENEFIT: Helps to improve efficiencies at the point-of-service, reduce front-end turnover, and decrease sales reducing activities (SRAs). One large, lane-based retailer saw a $30 million annual reduction in SRAs after deploying Secure Coach.

Secure Coach

A quick scan of associate job descriptions shows consumer-facing employees are expected to perform 10 or more tasks while engaging the consumer. They are encouraged to be quick, accurate, and pleasant. To meet their objectives, some associates may develop shortcuts or simply forget all the correct steps in a process which leads to slowness, errors, frustration, and loss. Appriss Secure Coach can help identify which associates need supportive training and provides the store or call center manager with specific metrics that have been triggered as well as a way to track training sessions and results. Chainwide use of the system can enhance the customer experience and lead to higher profit at the store and chain level.

Coach allows retailers to use populated data and risks being managed in Appriss Secure to generate coaching session opportunities. This provides a single solution to reduce losses related to theft, fraud, and associate error.

Front-End Optimization

Exception Based Reporting (EBR) helps Loss Prevention teams find suspicious incidents within POS data – the big cases. Coach is the complement. It helps Store Operations keep the majority of the front-end optimized by managing associate knowledge and behaviors with training and coaching.

Benefits Multiple Departments

The Coach module offers the retailer measurable benefits to three departments: Operations, Loss Prevention, and Human Resources.

OPERATIONS

The primary goals of Coach for Operations are to increase associates' efficiency, reduce employee turnover, and improve financial performance.

The corporate-level Operations team can analyze the data and determine which training to address throughout the chain. These may be SRAs (Sales Reducing Activities) that can cause loss on their own or may be masking other problems. Line voids, post voids, and no sales are among the legitimate actions that can become sources of loss if used outside their intended purpose. Appriss Retail research has shown that departments and stores with high SRAs typically have high shrink. By curbing the SRAs, shrink can be reduced.

Using Coach, associates whose behavior exceeds a threshold will be flagged for supportive training. The store manager can login and see who needs training and on which topics, then follow through with a focus on correcting specific behaviors. The manager documents the training, monitors associate performance through the application, and continues to offer training until the correct technique becomes second nature.

Secure Coach also helps managers objectively identify outstanding performance. This can be useful for employee recognition programs, upselling contests, and performance reviews.

LOSS PREVENTION

Loss Prevention seeks to benefit from Coach by reducing shortage-causing behavior, improving compliance with procedures, and clearing the clutter of SRAs that may mask high-value fraudulent behavior.

When associates are sloppy about procedures (like popping open the cash drawer to make change), they create SRAs that may increase a consumer's time in line or on the phone, directly increase risk, and slow investigative efforts by cluttering the electronic journal. The more abundant these transactions, the harder it is to detect fraud. For example, employees may perform a price check by scanning the item for sale and then voiding the transaction. If this becomes the default price lookup process for one associate, that person may be flagged for investigation because this behavior often signals fraud. When Coach is implemented, Loss Prevention can focus on the larger cases that truly indicate fraud.

HUMAN RESOURCES

Human Resources needs to ensure that employees are treated fairly and to minimize turnover.

This automated system applies the same criteria to all. The module provides documentation of all efforts that have been made to correct the behavior. Coaching existing staff reduces turnover and avoids the high costs of recruiting and on-boarding new employees. If an associate does not improve after repeated training, a company policy can provide guidelines for the point at which dismissal is advisable. More often, however, employees respond positively to coaching.

Coach Roles

The system is implemented with a few core user roles.

- Performance Administrators (PAs) function at the corporate level and build the Key Performance Indicators (KPIs) that the system will use to measure performance. They also upload coaching instructions so that managers understand the requirements of the sessions and the specific content for correcting behavior or policy surrounding the risk/reason for coaching.
- End-users are management level personnel who are segmented into location groups and who get access only to the data appropriate to them. Groups are assigned at the store, district, region, and national level.
- Administrators manage the system and content, including maintaining the library of training documents. In addition, Human Resources and Training departments can use the data from the module to improve their processes and content.

Key Metrics, KPIs, and Triggers

PAs define their objectives then choose the key metrics from the t-log that will be used.

They then set the threshold criteria—such as top X, bottom X percent, etc. These KPIs may be positive, such as highest loyalty signups, or they may be an indicator that training is needed, such as highest line voids. The system can support any number of KPIs which can be turned off or on depending on the objectives.

An employee can be flagged for coaching by one of three triggers:

- An associate exceeds a KPI threshold.
- Other systems can be integrated into the associate performance module to trigger the need for coaching, such as a consumer complaint or a job change.
- The trigger can be created from a requirement that everyone in that department or job code be trained and certified. Or, based on hire date or last trained date for a topic (such as ethics), have a trigger to receive annual refresher training or advanced training.

The system presents the end-users with a work view screen that identifies associates who have been flagged for supportive training, reasons, and training materials.

How Secure Coach Works

1. The PAs determine which behaviors to target. They use the simulator function to build and test KPIs and then enter them into the Coach system.
2. Associates whose behavior is identified are flagged for supportive coaching.
3. The end-user logs into the Secure Coach module where the list of who needs coaching that week and why are displayed. The list is sorted in priority order.
4. The end-user reviews previous coaching sessions and instructions as well as the resources loaded into the system for the new coaching session.
5. The end-user conducts the training and logs the training into the system.
6. If an associate slips back into the unwanted behavior, the end-user will be notified to conduct another training.

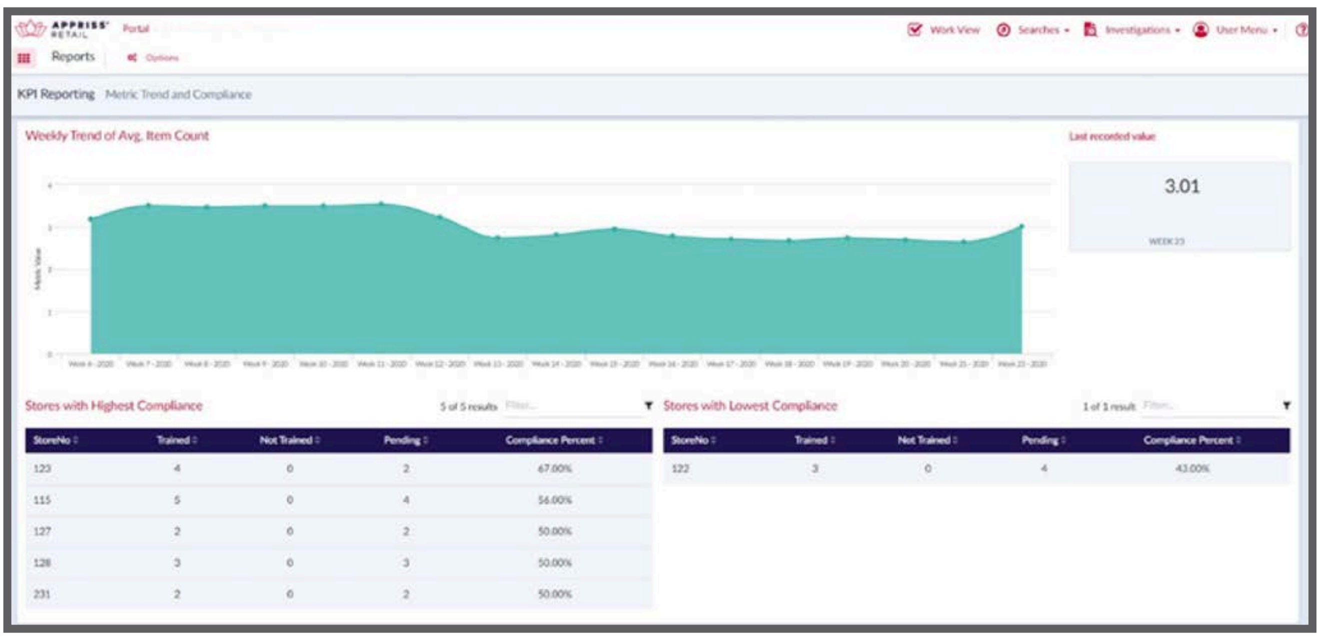
End-users can record information wherever they are through a web-based framework including an online company portal. The module is designed for mobile devices and computers.

A Closer Look: Creating KPIs

Nearly any measurable action at the POS can be converted into KPIs. The KPI composer wizard walks the PA through the steps for defining the associate's action, the metrics to which it will be compared, the threshold(s), and next steps (such as reading a PDF or watching a video).

If desired, the PA can set the system to only recommend an associate for coaching if they have breached multiple KPIs or have had a certain number of violations. This helps them address the neediest associates first.

KPI compliance can be viewed at the individual or store level as the following Top X, Bottom X report shows.



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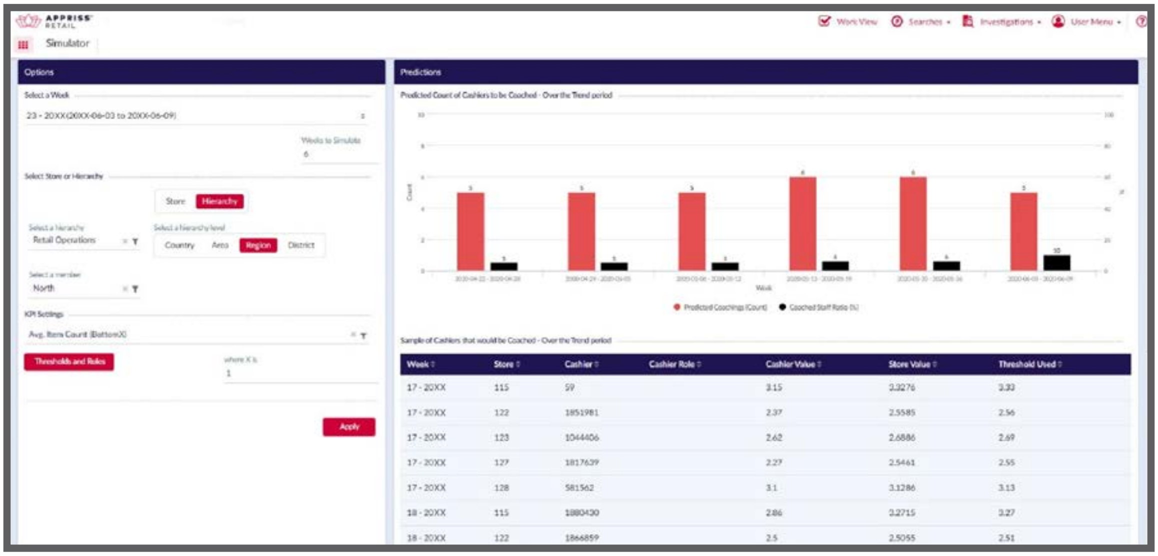
A Closer Look: Simulating Outcomes

The Coach module helps improve profits and operations by identifying training gaps and helping manage consultive coaching. The PA needs to balance the number of associates managers can coach in a week with the value of the outcome. The simulator function projects the results so the PA can adjust the KPIs to achieve cost savings and efficiency goals before launching the training program.



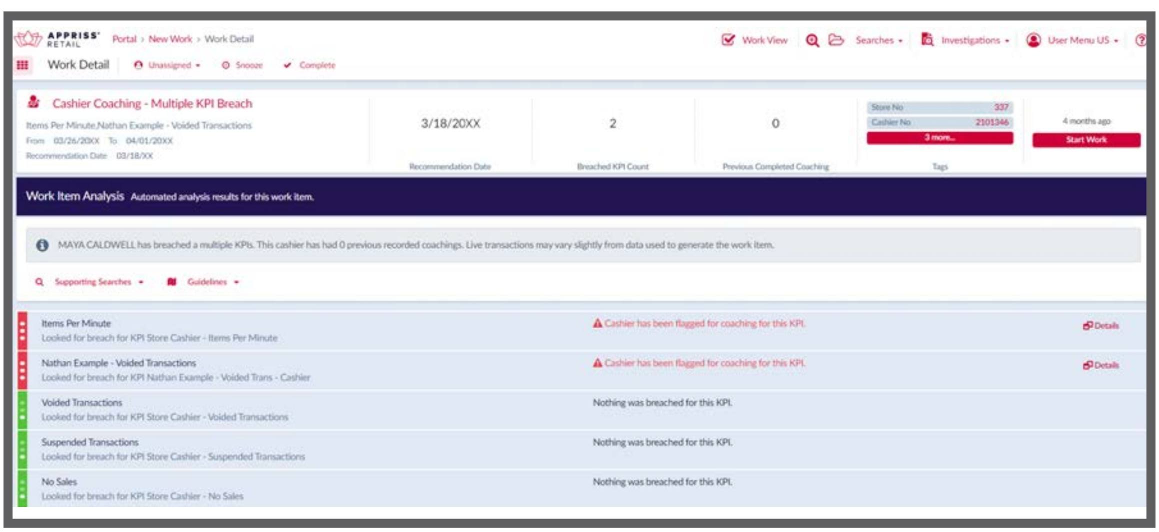
The PAs use the simulator function to project the results of the KPIs. They can tweak them until they reach a practical and productive outcome.

End-User Work View

An end-user, such as a store manager, logs in to see the "Coach Schedule for This Week." It displays a list of associates who have been flagged. The end-user can click on an individual listing and see which KPIs were breached and therefore what additional training is needed.

With a full understanding of the objectives, causes, and materials available, the user can conduct an effective coaching session. As trainings are completed, the system records the progress. After coaching, the end-user can follow-up the training with workbooks (if available), one-to-one meetings, training team intervention, or other training enhancements.

The module will generate a backlog list of any coaching that was expected but not completed.

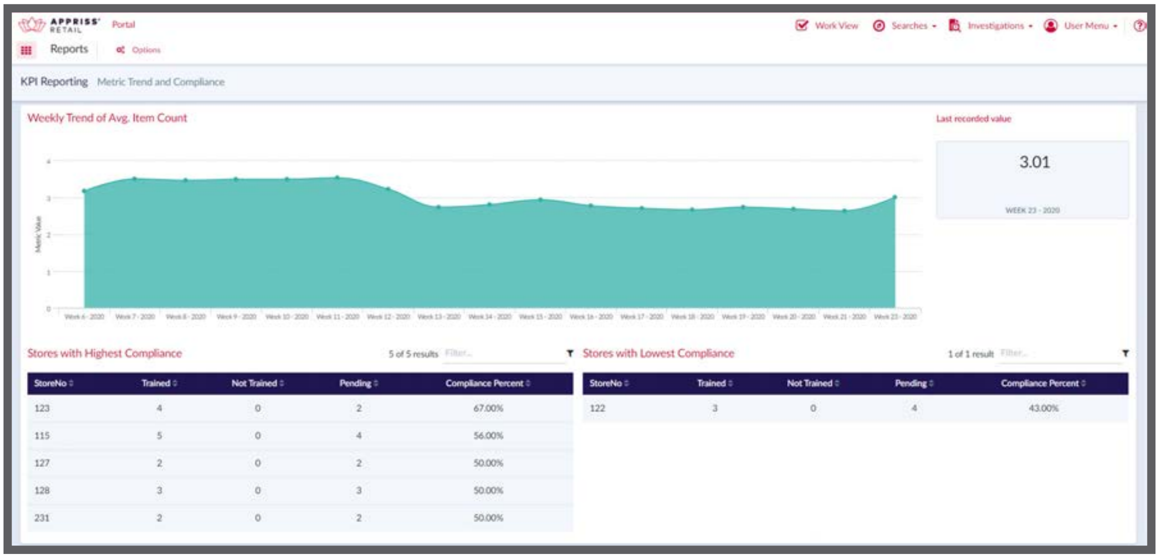


Feedback and Reporting

Statistics from training sessions can be accessed to improve operating performance. Administrators can review the current settings to determine if the KPIs are properly set. Are they weighted in such a way as to make the best coaching recommendations? Administrators can also review store and call center compliance. Are they participating in the coaching program? Are they completing the coaching recommendations within the allotted amount of time? Do they participate on a regular cadence? This is a key component in ensuring the coaching program is a success and achieving the anticipated ROI.

In addition, the module tracks which training materials are most effective and what methods produce the best results.

Feedback loops are a critical part of artificial intelligence, as Coach generates metrics over an extended time, the concepts of feedback and improvement will be analyzed.



Summary

Secure Coach encourages conformance with established procedures. When employees are made aware that their actions are being monitored, they become more careful, and this directly affects store and call center performance. One can expect to see measurable improvement in all customer-facing performance as coaching sessions take place. As the number of SRAs decreases, Loss Prevention can focus on high-value cases. All these benefits occur at the same time as the company is demonstrating commitment to its employees.

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