AN ANALYSIS OF ACTIVITIES OF MIDDLE MANAGEMENT PERSONNEL IN THE RETAIL TRADE INDUSTRY WITH IMPLICATIONS FOR CURRICULUM DEVELOPMENT IN POST-SECONDARY INSTITUTIONS

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ABSTRACT

AN ANALYSIS OF ACTIVITIES OF MIDDLE MANAGEMENT PERSONNEL IN THE RETAIL TRADE INDUSTRY WITH IMPLICATIONS FOR CURRICULUM DEVELOPMENT IN POST-SECONDARY INSTITUTIONS

By

John Hector Carmichael

The major objective of this study was to derive a taxonomy of common and identifiable activities of retail middle managers. The study determined the relative importance, crucialness to success on the job, and frequency of performance of these activities. This investigation also determined differences existing between middle managers in four types of firms, four levels of management, and two functional areas of employment.

Procedures

The study involved 15 firms in Standard Industrial Classification Group 53, Retail Trade--General Merchandise, and consisted of six traditional department stores, three chain department store organizations, three discount firms, and three variety store chains ranging in size from approximately $20 million to over $2 billion in annual sales. The major research instrument, a questionnaire containing 202 statements that describe selling, sales

promotion, buying, operations, and managerial activities, was developed from current textbooks, literature, and personal interviews.

Executives were interviewed during personal visits to each firm in order to gain insight and background information related to the study. At the same time, a proportional sample of middle managers was selected from each firm. Of 846 questionnaires mailed, 701, or 83 per cent, were returned representing four per cent of the total population of 17,538.

There were four major analyses of the questionnaires: (1) response of all 701 mid-managers to each activity, (2) response based upon type of firm, (3) response based upon level of management, (4) response based upon functional area of employment.

Findings

1. The Managerial competency was reported as the most crucial of all competency areas. The activities that cluster around supervision, analysis, problem-solving, decision-making, communicating, human relations, and innovation were found to be the most crucial activities contributing to the success of middle managers.

2. A cooperative education program which involves on-the-job experience was viewed by retail executives as a necessary and important part of the post-secondary mid-management curriculum.

promotion, buying, operations, and managerial activities, was developed from current textbooks, literature, and personal interviews.

Executives were interviewed during personal visits to each firm in order to gain insight and background information relative to the study. At the same [illegible]

3. A major difference exists between activities performed by middle managers in traditional department stores as compared to discount, chain, and variety organization mid-managers.

4. Routine marketing and distribution activities were found to be more crucial to lower levels of management while managerial-type activities were found to be more crucial to the higher levels of management.

Conclusions

1. There are a set of common and identifiable activities that are crucial to the success of retail middle managers in different types of firms, levels of management, and functions. These activities, prepared as a taxonomy of retail middle management activities, can be used as a guide in developing and assessing mid-management courses in post-secondary institutions.

2. The traditional department store model should not be used in developing a post-secondary "mid-management" curricula since mid-management personnel in this type of firm are more highly specialized than mid-managers in discount, chain, and variety organizations which represent 80 per cent of general merchandise sales.

3. As post-secondary graduates most often enter retailing at the lowest level of management, they should be equipped to satisfactorily perform the rank and file activities which were found to be so crucial to success at

this level. Cooperative or work experience programs are methods of providing students with an opportunity to learn many of these routine rank and file activities.

4. Retail middle management positions are not organized into discrete levels. However, job entry positions can be identified and career ladders developed for post-secondary students on the basis of existing retail management opportunities.

5. Because activities and responsibilities of retail middle managers are continually changing as newer merchandising and operations techniques emerge, post-secondary "mid-management" instructors should work closely with employers so that the instructors will be kept abreast of these changes.

AN ANALYSIS OF ACTIVITIES OF MIDDLE MANAGEMENT PERSONNEL IN THE RETAIL TRADE INDUSTRY WITH IMPLICATIONS FOR CURRICULUM DEVELOPMENT IN POST-SECONDARY INSTITUTIONS

By

John Hector Carmichael

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CHAPTER I

THE PROBLEM OF THE STUDY

Introduction

Since the end of World War II, rapid advances in technology have created the need for increased employee skills at all levels. However, the greatest advances and increased need has been among the middle range positions. Technological advances are moving so swiftly that it has been stated that semi-professional, technical, and managerial jobs will account for over 50 per cent of the labor force by 1960.[1] These upgraded manpower needs are increasingly being met by post-secondary institutions which offer training beyond the normal twelve years.

The objective of high school distributive education programs is to train young people for entry employment and the pursuance of their career objectives in marketing. The four-year college, on the other hand, emphasizes preparation for eventual promotion to professional positions at

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[1] Norman P. Harris, "The Community Junior College--A Solution to the Skilled Manpower Problem," in Higher Education in an Age of Revolution, ed. by G. Kerry Smith (Washinton: Association for Higher Education, 1962), p. 111.

the top levels of marketing management. The post-secondary curricula have attempted to bridge this gap.

A rapidly developing occupational program in post-secondary institutions is the "Mid-Management" curriculum for students planning on careers in distribution. One of the reasons for the growth of the "Mid-Management" program is the fact that the retail trade industry, the major factor in distribution in our economy, employs more persons at the middle management level than any other industry.[2] Because retailing is characterized as "one of the most dynamic and rapidly changing segments of business,"[3] it is imperative that post-secondary curriculum planners keep abreast of the competencies that are currently needed to successfully perform in middle management positions and those skills and abilities that will be needed in the future.

The basic idea for this study evolved as an outgrowth of the first United States Office of Education Institute for Post-Secondary Teachers of Marketing and Distribution, a conference proposed and implemented by the Research and Development Program in Vocational-Technical

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[2] Raymond E. Glos and Harold A. Baker, Introduction to Business (5th ed.; Cincinnati, Ohio: South-Western Publishing Company, 1963), p. 154.

[3] Malcolm P. McNair, "Significant Trends and Developments in the Post-War Period," in Competitive Distribution in a Free High Level Economy and Its Implications for the University, ed. by A. B. Smith (Pittsburgh: University of Pittsburgh Press, 1958), p. 1.

Education at Michigan State University, and held at that institution during the summer of 1966. Research on middle management positions in distributive occupations on which "Mid-Management" curricula could be based was considered by the Institute participants to be a most pressing need. Review of related literature in distributive occupations, middle management, and post-secondary institutions confirmed the scarcity of studies and reinforced the need for research on middle management positions in the retail trade industry.

Statement of the Problem

The problem was to establish on an empirical basis the duties of retail mid-managers on which more accurate decisions can be made prior to initiating or revising curriculum content in post-secondary middle management education programs, and to determine if a consistent definition of middle management can be applied to a wide range of management positions.

Objectives

The major objective of the study was to derive a taxonomy of retail mid-management duties which would consist of a ranking of activities according to major marketing and distribution competency areas, their relative importance, their crucialness to success on the job, and

frequency of performance. In accomplishing this objective, the following questions were asked:

1. Do middle management positions have a common and identifiable cluster of activities that are crucial to success on the job, or is each position unique?
2. If there is a cluster of identifiable activities common to all middle management positions, what are these activities, how crucial are they to success on the job, and with what frequency are they performed?
3. Do the activities of middle managers differ between retail organization classifications? If so, what are the differences?
4. Do the activities of middle managers differ at various management levels? If so, what are the differences?
5. Do the activities of middle managers in merchandising positions differ from the activities of middle managers in operations positions? If so, what are the differences?
6. Are middle management positions in retail organizations discretely organized into levels, or are the positions overlapping and continuous?

Need for the Study

Ample evidence exists of the changing structure of our labor force and the continual upgrading of manpower skills required by business and industry. Dr. Norman Harris of the University of Michigan, describing the rapid occupational changes in employment in the United States has indicated that "the really significant changes in our labor force, and in society in general, have occurred at the level of the semi-professional and technical; the managerial, business, and sales; and the highly skilled jobs."[4] Dr. Keith Davis of Arizona State University, in an analysis of manpower needs for the 1970's, indicates that our nation's management shortage "may indeed be much more serious than our engineering and scientific shortage."[5]

Dr. Grant Venn, author of Man, Education, and Work, the report of a study of the place of occupational education within education as a whole, summarized the chapter on manpower needs by stating that "the need in the semi-professional, technical, and highly skilled occupations is for more people, and the right kind of people who are well trained and well educated. Only through education can these ends be accomplished."[6]

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[4] Harris, op. cit., p. 111.

[5] Keith Davis, "Management Brain-Power Needs for the 1970's," Journal of the Academy of Management, (August, 1960), 125.

[6] Grant Venn, Man, Education, and Work: Post-Secondary Vocational and Technical Education (Washington: American Council on Education, 1964), pp. 135-36.

When expansion of the retail trade industry in our economy is viewed in relation to national manpower requirements, it may be concluded that the shortage of middle management personnel in retailing may very well become acute in years to come. Garber, in a recent article, states that "unless constructive steps are taken to bring academic retailing in line with practical retailing, even greater losses will be sustained in the arena of manpower competition."[7]

The present shortage of qualified middle managers has caused retailers to explore a relatively new source of middle management manpower--the post-secondary institution. The demand for retail managers has been reflected in the rapid growth of programs to train students for these positions. Dr. Norman C. Harris, in a recent study of technical programs in junior colleges[8] discovered that business education enrolls more students than any other program. A recent study of students in higher education by the American Council on Education[9] revealed that the

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[7] Harold S. Garber, "Failure at the Academic Level," Stores (New York: National Retail Merchants Association, August, 1967), p. 47.

[8] Norman C. Harris, Technical Education in the Junior College (Washington: American Association of Junior Colleges, 1964), p. 73.

[9] Alexander W. Astin, Robert J. Panos, and John A. Creager, "National Norms for Entering College Freshmen--1967," ACOE Research Report, vol. 2, no. 7 (Fall, 1967).

career occupation of students in two-year colleges was most likely to be that of businessmen.

The retailing profession is in continual adjustment to the dynamic changes taking place in our economy. Changing social, environmental, demographic, and political factors as well as innovations such as the computer and systems planning require a continual analysis of the functions of middle management personnel in all areas of retailing.

It is apparent that a recurring problem is that of the most suitable curriculum for the preparation of retail middle management personnel. In approaching this problem it should be recognized that the teacher's goal in the learning process is the achievement of relevant performance skills by the individual student. The focus must be upon the student and what he must learn to assure success in the "real world." Therefore, relevant learning objectives must be defined in terms of recognized job performance.

The most specific model for deriving learning objectives in the Mager[10] model in which the objective is stated in behavioral terms that describe what the learner will be doing when demonstrating his achievement of the objective. However, before such objectives can be

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[10] Robert F. Mager, Preparing Instructional Objectives (Palo Alto, California: Fearon Publishers, 1962).

stated, certain specific input data is needed: (1) knowing what the job consists of, (2) knowing what one needs to do to perform each of the tasks, and (3) knowing how frequently the task is to be performed. The first step in developing learning objectives and planning a curriculum, therefore, requires an analysis of real-world employment. This study was a necessary first step in providing input data to post-secondary curriculum planners and teachers on the vocational-educational requirements for the specific skills and knowledge needed by middle managers to be successful in general merchandise retail organizations.

Assumptions

The following assumptions were established for the purpose of this study:

1. That there are certain similar activities performed by a wide range of management personnel in retailing.
2. That the knowledge of these activities can be the basis for deriving instructional objectives.
3. That the knowledge of common activities can lead to the development of more efficient, effective, and relevant retail management programs at the post-secondary level.
4. That the organizational boundary for middle management is above the supervisory level at

the lower end and immediately below corporate officers at the upper level.

5. That there are four levels of retail management which can be identified.
6. That activities performed by management personnel are essentially the same regardless of the size of the community in which they are employed.
7. That the activities investigated are important to successful job performance.

Limitations of the Study

The study was limited as follows:

1. Limitations as to Firms. This study investigated middle management personnel in the following multi-unit merchandising retail organizations: (a) traditional (independent) department stores, (b) department store chains, (c) discount department store chains, and (d) limited price variety store chains. The first three types of organizations are broadly classified as "Department Stores" by the U. S. Bureau of Census (Standard Industrial Classification 531); the fourth organization, "Limited Price Variety Stores," is classified as S. I. C. 533.

2. Limitations as to Personnel. This study was concerned with an analysis of the activities of middle management personnel. Activities performed by rank and file employees and top management were not examined.

3. Limitations as to Functions. There are five basic functional positions within a retail firm: (1) merchandising, (2) operations, (3) sales promotion, (4) control, and (5) personnel. This study analyzed the activities of personnel performing the functions of merchandising and operations. These two functions represent approximately 80 per cent of the supervisory and middle management positions in retail organizations.

Definition of Terms

Most of the terms and concepts used in this study are familiar and are used in the conventional manner. The following terms are defined to delimit the intended understanding:

Activity

A specific operation or element of a position which contributes to the overall performance of that position. A meaningful statement that is descriptive in some way of a part of a retail management position.

Distributive Education

A program of instruction for people who are, or wish to be, engaged in the field of marketing and distribution. Distributive education functions through organized programs of instruction for high school youth, post-high school youth, and for adults. The program includes subjects that will contribute directly to increasing the

knowledge, skill, and ability of persons who have career goals in distribution as well as subjects designed to train persons for changing to a related kind of work in another distributive occupation or for promotion to a higher level distributive position.[11]

Distributive Occupations

Those occupations followed by proprietors, managers, or employees engaged primarily in marketing or merchandising goods or services. Such occupations may be found in various business establishments, including, without being limited to, retailing, wholesaling, manufacturing, storing, transporting, financing, and risk bearing. Distributive occupations do not include trade, industrial, or office occupations.[12]

Educational Objectives

Educational objectives are instructional goals specified in terms of intended student behaviors. They represent the expected outcomes of an educational program.

First-Line Management (same as Supervisory Management)

A person at the first level of supervision, who is in charge of, and has as his primary duty, the management

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[11] Administration of Vocational Education, Vocational Education Bulletin No. 1, U. S. Office of Education, 1958, p. 13.

[12] Ibid.

of a recognized unit within a firm. The first-line management generally spends approximately 50 per cent of his time in managerial work, customarily and regularly supervising employees and exercising the discretionary powers consonant with the position.

Function

A collection of activities having related purposes. Most retail firms are organized into the following five functional areas:

1. Merchandising.--The closely related activities involved in buying and selling merchandise and services to customers.

2. Sales Promotion.--The closely related activities which induce customers to come to the store and which assist in the advertising and sale of merchandise and services.

3. Operations.--The closely related activities which support the merchandising, sales promotion, finance and control, and personnel functions.

4. Finance and Control.--The closely related activities concerned with maintaining the payroll, funds, establishing budgets and standards of performance, and measuring store and unit performance.

5. Personnel.--The closely related activities concerned with the recruitment, interviewing, employment, placement, and training of store personnel.

Job Analysis

The systematic technique of determining the essential elements which constitute a job. Job analysis data provides basic information as to what is entailed in performing a job. The main educational purpose of job analysis is to provide data for determining course content, developing instructional material, and devising methods of teaching.

Mid-management Curricula

A post-secondary occupational program which equips students for employment at the mid-management and supervisory levels. Depending upon the educational institution, this program may also be called "marketing," "retailing," "merchandising," or "distributive education." The student who completes such a program receives instruction in skills used at the supervisory level by most distributive businesses.[13]

Middle Management

A management group responsible for execution and interpretation of policies throughout the organization and for the successful operation of assigned units, divisions, or departments.[14] Because units and departments in retail

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[13] Directory of Post-Secondary Retailing and Marketing Vocational Programs. Washington, D.C.: American Vocational Association, 1968, p. 2.

[14] Carl Heyel, ed., The Encyclopedia of Management (New York: Reinhold Publishing Corporation, 1963), p. 476.

firms are generally small-scale, and activities are carried out in quasi-autonomous units (even though the corporation itself may be very large), an individual with supervisory responsibility can be considered part of middle management. For this study, therefore, the term middle management refers to all levels of management from first-line management up to but not including the corporate level.

Occupational Competence

The possession of sufficient ability and requisite qualifications for a specified job. It is the product of some combination of education, experience, and personal traits.

Post-Secondary Institution

An institution that provides a level of education beyond high school but does not grant the baccaleaureate degree. Post-secondary institutions are known by a wide range of names: junior colleges, community colleges, technical institutes, area vocational schools, adult education centers, and lower divisions of four-year colleges. The term "post-secondary," used synonomously with "post-high school," is a generic term used by the United States Office of Education and such schools to enable these institutions to meet the requirements of federal legislation.

Rank and File Employee

A non-supervisory employee performing routine and basic job activities such as selling, stockkeeping, delivery, etc.

Retail Trade Industry

The institutions that perform the functions of retailing, including all establishments primarily engaged in selling merchandise to personal, household, and farm users.[15]

Standard Industrial Classification

"The Standard Industrial Classification was developed for use in the classification of establishments by types of activity in which engaged; for purposes of facilitating the collection, tabulation, presentation, and analysis of data relating to establishments; and for promoting conformity and comparability in the presentation of statistical data collected by various agencies of the United States Government, state agencies, trade associations, and private research organizations."[16]

SIC 531 -- Department Stores -- Establishments normally employing twenty-five people or more and engaged in selling some items in each of the

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[15] U. S. Bureau of the Census, Census of Business, 1963, Vol. 1, Retail Trade -- Summary Statistics, Part I, (Washington, D.C.: U. S. Government Printing Office, 1966).

[16] "Standard Industrial Classification for Use in Distributive Education," (Washington: U. S. Department of Health, Education, and Welfare, OE-83013, 1964), p. iii.

> following lines of merchandise: (1) Furniture, home furnishings, appliances, radio and TV sets; (2) A general line of apparel for the family; (3) Household linens and dry goods.
>
> SIC 533 -- Limited Price Variety Stores -- Establishments primarily selling a variety of merchandise in the low and popular price ranges such as stationery, light hardware, toys, housewares, confectionery. These establishments frequently are known as "Five and Dime" stores."[17]

Since SIC 531, Department Stores, is a very broad categorization, for the purpose of this study, this definition was modified in order to classify the following three types of department stores:

1. Traditional (Independent) Department Store.--A retail firm engaged in selling a wide variety of goods and services such as furniture, home furnishings, interior decorating, large and small appliances, family apparel, domestic goods, etc., and traditionally providing many "free" services such as liberal return policies, credit, delivery, and restaurant. Established prior to World War II, the main store is located near the center of a downtown business district, with branch stores in the suburbs.

2. Department Store Chain.--A large retail organization distinguished from the Traditional (Independent) Department Store in the following manner: (1) it is a multi-unit organization with stores in many states, (2) each local store is known by the corporation name, (3) the chain features its own "brand" of merchandise.

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[17] *Ibid.*, p. 3.

3. Discount Store Chain.--A retail organization which attempts to expand sales volume by selling at low prices generally below the prices of the Traditional (independent) Department Store. In an effort to attain a high rate of merchandise turnover, the Discount Chain generally offers limited services and operates on a lower margin of profit. Like the Department Store Chain, the Discount Store Chain is a multi-unit operation with all stores using the corporate name.

Taxonomy

A classification of the activities of retail management personnel by major marketing and distribution competency areas ranked according to their relative importance, their crucialness to success on the job, and frequency of performance.

Terminal Program

A curriculum which is vocational in nature and planned to prepare students for direct entry into employment in contrast with "transfer" programs planned to enable students to transfer to a senior college or university without loss of credit.

Top Management

The policy-making group responsible for the over-all direction and success of all company activities. It is made up of the Board Chairman, President, Directors who are: D. Discount Store Chain--a retail organization which attempts to expand sales volume by selling at low prices generally below the prices of the traditional (independent) department store. In an effort to achieve high rate of merchandise turnover, the discount chain are officers, and key top management personnel usually directly responsible for a major division or function of the business, but each also having a responsibility for the performance of the business as a whole, participating in decisions of a company-wide nature and collaborating with others in the group in important matters affecting any or all phases of the company's operation.[18]

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[18] Heyel, op. cit., p. 476.

CHAPTER II

REVIEW OF LITERATURE

Introduction

At the present time there is very little research available concerning retail middle management positions and a scarcity of research relating directly to post-secondary retail "mid-management" curricula. One of the major reasons for the lack of curricula research is the recent rapid growth of post-secondary institutions, both in numbers of institutions and enrollment, and the concomitant growth of "mid-management" curricula within those institutions.

For the most part, related research and literature provide data on certain aspects of the non-retailing middle manager or are investigations of selected retail management positions. The role of the post-secondary institution is discussed in the initial section of this chapter. Later discussion focuses upon studies of non-retailing middle management personnel in business and industry, investigations of selected retail management positions, and related research on retail rank and file employees.

The Role of the Post-Secondary Institution

There is a great diversity in types of post-secondary institutions, with each institution having distinguishing characteristics affecting the type and quality of educational program it can offer. Recognizing the diversity of objectives, most educational authorities view the role of post-secondary institutions as including one or more of the following purposes: (1) preparation for advanced study, (2) vocational education, (3) general education, and (4) community service.[19]

Vocational or occupational education is a major institutional function providing training for students who do not plan to continue their education in a senior college. Because of the various types of post-secondary institutions, occupational education is provided under many conditions, for many occupational skills, and for a number of objectives.

Since the end of World War II, as the tempo of change in our society has accelerated, the preparation of students for successful vocational careers in post-secondary institutions has greatly increased in importance. In this respect, Grant Venn has stated,

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[19] Henry Nelson, ed., The Public Junior College, the Fifty-Fifth Yearbook of the National Society for the Study of Education (Chicago: University of Chicago Press, 1956), p. 69.

The Role of the Post-
Secondary Institution

There is a great diversity in types of post-secondary institutions, with each insisting on having distinguishing characteristics affecting the type and quality of educational progress it can offer. Recognizing the diversity of objectives, most educational authorities view

> A key to occupational preparation for tomorrow will be the comprehensive post-secondary educational institution. Reasons for this development are clear: more advanced vocational and technical education courses are needed beyond the high school to meet the educational demands of more sophisticated technologies; many occupational fields are requiring more post-high-school general and related education to complement the more specialized technical training; employers favor the older employee, who has had post-high-school occupational training; and adults continuing their education seem to favor the post-secondary institution over the high school.[20]

An institution that has emerged to play a major role in programs of post-secondary occupational education is the community junior college. The report of a three-year study by the Administrative Committee on Terminal Education of the American Association of Junior Colleges indicating the increased interest in post-high-school education and stressing the importance of occupational education at this level states that since graduation from the junior college marks the end of formal classroom training for the majority of its students, "the junior college must provide these students with the skills, the information, and the personal qualities that will enable them to assume their place almost immediately in adult life."[21]

In a study of the potential role of the junior college in education for business, Goddard found terminal

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[20] Venn, op. cit., p. 165.

[21] Phebe Ward, Terminal Education in the Junior College (New York: Harper and Brothers Publishers, 1947), p. 7.

education for the semi-professional business occupations to be a significant and expanding curriculum area.[22] This study has been corroborated by the research of Harris,[23] which indicated that business education in junior colleges enrolls more students than any other program, and the American Council on Education,[24] which revealed that the career occupation of students in two-year colleges was most likely to be that of businessmen.

It can be noted that the function of providing occupational education is a growing one in post-secondary institutions. And, within the framework of occupational education, business programs because of the demands of business and industry have assumed an even greater significance.

The Role of Post-Secondary Distributive Education

Programs for training persons for selected distributive occupations at the post-secondary level are being developed and conducted in ever-increasing numbers. The Vocational Education Act of 1963 provided a financial impetus for states to expand their occupational programs at the post-secondary level by requiring that states

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[22] Merl Lee Goddard, "The Potential Role of the Junior College in Education for Business" (unpublished Ed.D. dissertation, University of Indiana, 1962).

[23] Harris, op. cit., p. 73.

[24] Astin, et al., op. cit.

spend Federal funds for the development and expansion of such programs.[25]

The United States Office of Education reported that 21,003 students were enrolled in post-secondary distributive education programs in 1967.[26] The Distributive Education Unit of the United States Office of Education estimated, in 1967, that 92,500 students would be enrolled for the 1969-1970 school year.[27]

Haines and Toothman, reporting the results of a special task force on post high school education at the 1963 National Clinic on Distributive Education, state that the primary goal of post-secondary distributive education, of which a mid-management curriculum is but a part, "is to offer vocationally oriented programs in distribution for persons who have completed or left high school and

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[25] The Vocational Education Act of 1963 carried the following provisions: "At least 33 1/3 per centum of each State's allotment for any fiscal year ending prior to July 1, 1968, and at least 25 per centum of each State's allotment for any subsequent fiscal year shall be used only for the purposes. . . . Vocational education for persons who have completed or left high school and who are available for full-time study in preparation for entering the labor market. . . . Construction of area vocational education school facilities."

[26] Bureau of Adult, Vocational, and Library Programs, Division of Vocational-Technical Education, Fact Sheet Vocational Education Fiscal Year 1967 Data (Washington: D.C.: United States Office of Education, 1967).

[27] Distributive Education Unit, Statistical Data, Distributive Education (Washington, D.C.: U. S. Office of Education, October, 1967).

who are available for full-time study in preparation for entering the labor market."[28]

Because the objectives of the wide range of post-secondary institutions are quite different with each institution having certain characteristics affecting the type and quality of program it can offer, diversity in curriculums and courses is to be expected. In an analysis of 1965-66 state department of education post-secondary distributive education directories, the Instructional Materials Laboratory of the University of Texas Distributive Education Department found that 158 post-secondary institutions in 19 states and Puerto Rico were offering vocational programs in marketing and distribution. The entire study revealed several significant factors:

> 1. The variations in curriculum course offerings, program operations and objectives were as numerous as the schools offering the programs.
> 2. No patterns of trends, strengths, or weaknesses could be identified.
> 3. Requirements, prerequisites, enrollments, recruiting practices, and scheduling were largely a matter of local regulation and convenience.
> 4. Work experience, job training, placement of students, and the responsibilities for training were as varied as the curriculums.
> 5. Responsibility for the curriculums, use of advisory committees, instructor recruitment, and qualifications were largely a matter of local policy and philosophy.

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[28] Peter G. Haines and Rex C. Toothman, "Post-High School Preparatory Education for Careers in Distribution," Business Education Forum, (April, 1964), p. 13.

who are available for full-time study in preparation for entering the labor market."

Because the objectives of the wide range of post-secondary institutions are quite different with each institution having certain characteristics effecting the type and quality of program it can offer, diversity in curriculum and process is to be expected. In an analysis

> 6. Physical facilities, equipment, and department identification were as varied as the curriculums and job training requirements.[29]

The special task force group reporting on post-high school distributive education programs at the 1963 National Clinic on Distributive Education, indicated that post-high students are those who are past the usual high school age with the bulk of them probably 25 or under, even though the upper limit is indefinite. The key criterion in defining a post-high school student, however, is not so much age as the willingness of a person to be available for full-time schooling and to concentrate on programs with a well-defined occupational goal.[30]

The Post High School Task Force also indicated that "a well-balanced program of distributive education should be offered; yet, it should be specific enough to meet the occupational goals of the students. Both breadth and depth must be considered to insure that the program will not be limited to preparation for a specific job only. At the same time, there must be specialization; otherwise the program is in danger of becoming so general that it will not serve any worthwhile purpose."[31]

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[29] Robert R. Luter, "Building D.E. Curriculum for the Junior College," American Vocational Journal, (April, 1968), pp. 52-53.

[30] Task Force II, "Post High School," National Clinic on Distributive Education, Washington, D.C.: October 14-18, 1963, p. 1.

[31] Haines and Toothman, *op. cit.*, p. 14.

Research Related to the Middle Management Level

Most management texts make only slight mention of persons operating in middle management positions. This is probably due to the fact that the authors, for the most part college professors and thereoticians, believe that the basic skills of management are similar for all managers or administrators in any type of organization. Nevertheless, there are various levels of duties and responsibilities within the management group.

McFarland,[32] in his basic management text, lists six divisions of the management group: the chief executive, the senior executives, department or division heads, superintendents, general foremen, and first-line supervisors. The six divisions are evenly sub-divided into three levels, top management, middle management, and supervisory management. Although McFarland's title designations refer primarily to the industrial firm, there are counterpart levels within retail organizations.

Niles, in her book Middle Management, made the following statement concerning the origin of the term middle management:

> Eight years ago my husband, Henry E. Niles, was discussing with me the problems of the junior administrator. He mentioned the whole layer of management which lies immediately below top

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[32] Dalton E. McFarland, Management: Principles and Practices. (2d ed.; New York: The Macmillan Company, 1964), p. 239.

> management and called it 'middle management.' I exclaimed, 'that is the title of my book on the junior administrator.' So far as we are aware, that was the first mention of a term which since has become common.[33]

Mrs. Niles' statement may or may not portray the true origin of the term, middle management. However, Mrs. Niles is the first recognized author to contribute a book dealing exclusively with this area of management.

Newport, in a survey of middle management development in 121 industrial organizations found that:

> Middle management is that segment of an organization which includes personnel at all levels of authority found between but including neither, the vice presidential level and the first level of supervision--most frequently referred to as the foreman level . . . middle managers are accustomed to performing within the confines of a technically oriented functional area.[34]

McLarney states that "There are no clear lines of demarcation between the activities of middle management and those of supervisor,"[35] and, therefore, he treats both with the designation "supervisor." He indicates that this management group is concerned with the internal running of the business, whereas top management is

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[33] Mary C. Niles, Middle Management: The Job of the Junior Administrator (New York: Harper and Brothers, 1949), p. ix.

[34] Marvin Gene Newport, "Middle Management Development in Industrial Organizations" (unpublished Ph.D. dissertation, University of Illinois, 1963).

[35] William J. McLarney, Management Training: Costs and Principles (Homewood, New Jersey: Richard D. Irwin, Inc., 1955), p. 98.

concerned with overall company policies and the handling of the company's external relationships.

Pfiffner and Sherwood developed, after years of study, consultation, practice, and teaching, seven broad behavior-task guides for the middle management level. They state that persons operating at this level maintain closer contact with day-to-day results; participate in operating decisions; evaluate production results rather than program; evaluate personnel from a standpoint of immediate usefulness rather than future potential; spend less time in reading and reflection because of the press of events; are more likely to spend time deliberating with colleagues in solving urgent and immediate problems; make plans for achieving goals established by the corporate level; and implement policy decisions within the limitations set by higher echelons.[36]

After studying definitions of the middle manager in management textbooks, analyzing the definition used by Newport and McLarney, and recognizing the use of the term by post-secondary educators, the following definition was selected as representative of literature and as serving the purpose of the present study.

Middle Management: A management group responsible for execution and interpretation of policies throughout concerned with overall company policies and the handling of the company's external relationships.

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[36] John M. Pfiffner and Frank P. Sherwood, Administrative Organization (N.J.: Prentice Hall, Inc., 1960), pp. 148-149.

Pfiffner and Sherwood develop, after years of study, consultation, practice, and teaching, seven-stage behavior-task guides for the middle management level. They state that persons operating at this level maintain the organization and for the successful operation of assigned units, divisions, or departments. Because units and departments in retail firms are generally small-scale, and activities are carried out in quasi-autonomous units (even though the corporation itself may be very large), an individual with supervisory responsibility can be considered part of middle management. Therefore, the term middle management in this study, as defined previously, refers to all levels of management from first-line management up to but not including the corporate level.

Research Related to the Non-Retailing Middle Manager

In 1964, Shaul, investigating the impact of data processing systems on middle managers, rejected the hypothesis that data processing would cause significant changes in the nature and scope of the function of middle managers. Shaul found that middle managers still must continue to perform the executive functions of organizing, planning, staffing, directing, and controlling even though there has been a shift in the amount of time spent on each function. The study indicated that middle managers still must continue to make full use of experience and judgment in making decisions, and are not required to be highly skilled in the advance techniques of computer operations.

In contrast, Shaul found that the scope of the position of middle managers has changed significantly because data processing has enabled middle managers to make more accurate short-range plans, maintain existing detail in long-range plans, and to develop an increasing awareness of responsibility to engage in planning decisions at their level. Interestingly enough, Shaul's study indicated that the amount of personal contact between upper and lower levels of management will tend to increase. Also, "data processing has brought increasing complexities to the middle manager job because incumbents must know something about the capabilities and limitations of the system, must exercise greater leadership in crosswise and horizontal relationships outside their own department, must react faster, make decisions more quickly, consider more facts when making decisions and make more elaborate plans. The use of experience and judgment in making decisions is increasingly required because of the improvements in data received, the demands of superiors, and the added complexities of the position."[37]

Douglas,[38] recognizing the importance of the middle manager as an industrial human resource, focused his

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[37] Donald Robert Shaul, "The Effects of Data Processing on Middle Managers" (unpublished Ph.D. dissertation, University of California at Los Angeles, 1964).

[38] John Douglas, "The Present Status of the Management Training and Development Activities for the Non-promotable Middle Managers in the Major American Companies--A Study of an Undeveloped Managerial Resource" (unpublished Ph.D. dissertation, Cornell University, 1960).

attention upon the non-promotable middle manager. After a survey of 114 firms and a case study analysis of 22 promotable and non-promotable middle managers in one company, Douglas concluded that non-promotable middle managers account for approximately 32 per cent of the total middle management force. The non-promotable middle manager was found to be largely responsible for many problems in performance and for many personnel problems, and for this reason the education, training, and development of such individuals must be altered in order to achieve the non-promotable manager's potential.

Two studies of middle managers were concerned with job attitudes of this management group. Eran,[39] in 1965, sought to explore the relationship between level of management, personality traits, and job attitudes. He found that variation in job attitudes of middle management personnel cannot be accounted for by variation in job level or personality factors alone. Eran concluded that variations in middle management job attitudes were caused by an interaction between hierarchical level and personality traits. In 1959, Browne gained insight into elements of the work sutuation which tend to produce satisfaction and

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[39] Mordechai Eran, "The Relationship between Self-Perceived Personality Traits and Job Attitudes in Middle Management" (unpublished Ph.D. dissertation, University of California, Berkely, 1965).

dissatisfaction among middle management personnel. Job satisfaction appeared to be highest where:

> (1) the largest percentage of respondents felt involved in decision-making; (2) a high percentage believed that their authority was commensurate with their responsibility; (3) internal communication was judged to be adequate; (and) (4) there were the fewest levels in the hierarchy.[40]

Middle management studies by Read,[41] Johnson,[42] Kaufman,[43] and Tausky,[44] although not directly related to this one, provide some insight into the role of the middle manager in business and industry.

Research Related to Retail Management

This study is a research effort to investigate a wide range of middle management positions in a number of

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[40] Margaret Carlson Browne, "Job Attitudes of Middle Management in Three Cooperative Extension Services" (unpublished Ph.D. dissertation, University of Wisconsin, 1959).

[41] William Herbert Read, "Some Factors Affecting the Accuracy of Upward Communication at Middle Management Levels in Industrial Organizations" (unpublished Ph.D. dissertation, University of Michigan, 1960).

[42] Virginia Kroener Johnson, "Responsibilities of Food Production Managers Performing at the Middle Management Level" (unpublished Ph.D. dissertation, University of Wisconsin, 1960).

[43] Louis Kaufman, "The Suitability of Retired Army Officers for Middle Management Positions in Industry" (unpublished D.B.A. dissertation, University of Southern California, Los Angeles, 1964).

[44] Curt Tausky, "Career Anchorage Points of Middle Managers" (unpublished Ph.D. dissertation, University of Oregon, 1963).

diverse types of retail organizations. Previous research efforts related to this study have focused, for the most part, upon a single management position such as buyer, department head, et. al., positions that are within the range of the middle management level.

Straul's[45] observational investigation of eight department store buyers to determine how they spend their in-store time, provides several findings relative to the present study. The purpose of Straul's study was to determine if department heads (buyers) performed many tasks that might more economically be covered by sales and stock personnel. He found this to be true.

Straul found that about one half of the average day of a department head was devoted to selling tasks, with smaller shares of time devoted to buying, stockkeeping, studying departmental records, and conferring with superiors. A surprisingly small amount of time was expended on buying tasks. In an analysis of department heads according to department size, Straul found that heads of small departments tended to spend more time in personal selling and less time conferring with superiors and studying departmental records than did heads of large departments.

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[45] Robert M. Straul, "How Department Heads Spend Their In-Store Time," Journal of Retailing, Vo. 36, no. 4 (Winter, 1960-61), pp. 207-216, 224.

Henry's[46] sociological analysis of the department store buyer provides evidence of the changing role of a key retail middle manager. In approaching his study from an historical viewpoint, Henry discovered that the status of buyers was highest before 1925 and from that time to 1960 there has been a gradual diminution in their roles. Changing organizational structures and operational standards (e.g., group buying, establishment of merchandise managers, the advent of the branch store, et. al.) have all contributed to new buyer responsibilities and functions. The study reinforces the need for continual analysis of management positions which are constantly changing in response to economic and social conditions.

Dalrymple,[47] in a study to determine quantitative methods of measuring merchandising performance in department stores, asked one question which is pertinent to this study. Asking 111 merchandising executives in 11 department stores "What would you say are the most important duties and responsibilities of your job?" over 50 per cent of the executives ranked selection of the right merchandise and training and supervision of subordinates as their primary job duties and responsibilities.

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[46] Robert Rudolph Henry, "The Changing Roles and Status of the Department Store Buyer, 1870-1960" (unpublished Ph.D. dissertation, Syracuse University, 1965).

[47] Douglas Jesse Dalrymple, "Quantitative Methods of Measuring Merchandising Performance in Selected Department Stores," (unpublished D.B.A. dissertation, Michigan State University, 1964).

Henry's[96] sociological analysis of the department store buyer provides evidence of the changing role of key retail middle managers. In approaching his study from an historical viewpoint, Henry discovered that the status of buyers was highest before 1929 and from that time to 1968 there has been a gradual diminution in their roles

Although the writer's research is concerned with middle managers in multi-unit retail operations, Kunsemiller's[48] investigation of the educational needs of independent store owners has direct relevance to this study. Upon completion of this study, Kunsemiller's conclusions, although couched in terms of the small independent retail businessman, were found to be no less applicable to the middle manager in a multi-unit retail operation. A synthesis of his findings indicate that management programs for small businessmen should develop a broad range of interests in preference to overspecialization; that education for small businessmen should develop analytical abilities and discriminatory capacities of conceptualization using methods of teaching that emphasize the scientific process in problem solving and decision-making through case problems, management games and role playing; and finally, that cooperative work experience programs in retailing should be expanded in secondary and higher educational institutions.

In a study of executive development activities in traditional department and specialty stores for the National Retail Merchants' Association, Niederpruem and

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[48] Charles Frederic Kunsemiller, III, "Recognized Educational Needs of Independent Retail Store Owners in Selected Cities in California" (unpublished Ed.D. dissertation, University of Southern California, Los Angeles, 1961).

Plant[49] investigated four levels of store management. For the purpose of their study, executives and trainees were defined as follows:

> Major Executives: Division heads, officers of firm. Those above department managers.
>
> Senior Executives: Managers of selling and non-selling departments.
>
> Junior Executives: Assistant buyers, assistant heads of selling and non-selling departments, and service managers.
>
> Executive Trainees: Any person in the organization considered qualified for promotion to executive responsibility. May be hired directly from colleges, high schools, or from another firm or may be already employed in the store.

Niederpruem and Plant found that the ratio of executives to other regular employees including trainees showed an overall average of one executive or supervisory employee to every 8.1 employees. This fact is a major reason which explains why retailing is ranked so highly as a career industry compared to other fields of endeavor. Only 35 per cent of 136 stores were found to have organized or semi-formal management development programs. It was concluded that many stores could profit from more organized manpower planning and training on a long-range basis. The study revealed that management has not given the necessary attention to reducing executive

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[49] Marion A. Niederpruem and George Plant, Developing Store Executives (New York: National Retail Merchants Association, 1960).

turnover by conducting objective and thorough exit interviews.

The Niederpruem-Plant study, conducted in 1960, found colleges and universities to be the best source for recruiting executive trainees, but took cognizance of the growing number of post-secondary institutions as a frequently overlooked and very valuable source. They concluded that the best preparation for a career in retailing was a college education, involvement in extra-curricular activities during college, work experience during college, and participation in a formalized retail training program for executive trainees.

There have been a number of studies specifically conducted with the purpose of obtaining from retail executives insight into desirable retail education at the college level. The findings are reviewed to provide background on the perceptions of retailers toward formalized educational programs.

Gillespie,[50] in a study of ten large retailing establishments in the New York metropolitan area, found that only 7 of 86 basic college courses were considered by 50 per cent or more of the executives interviewed to be essential for potential retailing executives. The seven courses were: human relations, human relations in

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[50] Karen R. Gillespie, "Education for Potential Retailing Executives," Journal of Business Education, Vol. 35 (January, 1960), p. 187.

retailing, human relations in business, speech, business English, English composition, and economics. Both participation in extra-curricular activities and work experience during school years were considered desirable by over 90 per cent of the executives interviewed.

In a study of the perceptions of retailers toward retail education in California state colleges, Hampton[51] found that retailers tended to favor "practical" on-the-job training as the soundest method of developing executive talent and had little, if any, faith in collegiate retailing programs. An interesting finding concerned the surprisingly little communication or contact between the retailer in the field and the retail educator in the classroom.

Jefferson's[52] investigation of the career patterns and formal education of 200 limited price variety store managers revealed that only 40 per cent of the managers had more than a high school education. Of significance was the fact that four out of five of the managers received their first occupational experience in some phase of retailing and distribution.

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[51] Robert E. Hampton, "Perceptions of Retailers and Retail Educators toward Retail Education in the California State Colleges," Journal of Business Education, Vol. 37, (October, 1962), p. 114.

[52] Robert W. Jefferson, "A Study of the Career Patterns and Formal Education of Selected Managers of Illinois" (unpublished Master's thesis, State College of Iowa, 1963).

A number of studies of rank and file and supervisory positions in retailing have been conducted to provide guidelines for the development of distributive education programs at the high school level. A recent study by Ertel[53] identified twelve major tasks performed by merchandising employees working in three standard industrial classifications of retail establishments. The twelve major task categories were selling, stockkeeping, checkstand operation, receiving and marking merchandise, delivery, keeping records, computing, display, advertising, buying, pricing, and merchandise control. The findings indicated clusters of knowledge necessary for successful employment in the merchandising function in retailing by non-supervisory employees and by supervisors. Ertel found that "substantial percentages of supervisors regularly perform all the activities of non-supervisors," activities in the major tasks of keeping accounts and records, planning and arranging interior displays, buying merchandise for resale, pricing, and controlling merchandise. One conclusion reached in the study concerned the inconsistency between the type of tasks performed in the merchandising division of the general merchandise retail stores and distributive education curricula. The data

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[53] Kenneth A. Ertel, "Identification of Major Tasks Performed by Merchandising Employees Working in Three Standard Industrial Classifications of Retail Establishments" (unpublished Ph.D. dissertation, Washington State University, 1967).

suggested a new approach in selecting the content and in developing distributive education curricula.

Crawford[54] engaged in a study of entry and career jobs for high school distributive education students. The investigation was an analysis of jobs in department stores, variety stores, food stores, restaurants, service stations, wholesale organizations, and hotels and motels. Competencies needed to perform the critical tasks in the various distributive jobs were organized into nine areas: advertising, communications, display, human relations, mathematics, merchandising, operations and management, product and/or service technology, and selling. Mrs. Crawford found many tasks that were common to a number of the rank and file jobs.

James J. Bliss, Executive Vice President of the National Retail Merchants Association, reporting on a staff study of the role of the middle manager,[55] states that the functions of this broad managerial group are continually changing because of the dynamic nature of the retailing profession. New executive responsibilities are being assumed by middle managers because of the suggested a new approach in investigating the competencies in developing distributive education curricula.

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[54] Lucy C. Crawford, A Competency Pattern Approach to Curriculum Construction in Distributive Teacher Education. Final Report of Research Project, U.S.O.E. Grant No. OE-6-85-044, Vols. I, II, III, and IV, Virginia Polytechnic Institue, Blacksburg, 1967.

[55] James J. Bliss, "The Future of Middle Management in Retailing," Stores (New York: National Retail Merchants Association, February and March, 1967).

vice. Crawford[24] engaged in a study of entry and career jobs for high school distributive education students. The investigation was an analysis of jobs in department stores, variety stores, food stores, restaurants, service introduction of the computer and electronic data processing, the expansion of branch operations, the competitive profit squeeze, and organizational growth. Bliss states that:

> Retailing will have to recruit and develop more executive talent in the next five years than it has in the past two decades. . . . The real secret of future success for a store will depend on improved utilization of people. Middle management in retailing offers one of the last frontiers for stores to improve their profit performance and to get an edge on competition.

Summary

The literature revealed that one very important role of the post-secondary institution was to provide vocational training for students who do not plan to continue their formal education in a senior college. It was further indicated that the primary goal of post-secondary distributive education is to offer vocationally oriented programs in distribution for persons who have completed or left high school and who are available for full-time study in preparation for entering the labor market.

The research concerned with the non-retailing middle manager in business and industry placed this level of management between top management and first-line supervision. The duties of the middle manager were specified as those which implement and supplement the objectives, policies, and plans of top management, acting

as top management's contact with individuals at the rank and file level. There have been several studies focusing attention on specific retail management titles such as buyer and department head and a number of studies which have investigated the duties of rank and file and supervisory retail employees.

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CHAPTER III

PROCEDURES FOR THE STUDY

The initial section of this chapter is devoted to a discussion of research techniques used in job analysis studies. After that discussion, the five phases of the research procedure used in this study are examined in greater detail.

Research Techniques Used in Other Studies

There are many research methods which have been used to determine the occupational demands of jobs. Most of the various research techniques were examined prior to selecting the method used in this investigation. Ward, in commenting upon this problem states that,

> No one method of determining course content can be offered as a cure-all; but in successful terminal courses, objectives and content are determined by means of analyses--occupational and job analyses for occupational training and life-activity analyses for general education.[56]

Several research methods have been used to analyze the activities of personnel in management and rank and file positions. Examples are: (1) work sampling, (2) the

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[56] Ward, op. cit., p. 45.

shadow technique, (3) case history, (4) card sort, (5) Q-sort, (6) critical incidents, (7) personal interview, (8) questionnaire, and (9) a combination of personal interview and questionnaire. Research using each of these methods will be described briefly.

Johnson[57] used work sampling, a technique consisting of a random sampling of observations, to classify and analyze management activities of a limited number of food production managers performing at the middle management level. This technique was found to be quite appropriate for determining the objectives of a professional education curricula.

Routson,[58] analyzing the performance of sales personnel in department stores, used the shadow technique, a method similar to work sampling. In this study, sales clerks were observed for several days during a seven-week period. The findings provided data which can be useful in training sales clerks. This technique is useful when studying one type of position, e.g. a sales clerk, but can not be used when attempting to analyze the activities of 15 different positions in four types of firms.

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[57] Johnson, op. cit.

[58] Jack C. Routson, "An Observational Analysis of Functional Performance of Retail Sales Personnel" (unpublished Ph.D. dissertation, University of Illinois, 1964).

Wald,[59] investigating the characteristics of executives and trends in those characteristics, used the case history method to study a limited number of executives. A profile of the business executive is extracted from intensive interviewing and testing and is useful in determining the needs of future business leaders. This method is very adaptable to the study of top management people, since at that level basic management and administrative skills are quite similar. However, management personnel at lower levels, although needing basic administrative and supervisory skills, tend also to need specialized knowledge for their particular area. It would be prohibitive to use the case study method to study the wide range of differentiated positions found at the middle management level.

Clark,[60] in determining vocational competencies needed for employment in the agricultural-chemical industry in Michigan, used a personal interview-card sort technique. The interviewee was told by the interviewer to place cards, colored according to job function and containing specific job competencies in compartments of a box partitioned according to a scale value. The mean of the ratings was used in determining instructional content.

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[59] Robert M. Wald, "Who Will Be the New Managers?" The Iron Age, October 5, 1967.

[60] Maynard Christensen and Raymond M. Clark, Vocational Competencies Needed for Employment in the Agricultural-Chemical Industry in Michigan (East Lansing: Michigan State University, 1967).

Schill and Arnold,[61] in developing curricula content to prepare students for employment in six technical occupations, used a modified Q-sort technique. A group of cards was developed to represent the content of courses taken by technicians in preparing for various jobs. The respondent first sorted the cards into three piles (those closely related to job performance, those somewhat related, and those totally unrelated), and secondly then forced the "related" and "somewhat related" piles into the left end of a normal distribution. A core curricula was developed after analysis of all responses.

Flanagan,[62] one of the pioneers in the use of the critical incident method, has conducted many job analyses with this technique. The approach consists of a set of procedures for collecting direct observations of specific behavior. Initially, the researcher obtains the general aim of an activity expressed in terms to which most authorities would agree. After plans are developed for collecting factual incidents regarding the activity, a record of specific behaviors is made by those in the best position to make the necessary observations and evaluations. Then the data is collected, tabulated, analyzed, and

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[61] William John Schill and Joseph Paul Arnold, Curricula Content for Six Technologies (Urbana: University of Illinois, 1965).

[62] John C. Flanagan, "The Critical Incident Technique," Psychological Bulletin, Vol. 51, No. 4 (July, 1954).

interpreted. The result is a formulation of the critical requirements of an activity and a basis on which inferences can be made as to requirements in terms of aptitudes, training, and other characteristics.

A survey of industrial technicians by Brandon[63] made use of a personal interview-survey questionnaire in several Michigan communities to provide data for educational planning at the post-secondary level. Ozzello,[64] in a study of accounting technicians, used a similar research technique. Using this method, Ozzello established a criteria that can be used to assist in the evaluation of accounting programs. Ertel[65] also used a personal interview and structured questionnaire to identify major tasks performed by retailing rank and file employees.

Mahoney, Jerdee, and Carroll[66] developed a questionnaire for measuring management performance after analyzing managerial assignments at all levels, in all functions,

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[63] George L. Brandon, Twin Cities Technicians (East Lansing: Michigan State University Press, 1958).

[64] Lawrence M. Ozzello, "An Analysis of Accounting Type Activities Performed by Technical Accountants in Firms Manufacturing Durable Goods with Implications for Evaluation of Post-High School Terminal Accounting Programs" (unpublished Ph.D. dissertation, Michigan State University, 1967).

[65] Ertel, op. cit.

[66] Thomas A. Mahoney, Thomas H. Jerdee, and Stephen J. Carroll, Development of Managerial Performance--A Research Approach (Monograph C. 9, Cincinnati: South Western Publishing Co., 1963).

and in various sizes of firms. The Mahoney questionnaire consists of a brief check list of management duties and responsibilities which can be administered by mail.

Hemphill[67] and the Educational Testing Service, in a study of the dimensions of executive positions, also used a questionnaire to analyze the work of 93 executives in five firms. The executives were selected from three levels and five functional areas of business. Hemphill's approach was considerably modified and adapted to serve as a framework for this study.

In summary, there are many research methods which have been successfully used to provide data on which to base curriculum decisions. A careful analysis of each of these research methods led to the conclusion that a well-developed questionnaire, together with selected personal interviews, would be the approach best suited to accomplish the goals of this study.

The five major divisions of this study are as follows:

Phase I. Determination of population and sample,

Phase II. Development of research instruments,

Phase III. Interviewing and data collection,

Phase IV. Analysis of data,

Phase V. Preparation of a taxonomy of retail management activities.

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[67] John K. Hemphill, Dimensions of Executive Positions (Columbus, Ohio: Bureau of Business Research, Ohio State University, 1960).

and in various sizes of firms. The Mahoney questionnaire consists of a brief check list of management duties and responsibilities which was administered by mail.

Hemphill[67] and the Educational Testing Service, in a study of the dimensions of executive positions, [illegible] used a questionnaire [illegible] in five firms [illegible] levels [illegible]

Figure 1 is a flow chart depicting the five phases and indicates the 25 procedural steps and dates taken in completing the study.

Phase I. Determination of Population and Sample

The retail trade industry is the nation's second largest industry. According to the 1963 Census of Business, retail trade in the United States amounted to $244,201,777,000, or 42% of the Gross National Product (583.9 billion) for 1963. In order to facilitate data collection in the retail industry, the Census Bureau divides retailers into eleven Standard Industrial Classifications. The eleven classifications of retailing, their sales, and percentage of sales to total retail sales are indicated in Table 1.

The Standard Industrial Classification Major Group 53 "Retail Trade--General Merchandise" was selected for purposes of this study because preliminary investigation indicated that a good proportion of post-secondary retail mid-management students enter positions within this group. The General Merchandise Group (Table 2) reported sales in 1963 of $30 billion, which represented 12.3 per cent of total retail sales. The general merchandise group also made a substantial increase in percentage of retail sales between the census of 1958 and 1963.

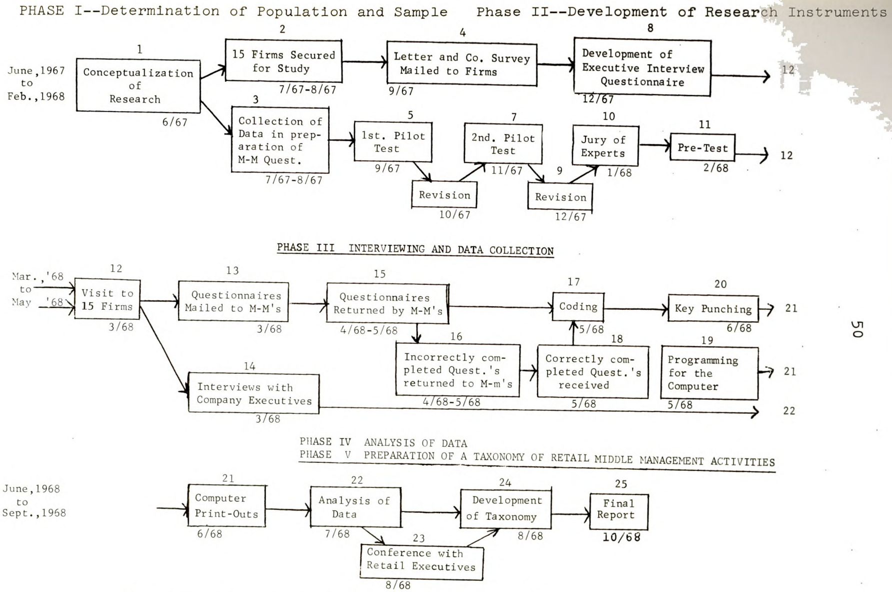
PHASE I--Determination of Population and Sample
Phase II--Development of Research Instruments
June,1967 to Feb.,1968
1 Conceptualization of Research 6/67
2 15 Firms Secured for Study 7/67-8/67
3 Collection of Data in preparation of M-M Quest. 7/67-8/67
4 Letter and Co. Survey Mailed to Firms 9/67
5 1st. Pilot Test 9/67
Revision 10/67
7 2nd. Pilot Test 11/67
9 Revision 12/67
8 Development of Executive Interview Questionnaire 12/67
10 Jury of Experts 1/68
11 Pre-Test 2/68
12
12
PHASE III INTERVIEWING AND DATA COLLECTION
Mar.,'68 to May '68
12 Visit to 15 Firms 3/68
13 Questionnaires Mailed to M-M's 3/68
14 Interviews with Company Executives 3/68
15 Questionnaires Returned by M-M's 4/68-5/68
16 Incorrectly completed Quest.'s returned to M-m's 4/68-5/68
17 Coding 5/68
18 Correctly completed Quest.'s received 5/68
19 Programming for the Computer 5/68
20 Key Punching 6/68
21
21
22
PHASE IV ANALYSIS OF DATA
PHASE V PREPARATION OF A TAXONOMY OF RETAIL MIDDLE MANAGEMENT ACTIVITIES
June,1968 to Sept.,1968
21 Computer Print-Outs 6/68
22 Analysis of Data 7/68
23 Conference with Retail Executives 8/68
24 Development of Taxonomy 8/68
25 Final Report 10/68

Figure 1.--Flow Chart of Procedural Steps and Dates

TABLE 1.--Retail sales by kind of business, 1963.

Kind of Business	Sales ($1,000)	% Total Retail Sales
General Merchandise Group Stores	$ 30,002,764	12.3
Lumber, Building Material, Hardware, Farm Equipment Stores	14,605,836	6.0
Food Stores	57,079,186	23.4
Automotive Dealers	45,376,290	18.6
Gasoline Service Stations	17,759,917	7.3
Apparel, Accessory Stores	14,039,979	5.7
Furniture, Home Furnishings, Equipment Stores	10,925,843	4.5
Eating, Drinking Places	18,412,414	7.5
Drug Stores, Proprietary Stores	8,486,682	3.5
Other Retail Stores	21,309,222	8.7
Non-Store Retailers	6,203,644	2.5
TOTAL	$244,201,777	100%

TABLE 2.--Sales, general merchandise group, S.I.C. 53, 1963

S.I.C.	Kind of Business	Sales ($1,000)	% Sales within Gen. Mdse. Group	% Total Retail Sales
531	Department Stores	$20,537,280	68	8.4
533	Variety Stores	4,538,345	15	1.9
539	Misc. Gen. Mdse. Stores	4,927,139	17	2.0
TOTAL, General Merchandise Group		$30,002,764	100%	12.3%

Since S.I.C. Group 531, Department Stores, represents 68 per cent of sales within the General Merchandise Group, it was necessary to subdivide Department Stores to provide proper representation of that group. The three major types of stores within the broad classification of Department Stores are indicated in Table 3, together with their percentage of total Department Store sales.

TABLE 3.--Estimated sales, department stores, S.I.C. 531, 1963.

Kind of Store	Sales ($1,000)	% Total Department Store Sales
Traditional Department Stores	$ 5,125,000	25
Department Store Chains	10,250,000	50
Discount Stores	5,125,000	25
TOTAL	$20,500,000	100%

The estimated percentage of General Merchandise Group Sales made by each of the four major classifications within that group is shown in Table 4.

The U.S. Bureau of the Census indicates that there are only 20 multi-unit retail organizations with 101 or more establishments, yet these 20 account for 37.4 per cent of total General Merchandise Group Sales.[68]

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[68] U.S. Bureau of the Census, op. cit.

TABLE 4.--Percentage sales by four major retail classifications.

Kind of Business	Per Cent of General Merchandise Group Sales
Traditional Department Stores	20
Department Store Chains	45
Discount Stores	20
Variety Stores	15
TOTAL	100%

Weiss, in a study of general trends in mass retailing, states that in 1966 "Sears, Wards, Penney, Woolworth, Grant--just these five--controlled an unbelievable 30% of general merchandise volume at retail. By 1975, these five giants alone will control 40% of general merchandise volume (and in some classifications, these figures will be still higher)."[69] Weiss goes on to state that "There may be 1,200 to 1,400 traditional department stores. However, the 100 largest department stores account for well over 80% of total department stores volume."[70]

One of the basic concerns of the study was adequate representation of the General Merchandise Group and of the

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[69] E. B. Weiss, Retail Trends that Will Shape Tomorrow's Marketing (New York: Doyle Dan Bernback, Inc., 1967), p. 6.

[70] *Ibid.*, p. 25.

classifications within that group. To satisfy this concern, a list was compiled of leading retail firms within the four classifications. A telephone call was made to the senior personnel executive in each organization, explaining the study and requesting the firm's cooperation. Fifteen firms, representing the population being investigated, agreed to participate in the study.

The fifteen firms included in the study represent a variety of sizes and organizational types, and range in size from about $20 million to over $2 billion in annual sales.

Phase II: Development of Research Instruments

Two research instruments were used in this study. One instrument, "Retail Management Survey" (Appendix B), was a questionnaire completed by middle managers; the second instrument, "Structured Retail Executive Interview" (Appendix C), was used by the researcher in personally interviewing retail executives.

Retail Management Survey

The primary research instrument was a questionnaire containing 202 statements that describe activities performed by a wide range of management personnel. Statements were selected from available literature on the nature of the management function, interviews with retailers, observations of retail management personnel, examination of job

descriptions furnished by retail organizations, a review of lesson plans and textbooks on retailing and retailing management, and interviews and consultations with retail and marketing educators. The questionnaire was developed to ascertain the crucialness of each activity to job success and the frequency of performance of each activity. The activities were grouped according to the six competencies in marketing and distribution established by the U. S. Office of Education[71] (Appendix D). The six competencies were:

1. Selling. The closely related activities and understandings involved in waiting on customers, acquainting them with available goods, influencing buying decisions, and providing required services.
2. Sales Promotion. The closely related activities and understandings which include advertising, display, public relations, and coordination of media with personal selling, all of which induce customers to come to the store and which assist in the advertising and sale of goods.

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[71] Edwin L. Nelson, "A Conceptual Framework for Curriculums in Distributive Education," Research Paper (Washington, D.C.: Distribution and Marketing Occupations, State Vocational Services, Division of Vocational and Technical Education, U. S. Office of Education), October, 1963.

3. Buying. The closely related activities and understandings involved in securing goods for resale.
4. Operations. The closely related activities and understandings which support the selling, sales promotion, buying, and market research functions, which include such items as transportation, storage, credit, customer services, protection, and reporting.
5. Market Research. The closely related activities and understandings which require investigation of the market environment in which the sale of goods takes place and match the goods to the market in which they are to be sold.
6. Managerial. The managerial competency was categorized into five sub-areas:
    1. Planning. Determiming what needs to be done in a priority order, who will do it, and when and where it will be done.
    2. Directing. Overseeing the performance of work.
    3. Coordinating. Working with other units of the organization and the group in assembling personnel and other resources to accomplish planned objectives.

4. Controlling. Establishing standards of performance, measuring performance, and correcting any deviations.
5. Innovating. Introducing new ideas and insuring successful change.

The development of this instrument was accomplished in four stages:

1. An initial pilot test of the Retail Management Survey was conducted in order to insure that all possible activities were included and to determine the adequacy of the proposed questionnaire format. The test was administered to management personnel in Michigan retail firms. Revisions were made as necessary.
2. A second pilot test of the Retail Management Survey was conducted in an attempt to further rework, combine, or delete, and refine the statements and to insure that the instructions could easily be followed. Revisions were made as necessary.
3. A jury of experts consisting of selected management personnel (Appendix E) from the Michigan area reviewed the questionnaire after the second pilot test. Revisions were made as necessary.

4. The final instrument was pre-tested by a small sample of management personnel[72] in Michigan prior to its use in the study. The primary purpose of the pre-test was to obtain the average length of time necessary to complete the questionnaire.

Structured Retail Executive Interview

The second research instrument was prepared in the form of a structured interview to be used in personal meetings with retail executives. The purpose of the personal interview was: (1) to obtain insight into the management hierarchy and functional areas of employment in the firm and secure a representative sample of management personnel to whom the "Retail Management Survey" would be administered; (2) to secure expert opinion concerning the definition and criteria of middle management used by the firm and the retail trade industry; and (3) to provide the researcher with general background information about the beliefs of executives concerning the educational needs of middle managers. The instrument covered three major topics:

1. An analysis of the definition of middle management, management levels, and functional areas of employment.

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[72] Five middle management employees in the Lansing area completed the questionnaire in an average time of 30 minutes.

2. The skills and abilities presently needed by middle managers.
3. The skills and abilities that will be needed by middle managers in the future.

Phase III. Interviewing and Data Collection

During the initial stages of the study, a letter explaining the study in detail, together with the "Retail Middle Manager Survey Questionnaire" (Appendix A), was mailed to the 15 participating firms. The purpose of this questionnaire, which had been pre-tested in Michigan, was to derive the total number of management personnel in their organization, levels of management within their firm, and the functional areas in which middle managers are employed. Response to this questionnaire indicated the difficulty on the part of executives toward discretely ranking management personnel in a hierarchy according to job function and management level. Although some questions were unable to be answered, the questionnaire established a rapport with executives from each firm and set the tone for the nature of the study and a personal visit and interview to follow.

A personal visit was made to the home office of the fifteen participating retail firms. The two major tasks accomplished during each visit are described below:

Interviews with Executives

One or more executives from each firm was interviewed by the researcher using the "Structured Retail Executive Interview."

Selection of Middle Managers to Complete the Questionnaire

Prior to the personal visit, firms responded by mail to the "Retail Middle Manager Survey" questionnaire (Appendix A) mailed to them, indicating the total number of management personnel in their firm. During the personal visit, the researcher obtained a proportional sample of middle managers in each organization according to function and management level. The organizational sampling plan is listed in Table 5.

The sampling plan for each of the 15 individual firms is shown in Table 6. The hierarchy of management levels on which the individual firm sampling plan was based is presented in Table 7. The levels were determined by requesting from each firm the total number of merchandising and operations management personnel at the various levels in the firm from the point at which a post-secondary student would enter to just below the corporate staff.

Criteria used in selecting middle managers were: (1) the individual must have occupied his position for a minimum of one year, (2) displayed an ability to succeed

TABLE 5.-- Organizational sampling plan.*

Kind of Business	Merchandising and Operations Management	Sample	Percentage of Population
I. S.I.C. Group No. 5311, Department Stores			
Traditional Department Stores (referred to hereafter as TDS):			
TDS-1	1,644	64	4
TDS-2	551	36	6
TDS-3	298	30	10
TDS-4	199	15	7
TDS-5	55	13	23
TOTAL TDS	2,747	158	5%
Discount Department Stores (referred to as DS):			
DS-1	1,372	51	3
DS-2	587	32	5
DS-3	454	27	6
DS-4	286	39	13
TOTAL DS	2,699	149	5%
Chain Department Stores (referred to as CDS):			
CDS-1	7,227	121	1
CDS-2	2,246	113	5
CDS-3	582	54	9
TOTAL CDS	10,055	288	3%
II. S.I.C. Group No. 5311, Limited Price Variety Stores			
VS-1	1,237	26	2
VS-2	487	49	10
VS-3	313	31	10
TOTAL VS	2,037	106	5%
TOTALS, All Kinds of Businesses:	17,538	701	4%

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*A code was used in order to keep company information confidential. The dissertation committee has a list of the participating firms.

TABLE 6.--Individual firm sampling plan.*

Level	Population	Sample	Percentage of Population
I. Traditional Department Stores (TDS)			
TDS-1			
4	44	3	7
3	300	13	4
2	650	28	4
1	650	20	3
TOTALS	1,644	64	4%
TDS-2			
4	36	5	14
3	170	12	7
2	180	10	5
1	165	9	5
TOTALS	551	36	6%
TDS-3			
4	14	3	21
3	90	8	9
2	122	16	13
1	72	3	4
TOTALS	298	30	10%
TDS-4			
4	10	2	20
3	69	5	7
2	65	6	9
1	55	2	3
TOTALS	199	15	7%
TDS-5			
4	5	2	40
3	8	4	50
2	17	4	23
1	25	3	12
TOTALS	55	13	24%
II. Discount Department Stores (DS)			
DS-1:			
4	22	1	4
3	125	7	5
2	240	28	12
1	985	15	1
TOTALS	1,372	51	4%
DS-2:			
4	25	2	8
3	101	4	4
2	111	6	5
1	350	20	5
TOTALS	587	32	5%
DS-3			
4	6	3	50
3	44	3	7
2	14	3	21
1	360	13	4
TOTALS	454	27	6%

TABLE 6.--Continued.

	Level	Population	Sample	Percentage of Population
	DS-4			
	4	21	6	28
	3	115	17	14
	2	150	16	10
	1 (Not sampled because not considered management by the firm)			
	TOTALS	286	39	13%
III.	Chain Department Stores (CDS)			
	CDS-1:			
	3	1,662	25	1
	2	1,139	42	3
	1	4,426	54	1
	TOTALS	7,227	121	1%
	CDS-2:			
	4	46	4	8
	3	1,200	62	5
	2	1,000	47	4
	1 (Not sampled because not considered management by the firm)			
	TOTALS	2,246	113	5%
	CDS-3:			
	4	22	2	9
	3	117	12	10
	2	152	17	11
	1	291	23	8
	TOTALS	582	54	9%
IV.	Variety Stores (VS)			
	VS-1:			
	3	530	16	3
	2	307	7	2
	1	400	3	1
	TOTALS	1,237	26	2%
	VS-2:			
	3	307	33	9
	2	180	16	9
	1 (Not sampled because not considered part of management)			
	TOTALS	487	49	10%
	VS-3:			
	4	36	1	2
	3	77	20	30
	2	200	10	5
	1 (Not sampled because not considered part of management)			
	TOTALS	313	31	10%

*The stratified sampling figures for each firm that participated in the study. Four management levels were determined by the researcher with help from executives in each firm, the population at each level computed, and the sample selected. Table 7 presents typical titles which describe positions at the four management levels.

TABLE 7.--Levels of management.

Level	Position Title or Function
4	Traditional Department Store Merchandise Manager Senior Executive Division or District Manager (overseeing several stores)
3	Store Manager of a chain store Buyer Operations position at third level
2	Assistant Store Manager of a chain store Assistant Buyer Department Manager of a traditional department store's branch store Operations position at second level
1	Department Manager of a chain store Assistant to a Buyer Assistant to a Department Manager of a traditional department store Operations position at first level

in that position, and (3) been considered promotable by the firm. Geographic location of employment was considered in order to obtain a representative nation-wide sample.

A letter from a designated executive in the firm was mailed with the questionnaire to each middle manager selected (Appendix F). The instructions requested that the questionnaire be returned in an enclosed envelope to the Retail Management Project officer at Michigan State University.[73] The respondent was also asked to acknowledge to

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[73] The office facilities, as well as staff and financial assistance, were provided by the Michigan State University Research and Development Program in Vocational-Technical Education directed by Dr. Peter G. Haines. One of the

the company executive that he completed and returned the questionnaire to Michigan State University. Each participating organization followed up management personnel who had not completed and mailed their questionnaire within a specified period of time.

A sample of 846 management personnel were mailed questionnaires. As the questionnaires were received by the researcher, they were checked for completeness. There were 39 questionnaires on which respondents had failed to answer fifteen or more questions, or had misread the directions and only partially completed the questionnaire. The questionnaire was returned to the respondent with a letter (Appendix G) requesting that he complete the questionnaire and return it to the Retail Management Project office. Thirty-five of the 39 questionnaires were eventually returned and included in the sample. Altogether, a total of 701 respondents, from 48 of the 50 states, returned usuable questionnaires. This represented an 83 per cent return of questionnaires distributed and was four per cent of the total population of 17,538 investigated. Forty-two per cent of the respondents were located in the East North Central States of Ohio, Michigan, Indiana, Wisconsin, and Illinois. Every region in the United States was represented.

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functions of this program is to sponsor studies concerned with curriculum development in vocational and technical education.

Phase IV: Analysis of Data

The responses to the management questionnaire were coded on the questionnaire and transferred to punch cards. The cards were coded according to retail classification, organization, management level, and functional area of employment. Tabulations and appropriate statistical calculations were performed by the Control Data "3600" computer of the Computer Institute for Social Science Research at Michigan State University.

Computer print-outs provided the total response to each activity and a break-down of responses according to type of firm, level of management, and functional area of employment. Data from the computer print-outs needed to meet the objectives of the study were placed in the following four major tables:

Table 9	Marketing Activities in Ten Competency Areas and Ranked According to Crucialness to Success on the Job: N = 701.
Table 11	Marketing Activities in Ten Competency Areas and Ranked According to Crucialness to Success on the Job by Four Types of Firms: N = 701.
Table 13	Marketing Activities in Ten Competency Areas and Ranked According to Crucialness to Success on the Job by Four Levels of Management: N = 701.
Table 15	Marketing Activities in Ten Competency Areas and Ranked According to Crucialness to Success on the Job by Two Functional Areas of Employment: N = 701.

Each of the tables was analyzed to ascertain whether there were clusters of activities performed by all middle managers and also according to type of firm, level of management, and functional area of employment. In addition, a rank ordering of the 202 activities from one to 202 according to crucialness to success on the job was made in order to consider all marketing and distribution activities in total (Appendix H).

Three null hypotheses were tested with the chi-square statistic to assist in determining variations from the norm within types of firm, levels of management, and functional areas of employment. A rejection level at the .05 level of significance was used. Chi-square was used to test the null hypotheses:

1. "No significant difference exists in the proportion of retail middle managers performing an activity when compared by type of firm."
2. "No significant difference exists in the proportion of retail middle managers performing an activity when compared by level of management."
3. "No significant difference exists in the proportion of retail middle managers performing an activity when compared by level of management."

In order to benefit from the experience and knowledge of executives in the retail trade industry, a conference to discuss the data in the tables was arranged in New York

City with representatives from firms similar to those in the study (Appendix I). Prior to the conference, an explanation of the study was made to each executive and a copy of each of the four major tables was mailed to him. During the conference session, each table was analyzed and discussed and various points of view were presented by executives representing four types of firms.

Phase V: Preparation of a Taxonomy of Retail Middle Management Activities

A taxonomy of retail middle management activities was prepared for use in post-secondary institutions. The taxonomy was based upon an analysis of the activities of middle managers in a wide range of multi-unit merchandising organizations and interviews and conferences with retail executives concerning mid-management skills and abilities needed at present and in the future. The taxonomy consists of a classification of activities by major marketing and distribution competency areas ranked according to their relative importance, with indication provided of deviation from the norm according to type of firm or level of management. The format was planned to assist post-secondary personnel in initiating and assessing "mid-management" programs.

CHAPTER IV

THE FINDINGS, PART I: ANALYSIS OF ACTIVITIES OF MIDDLE MANAGERS

The problem of this study was to establish on an empirical basis the duties of retail middle managers on which more accurate decisions can be made prior to initiating or revising curriculum content in post-secondary middle management education programs. The 701 middle managers in the study represented four types of retail firms, four levels of management, and two functional areas of employment. Each of these variables was analyzed according to marketing activities in ten competency areas. The four major analyses were:

1. In-Total Response. The composite response of all 701 middle managers to each activity (Table 9).
2. Type of Firm. Response based upon four types of firms: Traditional Department Store, Discount Department Store, Chain Store, and Variety Store (Table 11).
3. Level of Management. Response based upon four levels of management (Table 13).

4. Functional Area. Response based upon the functional areas of operations and merchandising (Table 15).

Profile of Respondents

The profile of respondents, taken from answers to questions posed on the last page of the Retail Management Survey (Appendix A), provides insight into the background of the 701 retail middle managers who participated in this study. The responses, shown in Table 8, provide data on age and sex, education, retail experience, and job description.

Age and Sex

Eighty-seven per cent of the respondents were male; 91, or 13 per cent of the 701 respondents were female. This relatively low percentage of women in middle management positions is probably indicative of the type of stores investigated. The average age of the respondents was 35; 80 per cent of the respondents were age 44 or less. The data indicates that it takes several years for an individual to move into the average middle management position.

Education

It was apparent that the minimum educational requirement for the mid-managers was a high school diploma. A third (234) reported high school as the highest educational level completed; 18 per cent (129) as completing less than

two years of college, 18 per cent (126) stated that they had completed at least two years of college-level study. Over one-fourth (187) of all the middle managers had earned a college degree.

The great majority of managers (71%) took a college preparation, or general academic educational program in high school; yet 55 per cent (239) of those attending college majored in business. Approximately one-fourth (158) of the managers who attended college took a liberal arts program with majors in fields such as history, psychology and English. Fifteen of the respondents earned degrees in the field of education.

Surprisingly almost one-half of the middle managers reported taking no retailing courses beyond the high school level. Over 27 per cent took between one and three courses and 24 per cent took four or more courses in an institution beyond high school.

Retail Experience

By and large, the respondents were an experienced group with an average of close to 11 years in supervisory or management positions. Eighty-seven per cent (616) of all respondents reported having three or more years of supervisory or management responsibility. However, 35 per cent (247) of the respondents entered retailing in a supervisory or management capacity, never serving in a rank and file retail position while 65 per cent (454) had

served in a rank and file capacity for one or more years. Twenty-two per cent (157) served in a rank and file position for at least one year prior to promotion to management responsibility.

Job Description

The managers work an average of 50 hours per week. Seventy-one per cent (500) work a range of 41 to 56 hours per week. Several respondents indicated that they counted only store hours in their work total and not the time spent at home on office work, reading trade publications and keeping abreast of retail developments.

The sample for this study consisted of personnel almost evenly divided between the two functions of merchandising and operations. Job titles most frequently listed were Store Manager, Department Manager, Assistant Store Manager, Buyer and Assistant Buyer.

Common and Identifiable Activities of Middle Managers

The first question asked in accomplishing the objectives of the study was: Do middle management positions have a common and identifiable cluster of activities that are crucial to success on the job, or is each position unique? Table 9 presents the composite response of 701 retail middle managers to 202 activities according to 10 competency areas. Because of the length of the table, all discussion follows it.

TABLE 8.--Composite profile of mid-management respondents. N = 701.

Question	Frequency	Per Cent*
1. Sex		
Male	610	87%
Female	91	13
TOTAL	701	100%
2. Age		
Under 25	87	12%
25-29	170	24
30-34	120	17
35-44	181	26
45-54	102	15
55-64	36	5
65 and Over	2	0
No Response	3	0
TOTAL	701	99%
Mean Age = 35.4 Years S. D. = 10.6 Years		
3. Highest Educational Level Completed		
Less than High School	23	3%
High School Graduate	234	33
Less than 2 years of College	129	18
At least 2 years of a 4-year College	99	14
Graduate of a 2-year Post High Institution	27	4
Bachelor's Degree	149	21
Some Graduate Study	24	3
Graduate Degree	14	2
No Response	2	0
TOTAL	701	98%
4. Educational Program Taken in High School		
College Preparation or General Academic	496	71%
Business or Commercial	147	21
Distributive Education	29	4
Other	18	3
No Response	11	2
TOTAL	701	100%
5. Educational Program Taken in College (if attended)		
Liberal Arts	103	15%
Business	239	34
No Major	34	5
Other	55	8
Did Not Attend College	257	37
No Response	13	1
TOTAL	701	100%
6. Retailing Courses Taken in an Institution Beyond H.S.		
None	344	49%
1	73	10
2-3	120	17
4-5	58	8
6-8	21	3
9-11	15	2
12-15	19	3
16-20	12	2
21 or more	18	3
No Response	21	3
TOTAL	701	100%
Mean Courses Taken = 2.7 S.D. = 4.9		

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*Per cent figure rounded to nearest .5.

TABLE 8.--Continued.

Question	Frequency	Per Cent
7. Years in Retailing as an Employee Having no Supervisory or Management Responsibility		
None	247	35%
1 year	157	22
2 years	101	14
3 years	57	8
4 years	30	4
5 years	27	4
6 or more years	68	10
No Response	14	2
TOTAL	701	99%
Mean Years as Rank and File Employee = 1.8		
S.D. = 2.1		
8. Years in Retailing Having Supervisory or Management Responsibility		
Under 2 years	85	12%
3-6 years	194	28%
7-10 years	143	20
11-15 years	105	15
16-20 years	67	10
21-25 years	60	9
26-30 years	17	2
31-35 years	17	2
36 or more years	10	1
No Response	3	0
TOTAL	701	99%
Mean Years in Management = 10.9		
S. D. = 8.4		
9. Length of Average Work Week During Year		
Under 40 hours	2	0%
40 hours	83	12
41-44 hours	112	16
45-48 hours	137	20
49-52 hours	131	19
53-56 hours	120	17
57-60 hours	63	9
61-64 hours	28	4
65 or more hours	19	3
No Response	6	1
TOTAL	701	100%
Mean Work Week = 49.7		
S. D. = 6.8		
10. Primary Function of Position		
Operations	392	56%
Merchandising	309	44
TOTAL	701	100%
11. Official Title		
Department Manager, Department Head, Division Manager, Supervisor, et al. of a unit or branch store (lowest level of supervisor)	151	21%
Assistant to a Buyer, Assistant Department Manager (of a traditional department store)	9	1
Operations positions at 1st. level of management (e.g. Stock Supervisor, Area Manager, et. al.	13	2
Assistant Store Manager	147	21
Assistant Buyer, Associate Buyer	41	6
Department Manager (2nd level of supervision)	26	4
Operations position at 2nd level of management (e.g. Delivery and Warehouse Supervisor, et. al.	26	4
Chain Merchandiser	13	2
Buyer	41	6
Store Manager	182	26
Operations positions at 3rd level of management	18	2
Assistant Merchandising Manager	2	0
District or Division Manager	12	2
Merchandise Manager	12	2
Senior Executives	8	1
TOTAL	701	100%

The responses in Table 9 are from retail management personnel in more than twenty-five positions, in four types of firms, and at four levels of management. Using the 50 per cent level as a criterion, meaning that 50 per cent or more of all respondents found the activity to be crucial, 128 activities (or 63%) were found to be crucial to success on the job by 701 retail middle managers. The responses provide evidence that many activities are common to a wide range of positions and indicate that some activities are unique to certain management positions. In other words, there is a common and identifiable cluster of activities that are crucial to the success of retail middle managers.

The second question of the study was related to the first one, namely: If there is a cluster of identifiable activities common to all middle management positions, what are these activities, how crucial are they to success on the job, and with what frequency are they performed? In answering this question, the responses of the managers were analyzed according to the ten competency categories described earlier.

Selling Competency

The 11 top-ranked Selling activities are customer-oriented dealings. It is quite natural that the most crucial activities in the Selling competency area relate specifically to customers. Of interest is the fact that the initial three activities relate primarily to

TABLE 9.--Marketing activities in ten competency areas and ranked according to crucialness to success on the job: N = 701.[1]

Rank Order In The Competency Area	Crucial to Success	Activity	Not Done By Me	Not Done By Me But Must Be Known	Done By Me	Frequency of Performance			
						Daily	Weekly	Monthly	Sea/Ann
		Selling							
1	78	Handling customer complaints	9	16	74	64	8	2	0
2	70	Insuring customer satisfaction after transaction	18	25	57	50	6	1	0
3	64	Interpreting store policies to customers	15	18	67	49	13	5	0
4	62	Greeting customers	16	12	70	67	3	0	0
5	58	Explaining technical and sales features of mdse.	20	23	57	33	19	3	2
6	57	Approving customer returns and allowances	16	26	58	50	7	1	0
7	55	Providing comfort and convenience services to customers	30	24	46	41	3	2	0
8	49	Processing customer returns and allowances	19	41	41	35	5	1	0
9	48	Selling to customers on the floor	20	35	44	37	7	0	0
10	45	Completing customer sales transactions	27	43	31	25	5	1	0
11	43	Approving customer checks	18	19	62	58	3	1	0
12	40	Recording sales on unit control records	44	40	17	10	5	2	0
13	36	Demonstrating merchandise	42	30	28	19	6	2	1
14	31	Recording non-cash transactions (e.g., C.O.D. charge)	44	39	17	13	3	1	0
15	29	Operating a cash register	19	55	26	19	5	1	1
16	27	Writing sales slips	33	44	22	16	5	1	0
17	21	Wrapping and packing merchandise	51	33	15	12	2	1	0
18	19	Confirming customer delivery dates	65	26	8	6	2	0	0
19	16	Preparing delivery tickets	64	29	5	4	1	0	0
		Sales Promotion							
1	90	Presenting the firm in a favorable image	3	3	93	91	1	1	0
2	73	Determining merchandise display location	11	14	75	50	21	3	1
3	71	Coordinating advertising with merchandise display	18	16	66	19	38	7	2
4	67	Planning or revising department or store layout	19	11	70	16	15	13	26
5	67	Planning and scheduling promotional and special events sales	25	20	55	5	21	24	5
6	62	Evaluating effectiveness of advertisements	21	16	64	12	43	7	2
7	61	Planning advertising programs and schedules	26	27	46	5	22	17	2
8	59	Coordinating advertising with personal selling	28	17	55	22	26	6	1
9	58	Deciding what merchandise is to be advertised	30	20	51	5	27	17	2
10	50	Approving advertising proofs	31	20	50	10	31	8	1
11	47	Preparing merchandise for display	26	35	39	21	14	3	1
12	45	Requesting display and sign services	23	24	52	20	22	8	2
13	43	Submitting merchandise facts and rough copy of advertisements	43	18	40	5	23	9	2
14	43	Selecting themes for displays	29	25	47	11	23	9	4
15	42	Working with home office on sales promotion planning	50	14	36	5	11	15	5
16	39	Keeping records of merchandise on display	37	30	32	18	12	2	0

17	35	Selecting fixtures for merchandise displays	42	23	35	15	10	5	5
18	33	Using advertising mats	42	32	26	3	18	3	2
19	33	Checking merchandise returned to stock from display	30	33	37	15	16	5	1
20	25	Trimming show cases	49	36	15	3	8	3	1
21	20	Trimming store windows	63	29	9	1	5	2	1
22	8	Preparing information for public relations staff	85	10	6	1	1	2	2
		Buying							
1	81	Determining appropriate quantities to order	13	17	69	44	21	3	1
2	80	Deciding when to take markdowns	13	14	74	34	26	11	3
3	77	Deciding how much markdown to take	15	15	71	40	19	10	2
4	73	Using the law of supply and demand in ordering merchandise	21	12	67	47	17	1	2
5	72	Buying to meet consumer demand	24	15	59	40	15	3	1
6	69	Using pruchase order and requisition forms	11	20	70	46	19	3	2
7	66	Determining styles to order	28	16	55	28	15	4	8
8	66	Determining shrinkage loss	28	24	47	24	3	5	15
9	65	Following vendors' or company suggested retail prices	21	14	64	59	3	0	2
10	65	Buying merchandise for special promotions	26	14	59	9	16	26	8
11	65	Working with buying office	24	10	66	37	17	7	5
12	64	Determining timing of merchandise pruchases	31	12	58	30	13	8	7
13	61	Ordering merchandise from central warehouse	22	39	38	14	21	3	0
14	60	Maintaining buying records	31	31	38	23	10	4	1
15	58	Estimating markdowns for a month or season	32	21	46	2	4	29	11
16	56	Figuring markon	26	27	44	27	10	4	3
17	54	Determining markups	30	28	41	30	6	2	3
18	53	Working with home office or division on buying	40	10	51	23	15	6	7
19	53	Computint "open to buy"	40	32	28	8	7	13	0
20	51	Using federal and state regulatory laws in decision-making	36	18	45	29	8	6	2
21	51	Communicating with vendors about adjustments or returns	28	29	43	12	15	14	2
22	47	Determining prices for individual items	44	20	37	26	7	2	2
23	46	Scheduling the buying shipment dates	43	19	38	17	9	5	7
24	45	Dealing with vendors' salesmen	29	12	60	25	21	11	3
25	42	Establishing price lines for department	49	20	31	10	3	3	15
26	39	Providing information to be submitted to data processing	45	22	31	11	13	5	2
27	39	Using vendors' reorder procedures	41	26	32	15	14	3	0
28	34	Buying from wholesalers	53	13	34	11	13	6	4
29	24	Ordering from catalogs	60	16	24	6	10	5	3
30	24	Selecting buying sources	62	18	19	7	3	2	7
31	23	Negotiating with vendors about terms and discounts	69	16	14	7	3	2	2
32	22	Requesting datings from vendors or home office	59	17	22	6	7	5	4
33	19	Attending vendors' shows or visiting markets to buy	66	8	26	1	2	5	18
34	9	Determining trade-in prices	84	8	7	4	2	1	0

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[1] All figures shown as percentages and rounded to the nearest whole.

TABLE 9.--Continued.

Rank Order In The Competency Area	Crucial to Success	Activity	Not Done By Me	Not Done By Me But Must Be Known	Done By Me	Frequency of Performance Daily	Frequency of Performance Weekly	Frequency of Performance Monthly	Frequency of Performance Sea/Ann
		Operations							
1	82	Developing and applying measures to prevent store shrinkage	13	10	77	64	7	5	1
2	77	Supervising inventory-taking	11	13	75	6	8	5	56
3	77	Conducting a physical inventory	12	21	66	3	6	6	51
4	77	Insuring store or department cleanliness	8	19	72	69	3	0	0
5	74	Maintaining a perpetual or basic stock inventory	17	27	56	23	20	11	2
6	68	Meeting local, state and federal laws	16	17	66	59	3	2	2
7	67	Establishing basic stock count schedules and reorder plans	25	24	51	15	19	10	7
8	66	Using a telephone	2	2	95	91	4	0	0
9	63	Keeping proper payroll control	30	22	48	25	22	1	0
10	61	Checking condition of merchandise received	16	39	45	39	5	1	0
11	61	Recording stock count information	18	50	32	12	14	4	2
12	59	Watching for and preventing accident hazards	11	9	80	77	2	1	0
13	58	Insuring adherence to store credit policies	24	20	54	49	5	0	0
14	57	Keeping files on invoices and purchase orders	22	54	25	20	4	1	0
15	56	Organizing perimeter (reserve) stock	15	33	50	25	17	5	3
16	55	Maintaining and using a unit control system	32	29	37	23	11	2	1
17	53	Receiving, checking, and marking merchandise	29	52	20	15	3	2	0
18	44	Requisitioning supplies, equipment, or fixtures	22	33	45	7	15	20	3
19	44	Scheduling inventories	36	27	36	5	10	8	13
20	42	Insuring preventative maintenance of equipment and fixtures	36	21	42	25	8	7	2
21	39	Working with a code system in marking merchandise	36	31	33	28	3	1	1
22	37	Controlling perishable goods	48	20	31	23	6	1	1
23	37	Using the retail price accounting system	48	24	27	21	3	2	1
24	35	Scheduling repairs on customer or store mdse.	37	31	31	15	11	5	0
25	32	Preparing price tickets	40	48	12	9	2	1	0
26	31	Reporting sales by the split-ticket system	49	31	21	15	5	1	0
27	30	Insuring proper lighting and heating or cooling	42	23	35	28	3	2	2
28	27	Insuring prompt service in customer lunch area	62	16	20	18	2	0	0
29	26	Inspecting lunch area for cleanliness	45	17	39	27	10	2	0
30	25	Operating an adding machine	24	23	53	37	13	3	0
31	25	Controlling warehouse stockkeeping functions	62	21	16	12	4	0	0
32	24	Analyzing computer print-outs to determine inventory	67	10	21	2	6	10	3
33	20	Scheduling and controlling delivery to customers	61	29	10	7	2	1	0
34	16	Using professional and local shopping services	71	13	16	3	2	5	6
35	8	Using a typewriter	68	18	14	4	5	4	1

		Market Research							
1	80	Determining consumer demand	12	15	73	54	13	3	3
2	80	Recognizing fashion influences and trends	11	15	74	55	9	3	7
3	75	Keeping informed of public opinion	8	15	77	67	7	3	0
4	70	Determining strengths and weaknesses of competitors	15	11	74	34	26	11	3
5	70	Shopping local competitors	11	13	76	9	40	23	4
6	65	Forecasting sales for a future period	23	19	58	6	11	23	18
7	59	Forecasting future trends or events	31	19	49	15	10	13	11
8	56	Searching for new items and lines	36	10	54	39	9	3	3
9	53	Obtaining market information from buying or home office	35	12	53	22	19	7	5
10	48	Assessing events that may affect the firm	37	16	47	25	9	9	4
11	40	Reading trade publications	9	3	89	17	35	36	1
12	36	Using data processing information to forecast sales	56	16	27	5	10	8	4
13	35	Assessing socio-economic trends in the community	48	18	34	11	6	10	7
14	14	Assessing proposed retail legislation	65	23	11	2	2	4	3
		Managerial--Planning							
1	99	Following instructions from superiors	0	0	99	92	6	1	0
2	91	Reading company memorandums and reports	2	2	96	80	15	1	0
3	87	Establishing procedures to accomplish goals	8	7	85	51	21	10	3
4	82	Determining the goals of a department or area	8	17	64	30	18	16	10
5	80	Determining responsibilities of employees	8	13	78	52	14	8	4
6	79	Establishing standards for the department or area	13	12	75	50	13	7	5
7	75	Planning for the future from current operations data	18	10	71	21	18	20	12
8	74	Evaluating proposals and suggestions	12	8	80	57	18	4	1
9	72	Determining priorities	20	7	72	67	4	1	0
10	65	Preparing budgets	29	21	51	4	10	18	19
11	59	Determining a sales budget for a season	32	25	43	2	1	12	28
12	52	Determining expenses for a season	39	19	43	2	2	10	29
13	50	Deciding action to take based upon data processing information	43	11	45	11	16	13	5
14	44	Determining finances necessary to accomplish sales budget	49	18	33	6	8	11	8
15	35	Establishing an advertising budget	56	20	24	0	0	11	13
		Managerial--Directing							
1	98	Making proper, timely decisions	1	1	98	94	4	0	0
2	97	Supervising employees	1	2	96	96	0	0	0
3	95	Communicating ideas to others	1	1	97	92	5	0	0
4	94	Delegating responsibilities to others	2	1	97	93	3	1	0
5	94	Motivating employees	2	2	94	86	7	1	0
6	93	Assigning work to be done by others	2	2	95	90	4	1	0
7	91	Keeping employees' morale high	4	3	92	87	5	0	0
8	89	Insuring that employees comply with their assignments	4	7	87	83	4	0	0
9	81	Instructing employees on store policies and procedures	5	13	82	48	27	6	1

TABLE 9.--Continued.

Rank Order In The Competency Area	Crucial to Success	Activity	Not Done By Me	By Me But Must Be Known	Done By Me	Frequency of Performance			
						Daily	Weekly	Monthly	Sea/Ann
10	77	Handling employee complaints	9	12	78	60	13	5	0
11	76	Using "on-the-job" training method	12	13	74	64	6	2	2
12	74	Evaluating employees' progress	8	10	80	25	12	22	21
13	74	Disciplining employees	11	14	73	48	15	8	2
14	73	Teaching salespeople new merchandise information	13	20	67	39	20	5	3
15	69	Training new salespeople	18	32	49	20	8	8	13
16	55	Hiring employees	31	28	40	11	9	9	11
17	55	Using training aids and equipment	25	17	57	23	17	13	4
18	55	Training new non-selling employees	30	34	37	16	6	4	11
19	53	Promoting employees	32	21	46	6	4	16	20
20	51	Interviewing job applicants	27	24	48	15	16	8	9
21	47	Discharging employees	27	28	41	9	5	7	20
22	42	Counseling employees on their personal problems	31	13	55	25	12	14	4
23	32	Recommending employees for transfer	43	17	37	4	3	9	21
		Managerial--Coordinating							
1	90	Keeping superiors informed	1	1	97	70	24	3	0
2	89	Exchanging information with superiors in the firm	2	2	96	62	27	5	2
3	79	Exchanging information with subordinates in the firm	6	1	92	76	13	2	1
4	79	Organizing a department or store's effort	15	7	77	46	19	9	4
5	75	Communicating with other departments or areas	6	4	90	72	15	2	1
6	71	Seeking cooperation of other departments or areas	13	7	78	60	13	3	2
7	70	Conducting meetings	12	11	76	9	52	11	4
8	70	Expediting proper merchandise handling	14	30	56	49	6	1	0
9	67	Exchanging information with equals in the organization	7	3	88	55	23	7	3
10	66	Reporting on employees' traits and abilities to superiors	10	6	83	24	15	21	23
11	49	Arranging meetings	27	13	60	6	40	11	3
		Managerial--Controlling							
1	92	Handling responsibilities that cannot be delegated	3	2	93	83	9	1	0
2	85	Comparing operations with past performance or expectations	5	5	89	45	25	15	4
3	85	Insuring accuracy in paperwork	8	13	79	69	8	2	0
4	81	Analyzing sales figures	9	9	72	44	32	5	1
5	77	Evaluating performance of subordinates	6	9	84	37	13	14	20
6	77	Collecting information and preparing reports	9	18	71	25	28	13	5
7	75	Controlling operating expenses	21	15	65	52	7	6	0
8	70	Controlling selling expenses	23	15	62	46	12	4	0
9	69	Working with percentages, fractions, and decimals	12	12	77	55	18	3	1

10	69	Controlling the finances of a department or area	25	20	55	39	9	6	1
11	66	Training employees to be accurate in sales transactions	19	28	52	37	11	3	1
12	64	Analyzing operating costs	27	18	54	15	13	24	2
13	64	Analyzing a retail profit and loss statement	23	20	56	1	3	45	7
14	62	Analyzing selling costs	29	17	55	24	19	9	3
15	62	Maintaining "open to buy" records	33	33	33	17	8	8	0
16	60	Calculating stock turnover	27	25	48	9	10	18	11
17	55	Taking part in making store policy	35	15	51	28	14	6	3
18	50	Analyzing information provided by data processing	39	10	50	12	22	12	4
19	47	Checking and reporting on cash registers	30	37	32	25	6	1	0
20	45	Approving requests that deviate from normal procedures	27	12	60	32	18	8	2
21	44	Using business mathematical formulas	41	13	46	30	12	4	0
22	39	Adding columns of figures by hand	31	13	56	45	10	1	0
23	33	Analyzing charts and graphs	54	13	32	6	11	12	3
24	33	Dictating letters or reports	53	10	36	19	12	4	1
25	32	Using ratios to determine deviation from standards	55	14	30	12	10	6	2
		Managerial--Innovating							
1	95	Searching for ways to make my position more effective	0	2	97	91	3	3	0
2	88	Adopting ideas to improve performance	5	4	90	66	14	3	2
3	70	Seeking ways to eliminate paperwork	15	11	74	41	17	11	5
4	44	Improving department or area operation by use of innovation	32	8	60	46	8	5	1

satisfying customers, a defensive-type tactic, and that actual selling to customers is ranked ninth out of 19 activities.

It is apparent that sales clerks and rank and file employees are charged with the prime responsibility of selling, with management personnel serving as a backstop to handle customer complaints and insure customer satisfaction. The selling activities of least cruciality to managers are routine tasks normally performed by rank and file employees, e.g. operating a cash register, writing a sales slip, and wrapping and packing merchandise, However, the very fact that such routine activities appear crucial to over 20 per cent of the managers provides an indication that management personnel are called upon to perform many rank and file tasks.

Sales Promotion Competency

Ninety per cent of all respondents regard "Presenting the firm in a favorable image" as crucial to their success. The Sales Promotion clusters of display location and advertising are ranked above the 50 per cent cruciality level. In all, ten of the 22 Sales Promotion activities were ranked fifty per cent or above in cruciality to success.

Buying Competency

The most crucial Buying activity was "Determining appropriate quantities to order." It was ranked 81 per

cent crucial by all 701 respondents. Twenty-one of the 34 buying activities were seen as crucial to the success of 50 per cent or more of the mid-managers.

Two activities directly related to Buying are economic-type activities: "Using the law of supply and demand in ordering merchandise" (73% crucial) and "Using federal and state regulatory laws in decision-making" (51% crucial).

The importance of making decisions becomes evident when Buying activities are analyzed. Judgments must be made as to appropriate quantities of merchandise to order (81% crucial), when to take markdowns (80% crucial), how much markdown to take (77% crucial), determining styles to order (66% crucial), buying to meet customer demand (72% crucial), and determining timing of merchandise purchases (64% crucial).

Activities such as "Selecting buying sources" (24% crucial), "Negotiating with vendors about terms and discounts" (23% crucial), and "Attending vendors' shows or visiting markets to buy" (19% crucial) are not ranked high. This is because they are, in multi-unit firms, usually performed by specialists in the regional or home office.

Operations Competency

Safeguarding merchandise and knowing current stock positions are the two major elements in the Operations

competency. The prevention of shrinkage, the retail term applied to merchandise that is unaccounted for, i.e., stolen, mispriced, damaged, etc. was found to be crucial to 82 per cent of the respondents. The cluster of activities related to inventory-taking, i.e., supervising 77 per cent, conducting 77 per cent and maintaining inventories 74 per cent, all rank very high in contributing to the success of management personnel.

Although inventory matters are crucial, it was reported that only 24 per cent of the respondents found that analyzing computer print-outs to determine inventory was crucial. However, the figure is important for two reasons. First, 21 per cent reported analyzing computer print-outs, 10 per cent reported that although they don't actually analyze print-outs they must know how to analyze them. Secondly, when computer print-outs were made available to mid-managers, in nearly every case, analysis of the print-out to determine inventory status was crucial. Sixty seven per cent stated that they don't analyze print-outs at all, indicating that the application of data processing to inventory-taking is not wide-spread in retailing, and other methods of inventory-taking, i.e., actual stock count, unit record, et al. continue to be very important methods of inventory control.

Several clerical-type tasks are also reported as activities of great importance. Activities such as

"Recording stock count information" 61 per cent, "Checking condition of merchandise received" 61 per cent, "Keeping files of invoices and purchase orders" 57 per cent, "Organizing perimeter (reserve) stock" 56 per cent, and "Maintaining and using a unit control system" 55 per cent, although basically routine in nature, all contribute to the success of the retail management person.

Market Research Competency

The market research function is a vital part of the mid-manager's job. "Determining consumer demand" and "Recognizing fashion influences and trends" rank very high (80%) and attention is given to these activities on a daily basis by over 50 per cent of the respondents. An activity linking both of the above, "Keeping informed of public opinion" is also ranked quite high (75%).

A second cluster of activities relate to competition and involve shopping local competitors and determining their strengths and weaknesses. Forecasting sales and future events provides a third major cluster of market research activities.

Managerial--Planning Competency

The planning function is an important one for managers. In knowing what to plan, however, managers must follow the instructions of their supervisors. Following instructions received the highest cruciality rating of all 202 activities--99% view it as crucial.

Thirteen of the 15 planning activities were seen as more than 50 per cent crucial by the 701 managers. In 11 of the activities (those ranked from 2 to 13) a decision had to be made by the manager. Decision-making appears to be a key to successful planning with problem-solving and logical thinking an integral part of the process.

Managerial--Directing Competency

One of the very important duties of the mid-managers is directing others. In this phase of management, the human relations aspect becomes all important. Supervising, communicating ideas, motivating, delegating, following up, and disciplining employees are all activities in which the manager functions in a face-to-face relationship with his subordinates. These activities are not only highly crucial, but are also performed on a daily basis in the great majority of cases.

Even though the Personnel Departments of most firms handle tasks such as interviewing, training, and discharging employees, approximately one-half the managers indicated their involvement in these activities. Getting the job done through others is a very important retail management competency needed by students who aspire to management positions.

Thirteen of the 15 planning activities were seen as more than 90 per cent [illegible] by the [illegible] managers. In 1

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Managerial--Coordinating Competency

It is common knowledge that teamwork is a vital aspect of employees in a retail organization. Very high marks were given to the activities of exchanging information with superiors, subordinates, and equals in the firm. Although much coordination takes place on a daily basis, a good one-quarter of coordinating efforts take place weekly.

Managerial--Controlling Competency

Retailers are very "figure-oriented." Cost of goods, operating and selling expenses, profits, losses, markups, markdown, and stock turnover are several of the measures used by managers to control the funds or goods committed to them. The analysis of financial data and the decisions made based upon the analysis contribute heavily to the success of the mid-managers.

Managerial--Innovating Competency

The managers appear to be an innovative group contunually searching for (95%) and adopting ideas (88%) which will improve their effectiveness and performance on the job.

Summary of Crucialness of Activities

Table 10 provides a summary of the cruciality of middle management activities according to competency area.

TABLE 10.--Level of cruciality of activities of all middle managers according to competency area.

Competency Area	Total Number of Activities	Level of Cruciality				
		0-24 %	25-49 %	50-74 %	75-89 %	90-100 %
Selling	19	3	9	6	1	0
Sales Promotion	22	2	10	9	0	1
Buying	34	6	7	18	3	0
Operations	35	4	14	13	4	0
Market Research	14	1	4	6	3	0
Managerial:						
Planning	15	0	2	6	5	2
Directing	23	0	3	9	4	7
Coordinating	11	0	1	5	4	1
Controlling	25	1	6	11	6	1
Innovating	4	0	1	1	1	1
TOTALS	202	17	57	84	31	13

Of the 128 activities found to be "core crucial" (activities crucial to 50 per cent or more of the middle managers), 44 (34%) of the activities were reported as 75 per cent or more crucial. Of the 44, 32 were managerial-type activities. Twelve managerial-type activities were reported crucial by 90 per cent or more of the mid-managers. Finally, a rank ordering of all 202 activities from one to

202 according to crucialness to success on the job (Appendix H) indicated that 19 of the 20 top-ranked activities were in the Managerial competency area.

Variations in Activities of Middle Managers in Different Types of Firms

The third question asked in accomplishing the objectives of the study was: Do activities of middle managers differ between retail organization classifications? If so, what are the differences? Are they major differences?

In answering this question, responses were categorized according to the four types of retail organizations investigated (Table 11). The four retail organizations and the number of respondents in each organization are as follows:

Traditional (independent) Department Stores (TDS)	158
Discount Stores (DS)	149
Chain Stores (CS)	288
Variety Stores (VS)	106
TOTAL	701

The null hypothesis, "No significant difference exists in the proportion of middle managers performing the activity when compared by types of firm" was established for each of the 202 activities. When each of the activities was tested by Chi-Square for the null hypothesis, 180 of the 202 activities were rejected at the .05 level of significance. This test reported a difference in the mid-managers' responses and indicated that activities of middle managers do differ according to type of firm.

TABLE 11.--Marketing activities in ten competency areas and ranked according to crucialness to success on the job by four types of firms: N = 701.[1]

Rank Order in the Competency Area	Crucial to Success	Activity	Type of Firm											
			TDS	N=158		DS	N=149		CS	N=288		VS	N=106	
			Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me
		Selling												
1	78*	Handling customer complaints	(66)	16	66	81	13	78	83	17	76	78	19	77
2	70*	Insuring customer satisfaction after transaction	(51)	23	43	69	26	59	77	24	61	[82]	28	63
3	64*	Interpreting store policies to customers	(42)	20	52	72	11	77	70	17	72	68	23	66
4	62*	Greeting customers	(47)	16	56	64	8	75	65	13	73	[75]	10	80
5	58*	Explaining technical and sales features of mdse.	51	15	52	57	28	52	61	25	59	61	24	64
6	57*	Approving customer returns and allowances	(41)	13	56	60	23	64	61	28	59	[70]	40	50
7	55*	Providing comfort and convenience services to customers	(33)	20	29	64	23	53	57	28	46	[73]	24	59
8	49*	Processing customer returns and allowances	(32)	26	33	[59]	42	45	54	43	44	49	54	33
9	48*	Selling to customers on the floor	(28)	30	31	49	28	48	53	34	51	[58]	52	41
10	45*	Completing customer sales transactions	(23)	27	22	48	44	30	52	46	38	[55]	55	27
11	43*	Approving customer checks	(27)	13	51	[57]	15	70	40	23	63	[54]	21	69
12	40*	Recording sales on unit control records	(25)	25	13	36	34	15	[51]	52	18	35	35	14
13	36*	Demonstrating merchandise	(25)	15	22	34	32	27	40	31	32	43	45	32
14	31*	Recording non-cash transactions (e.g., C.O.D. charge)	(14)	20	13	27	33	10	39	46	21	[42]	58	14
15	29*	Operating a cash register	(13)	42	19	32	60	24	31	52	35	[41]	74	15
16	27*	Writing sales slips	20	34	23	21	38	12	35	50	32	27	54	12
17	21*	Wrapping and packing merchandise	(9)	15	8	24	36	11	22	34	22	30	56	12
18	19*	Confirming customer delivery dates	24	16	17	17	22	6	20	34	7	13	25	6
19	16*	Preparing delivery tickets	11	9	8	14	24	5	17	40	6	20	38	6
		Sales Promotion												
1	90*	Presenting the firm in a favorable image	81	4	90	91	4	93	93	2	96	93	2	93
2	73*	Determining merchandise display location	(50)	13	59	78	13	80	77	16	76	[87]	8	90
3	71*	Coordinating advertising with merchandise display	(54)	13	53	76	15	70	74	20	66	[82]	8	85
4	67*	Planning or revising department or store layout	(47)	12	50	77	8	78	70	13	71	74	9	81
5	67*	Planning and scheduling promotional special events sales	(47)	20	35	59	23	45	74	22	62	[88]	14	80
6	62*	Evaluating effectiveness of advertisements	(42)	15	45	58	17	57	70	15	73	[75]	16	74
7	61*	Planning advertising programs and schedules	(46)	23	36	(46)	39	24	70	28	53	[79]	15	68
8	59*	Coordinating advertising with personal selling	(42)	16	40	51	17	46	[70]	19	64	[68]	15	64

9	58*	Deciding what merchandise is to be advertised	(41)	14	37	(46)	28	28	67	20	60	[73]	16	78
10	50*	Approving advertising proofs	44	6	46	50	21	47	51	25	49	59	23	61
11	47*	Preparing merchandise for display	39	20	38	[64]	30	56	(35)	45	25	[71]	41	51
12	45*	Requesting display and sign services	49	16	61	[56]	17	67	40	31	46	38	23	38
13	43*	Submitting merchandise facts and rough copy of advertisements	39	12	36	38	15	29	43	21	40	[58]	22	55
14	43*	Selecting themes for displays	(28)	18	33	50	19	63	42	31	39	[58]	26	61
15	42*	Working with home office on sales promotion planning	(27)	12	23	44	15	38	39	18	31	[70]	6	67
16	39*	Keeping records of merchandise on display	(26)	23	31	46	26	40	35	32	27	[58]	38	43
17	35*	Selecting fixtures for merchandise displays	(23)	12	18	41	19	41	30	29	32	[57]	27	53
18	33	Using advertising mats	(11)	9	9	32	32	26	41	42	27	[45]	38	46
19	33*	Checking merchandise returned to stock from display	27	22	40	40	27	45	29	41	31	41	40	35
20	25*	Trimming show cases	16	12	16	28	35	20	20	43	9	[46]	52	26
21	20*	Trimming store windows	(3)	6	0	17	21	10	18	39	2	[55]	46	33
22	8*	Preparing information for public relations staff	4	7	3	12	11	6	6	11	5	13	8	11
		Buying												
1	81*	Determining appropriate quantities to order	(58)	14	52	79	15	70	90	19	73	[96]	17	82
2	80*	Deciding when to take markdowns	(57)	19	41	75	21	66	[90]	9	83	[94]	8	82
3	77*	Deciding how much markdown to take	(58)	18	52	73	22	63	86	12	80	[87]	8	86
4	73*	Using the law of supply and demand in ordering merchandise	(49)	12	44	72	7	72	82	14	73	[88]	14	82
5	72*	Buying to meet consumer demand	(48)	14	38	(60)	22	45	[83]	12	71	[93]	14	82
6	69*	Using purchase order and requisition forms	63	9	73	[79]	13	67	67	23	67	70	35	58
7	66*	Determining styles to order	(44)	8	41	57	15	50	[79]	19	65	[77]	25	61
8	66*	Determining shrinkage loss	(35)	17	25	61	35	33	[77]	26	59	[87]	12	81
9	65*	Following vendors' or company suggested retail prices	(42)	15	42	66	13	59	74	12	76	[76]	18	77
10	65*	Buying merchandise for special promotions	(38)	15	32	(54)	21	45	[75]	15	69	[92]	4	94
11	65*	Working with buying office	67	6	72	[77]	8	75	57	14	57	65	8	67
12	64*	Determining timing of merchandise purchases	(43)	11	36	(45)	16	36	[78]	9	73	[84]	13	65
13	61*	Ordering merchandise from central warehouse	(34)	25	25	57	31	43	[71]	45	34	[83]	56	45
14	60*	Maintaining buying records	(47)	15	40	[46)	23	31	69	40	37	[77]	42	45
15	58*	Estimating markdowns for a month or season	(41)	19	33	(40)	26	22	[72]	24	57	[73]	10	74
16	56*	Figuring markon	(44)	16	42	50	32	35	58	33	41	[80]	24	67
17	54*	Determining markups	(39)	16	34	51	43	24	53	30	40	[8[illegible]]	20	75
18	53*	Working with home office or division on buying	47	9	42	61	12	59	50	11	45	60	8	59
19	53*	Computing "open to buy"	(33)	18	19	(27)	24	9	[67]	39	38	[78]	45	42
20	51*	Using federal and state regulatory laws in decision-making	(28)	16	24	60	19	50	54	20	49	[65]	12	63
21	51*	Communicating with vendors about adjustments or returns	49	13	48	58	26	46	47	38	37	56	32	44

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[1] All figures shown as percentages and rounded to the nearest whole.

TABLE 11.--Continued

Rank Order in the Competency Area	Crucial to Success	Activity	Type of Firm											
			TDS	N=158		DS	N=149		CS	N=288		VS	N=106	
			Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me
		Buying (continued)												
22	47*	Determining prices for individual items	46	15	33	39	23	25	40	20	31	[80]	21	67
23	46*	Scheduling the buying shipment dates	(34)	17	26	(30)	21	19	[59]	21	52	48	14	43
24	45*	Dealing with vendors' salesmen	[57]	6	64	[62]	12	73	(27)	14	47	49	13	71
25	42*	Establishing price lines for department	38	21	30	(27)	22	12	49	17	40	49	21	37
26	39*	Providing information to be submitted to data processing	(25)	13	23	44	20	32	44	27	33	41	21	40
27	39*	Using vendors' reorder procedures	(24)	11	25	[50]	26	42	34	28	27	[58]	40	46
28	34*	Buying from wholesalers	37	6	41	[50]	21	44	(21)	12	23	42	17	40
29	24*	Ordering from catalogs	(14)	3	22	19	12	18	27	20	24	[40]	27	32
30	24*	Selecting buying sources	[35]	14	32	19	17	15	17	19	10	[35]	20	28
31	23*	Negotiating with vendors about terms and discounts	[38]	17	27	28	21	16	(12)	13	7	22	18	11
32	22	Requesting datings from vendors or home office	23	16	23	20	19	18	22	15	24	25	25	21
33	19*	Attending vendors' shows or visiting markets to buy	[43]	5	61	17	8	28	11	9	14	(8)	9	14
34	9*	Determining trade-in prices	2	2	5	9	7	8	10	10	7	16	12	12
		Operations												
1	82*	Developing and applying measures to prevent store shrinkage	(58)	15	53	85	11	78	88	8	83	[98]	5	94
2	77*	Supervising inventory-taking	(58)	12	67	75	14	71	84	15	83	[88]	8	87
3	77*	Conducting a physical inventory	(61)	15	49	77	17	57	81	28	65	[90]	17	80
4	77*	Insuring store or department cleanliness	(59)	18	64	82	10	83	82	21	72	82	27	72
5	74*	Maintaining a perpetual or basic stock inventory	(57)	19	48	73	31	50	82	29	62	80	27	59
6	68*	Meeting local, state and federal laws	(47)	17	49	72	17	69	74	19	69	[80]	12	82
7	67*	Establishing basic stock count schedules and reorder plans	(49)	21	37	(55)	23	37	76	28	58	[84]	21	69
8	66*	Using a telephone	[83]	0	99	75	1	96	58	3	96	(50)	3	93
9	63*	Keeping proper payroll control	(32)	13	25	70	15	61	68	32	44	[83]	18	73
10	61*	Checking condition of merchandise received	54	23	48	70	34	52	53	51	32	[82]	35	62
11	61*	Recording stock count information	55	27	41	68	43	42	62	63	26	58	61	23
12	59*	Watching for and preventing accident hazards	(38)	15	59	[69]	5	88	59	9	83	[75]	4	93
13	58*	Insuring adherence to store credit policies	(41)	18	50	49	21	42	[76]	20	69	(47)	20	41
14	57*	Keeping files of invoices and purchase orders	51	27	38	[67]	58	27	52	63	15	64	64	25

15	56*	Organizing perimeter (reserve) stock	(46)	21	51	[66]	20	67	52	42	45	65	43	44
16	55*	Maintaining and using a unit control system	47	23	39	55	36	29	[65]	28	47	(42)	32	22
17	[illegible]*	Receiving, checking, and marking merchandise	(30)	28	13	61	55	22	52	63	14	[80]	52	41
18	44*	Requisitioning supplies, equipment, or fixtures	[illegible]	[illegible]	44	[54]	30	51	39	41	37	[60]	31	58
19	44*	Scheduling inventories	35	26	34	41	28	30	51	27	41	42	26	36
20	[illegible]*	Insuring preventative maintenance of equipment and fixtures	[illegible]	14	23	[56]	23	52	37	26	33	[67]	18	71
21	[illegible]*	Working with a code system in marking merchandise	(25)	[illegible]	25	44	29	36	41	36	32	[50]	36	42
22	[illegible]*	Controlling perishable goods	[illegible]	[illegible]	11	44	23	38	37	24	29	[67]	24	66
23	37*	Using the retail price accounting system	34	[illegible]	30	[illegible]	26	20	43	31	27	28	21	22
24	[illegible]*	Scheduling repairs on customer or store mdse.	[illegible]	[illegible]	[illegible]	[illegible]	38	28	39	39	31	40	24	49
25	[illegible]*	Preparing price tickets	[illegible]	[illegible]	9	40	47	33	31	59	7	[51]	69	12
26	[illegible]*	Reporting sales by the split-ticket system	[illegible]	[illegible]	14	33	35	21	[42]	43	27	(15)	21	8
27	30*	Insuring proper lighting and heating or cooling	13	[illegible]	19	35	22	35	28	32	31	[51]	20	67
28	[illegible]*	Insuring prompt service in customer lunch area	[illegible]	[illegible]	[illegible]	21	23	23	30	15	22	[63]	28	44
29	[illegible]*	Inspecting lunch area for cleanliness	[illegible]	[illegible]	7	30	21	48	26	20	40	[53]	18	64
30	25	Operating an adding machine	22	11	59	16	21	56	24	25	51	31	41	45
31	[illegible]*	Controlling warehouse stockkeeping functions	[illegible]	11	9	16	13	19	24	26	15	[40]	29	25
32	[illegible]*	Analyzing computer print-outs to determine inventory content	17	[illegible]	10	[illegible]	9	[illegible]	21	12	16	[34]	9	33
33	[illegible]*	Scheduling and controlling delivery to customers	19	[illegible]	11	17	25	3	22	37	11	23	34	13
34	10*	Using professional and local shopping services	[illegible]	[illegible]	17	15	11	11	14	15	15	23	13	23
35	[illegible]	Using a typewriter	[illegible]	11	16	9	19	17	9	19	13	9	23	13
		Market Research												
1	[illegible]*	Determining consumer demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	68	89	13	79	88	13	80
2	[illegible]*	Recognizing fashion influences and trends	[illegible]	[illegible]	63	[illegible]	[illegible]	70	[88]	12	82	80	16	75
3	[illegible]	Keeping informed of public opinion	[illegible]	20	67	77	16	78	78	13	78	75	10	81
4	70*	Determining strengths and weaknesses of competitors	[illegible]	[illegible]	51	72	12	77	73	10	77	[88]	7	91
5	70*	Shopping local competitors	[illegible]	13	60	73	13	78	72	13	80	[84]	13	84
6	65*	Forecasting sales for a future period	[illegible]	21	34	60	23	48	[78]	18	69	69	14	74
7	59*	Forecasting future trends or events	[illegible]	[illegible]	40	(46)	24	39	65	14	59	68	26	48
8	56*	Searching for new items and lines	(41)	10	41	(39)	16	33	[68]	7	69	[74]	8	70
9	53*	Obtaining market information from buying or home office	45	10	46	46	13	47	60	11	58	54	11	58
10	48*	Assessing events that may affect the firm	(37)	[illegible]	37	[58]	15	53	46	16	45	54	14	53
11	40*	Reading trade publications	41	4	82	46	1	93	36	2	89	39	5	92
12	36*	Using data processing information to forecast sales	27	11	21	40	22	27	42	17	31	27	11	25
13	35*	Assessing socio-economic trends in the community	26	17	21	32	21	28	39	13	40	43	18	39
14	[illegible]*	Assessing proposed retail legislation	9	13	7	12	26	7	13	25	11	[27]	29	23

TABLE 11.--Continued

Rank Order in the Competency Area	Crucial to Success	Activity	Type of Firm											
			TDS	N=158		DS	N=149		CS	N=288		VS	N=106	
			Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me
		Managerial--Planning												
1	99	Following instructions from superiors	99	0	100	98	1	99	99	0	99	100	0	100
2	91*	Reading company memorandums and reports	84	1	99	93	1	96	93	1	96	94	5	95
3	87*	Establishing procedures to accomplish goals	79	13	73	91	5	86	89	6	88	86	7	85
4	82*	Determining the goals of a department or area	(63)	32	49	85	16	77	90	12	84	88	17	83
5	80*	Determining responsibilities of employees	(68)	16	63	[91]	14	83	79	13	78	82	8	83
6	79	Establishing standards for the department or area	74	15	70	83	7	81	80	13	75	78	16	73
7	75*	Planning for the future from current operations data	(58)	15	53	72	12	65	82	8	68	[88]	4	87
8	74	Evaluating proposals and suggestions	68	9	73	81	11	80	73	7	80	77	5	84
9	72*	Determining priorities	65	9	64	74	7	72	73	6	77	74	11	73
10	65*	Preparing budgets	(44)	12	39	61	26	42	74	26	54	[76]	13	73
11	59*	Determining a sales budget for a season	(41)	19	29	(38)	31	20	[73]	26	55	[77]	21	65
12	52*	Determining expenses for a season	(37)	18	28	(40)	23	25	58	20	49	[76]	10	73
13	50*	Deciding action to take based upon data processing information	(35)	10	31	59	15	48	52	10	49	52	9	49
14	44*	Determining finances necessary to accomplish sales budget	(31)	14	23	(33)	15	22	53	24	37	[54]	12	44
15	35*	Establishing an advertising budget	(18)	[illegible]	14	(13)	14	4	[50]	24	39	[49]	32	28
		Managerial--Directing												
1	98*	Making proper, timely decisions	96	1	95	98	1	98	100	1	99	99	3	97
2	97*	Supervising employees	88	2	92	99	1	99	100	2	97	100	1	99
3	95	Communicating ideas to others	91	1	96	95	1	99	95	1	99	97	0	99
4	94	Delegating responsibilities to others	92	2	96	98	1	99	95	1	98	92	2	95
5	94	Motivating employees	91	3	90	95	1	98	94	1	96	98	4	97
6	93*	Assigning work to be done by others	84	3	92	95	2	95	95	2	97	98	0	98
7	91	Keeping employees' morale high	85	6	89	93	3	94	93	1	96	93	3	91
8	89*	Insuring that employees comply with their assignments	(79)	11	79	90	5	92	91	7	88	94	3	96
9	81*	Instructing employees on store policies and procedures	(65)	15	75	87	13	85	86	13	82	85	9	87
10	77*	Handling employee complaints	(63)	13	68	77	12	80	80	13	77	[88]	8	92
11	76*	Using "on-the-job" training method	(65)	8	72	79	11	75	81	17	74	78	15	76
12	74*	Evaluating employees' progress	(64)	13	74	83	10	82	76	9	83	75	8	93
13	74*	Disciplining employees	(62)	15	64	81	13	79	74	12	76	80	16	76
14	73*	Teaching salespeople new merchandise information	(59)	16	63	72	17	68	77	24	68	[88]	21	74
15	69*	Training new salespeople	(35)	27	26	[81]	26	63	77	36	54	[81]	39	48
16	55*	Hiring employees	(21)	15	16	[68]	30	51	61	37	39	[73]	23	61
17	55*	Using training aids and equipment	(30)	18	32	56	15	57	63	21	67	[66]	10	70
18	55*	Training new non-selling employees	(30)	18	27	[71]	34	47	53	42	29	[74]	35	53
19	53*	Promoting employees	(31)	20	30	56	22	48	59	23	50	[65]	14	59
20	51*	Interviewing job applicants	(28)	8	29	60	22	58	52	34	43	[66]	24	66
21	47*	Discharging employees	(25)	23	22	56	28	49	48	34	38	[63]	22	60
22	42*	Counseling employees on their personal problems	(29)	13	40	48	10	68	42	15	50	[54]	14	62
23	32*	Recommending employees for transfer	26	17	42	[44]	19	43	27	16	34	37	21	35

Managerial--Coordinating

1	90	Keeping superiors informed	90	1	97	90	1	98	90	1	97	88	3	97
2	89*	Exchanging information with superiors in the firm	90	1	95	92	1	97	90	1	96	80	6	91
3	79*	Exchanging information with subordinates in the firm	72	1	89	81	1	91	85	2	94	(69)	2	88
4	79*	Organizing a department or store's effort	(62)	6	61	85	5	85	83	8	83	85	8	81
5	75	Communicating with other departments or areas	76	3	88	81	3	94	73	5	89	71	4	87
6	71*	Seeking cooperation of other departments or areas	63	4	73	80	6	89	70	7	79	74	10	74
7	70*	Conducting meetings	70	9	80	75	9	76	67	14	75	75	8	78
8	70*	Expediting proper merchandise handling	(53)	21	47	70	21	70	70	36	52	[83]	38	59
9	67	Exchanging information with equals in the organization	64	3	85	75	2	94	67	3	89	63	3	84
10	66*	Reporting on employees' traits and abilities to superiors	(56)	6	43	[79]	6	89	68	5	86	(56)	9	70
11	49*	Arranging meetings	42	15	64	57	13	64	43	14	57	47	8	57

Managerial--Controlling

1	92	Handling responsibilities that cannot be delegated	90	2	93	95	5	94	92	1	96	92	2	92
2	85*	Comparing operations with past performance or expectations	78	6	82	86	7	90	89	3	92	86	3	91
3	85*	Insuring accuracy in paperwork	82	9	82	94	8	89	81	19	73	88	11	78
4	81*	Analyzing sales figures	68	7	73	77	16	74	88	6	88	87	6	90
5	77*	Evaluating performance of subordinates	(59)	10	77	83	9	47	82	9	85	84	5	89
6	77	Collecting information and preparing reports	76	11	77	83	13	72	75	25	68	77	18	72
7	75*	Controlling operating expenses	(53)	[illegible]	44	73	19	58	85	12	74	[90]	10	85
8	70*	Controlling selling expenses	(39)	17	34	68	17	54	[82]	13	73	[90]	11	84
9	69*	Working with percentages, fractions, and decimals	66	9	74	60	12	67	73	15	78	77	7	89
10	69*	Controlling the finances of a department or area	(54)	13	40	61	29	[illegible]	75	16	63	[81]	18	69
11	66*	Training employees to be accurate in sales transactions	71	20	45	69	28	54	74	32	57	[81]	30	63
12	64*	Analyzing operating costs	(49)	20	35	57	28	54	70	32	57	[83]	30	63
13	64*	Analyzing a retail profit and loss statement	(47)	19	29	58	23	45	70	18	59	[82]	9	75
14	62*	Analyzing selling costs	(37)	16	36	(51)	21	40	[75]	16	64	[84]	13	75
15	62*	Maintaining "open to buy" records	(41)	19	26	(37)	[illegible]	14	[76]	39	44	[92]	48	48
16	60*	Calculating stock turnover	(37)	17	34	60	23	46	69	31	52	71	22	73
17	55*	Taking part in making store policy	(37)	17	54	60	11	57	69	15	57	[71]	18	58
18	50*	Analyzing information provided by data processing	42	10	49	52	5	51	53	10	55	51	12	41
19	47*	Checking and reporting on cash registers	(30)	15	45	54	36	39	47	43	32	[63]	55	33
20	45*	Approving requests that deviate from normal procedures	39	10	57	52	8	59	45	16	62	42	9	52
21	44	Using business mathematical formulas	47	11	48	39	14	37	44	15	46	53	13	53
22	39	Adding columns of figures by hand	42	6	65	41	13	58	38	14	58	(28)	19	36
23	33*	Analyzing charts and graphs	30	12	31	37	15	30	27	13	29	[47]	14	32
24	33	Dictating letters or reports	33	8	39	34	11	33	34	12	39	26	8	31
25	32*	Using ratios to determine deviation from standards	28	14	24	32	15	28	31	11	30	[42]	20	40

Managerial--Innovating

1	95	Searching for ways to make my position more effective	94	2	97	96	2	96	95	1	97	93	2	97
2	88	Adopting ideas to improve performance	84	3	89	91	3	92	89	5	91	88	3	90
3	70*	Seeking ways to eliminate paperwork	65	9	66	75	7	82	71	13	73	70	11	73
4	44	Improving department or area operation by use of innovation	42	8	58	42	5	57	42	7	61	52	11	66

*The null hypothesis, "No significant difference exists in the proportion of mid-managers performing the activity when compared by type of firm," was rejected at the .05 level.

In order to show variations between types of firms, whenever mid-managers in one type of firm judged an activity as 10 per cent or less crucial than the average cruciality of all firms, the percentage was indicated by parentheses. Whenever mid-managers in one type of firm judged an activity as 10 per cent or more crucial than the average cruciality of all firms, the percentage was bracketed.

Mid-managers in traditional department stores generally viewed most activities as less crucial than the average of all mid-managers while the variety store people indicated most activities as more crucial than the average of all middle managers. The retail executives that met in a post-survey conference (Appendix I) confirmed this finding and indicated that a considerable difference existed between the traditional department store and the other three types of firms. In most cases, the traditional store is much larger and self-contained and, therefore, the traditional store mid-manager tends to specialize in a specific area. Because of specialization, mid-managers in traditional department stores have fewer activities to perform, hence, fewer activities to view as crucial to their job success. At the other end of the continuum, the mid-manager in a variety store organization, usually involved in a smaller operation, is a generalist with a great many activities and responsibilities, most of which are viewed

as crucial to his success. An example is illustrated in the activity "Trimming store windows" in which only three per cent of traditional department store people indicate this activity as crucial to their success, whereas 55 per cent of the variety store mid-managers believe this activity to be crucial.

The Variety Store mid-managers' responses were closer to the Discount and Chain management responses and provide evidence that a difference exists between the traditional department store and the other three types of firms. The responses of mid-managers in Discount and Chain organizations tended to be quite similar and closer to the average responses from all firms.

Table 12 is a summary of the data appearing in Table 11 and indicates, according to a quartile level of competency, where each of 202 activities were ranked by middle managers in the four types of firms. Figure 2, on the other hand, provides a graphic summary of the manner in which mid-managers in the different firms responded. The traditional department store manager clearly views many activities as less crucial to his success than middle managers in the other three firms. The Discount and Chain organization mid-managers tend to judge activities similarly while the Variety Store mid-managers report the greatest number of activities crucial to them.

TABLE 12.--Cruciality groupings of activities by middle managers in four types of firms.

Type of Firm	Competency	Level of Cruciality			
		0-24%	25-49%	50-74%	75-100%
TDS	Selling	7	9	3	0
	Sales Promotion	5	14	2	1
	Buying	4	24	6	0
	Operations	14	12	8	1
	Market Research	1	7	6	0
	Managerial:				
	Planning	1	5	6	3
	Directing	1	8	6	8
	Coordinating	0	0	8	3
	Controlling	0	15	6	4
	Innovating	0	1	1	2
	TOTALS	33	95	52	22
DS	Selling	4	6	8	1
	Sales Promotion	2	9	7	4
	Buying	5	9	16	4
	Operations	4	13	13	5
	Market Research	1	6	4	3
	Managerial:				
	Planning	1	3	4	7
	Directing	0	2	7	14
	Coordinating	0	0	1	10
	Controlling	0	6	13	6
	Innovating	0	1	0	3
	TOTALS	15	55	73	57
CS	Selling	3	5	9	2
	Sales Promotion	3	9	8	2
	Buying	6	7	12	9
	Operations	6	11	11	7
	Market Research	1	4	5	4
	Managerial:				
	Planning	0	0	8	7
	Directing	0	3	6	14
	Coordinating	0	1	6	4
	Controlling	0	7	7	11
	Innovating	0	1	1	2
	TOTALS	19	48	73	62
VS	Selling	2	7	7	3
	Sales Promotion	1	4	11	6
	Buying	3	8	7	16
	Operations	4	8	12	11
	Market Research	0	4	5	5
	Managerial:				
	Planning	0	1	3	11
	Directing	0	1	7	15
	Coordinating	0	1	5	5
	Controlling	0	5	5	15
	Innovating	0	0	2	2
	TOTALS	10	39	64	89
	GRAND TOTAL	79	237	262	230

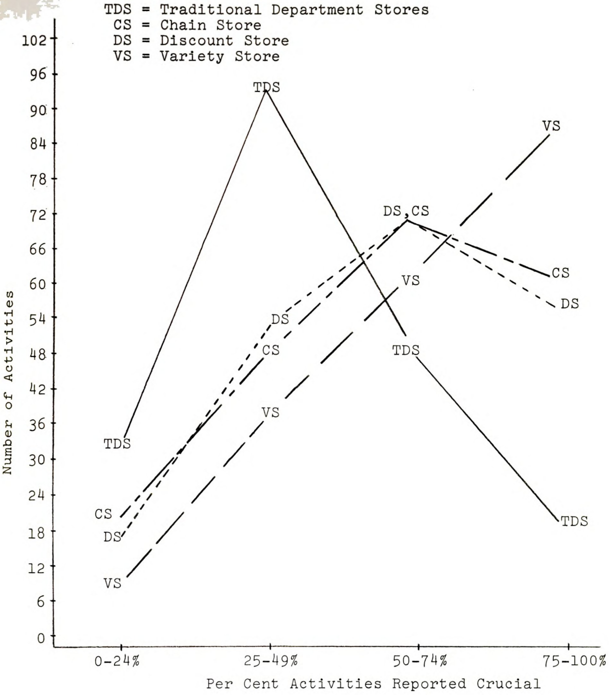

Figure 2.--Cruciality of 202 marketing activities reported by four types of firms.

In the competencies of Selling, Sales Promotion, and Operations, the Discount and Chain organization mid-managers reflected scant differences in their responses. However, in Buying and Market Research competencies, the mid-managers in Chain organizations indicated that these activities were more crucial to them. In this respect, the mid-managers in the Chain organizations tended to respond more like the managers in Variety organizations than Discount firms.

Analyzing the 78 Managerial activities which were divided into the five sub-competencies of Planning, Directing, Coordinating, Controlling, and Innovating, the Chi Square test indicated that there was a significant difference in 60 of the 78 activities. The activities that were similar were general in nature such as following instructions, establishing standards, evaluating proposals, communicating ideas, motivating employees, delegating responsibilities, keeping supervisors informed, collecting information and preparing reports, and searching for ways and adopting ideas to improve performance.

The traditional department store middle managers viewed 38 of the 78 Managerial activities as 10 per cent or less crucial than the average of all middle managers. On the other hand, the Variety Store managers viewed 20 of the 78 Managerial activities as 10 per cent or more crucial to their job success. In summarizing the Managerial

competency, the Discount and Chain organization middle managers tended to respond the same; the Variety Store mid-manager responded similarly, only reporting a higher degree of cruciality for most activities. The traditional department store manager viewed all Managerial activities as less crucial than the average to his success.

Variations in Activities of Middle Managers in Different Levels of Management

The fourth question asked in accomplishing the objectives of the study was: Do the activities of middle managers differ at various management levels? If so, what are the differences? Are they major differences?

Preliminary research early in the study indicated that it was extremely difficult to rank middle managers and, therefore, classify them according to discrete levels. Neither salary or title nor any other criteria could be used to properly distribute middle managers into discrete grades or classes. However, discussions with retail executives indicated that a rough attempt could be made to classify mid-managers into one of four hierarchial levels. With this in mind, and for purposes of the study, all retail middle managers were judged to be in one of four management levels:

1. The first level, the lowest management level and located immediately above rank and file employees, consisted of positions such as the

Department Manager of a chain store, Assistant to a Buyer, and Receiving Manager.

2. The second level of management consisted of mid-management positions such as Assistant Store Manager of a chain store, Assistant Buyer, Department Manager of a traditional department store's branch store, and Warehouse Supervisor.
3. The third level of management consisted of Store Managers, Buyers, and management personnel in Operations positions at an equivalent level.
4. The fourth level, the highest level of middle management, consisted of persons positioned immediately below corporate executives. Examples of the fourth level are traditional department store Merchandise Managers and Division or District Managers responsible for several stores.

The four levels of management and the number of respondents at each level were as follows:

Level 4	33
Level 3	247
Level 2	247
Level 1	174
TOTAL	701

Table 13 provides the responses of middle managers according to the four levels of management. As would be expected, the responses differ from level to level. For the most part, mid-managers at Level 1, the lowest level, tended to judge rank and file-type activities as more

TABLE 13.--Marketing activities in ten competency areas and ranked according to crucialness to success on the job by four levels of management: N=701[1]

Rank Order in the Competency Area	Crucial to Success	Activity	Level of Management 1 N=174 Crucial			2 N=247 Crucial			3 N=247 Crucial			4 N=33 Crucial		
			Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me
		Selling												
1	78*	Handling customer complaints	87	6	88	78	8	83	75	29	62	(48)	36	33
2	70*	Insuring customer satisfaction after transaction	77	13	75	64	23	57	73	34	49	(55)	42	27
3	64*	Interpreting store policies to customers	[74]	9	83	62	11	73	62	28	57	(30)	42	18
4	61*	Greeting customers	[75]	10	80	58	12	71	60	12	69	(33)	12	7
5	58*	Explaining technical and sales features of mdse.	[69]	13	69	58	21	60	54	29	50	(21)	39	15
6	57*	Approving customer returns and allowances	[70]	3	87	54	20	63	54	45	34	(27)	39	18
7	55	Providing comfort and convenience services to customers	53	15	56	50	23	44	60	29	44	(42)	45	12
8	49*	Processing customer returns and allowances	[71]	15	73	42	38	41	43	61	21	(21)	42	6
9	48*	Selling to customers on the floor	[60]	20	65	42	34	45	46	45	34	(27)	39	9
10	45*	Completing customer sales transactions	[59]	29	54	41	45	29	42	52	18	(15)	30	9
11	43*	Approving customer checks	[56]	4	83	41	15	68	37	30	48	(18)	36	12
12	42	Recording sales on unit control records	42	29	26	41	42	17	38	43	11	(30)	42	3
13	36*	Demonstrating merchandise	[52]	13	50	31	28	70	30	44	39	(6)	27	0
14	31	Recording non-cash transactions (e.g., C.O.D. charge)	32	27	25	33	40	21	29	48	8	(18)	30	0
15	30*	Operating a cash register	38	41	49	29	60	23	25	61	16	(15)	36	12
16	27*	Writing sales slips	41	36	40	26	45	24	21	51	11	(15)	33	6
17	21*	Wrapping and packing merchandise	29	24	33	14	35	12	21	40	8	(12)	21	3
18	19*	Confirming customer delivery dates	19	11	16	21	33	12	17	29	5	12	31	0
19	16*	Preparing delivery tickets	16	19	19	12	31	13	19	35	11	(6)	24	0
		Sales Promotion												
1	90	Presenting the firm in a favorable image	91	2	93	88	4	92	88	2	94	97	3	97
2	73*	Determining merchandise display location	70	8	77	74	11	79	77	17	77	(39)	33	48
3	71*	Coordinating advertising with merchandise display	69	10	66	71	11	70	74	23	66	(58)	39	33
4	67*	Planning or revising department or store layout	58	10	61	68	12	67	71	11	77	70	12	75
5	67*	Planning and scheduling promotional and special events sales	(48)	20	37	65	29	44	[80]	13	75	76	18	59
6	62*	Evaluating effectiveness of advertisements	(44)	17	45	60	19	60	[73]	13	78	70	0	81
7	61*	Planning advertising programs and sehcdules	(44)	29	26	59	35	36	[75]	19	70	67	21	54
8	59	Coordinating advertising with personal selling	62	14	57	56	15	52	60	19	58	(48)	39	21

9	58*	Deciding what merchandise is to be advertised	(41)	21	30	56	24	46	67	14	70	58	21	45
10	50*	Approving advertising proofs	(38)	15	38	52	21	48	54	18	59	42	42	21
11	47*	Preparing merchandise for display	[53]	22	50	47	30	43	42	49	25	(27)	45	6
12	44*	Requesting display and sign services	[60]	12	77	45	18	56	36	38	37	(27)	33	24
13	43*	Submitting merchandise facts and rough copy of advertisements	34	12	32	43	22	37	45	16	46	45	42	12
14	43*	Selecting themes for displays	51	13	45	41	23	48	41	30	43	(27)	30	36
15	42*	Working with home office on sales promotion planning	(32)	16	[illegible]	36	17	29	[52]	10	50	36	0	48
16	37*	Keeping records of merchandise on display	42	21	47	39	26	34	41	39	50	(24)	30	3
17	35*	Selecting fixtures for merchandise displays	32	14	41	38	20	42	32	32	28	30	18	27
18	33*	Using advertising mats	26	32	15	34	35	23	38	29	39	(12)	36	9
19	33*	Checking merchandise returned to stock from display	[47]	16	64	28	30	38	30	48	20	(18)	39	0
20	25*	Trimming show cases	31	13	28	(22)	33	19	(23)	48	6	(12)	30	0
21	20*	Trimming store windows	15	19	7	17	29	12	26	38	7	12	21	0
22	-	Preparing information for public relations staff	5	8	2	8	11	8	10	10	24	9	9	2
		Buying												
1	81*	Determining appropriate quantities to order	[illegible]	6	77	82	12	74	86	27	62	(55)	36	33
2	80*	Deciding when to take markdowns	73	9	70	82	16	72	83	11	79	74	36	51
3	77*	Deciding how much markdown to take	74	14	70	77	16	67	83	12	78	(58)	30	48
4	73*	Using the law of supply and demand in ordering merchandise	71	7	65	73	12	68	79	14	70	(55)	27	42
5	70*	Buying to meet consumer demand	(60)	7	57	72	15	60	81	17	67	64	45	21
6	69*	Using purchase order and requisition forms	70	5	70	75	14	91	64	33	53	64	42	36
7	66*	Determining styles to order	57	5	50	69	15	60	72	20	69	(45)	42	21
8	66*	Determining shrinkage loss	(52)	28	27	66	30	41	[79]	14	70	(55)	24	39
9	65*	Following vendors' or company suggested retail prices	65	6	63	65	13	68	64	16	66	(55)	24	39
10	65*	Buying merchandise for special promotions	(52)	3	50	62	9	57	[79]	14	72	(55)	6	33
11	65*	Working with buying office	62	8	59	67	13	63	64	9	60	73	9	78
12	64*	Determining timing of merchandise purchases	(53)	9	42	61	16	52	74	7	69	58	27	42
13	61*	Ordering merchandise from central warehouse	55	14	59	60	40	37	70	54	31	(39)	52	12
14	60*	Maintaining buying records	53	11	48	58	40	29	69	34	43	(39)	45	12
15	58*	Estimating markdowns for a month or season	(41)	24	27	57	35	32	[70]	5	75	67	27	45
16	56*	Figuring markon	(40)	26	29	60	23	49	63	31	52	55	39	39
17	54*	Determinig markups	(34)	28	23	56	30	39	65	26	55	61	33	33
18	53*	Working with home office or division on buying	48	8	43	53	14	42	55	9	57	52	3	59
19	53*	Computing "open to buy"	(35)	19	23	51	40	17	[63]	39	32	[67]	39	30
20	51*	Using federal and state regulatory laws in decision-making	(37)	18	28	49	21	42	[63]	16	58	58	21	51
21	51*	Communicating with vendors about adjustments or returns	52	20	50	55	30	47	49	34	37	(27)	27	21

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[1] All figures shown as percentages and rounded to the nearest whole.

TABLE 13.--Continued.

Rank Order in the Competency Area	Crucial to Success	Activity	Level of Management											
			1 N=174			2 N=247			3 N=247			4 N=33		
			Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me
		Buying (continued)												
22	47*	Determining prices for individual items	(28)	22	14	50	17	47	[57]	20	46	40	27	12
23	45	Scheduling the buying shipment dates	43	13	40	44	22	33	52	18	46	(30)	33	9
24	45*	Dealing with vendors' salesmen	41	8	52	58	8	70	38	16	57	(33)	27	39
25	42	Establishing price lines for department	39	14	46	43	25	26	45	19	38	45	18	33
26	39*	Providing information to be submitted to data processing	44	10	41	33	16	28	42	35	28	36	21	27
27	39*	Using vendors' reorder procedures	27	5	41	41	36	38	36	39	22	(21)	33	6
28	34*	Buying from wholesalers	23	6	33	43	16	40	29	14	32	30	27	6
29	24*	Ordering from catalogs	30	6	33	26	15	27	21	23	15	(3)	15	3
30	24*	Selecting buying sources	15	24	11	26	20	18	27	17	24	33	27	30
31	23*	Negotiating with vendors about terms and discounts	18	11	9	27	21	14	21	13	16	(36)	33	15
32	22*	Requesting datings from vendors or home office	25	10	24	21	16	22	19	20	21	24	45	13
33	19*	Attending vendors' shows or visiting markets to buy	16	5	21	19	10	25	18	9	24	[42]	9	45
34	9	Determining trade-in prices	9	7	8	8	7	7	10	11	9	0	3	3
		Operations												
1	82*	Developing and applying measures to prevent store shrinkage	74	14	69	81	10	74	88	6	85	88	12	79
2	77*	Supervising inventory-taking	76	7	82	79	13	77	80	17	72	(51)	18	57
3	77*	Conducting a physical inventory	72	16	68	80	21	70	80	25	65	(56)	27	45
4	77*	Insuring store or department cleanliness	77	10	85	74	13	78	80	30	62	(60)	33	52
5	74	Maintaining a perpetual or basic stock inventory	70	13	65	77	31	55	75	28	52	67	58	24
6	68*	Meeting local, state and federal laws	(56)	16	55	68	17	66	[79]	17	77	(55)	27	51
7	67*	Establishing basic stock count schedules and reorder plans	58	16	50	66	25	48	74	25	57	58	48	22
8	66	Using a telephone	67	1	98	66	2	96	60	2	93	[82]	0	100
9	63*	Keeping proper payroll control	(37)	20	25	63	27	45	[81]	18	56	67	18	54
10	61*	Checking condition of merchandise received	67	22	62	59	37	49	62	52	30	(33)	45	18
11	61	Recording stock count information	66	25	55	61	52	32	61	66	17	(45)	58	9
12	59	Watching for and preventing accident hazards	62	9	85	59	6	80	58	10	78	(39)	15	64
13	58	Insuring adherence to store credit policies	56	16	59	56	18	56	61	25	53	(45)	21	39
14	57*	Keeping files of invoices and purchase orders	52	41	30	59	52	27	62	65	20	(33)	52	3
15	56	Organizing perimeter (reserve) stock	60	16	65	56	31	65	56	45	39	(33)	48	24
16	55	Maintaining and using a unit control system	62	14	54	53	29	36	56	36	32	51	58	12
17	53*	Receiving, checking, and marking merchandise	47	39	30	50	54	19	62	60	14	(27)	48	0
18	44*	Requisitioning supplies, equipment, or fixtures	40	22	46	45	30	50	45	42	41	39	36	33
19	44	Scheduling inventories	42	21	37	41	30	30	50	26	43	(33)	36	27

20	42*	Insuring preventative maintenance of equipment and fixtures	(24)	13	30	44	22	46	[52]	29	48	(30)	15	39
21	39	Working with a code system in marking merchandise	42	21	41	39	32	32	38	34	32	30	61	3
22	37*	Controlling perishable goods	(23)	12	19	37	20	32	[49]	24	42	(24)	30	12
23	37*	Using the retail price accounting system	(23)	13	20	35	24	25	[48]	30	31	45	42	21
24	35*	Scheduling repairs on customer or store merchandise	44	15	53	33	33	30	33	39	24	(6)	33	3
25	32*	Preparing price tickets	34	36	24	27	54	8	36	53	8	(12)	33	3
26	31*	Reporting sales by the split-ticket system	[41]	18	39	28	38	16	26	34	13	(18)	30	3
27	30*	Insuring proper lighting and heating or cooling	(15)	15	15	30	21	43	38	31	42	21	24	18
28	27*	Insuring prompt service in customer lunch area	(8)	5	10	26	15	21	[45]	22	33	18	36	3
29	26*	Inspecting lunch area for cleanliness	(12)	14	17	25	17	42	[41]	18	51	(15)	15	30
30	25*	Operating an adding machine	29	18	59	28	17	67	21	32	38	(6)	24	33
31	25*	Controlling warehouse stockkeeping functions	(14)	14	9	26	21	19	34	26	20	(12)	24	0
32	24*	Analyzing computer print-outs to determine inventory content	17	7	13	23	12	20	27	8	26	30	21	27
33	20*	Scheduling and controlling delivery to customers	14	13	13	22	34	8	22	34	10	12	33	0
34	16*	Using professional and local shopping services	10	11	9	16	12	17	16	13	21	[27]	21	18
35	8	Using a typewriter	10	19	15	8	18	15	7	18	12	6	12	15
		Market Research												
1	80*	Determining consumer demand	75	10	70	79	13	72	86	19	74	(70)	21	57
2	80*	Recognizing fashion influences and trends	78	12	72	78	14	73	85	18	77	(61)	18	70
3	75	Keeping informed of public opinion	78	13	79	72	17	74	73	14	78	82	15	82
4	70*	Determining strengths and weaknesses of competitors	(58)	12	59	73	14	71	76	8	84	70	12	79
5	70	Shopping local competitors	62	9	74	72	9	81	71	18	75	73	18	72
6	65*	Forecasting sales for a future period	(55)	19	42	60	32	39	[76]	7	78	67	15	66
7	59*	Forecasting future trends or events	53	20	38	55	23	44	61	14	59	[76]	15	72
8	56*	Searching for new items and lines	48	7	48	54	13	51	64	9	63	52	15	42
9	53*	Obtaining market information from buying or home office	47	9	45	53	18	46	54	8	60	58	6	68
10	48*	Assessing events that may affect the firm	(36)	15	29	44	22	41	53	13	57	[73]	0	82
11	40*	Reading trade publications	47	3	76	37	2	92	34	4	90	48	3	97
12	36	Using data processing information to forecast sales	34	10	28	38	19	25	33	16	22	45	18	39
13	35*	Assessing socio-economic trends in the community	27	17	21	32	18	29	43	18	44	36	30	36
14	14*	Assessing proposed retail legislation	11	13	5	10	21	6	19	32	21	12	24	18
		Managerial-Planning												
1	99*	Following instructions from superiors	94	1	99	100	0	99	99	0	99	100	0	100
2	81*	Reading company memorandums and reports	84	2	91	93	2	96	94	2	98	88	0	100
3	87*	Establishing procedures to accomplish goals	78	10	78	85	10	80	93	4	91	94	0	94
4	82	Determining the goals of a department or area	79	17	69	80	24	66	87	11	85	82	12	78
5	80	Determining responsibilities of employees	84	12	81	75	17	71	81	9	83	79	21	69
6	79	Establishing standards for the department or area	75	13	70	79	14	72	79	11	78	88	6	85
7	75*	Planning for the future from current operations data	(51)	16	51	72	13	69	[86]	4	88	[94]	0	96
8	74*	Evaluating proposals and suggestions	(63)	7	69	74	12	79	78	5	88	[88]	0	100
9	72*	Determining priorities	(54)	10	53	74	7	73	(49)	4	82	[82]	6	88
10	65*	Preparing budgets	(38)	24	20	61	34	32	[87]	8	85	[85]	6	81
11	59*	Determining a sales budget for a season	(33)	28	19	56	36	28	[80]	11	75	[70]	21	55
12	52*	Determining expenses for a season	(26)	21	13	47	26	28	[74]	10	75	[79]	18	60
13	50*	Deciding action to take based upon data processing information	(39)	12	33	50	15	38	53	7	53	[79]	6	78
14	44*	Determining finances necessary to accomplish sales budget	(24)	16	13	43	28	22	[60]	11	54	42	6	36
15	35*	Establishing an advertising budget	(12)	18	1	29	28	10	[51]	11	50	[52]	15	45

TABLE 13.--Continued.

Rank Order in the Competency Area	Crucial to Success	Activity	Level of Management 1 N=174 Crucial			2 N=247 Crucial			3 N=247 Crucial			4 N=33 Crucial		
			Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me
		Managerial-Directing												
1	98	Making proper, timely decisions	97	0	99	98	2	97	99	1	98	97	0	100
2	97	Supervising employees	97	0	98	97	2	96	98	2	97	94	3	94
3	95	Communicating ideas to others	90	2	96	94	0	98	97	0	99	100	0	100
4	94	Delegating responsibilities to others	93	1	98	94	0	96	95	1	96	97	3	94
5	94	Motivating employees	92	2	93	94	3	95	96	2	95	100	0	100
6	93	Assigning work to be done by others	93	1	95	93	1	95	93	3	96	94	0	94
7	91	Keeping employees' morale high	91	2	96	89	2	92	94	3	92	88	9	85
8	89	Insuring that employees comply with their assignments	91	2	91	86	6	88	90	11	86	82	12	82
9	81	Instructing employees on store policies and procedures	84	7	87	(78)	11	84	82	17	79	82	21	72
10	77*	Handling employee complaints	74	16	73	74	7	82	84	13	80	(61)	24	63
11	76*	Using "on-the-job" training method	84	10	82	75	11	76	77	18	69	(58)	18	55
12	74*	Evaluating employees' progress	67	13	71	70	13	76	81	6	80	[91]	0	96
13	74	Disciplining employees	73	14	74	71	11	76	74	16	73	82	9	78
14	73*	Teaching salespeople new merchandise information	79	6	82	71	19	68	75	28	59	(36)	48	15
15	69*	Training new salespeople	78	9	74	63	29	50	74	50	34	(27)	45	3
16	55*	Hiring employees	(42)	24	30	49	27	38	[69]	33	48	64	37	48
17	55*	Using training aids and equipment	51	16	53	53	17	55	61	21	61	(42)	30	51
18	55*	Training new non-selling employees	(44)	18	38	54	35	38	63	46	34	(39)	30	24
19	53*	Promoting employees	(27)	29	18	(43)	27	32	[74]	10	74	[82]	9	78
20	51*	Interviewing job applicants	(38)	23	30	44	23	47	[61]	29	56	[67]	6	81
21	47*	Discharging employees	(35)	30	22	45	30	41	55	26	51	55	24	45
22	42*	Counseling employees on their personal problems	37	18	43	39	13	49	48	11	67	39	6	53
23	32*	Recommending employees for transfer	23	15	23	26	21	28	38	17	52	[67]	3	66
		Managerial-Coordinating												
1	90*	Keeping superiors informed	92	1	97	91	2	96	85	1	98	97	0	100
2	89	Exchanging information with superiors in the firm	87	3	93	91	1	96	86	0	96	97	0	100
3	79	Exchanging information with subordinates in the firm	76	1	89	76	1	92	81	2	95	[94]	0	100
4	79*	Organizing a department or store's effort	70	6	72	81	11	77	82	4	82	88	3	85
5	75	Communicating with other departments or areas	72	3	91	78	3	92	73	6	84	79	6	94
6	71*	Seeking cooperation of other departments or areas	73	8	80	73	6	83	(64)	7	71	[85]	3	94
7	70*	Conducting meetings	63	21	57	68	12	75	73	4	89	[94]	0	96
8	70*	Expediting proper merchandise handling	68	19	62	70	23	65	74	43	45	(52)	33	36
9	67*	Exchanging information with equals in the organization	70	5	83	70	2	89	58	2	90	70	0	97
10	66	Reporting on employees' traits and abilities to superiors	64	4	86	69	6	86	60	8	79	[82]	0	90
11	49*	Arranging meetings	41	18	40	46	13	57	53	11	72	[79]	3	93

		Managerial-Controlling												
1	92	Handling responsibilities that cannot be delegated	90	2	93	93	2	95	93	2	94	97	3	97
2	85*	Comparing operations with past performance or expectations	(74)	10	77	87	5	90	91	1	95	97	0	90
3	85	Insuring accuracy in paperwork	83	10	80	83	10	81	86	21	74	79	6	82
4	81*	Analyzing sales figures	(67)	17	65	82	11	79	[91]	1	96	88	0	97
5	77*	Evaluating performance of subordinates	68	13	74	75	13	80	83	2	95	[91]	0	96
6	77*	Collecting information and preparing reports	(67)	14	69	79	13	75	80	28	71	85	6	87
7	75*	Controlling operating expenses	(58)	20	42	74	18	63	86	6	82	[88]	27	60
8	70*	Controlling selling expenses	(55)	18	55	68	19	56	[84]	8	80	73	21	63
9	69*	Working with percentages, fractions, and decimals	60	13	63	70	11	89	73	13	83	[85]	6	88
10	69*	Controlling the finances of a department or area	(58)	19	45	65	25	46	[82]	15	71	70	18	54
11	66*	Training employees to be accurate in sales transactions	67	16	65	65	26	54	72	38	46	(30)	39	12
12	64*	Analyzing operating costs	(39)	25	25	63	26	44	[81]	8	81	[88]	3	84
13	64*	Analyzing a retail profit and loss statement	(32)	28	20	63	30	47	[85]	7	89	[91]	3	91
14	62*	Analyzing selling costs	(44)	20	35	61	21	48	[78]	11	74	61	15	63
15	62*	Maintaining "open to buy" records	(47)	20	27	57	44	39	[73]	29	49	64	30	36
16	60*	Calculating stock turnover	55	20	43	57	30	41	64	23	55	[70]	24	51
17	55*	Taking part in making store policy	(42)	19	35	56	15	50	61	13	57	[67]	12	66
18	50*	Analyzing information provided by data processing	(40)	9	37	51	11	46	55	10	60	[64]	9	69
19	47*	Checking and reporting on cash registers	44	28	43	47	31	41	52	50	22	(24)	27	15
20	45*	Approving requests that deviate from normal procedures	38	15	43	47	13	57	45	10	71	[64]	3	88
21	44*	Using business mathematical formulas	(31)	12	29	49	15	49	45	11	46	[70]	24	51
22	39*	Adding columns of figures by hand	[53]	10	68	39	11	61	(26)	16	40	42	6	67
23	33*	Analyzing charts and graphs	(23)	15	16	33	15	30	35	10	40	[58]	9	69
24	33*	Dictating letters or reports	(18)	11	16	28	12	31	42	9	52	[61]	3	69
25	32*	Using ratios to determine deviation from standards	25	11	21	30	13	26	38	17	38	39	15	39
		Managerial-Innovating												
1	95	Searching for ways to make my position more effective	95	0	100	95	3	94	95	2	99	94	0	100
2	88*	Adopting ideas to improve performance	80	5	84	90	4	92	90	3	94	94	0	97
3	70*	Seeking ways to eliminate paperwork	71	8	73	74	6	79	66	17	68	76	3	85
4	44*	Improving department or area operation by use of innovations	37	7	48	43	10	57	45	6	67	[55]	3	76

*The null hypothesis, "No significant difference exists in the proportion of mid-managers performing the activity when compared by level of management," was rejected at the .05 level.

crucial to their success than did mid-managers at higher levels. Conversely, management-type activities were judged by mid-managers at higher levels as more crucial to their success.

The null hypothesis, "No significant difference exists in the proportion of middle managers performing the activity when compared by levels of management" was established for each of the 202 activities. When each of the activities was tested by Chi-Square for the null hypothesis, 159 of the 202 activities were rejected at the .05 level of significance. This test reported a difference in the mid-managers' responses and indicated that activities of middle managers do differ at various management levels.

To show variations between levels of management, whenever mid-managers at one level of management judged an activity as 10 per cent or less crucial than the average cruciality of all levels, the percentage was indicated by parentheses. Whenever mid-managers at one level of management judged an activity as 10 per cent or more crucial than the average cruciality of all levels, the percentage was bracketed.

The significant difference between the activities of four levels of management clearly indicates four levels. But, the question then becomes, "are the four levels equally discrete in each of the ten major competency areas?" As Table 14 demonstrates, for some competencies the levels

are very discrete. For other competencies, however, the four levels actually collapse into but two or three levels, e.g., in the Selling competency the responses of mid-managers in Levels 2 and 3 are very similar.

In the Selling Competency area, there was a marked contrast between the first and fourth levels with mid-managers at Level 1, the lowest level, indicating that selling activities were very crucial to their success. Sixteen of 19 selling activities received the highest cruciality rating from Level 1; 12 of the 19 activities were judged "core crucial" by Level 1 (50 per cent or more of the mid-managers considered the activity crucial). In contrast, Level 4 gave selling activities the lowest cruciality rating with only one activity ranked "core crucial." Levels 2 and 3 ranked selling activities with the same degree of cruciality, each with the same seven activities reported by 50 per cent or more of the mid-managers to be crucial to job success, and both were closer to Level 1 in their responses than Level 4.

Sales Promotion activities that require planning, evaluating, and approving are less crucial for managers operating at Level 1 and more crucial for managers at Level 3. Such activities require higher level decisions than can be made at Level 1. Level 3, including Buyers and Store Managers, scored Sales Promotion activities more crucial for their level than any other level. One-half of

TABLE 14.--Variations between levels of management and competency area in respect to "core crucial" activities.*

Competency Area	Total Number of Activities	"Core Crucial" Activities	Level of Management			
			1	2	3	4
Selling	19	7	63%	37%	37%	5%
Sales Promotion	22	10	22	28	31	19
Buying	34	21	44	65	65	50
Operations	35	17	43	49	54	29
Market Research	14	9	50	64	72	72
Managerial:						
Planning	15	13	60	80	93	93
Directing	23	20	70	74	91	78
Coordinating	11	10	91	91	100	100
Controlling	25	18	52	72	76	84
Innovating	4	3	75	75	75	100
TOTALS	202	128				

*Read as follows: There were 19 activities in the Selling competency area and seven were judged as "core crucial" (50% or more of all middle managers reported the activity crucial to job success). Level 1 reported 63 per cent of the Selling activities as "core crucial"; Levels 2 and 3 reported 37 per cent of the Selling activities as "core crucial"; and Level 4 reported 5 per cent of the Selling activities as "core crucial."

the Sales Promotion activities are least crucial to Level 4 (highest level); they are most tasks actually performed by and crucial to, managers at lower levels.

Buying activities are not as crucial to mid-managers at Levels 1 and 4. They are most crucial to persons at Level 3 which include such positions as Buyer and Store Manager. However, it should be noted that Level 1 reported 30 of the 34 Buying activities as being 25 per cent or more crucial to their job success, indicating that the Buying Competency is an important one for even the lowest level of management.

Operations activities are most crucial for mid-managers operating at Level 3. Twenty per cent (7) of the activities were judged to be 10 per cent or more crucial to Level 3 than any other level. Two activities highly rated by Level 3 and which distinguish Level 3 from the other levels are "Meeting local, state, and federal laws," and "Keeping proper payroll control." Level 2 followed Level 3 in rating Operations activities as crucial. Fifteen of the 34 Operations activities were reported by Level 1 as 50 per cent or more crucial to their success.

The Market Research function is more of a responsibility for Levels 3 and 4. However, there is a subtle difference in the exact nature of the activities at these levels. Level 3 is much more concerned with "Determining consumer demand" (86%), "Recognizing fashion influences and

trends" (85%), and "Forecasting sales for a future period" (76%), all fairly specific activities related to the sales of a department or store operation. Level 4, on the other hand, reports "Keeping informed of public opinion" (82%), "Forecasting future trends or events" (76%), and "Assessing events that may affect the firm" (73%), activities of a more general nature affecting the entire organization, as responsibilities that are most crucial.

Although Level 1 generally scored Market Research activities as less crucial than Levels 3 and 4, it should be noted that Level 1 rated one-half of the Market Research activities (7 out of 14) as 50 per cent or more crucial to their job success.

The Managerial Competency was divided into the five sub-competencies of Planning, Directing, Coordinating, Controlling, and Innovating. On the whole, activities within the managerial competency become more crucial to job success as the mid-manager moves from Level 1 to Level 4.

Levels 2, 3, and 4 are much closer together in their judging of Managerial activities than Level 1. Mid-managers at Level 1 generally viewed managerial activities as less crucial--29 of the 78 activities were scored by them as 10 per cent or less crucial than the average. On the other hand, mid-managers at Level 4 scored 30 of the 78 activities as 10 per cent or more crucial to their job

success. Level 3 reported 16 of the 78 managerial activities as 10 per cent or more crucial.

Figure 3 graphically indicates the importance of Managerial activities by levels of management. The key finding to note is in the cruciality range of 75-100 per cent--Level 4 reports 46 activities in this range; Level 3, 41 activities; Level 2, 29 activities; and Level 1, 25 activities. It can be clearly seen that managerial activities, although generally most crucial to Level 4, the highest level, are also very crucial to mid-managers at Level 1.

Variations in Activities of Middle Managers in Different Functional Areas of the Firm

The fifth question asked in accomplishing the objectives of the study was: Do the activities of middle managers in merchandising positions differ from the activities of middle managers in operations positions? If so, what are the differences? Are they major differences?

There are five basic functional positions within a retail firm: (1) merchandising, (2) operations, (3) sales promotion, (4) control, and (5) personnel. This study analyzed the activities of personnel performing the functions of merchandising and operations. These two functions represent approximately 80 per cent of the supervisory and middle management positions in retail organizations.

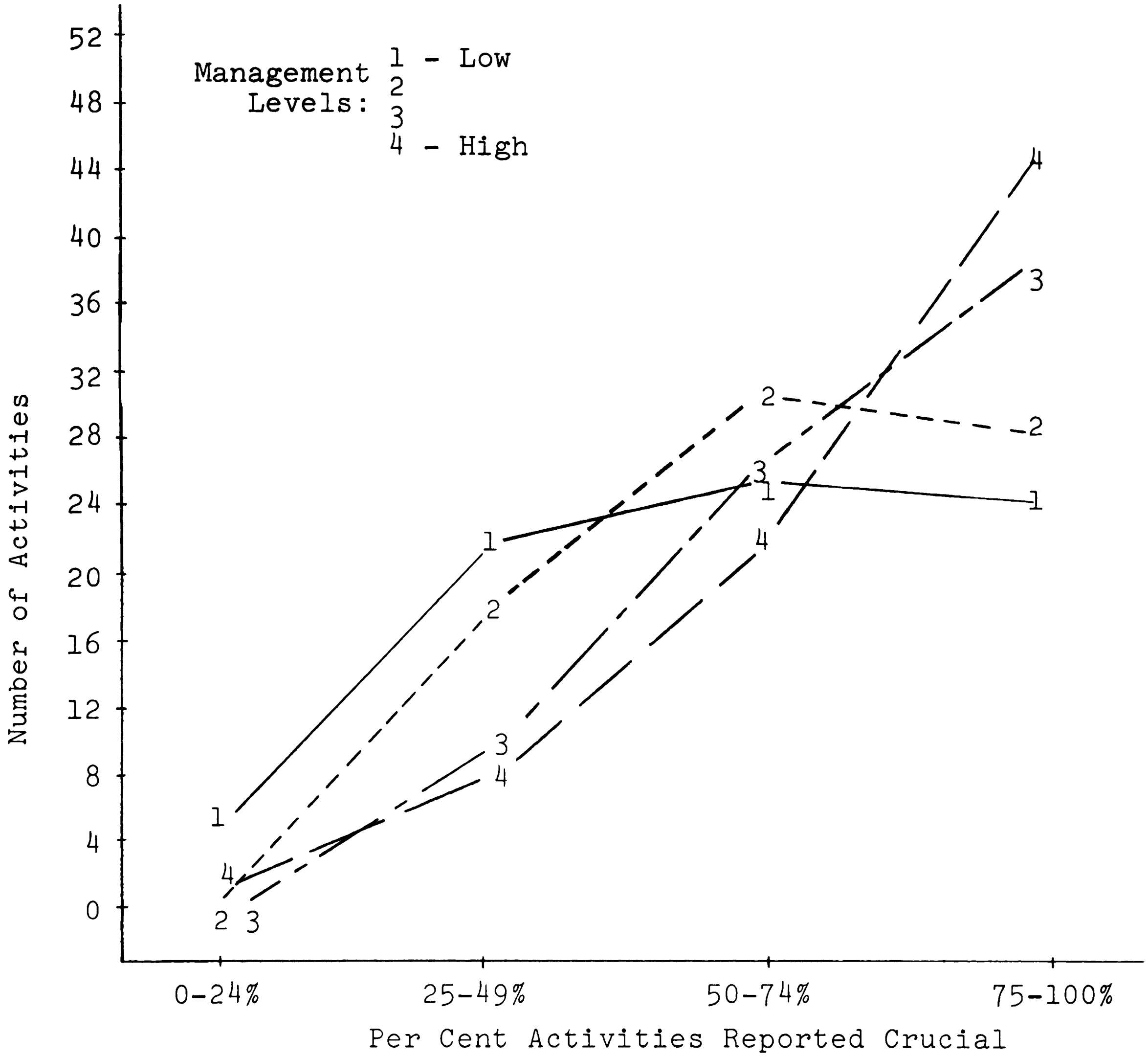

Figure 3.--Cruciality of 78 managerial activities reported by four levels of management.

In order to answer this question, all middle managers in the study had to be placed in either a "merchandising" or "operations" category. It was very difficult placing some middle managers in discrete "merchandising" or "operations" categories since in several cases, job titles and functions of positions varied depending upon the firm and its organizational strategy. In one firm, a store manager might be considered in "merchandising" while in another firm the store manager might be classified under "operations." Responses according to the functional areas of "merchandising" and "operations," therefore, should be analyzed with this fact in mind. There were 392 middle managers classified in the operations function and 309 in merchandising (Table 15).

The null hypothesis, "No significant difference exists in the proportion of middle managers performing the activity when compared by functional area of employment" was established for each of the 202 activities. When each of the activities was tested by Chi-Square for the null hypothesis, 87 of the 202 activities were rejected at the .05 level of significance. This test reported a difference in the mid-managers' responses and indicated that activities of middle managers do differ according to functional area of employment.

In order to show variations between functional areas, whenever mid-managers in one functional area judged an

TABLE 15.--Marketing activities in ten competency areas and ranked according to crucialness to success on the job by two functional areas of employment: N = 701.[1]

Rank Order in the Competency Area	Crucial to Success	Activity	Operations N=392 Crucial	Operations N=392 Not Done But Must Be Known	Operations N=392 Done By Me	MDS'G N=309 Crucial	MDS'G N=309 Not Done But Must Be Known	MDS'G N=309 Done By Me
		Selling						
1	78	Handling customer complaints	78	21	72	78	10	78
2	70	Insuring customer satisfaction after transaction	74	29	57	66	19	58
3	64	Interpreting store policies to customers	66	20	68	60	14	67
4	62	Greeting customers	66	11	76	57	14	65
5	58*	Explaining technical and sales features of merchandise	(47)	30	43	[72]	14	74
6	57	Approving customer returns and allowances	57	31	49	58	11	72
7	55*	Providing comfort and convenience services to customers	63	29	50	(44)	19	41
8	49*	Processing customer returns and allowances	45	51	32	55	27	53
9	48	Selling to customers on the floor	47	41	40	48	25	53
10	45	Completing customer sales transactions	45	51	25	44	32	38
11	43	Approving customer checks	40	28	56	46	7	71
12	40	Recording sales on unit control records	38	41	13	43	37	21
13	36*	Demonstrating merchandise	30	39	19	41	19	39
14	31*	Recording non-cash transactions (e.g., C.O.D. charge)	25	49	14	25	26	19
15	29	Operating a cash register	30	64	18	28	44	36
16	27	Writing sales slips	25	52	16	30	35	31
17	21	Wrapping and packing merchandise	22	42	13	17	23	19
18	19*	Confirming customer delivery dates	17	32	6	21	18	13
19	16	Preparing delivery tickets	17	35	5	13	20	8
		Sales Promotion						
1	90	Presenting the firm in a favorable image	90	2	93	88	3	93
2	73	Determining merchandise display location	73	12	76	72	14	67
3	71	Coordinating advertising with merchandise display	69	19	60	73	12	78
4	67	Planning or revising department or store layout	70	2	76	63	15	61
5	67	Planning and scheduling promotional and special events sales	69	19	85	63	21	50
6	62	Evaluating effectiveness of advertisements	64	15	66	58	17	61
7	61	Planning advertising programs and schedules	61	27	49	60	30	41
8	59	Coordinating advertising with personal selling	57	18	52	62	16	57
9	58	Deciding what merchandise is to be advertised	56	21	50	57	21	48
10	50	Approving advertising proofs	44	24	41	55	15	56
11	47	Preparing merchandise for display	43	41	21	53	27	50
12	45*	Requesting display and sign services	(32)	27	37	[61]	18	74
13	43*	Submitting merchandise facts and rough copy of advertisements	35	22	30	50	14	47
14	43	Selecting themes for displays	40	26	43	46	22	49
15	42	Working with home office on sales promotion planning	44	11	36	37	18	29
16	39	Keeping records of merchandise on display	40	32	29	39	25	40
17	35	Selecting fixtures for merchandise displays	29	26	35	38	18	35
18	33*	Using advertising mats	37	36	29	28	30	19
19	33	Checking merchandise returned to stock from display	29	41	25	38	22	52
20	25	Trimming show cases	24	44	12	25	25	21
21	20*	Trimming store windows	25	38	12	13	18	5
22	8	Preparing information for public relations staff	9	11	6	6	8	4

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[1] All figures shown as percentages and rounded to the nearest whole.

[illegible]

[illegible]

TABLE 15.--Continued.

Rank Order in the Competency Area	Crucial to Success	Activity	Function: Operations N=392 Crucial	Function: Operations N=392 Not Done But Must Be Known	Function: Operations N=392 Done By Me	Function: MDSG. N=309 Crucial	Function: MDSG. N=309 Not Done But Must Be Known	Function: MDSG. N=309 Done By Me
		Buying						
1	81	Determining appropriate quantities to order	78	24	60	85	8	81
2	80*	Deciding when to take markdowns	76	13	68	85	13	58
3	77*	Deciding how much markdown to take	72	15	67	84	14	76
4	73	Using the law of supply and demand in ordering merchanidse	72	14	64	77	8	73
5	72	Buying to meet consumer demand	71	18	56	72	10	48
6	69	Using purchase order and requisition forms	65	29	48	76	6	84
7	66	Determining styles to order	64	22	50	69	9	43
8	66*	Determining shrinkage loss	75	18	62	(56)	31	33
9	65	Following vendors' or company suggested retail prices	62	15	63	68	11	69
10	65	Buying merchandise for special promotions	67	15	50	63	15	59
11	65*	Working with buying office	58	14	46	73	6	76
12	64	Determining timing of merchandise purchases	63	12	56	65	11	58
13	61*	Ordering merchandise from central warehouse	68	50	34	54	23	46
14	60	Maintaining buying records	57	39	28	64	21	61
15	58	Estimating markdowns for a month or season	61	19	49	55	25	40
16	56	Figuring markon	55	30	40	58	25	48
17	54	Determining markups	54	25	42	54	31	38
18	53*	Working with home office or division on buying	46	11	43	61	9	56
19	53	Computing "open to buy"	56	35	28	47	27	27
20	51*	Using federal and state regulatory laws in decision-making	[62]	17	57	(37)	20	28
21	51	Communicating with vendors about adjustments or returns	46	35	33	58	20	46
22	47	Determining prices for individual items	46	19	36	48	20	34
23	46*	Scheduling the buying shipment dates	39	23	28	55	16	49
24	45*	Dealing with vendors' salesmen	(35)	14	52	[57]	8	70
25	42*	Establishing price lines for department	35	21	23	51	20	40
26	39*	Providing information to be submitted to data processing	37	28	27	41	13	36
27	39*	Using vendors' reorder procedures	36	35	26	41	12	41
28	34*	Buying from wholesalers	43	15	29	28	10	53
29	24	Ordering from catalogs	21	21	16	28	8	33
30	24*	Selecting buying sources	18	19	12	32	18	27
31	23*	Negotiating with vendors about terms and discounts	15	17	7	[36]	15	25
32	22*	Requesting datings from vendors or home office	15	20	12	30	14	21
33	19*	Attending vendors' shows or visiting markets to buy	(6)	10	10	[36]	6	43
34	9	Determining trade-in prices	8	9	5	9	6	9
		Operations						
1	82*	Developing and applying measures to prevent store shrinkage	88	4	86	74	16	66
2	77	Supervising inventory-taking	80	14	76	74	12	77
3	77	Conducting a physical inventory	78	21	66	76	22	66
4	77*	Insuring store or department cleanliness	82	19	76	70	17	71
5	74	Maintaining a perpetual or basic stock inventory	71	33	46	79	19	64
6	68*	Meeting local, state and federal laws	[78]	15	77	(56)	19	53
7	67	Establishing basic stock count schedules and reorder plans	66	26	47	67	21	55
8	66*	Using a telephone	58	3	93	74	1	99
9	63*	Keeping proper payroll control	[86]	23	68	(34)	23	21
10	61	Checking condition of merchandise received	58	49	34	64	27	58
11	61	Recording stock count information	58	60	20	67	37	48
12	59*	Watching for and preventing accident hazards	67	7	89	49	11	70
13	58*	Insuring adherence to store credit policies	64	20	58	50	19	50
14	57	Keeping files of invoices and purchase orders	57	64	15	58	44	34
15	56	Organizing perimeter (reserve) stock	54	38	43	59	24	62

TABLE 15.--Continued.

Rank Order in the Competency Area	Crucial to Success	Activity	Functions					
			Operations N=392			MDSG. N=309		
			Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me
16	55*	Maintaining and using a unit control system	47	33	25	[68]	23	54
17	53*	Receiving, checking, and marking merchandise	61	60	18	(43)	43	22
18	44*	Requisitioning supplies, equipment, or fixtures	52	39	51	(33)	25	47
19	44	Scheduling inventories	44	15	34	45	27	40
20	42*	Insuring preventative maintenance of equipment and fixtures	[55]	27	54	(24)	15	26
21	39	Working with a code system in marking merchandise	38	37	30	40	24	38
22	37*	Controlling perishable goods	[49]	28	41	(22)	11	19
23	37	Using the retail price accounting system	38	28	24	36	19	30
24	35*	Scheduling repairs on customer or store mdse.	37	41	27	32	18	38
25	32	Preparing price tickets	39	56	9	28	38	15
26	31	Reporting sales by the split-ticket system	28	37	12	34	24	29
27	30*	Insuring proper lighting and heating or cooling	[40]	31	48	(14)	14	16
28	27*	Insuring prompt service in customer lunch area	[44]	24	34	(7)	6	6
29	26*	Inspecting lunch area for cleanliness	[41]	19	59	(9)	13	15
30	25*	Operating an adding machine	20	31	46	31	13	63
31	25	Controlling warehouse stockkeeping functions	30	57	19	20	68	13
32	24	Analyzing computer print-outs to determine inventory content	22	10	19	25	9	21
33	20*	Scheduling and controlling delivery to customers	23	37	12	15	24	29
34	16*	Using professional and local shopping services	19	13	21	11	11	10
35	8	Using a typewriter	8	19	14	8	16	14
		Market Research						
1	80	Determining consumer demand	77	16	69	84	14	77
2	80	Recognizing fashion influences and trends	77	17	70	84	11	79
3	75	Keeping informed of public opinion	71	14	76	78	15	78
4	70	Determining strengths and weaknesses of competitors	72	10	75	69	13	71
5	70	Shopping local competitors	66	14	70	74	10	81
6	65	Forecasting sales for a future period	68	20	61	62	21	50
7	59	Forecasting future trends or events	55	17	48	62	20	48
8	56	Searching for new items and lines	52	10	50	61	10	59
9	53*	Obtaining market information from buying or home office	45	13	45	62	10	62
10	48	Assessing events that may affect the firm	49	14	49	44	18	38
11	40*	Reading trade publications	31	4	88	48	2	87
12	36*	Using data processing information to forecast sales	29	17	20	44	14	33
13	35	Assessing socio-economic trends in the community	38	17	33	31	19	25
14	14*	Assessing proposed retail legislation	16	28	14	11	17	5
		Managerial--Planning						
1	99	Following instructions from superiors	99	0	99	98	0	99
2	91	Reading company memorandums and reports	94	1	97	87	2	96
3	87	Establishing procedures to accomplish goals	90	6	88	83	9	79
4	82	Determining the goals of a department or area	85	13	80	80	22	68
5	80	Determining responsibilities of employees	83	12	86	75	15	73
6	79	Establishing standards for the department or area	78	12	74	78	13	73
7	75*	Planning for the future from current operations data	82	7	79	67	14	59
8	74	Evaluating proposals and suggestions	76	7	84	70	9	73
9	72*	Determining priorities	76	8	78	65	6	64
10	65*	Preparing budgets	[82]	21	66	(44)	23	28
11	59*	Determining a sales budget for a season	[70]	24	56	(45)	27	28
12	52*	Determining expenses for a season	[70]	17	61	(30)	22	18
13	50	Deciding action to take based upon data processing information	49	9	45	50	14	41
14	44*	Determining finances necessary to accomplish sales budget	52	19	37	35	18	23
15	35*	Establishing an advertising budget	42	19	33	(23)	19	12

TABLE 15.--Continued.

Rank Order in the Competency Area	Crucial to Success	Activity	Functions					
			Operations N=392			MDSG. N=309		
			Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me
		Managerial--Directing						
1	98	Making proper, timely decisions	99	1	98	97	1	97
2	97*	Supervising employees	99	1	98	94	3	95
3	95	Communicating ideas to others	96	1	98	92	1	97
4	94	Delegating responsibilities to others	96	0	98	93	2	96
5	94	Motivating employees	97	1	97	91	3	92
6	93	Assigning work to be done by others	95	1	96	91	2	94
7	91*	Keeping employees' morale high	95	1	97	86	5	88
8	89	Insuring that employees comply with their assignments	92	8	88	84	5	87
9	81*	Instructing employees on store policies and procedures	87	12	86	74	15	76
10	77*	Handling employee complaints	86	8	89	(65)	16	66
11	76*	Using "on-the-job" training method	83	14	78	70	11	29
12	74*	Evaluating employees' progress	81	8	87	66	13	71
13	74*	Disciplining employees	81	12	81	(63)	15	60
14	73*	Teaching salespeople new merchandise information	68	27	55	80	12	77
15	69	Training new salespeople	71	42	42	66	21	58
16	55*	Hiring employees	[72]	35	52	(39)	24	23
17	55*	Using training aids and equipment	62	20	64	(45)	17	36
18	55*	Training new non-selling employees	[67]	47	39	(38)	20	31
19	53*	Promoting employees	[69]	16	65	(30)	27	20
20	51*	Interviewing job applicants	[62]	29	61	(34)	21	30
21	47*	Discharging employees	[59]	28	56	(31)	29	21
22	42*	Counseling employees on their personal problems	50	12	68	(30)	15	36
23	32*	Recommending employees for transfer	36	19	46	24	16	26
		Managerial--Coordinating						
1	90	Keeping superiors informed	86	2	96	93	1	98
2	89	Exchanging information with superiors in the firm	86	1	94	92	2	97
3	79	Exchanging information with subordinates in the firm	79	2	93	77	1	91
4	79*	Organizing a department or store's effort	85	6	85	72	7	71
5	75	Communicating with other departments or areas	78	4	90	71	4	88
6	71	Seeking cooperation of other departments or areas	73	7	77	67	7	80
7	70	Conducting meetings	74	8	93	64	15	68
8	70	Expediting proper merchandise handling	72	32	56	67	25	57
9	67	Exchanging information with equals in the organization	62	8	86	71	4	88
10	66	Reporting on employees' traits and abilities to superiors	69	6	83	60	5	82
11	49*	Arranging meetings	52	10	68	44	17	49
		Managerial--Controlling						
1	92	Handling responsibilities that cannot be delegated	94	2	95	91	2	94
2	85	Comparing operations with past performance or expectations	88	3	91	83	6	86
3	85	Insuring accuracy in paperwork	84	17	75	85	9	83
4	81	Analyzing sales figures	85	5	86	77	13	78
5	77*	Evaluating performance of subordinates	85	5	12	(67)	13	76
6	77	Collecting information and preparing reports	79	26	66	74	9	79
7	75*	Controlling operating expenses	[91]	9	85	(54)	20	40
8	70*	Controlling selling expenses	[84]	10	77	(54)	21	42
9	69	Working with percentages, fractions, and decimals	69	13	78	69	11	74
10	69*	Controlling the finances of a department or area	77	20	62	(59)	20	45
11	66*	Training employees to be accurate in sales transactions	75	35	53	(56)	21	52
12	64*	Analyzing operating costs	[80]	14	73	(45)	25	31
13	64*	Analyzing a retail profit and loss statement	[75]	16	69	(51)	26	39
14	62*	Analyzing selling costs	[72]	13	66	(50)	22	40
15	62	Maintaining "open to buy" records	61	37	31	59	27	35

TABLE 15.--Continued.

Rank Order in the Competency Area	Crucial to Success	Activity	Functions					
			Operations N=392			MDSG. N=309		
			Crucial	Not Done But Must Be Known	Done By Me	Crucial	Not Done But Must Be Known	Done By Me
16	60	Calculating stock turnover	64	27	44	(43)	22	52
17	55*	Taking part in making store policy	64	11	60	(43)	20	34
18	50	Analyzing information provided by data processing	49	11	51	52	10	43
19	47*	Checking and reporting on cash registers	56	47	34	(37)	23	34
20	45*	Approving requests that deviate from normal procedures	49	10	67	39	15	50
21	44	Using business mathematical formulas	43	16	43	45	11	55
22	39*	Adding columns of figures by hand	(20)	15	46	[49]	10	69
23	33	Analyzing charts and graphs	34	12	35	30	15	28
24	33	Dictating letters or reports	34	8	40	29	12	40
25	32	Using ratios to determine deviation from standards	30	14	28	34	13	29
		Managerial--Innovating						
1	95	Searching for ways to make my position more effective	94	2	97	96	1	97
2	88	Adopting ideas to improve performance	90	4	92	85	4	89
3	70	Seeking ways to eliminate paperwork	72	12	75	69	8	72
4	44	Improving department or area operation by use of innovation	44	6	64	41	8	53

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*The null hypothesis, "No significant difference exists in the proportion of mid-managers performing the activity when compared by functional area of employment," was rejected at the .05 level.

activity as 10 per cent or less crucial than the average cruciality of both areas, the percentage was indicated by parentheses. Whenever mid-managers in one functional area judged an activity as 10 per cent or more crucial than the average cruciality of both areas, the percentage was bracketed.

In the Selling, Sales Promotion, and Market Research Competency areas, the responses of mid-managers in merchandising and operations functions tended to be quite similar with the slight difference being one of emphasis. The merchandising mid-manager was more concerned with merchandise, e.g., "Explaining technical and sales features of merchandise," "Approving customer returns and allowances," "Demonstrating merchandise," "Coordinating advertising with personal selling," "Requesting display and sign services," and "Submitting merchandise facts and rough copy of advertisements;" the operations mid-manager more concerned with operations-type activities, e.g. "Greeting customers," "Providing comfort and convenience services to customers," "Planning or revising department or store layout."

Merchandising mid-managers view the Market Research activities of "Determining consumer demand," "Recognizing fashion influences and trends," and "Shopping local competitors" as slightly more crucial to them while on the other hand, Operations mid-managers are somewhat more concerned with local store matters such as "Determining

strengths and weaknesses of competitors," "Forecasting sales for a future period."

The difference in cruciality of activities is especially apparent in the Buying, Operations, and Market Research Competencies. The Merchandising mid-manager views Buying activities as more crucial to his job success, with activities such as "Determining appropriate quantities to order," "Deciding when and how much markdown to take," "Working with home office of division on buying," and "Communicating with vendors" scored the highest. However, the Operations mid-manager is also involved in Buying and he views 19 of 34 activities as 50 per cent or more crucial to his success.

A marked difference was found in the Operations competency where clear-cut operating activities such as "Developing and applying measures to prevent store shrinkage," "Insuring department or store cleanliness," "Meeting local, state and federal laws," "Keeping proper payroll control," and "Insuring preventative maintenance of equipment and fixtures" were more crucial to "Operations" mid-managers. Also, to again point out the overlapping nature of the job functions, it should be noted that Merchandising mid-managers reported 14 of the 34 Operations activities as 50 per cent or more crucial to them.

The Operations middle managers distinctly viewed the Managerial Competency as more crucial to their success,

reporting 13 out of 78 managerial activities as 10 per cent or more crucial than the average of both functional areas. Figure 3 presents a graphic illustration of this difference. This finding was expected since the Merchandising mid-manager, generally considered a specialist, is primarily involved with product-related activities rather than personnel and accounting-type functions. On the other hand, the Operations mid-manager, charged with the responsibility of supporting the merchandising function, is more concerned with managerial activities such as preparing budgets, determining and controlling operating and selling expenses, analyzing operating and selling costs and retail profit and loss statements, and hiring, training, promoting, and discharging employees.

The Merchandising middle managers' responses provide evidence that they also must have management and supervisory skills, for while the Operations mid-manager reported 67 of the 78 managerial activities as 50 per cent or more crucial, the Merchandising mid-manager judged 53 of the 78 as crucial to his success.

Hierarchy of Middle Management Positions

The sixth question asked in accomplishing the objectives of the study was: Are middle management positions in retail organizations discretely organized into levels, or are the positions overlapping and continuous?

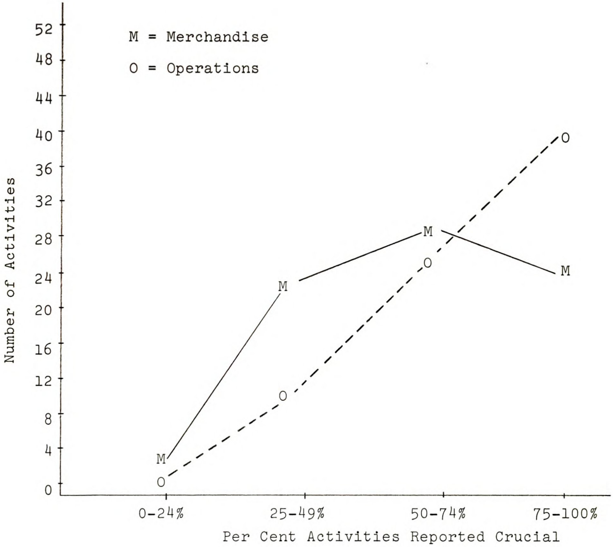

Figure 4.--Cruciality of 78 managerial activities reported by functional area.

The answer to this question was derived from personal interviews with retail executives and an analysis of the mid-manager survey. The evidence is quite clear that retail management positions are not organized in discrete levels, but are overlapping and continuous. Only one executive of the more than 40 interviewed indicated otherwise. That executive held a top-level position in a small traditional department store where management positions were easily defined and differentiated.

The retail executives agreed that there was no criteria by which you could judge the level at which a mid-manager operated. Although the easiest level to distinguish might be considered the lowest management level (Level 1), agreement could not be reached by all firms as to whether the first level could be truly considered management. A position such as Department Manager in a chain organization is often viewed as the first level of management. However, in many cases, the salary and responsibilities of Department Managers vary greatly, with some Department Managers actually serving as an Assistant Store Manager, and others earning considerably more than individuals at higher management levels.

The finding that levels of management overlap should not be interpreted to mean that a given retail organization does not have a hierarchy of management. Each firm surveyed had an established promotion policy and a definite

hierarchical management ladder. Quite often, lateral movement is a promotion in the management hierarchy. In several organizations, an individual initially promoted to store manager is given one of the firm's smaller stores to manage. After a period of several years, if the individual has performed satisfactorily and can assume greater responsibility, he is made manager of a larger store. This same procedure may be repeated four or five times until the individual is managing one of the firm's high-volume stores. In this sequence, even though the individual's title remained the same, each move was a promotion and a step up the management ladder. The same illustration can be used for Department Managers who, although they keep their title, move to departments with greater sales volumes and staff.

The previously reported analysis of middle manager activities at different levels of management indicated that it was difficult to distinguish between levels. For purposes of this study, all retail middle managers were placed in one of four management levels. Using a consistent selection procedure to place personnel at four discrete levels, it becomes possible, because of the wide range of positions and responsibilities, to distinguish between the responses of the upper and lower levels. The analysis indicated that mid-managers at the lowest level (Level 1) tended to judge rank and file-type activities

most crucial while, on the other hand, the middle managers at higher levels, especially the highest level (Level 4), judged the management-type activities as being most crucial for them.

Executives' Belief Concerning Mid-Management Education

In addition to the responses of 701 middle managers, the writer interviewed retail executives in 20 multi-unit retail organizations to secure opinions concerning the educational needs of middle managers. The following paragraphs summarize these beliefs:

1. There are great opportunities in the retail trade industry available to the post-secondary graduate. The large retail firms are actively seeking these students for employment in supervisory and management positions. In addition to the many job entry positions, there are a wide range of post-entry positions which provide both horizontal and vertical job mobility and provide for the career development of management personnel.

2. The executives reported overwhelming preference for graduates with retail experience. The two major reasons given were: first, the graduate is considered "screened" i.e., he knows both the advantages and disadvantages of retailing and, therefore, he is more likely to remain in retailing than the graduate with no experience; secondly, the graduate enters the profession equipped with

a practical as well as a theoretical understanding of retailing. Management trainee turnover among individuals who have had prior exposure to retailing was reported to be considerably less than those who have had no previous experience. Teachers can be of service to the student and retail profession by discussing not only the glamorous features of retailing but also its negative aspects such as work on weekends, long hours, willingness to relocate, customer orientation, et al.

3. The executives strongly believe that the student should not learn routine rank and file activities in the classroom, but rather on the job. They are in unanimous agreement that the cooperative program with supervised work experience is a necessary and vital part of the post-secondary mid-management curriculum.

4. Since many mid-managers have too narrow a view of the retail profession in the opinion of the executives, it was agreed that the mid-manager's post-secondary educational experience should be broadening. They feel that the mid-manager receives excellent training in rank and file-type activities with the firm and, therefore, he should acquire basic concepts of retailing while in school. Post-secondary institutions should not provide highly specialized training to prospective middle managers since in all likelihood they will not remain highly specialized once they join a large retail firm.

5. The use of computers and allied electronic equipment is being accelerated by all large retail organizations. The growing use of computers in these organizations will increase the role of middle managers instead of diminishing their importance. The executives believe that any "mid-management" program should include at least one course in data processing so that students will gain an understanding and appreciation of the inherent capabilities of the computer.

6. In multi-unit general merchandising firms, the primary buying function is accomplished in the home or regional office. The growth of retail organizations has encouraged the creation of highly specialized merchandising positions in headquarter locations. This has meant that the number of operating positions in a firm has increased at a greater rate than merchandising positions and, therefore, more operating personnel with administrative and managerial skills are needed.

7. Post-secondary institutions should emphasize training in attitudes since the proper attitude toward one's job, fellow employees, and desire to learn are vital to the success of middle managers. The retail executives indicated that technical competence has not been the overriding factor in the success or failure of middle managers. An entrepreneurial attitude toward "making money" is of greater importance than "A's" on a report card.

8. The biggest weakness of middle managers is their inability to manage. This deficiency results in the failure of more middle managers than any other reason. Additional glaring weaknesses are the inability to handle administrative detail, poor planning and organizing of time and work, an inability to delegate work, and an inability to teach and develop subordinates.

9. The most crucial skill needed by the middle manager is the ability to supervise and manage. Since this skill is so critical, the executives believe that considerable time should be devoted to insuring that post-secondary students acquire this ability. In addition to managerial ability, the two outstanding qualities needed by the mid-manager are the ability to think (analyze) and to deal with people (human relations).

10. Post-secondary educational institutions should insure that students understand and appreciate the fact that our private enterprise system is the cornerstone of American democracy. To be successful in retailing, the middle manager must, of necessity, understand the "profit" concept.

CHAPTER V

THE FINDINGS, PART II: TAXONOMY OF RETAIL MANAGEMENT ACTIVITIES

Introduction

One of the purposes of this study was to establish a taxonomy of marketing and distribution activities performed by retail mid-managers. According to Webster's Third New International Dictionary, a taxonomy is "the systematic distinguishing, ordering, and naming of type groups within a subject field."[74] The taxonomy of retail management activities ranks activities in order of cruciality to success according to major competency areas and depicts similarities and differences in cruciality between types of retail organizations, levels of management, and functional area of employment. The taxonomy could be used as a basis on which more accurate decisions might be made prior to initiating or revising curriculum content in post-secondary middle management education programs. The Taxonomy of Retail Management Activities is presented in Table 16.

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[74] Philip B. Gove (ed.), Webster's Third New International Dictionary (Springfield, Mass.: G. & C. Merriam Company, 1968).

TABLE 16.--Taxonomy of retail middle management activities.

Rank Order in Competency Area	Activity	Crucial to Success	Type of Firm				Level of Mgt.				Function	
			TDS	DS	CS	VS	Low 1	2	3	High 4	O*	M*
	Selling--Core Crucial											
1	Handling customer complaints	78	–							–		
2	Insuring customer satisfaction after transaction	70	–			+				–		
3	Interpreting store policies to customers	64	–				+					
4	Greeting customers	62	–			+	+			–		
5	Explaining technical and sales features of merchandise	58					+			–	–	+
6	Approving customer returns and allowances	57	–			+	+			–		
7	Providing comfort and convenience services to customers	55	–			+				–		–
	Not Core Crucial											
8	Processing customer returns and allowances	49	–	+			+			–		
9	Selling to customers on the floor	48	–			+	+			–		
10	Completing customer sales transactions	45	–			+	+			–		
11	Approving customer checks	43	–	+			+			–		
12	Recording sales on unit control records	40	–		+					–		
13	Demonstrating merchandise	36	–				+			–		
14	Recording non-cash transactions (e.g., C.O.D., charge)	31	–			+				–		
15	Operating a cash register	29	–			+				–		
16	Writing sales slips	27								–		
17	Wrapping and packing merchandise	21	–							–		
18	Confirming customer delivery dates	19										
19	Preparing delivery tickets	16								–		
	Sales Promotion--Core Crucial											
1	Presenting the firm in a favorable image	90										
2	Determining merchandise display location	73	–			+				–		
3	Coordinating advertising with merchandise display	71	–			+				–		
4	Planning or revising department or store layout	67	–									
5	Planning and scheduling promotional and special sales events	67	–			+	–		+			
6	Evaluating effectiveness of advertisements	62	–			+	–		+			
7	Planning advertising programs and schedules	61	–	–		+	–		+			
8	Coordinating advertising with personal selling	59	–		+	+				–		
9	Deciding what merchandise is to be advertised	58	–	–		+	–					
10	Approving advertising proofs	50					–					

	Not Core Crucial											
11	Preparing merchandise for display	47		+	-	+	+			-		
12	Requesting display and sign services	45		+			+			-	-	+
13	Submitting merchandise facts and rough copy of advertisements	43	-			+						
14	Selecting themes for display	43	-			+				-		
15	Working with home office on sales promotion planning	42				+	-		+			
16	Keeping records of merchandise on display	39	-			+				-		
17	Selecting fixtures for merchandise displays	35	-			+						
18	Using advertising mats	33	-			+			-			
19	Checking merchandise returned to stock from display	33					+		-			
20	Trimming show cases	25				+		-	-	-		
21	Trimming store windows	20	-			+						
22	Preparing information for public relations staff	8										
	Buying--Core Crucial											
1	Determining appropriate quantities to order	81	-			+						
2	Deciding when to take markdowns	80	-		+	+				-		
3	Deciding how much markdown to take	77	-			+				-		
4	Using the law of supply and demand in ordering merchandise	73	-			+	-					
5	Buying to meet consumer demand	72	-	-	+	+						
6	Using purchase order and requisition forms	69		+								
7	Determining styles to order	66	-		+	+				-		
8	Determining shrinkage loss	66	-		+	+			+	-		-
9	Following vendors or company suggested retail prices	65	-			+				-		
10	Buying merchandise for special promotions	65	-	-	+	+	-		+	-		
11	Working with buying office	65		+								
12	Determining timing of merchandise purchases	64	-	-	+	+	-					
13	Ordering merchandise from central warehouse	61	-		+	+				-		
14	Maintaining buying records	60	-	-		+				-		
15	Estimating markdowns for a month or a season	58	-	-	+	+	-		+			
16	Figuring markon	56	-			+	-					
17	Determining markups	54	-			+	-					
18	Working with home office or division on buying	53										
19	Computing "open to buy"	53	-	-	+	+	-		+	+		
20	Using federal and state regulatory laws in decision-making	51	-			+	-		+		+	-
21	Communicating with vendors about adjustments or returns	51								-		
	Not Core Crucial											
22	Determining prices for individual items	47				+	-		+			
23	Scheduling the buying shipment dates	46	-	-	+					-		
24	Dealing with vendors' salesmen	45	+	+	-					-	-	+
25	Establishing price lines for department	42		-								
26	Providing information to be submitted to data processing	39	-							-		
27	Using vendors' reorder procedures	39	-	+		+						
28	Buying from wholesalers	34		+	-							
29	Ordering from catalogs	24	-			+				-		
30	Selecting buying sources	24	+			+						

TABLE 16.--Continued.

Rank Order in Competency Area	Activity	Crucial to Success	Type of Firm				Level of Mgt.				Function	
			TDS	DS	CS	VS	Low 1	2	3	High 4	O*	M*
31	Negotiating with vendors about terms and discounts	23	+		-				+			+
32	Requesting datings from vendors or home office	22										
33	Attending vendors shows or visiting markets to buy	19	+			-			+		-	+
34	Determining trade-in prices	9										
	Operations--Core Crucial											
1	Developing and applying measures to prevent store shrinkage	82	-			+						
2	Supervising inventory-taking	77	-			+				-		
3	Conducting a physical inventory	77	-			+				-		
4	Insuring store or department cleanliness	77	-							-		
5	Maintaining a perpetual or basic stock inventory	74	-									
6	Meeting local, state and federal laws	68	-			+	-		+	-	+	-
7	Establishing basic stock count schedules and reorder plans	67	-			+						
8	Using a telephone	66	+			-				+		
9	Keeping proper payroll control	63	-			+	-		+		+	-
10	Checking conditions of merchandise received	61				+				-		
11	Recording stock count information	61								-		
12	Watching for and preventing accident hazards	59	-	+		+				-		
13	Insuring adherence to store credit policies	58	-	+	+	-				-		
14	Keeping files of invoices and purchase orders	57		+						-		
15	Organizing a perimeter (reserve) stock	56	-	+						-		
16	Maintaining and using a unit control system	55			+	-						+
17	Receiving, checking, and marking merchandise	53	-			+				-		-
	Not Core Crucial											
18	Requisitioning supplies, equipment, or fixtures	44	-	+		+						
19	Scheduling inventories	44								-		-
20	Insuring preventative maintenance of equipment and fixtures	42	-	+		+	-		+	-	+	-
21	Working with a code system in marking merchandise	39	-			+						
22	Controlling perishable goods	37	-			+	-		+	-	+	-
23	Using the retail price accounting system	37					-		+			
24	Scheduling repairs on customer or store merchandise	35	-							-		
25	Preparing price tickets	32	-			+				-		
26	Reporting sales by the split ticket system	31	-		+	-	+			-		
27	Insuring proper lighting and heating or cooling	30	-			+	-				+	-
28	Insuring prompt service in customer lunch area	27	-			+	-		+		+	-
29	Inspecting lunch area for cleanliness	26	-			+	-		+	-	+	-
30	Operating an adding machine	25					-			-		
31	Controlling warehouse stockkeeping functions	25	-			+				-		
32	Analyzing computer print-outs to determine inventory	24				+						
33	Scheduling and controlling delivery to customers	20										

34	Using professional and local shopping services	16								+		
35	Using a typewriter	8										
	Market Research--Core Crucial											
1	Determining consumer demand	80	–							–		
2	Recognizing fashion influences and trends	80	–		+					–		
3	Keeping informed of public opinion	75										
4	Determining strengths and weaknesses of competitors	70	–			+	–					
5	Shopping local competitors	70	–			+						
6	Forecasting sales for a future period	65	–		+		–		+			
7	Forecasting future trends or events	59		–						+		
8	Searching for new items and lines	56	–	–	+	+						
9	Obtaining market information from buying or home office	53										
	Not Core Crucial											
10	Assessing events that may effect the firm	48	–	+			–			+		
11	Reading trade publications	40										
12	Using data processing information to forecast trends in the community	36										
13	Assessing socio-economic trends in the community	35										
14	Assessing proposed retail legislation	14				+						
	Managerial-Planning--Core Crucial											
1	Following instructions from superiors	99										
2	Reading company memorandums and reports	91										
3	Establishing procedures to accomplish goals	87										
4	Determining the goals of a department or area	82	–									
5	Determining responsibilities of employees	80	–	+								
6	Establishing standards for the department or area	79										
7	Planning for the future from current operations data	75	–			+	–		+	+		
8	Evaluating proposals and suggestions	74					–			+		
9	Determining priorities	72					–		–	+		
10	Preparing budgets	65	–			+	–		+	+	+	–
11	Determining a sales budget for a season	59	–	–	+	+	–		+	+	+	–
12	Determining expenses for a season	52	–	–		+	–		+	+	+	–
13	Deciding action to take based on data processing information	50	–				–			+		
	Not Core Crucial											
14	Determining finances necessary to accomplish sales budget	44	–	–		+	–		+			
15	Establishing an advertising budget	35	–	–	+	+	–		+	+		–
	Managerial-Directing--Core Crucial											
1	Making proper, timely decisions	98										
2	Supervising employees	97										
3	Communicating ideas to others	95										
4	Delegating responsibilities to others	94										
5	Motivating employees	94										
6	Assigning work to be done by others	93										

TABLE 16.--Continued.

Rank Order in Competency Area	Activity	Crucial to Success	Type of Firm				Level of Mgt.				Function	
			TDS	DS	CS	VS	Low 1	2	3	High 4	O*	M*
7	Keeping employee's morale high	91										
8	Insuring that employees comply with their assignments	89	-									
9	Instructing employees on store policies and procedures	81	-					-				
10	Handling employee complaints	77	-			+				-		-
11	Using "on-the-job" training methods	76	-							-		
12	Evaluating employees progress	74	-							+		
13	Disciplining employees	74	-									-
14	Teaching salespeople new merchandise information	73	-			+				-		
15	Training new salespeople	69	-	+		+				-		
16	Hiring employees	55	-	+		+	-		+		+	-
17	Using training aids and equipment	55	-			+				-		-
18	Training new non-selling employees	55	-	+		+	-			-	+	-
19	Promoting employees	53	-			+	-	-	+	+	+	-
20	Interviewing job applicants	51	-			+	-		+	+	+	-
	Not Core Crucial											
21	Discharging employees	47	-			+	-				+	-
22	Counseling employees on their personal problems	42	-			+						-
23	Recommending employees for transfer	32		+						+		
	Managerial-Coordinating--Core Crucial											
1	Keeping superiors informed	90										
2	Exchanging information with superiors in the firm	89										
3	Exchanging information with subordinates in the firm	79				-				+		
4	Organizing a department's or store's effort	79	-									
5	Communicating with other departments or areas	75										
6	Seeking cooperation of other departments or areas	71							-	+		
7	Conducting meetings	70								+		
8	Expediting proper merchandise handling	70	-			+				-		
9	Exchanging information with equals in the organization	67										
10	Reporting on employee's traits and abilities to superiors	66	-	+		-				+		
	Not Core Crucial											
11	Arranging meetings	49								+		
	Managerial-Controlling--Core Crucial											
1	Handling responsibilities that cannot be delegated	92										
2	Comparing operations with past performance or expectations	85					-					
3	Insuring accuracy in paperwork	85										
4	Analyzing sales figures	81					-		+			

5	Evaluating performance of subordinates	77	−						+		−
6	Collecting information and preparing reports	77					−				
7	Controlling operating expenses	75	−			+	−		+	+	−
8	Controlling selling expenses	70	−		+	+	−	+			
9	Working with percentages, fractions and decimals	69							+		−
10	Controlling the finances of a department or area	69	−			+	−	+		+	−
11	Training employees to be accurate in sales transactions	66				+			−		−
12	Analyzing operating costs	64	−			+	−	+	+	+	−
13	Analyzing a retail profit and loss statement	64	−			+	−	+	+	+	−
14	Analyzing selling costs	62	−	−	+	+	−	+		+	−
15	Maintaining "open to buy" records	62	−	−	+	+	−	+			
16	Calculating stock turnover	60	−						+		−
17	Taking part in making store policy	55	−			+	−		+		−
18	Analyzing information provided by data processing	50					−		+		
	Not Core Crucial										
19	Checking and reporting on cash registers	47	−			+	−		−		−
20	Approving requests that deviate from normal procedures	45							+		
21	Using business mathematical formulas	44					−		+		
22	Adding columns of figures by hand	39				−	+	−		−	+
23	Analyzing charts and graphs	33				+	−		+		
24	Dictating letters and reports	33					−		+		
25	Using ratios to determine deviation from standards	22				+					
	Managerial-Innovating--Core Crucial										
1	Searching for ways to make my position more effective	95									
2	Adopting ideas to improve performance	88									
3	Seeking ways to eliminate paperwork	70									
	Not Core Crucial										
4	Improving department or area operation by use of innovations	44							+		

*O = Operations; M = Merchandising

Explanation of Taxonomy

All activities are grouped into the ten competency areas of Selling, Sales Promotion, Buying, Operations, Market Research and Managerial. The Managerial competency is divided into the sub-competency areas of Planning, Directing, Coordinating, Controlling, and Innovating. The activities within a competency area are ranked in order of cruciality to success according to the composite response of all 701 mid-managers. The ten columns that follow the composite response represent the four types of firms, four levels of managment, and two functional areas of employment being analyzed.

In order to provide a scale to determine the similarity or differences in activities among firms, management levels, and job functions, a criterion had to be developed. The criterion established for this study assumed that whenever the response to an activity by one type of firm, level of management, or functional area ranked more or less than 10 per cent crucial from the composite response of all 701 mid-managers, there was a substantial difference which should be noted. For purposes of this study, if the activity was ranked as less than 10 per cent crucial, a minus sign "-" was placed in the appropriate column. If the activity was ranked as more than 10 per cent crucial, a plus sign "+" was placed in the appropriate column.

An additional criterion was established to provide a core of mid-management activities which would receive serious consideration by curriculum planners. These activities, called "core crucial" activities, were those rated as crucial to job success by 50 per cent or more of the 701 retail mid-managers.

Analysis of Taxonomy

There were 128 activities which were rated as "core crucial," representing 63 per cent of the 202 activities analyzed. Exactly one-half of these "core crucial" activities were found in the Managerial competency area. The other half were spread among the Selling, Sales Promotion, Buying, Operations, and Market Research competencies.

Figure 5 presents a graphic representation of the 64 core non-managerial activities and the 64 core managerial activities. The major factor to be noted is the very high percentage of managerial activities found 50 per cent or more crucial to success. The response of all 701 mid-managers indicated that 85 per cent of the managerial activities listed in the questionnaire were core activities, whereas only 52 per cent of the 124 non-managerial activities were judged as core activities. This finding, indicating the importance of supervisory and managerial skills to the middle manager, was corroborated in interviews with retail executives responsible for mid-management

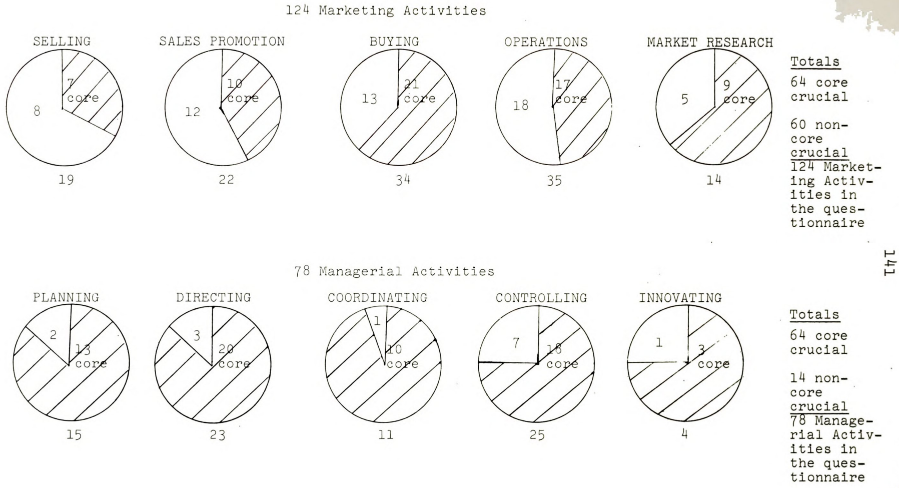

Figure 5.--Activities reported 50 per cent or more crucial ("core crucial") to job success of middle managers in general merchandising firms. [Read as follows: In the Selling Competency area, 7 of 19 activities were reported 50 per cent or more crucial ("core crucial") to job success.]

development. Most of the executives indicated that the greatest weakness of middle managers was their inability to manage.

Of the 128 activities ranked as "core crucial" (crucial to the success of 50 per cent or more of the mid-managers), 50 per cent (64 activities) were managerial and, therefore, by definition were not rank and file activities. Of the remaining 50 per cent (64 Marketing activities), approximately 56 per cent or 23 activities were judged to be rank and file-type activities. Figure 6 presents a graphic comparison of the "core crucial" Marketing activities according to rank-and-file type and management-type activities.

Some of the rank-and-file type "core crucial" activities followed by their cruciality percentages are: "Greeting Customers" (62%), "Presenting the Firm in a Favorable Image" (90%), "Using Purchase Order and Requisition Forms" (69%), "Conducting a Physical Inventory" (77%), "Checking Condition of Merchandise Received" (61%), and "Recognizing Fashion Influences and Trends" (80%). The fact that so many rank-and-file activities are "core crucial" provides evidence that management personnel are called upon to perform many routine tasks, which are crucial to their success on the job. It becomes an educational decision, however, as to how to best provide training for students in such tasks. The retail executives were in development.

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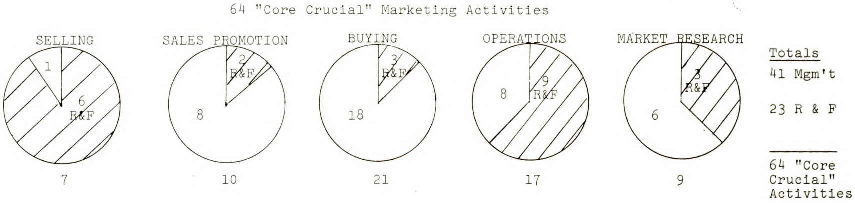

Figure 6.--Comparison of the "core crucial" marketing activities according to rank and file-type and management-type activities. (Slashed area represents rank and file-type marketing activities judged to be "core crucial" while the blank area represents management-type activities judged to be "core crucial".)

general agreement that such routine activities should not be taught in school but rather learned on the job by the student.

Table 17, presenting the "core crucial" activities according to competency area, lists only the 128 activities reported to be crucial to job success by 50 per cent or more of the retail middle managers.

TABLE 17.--"Core crucial" activities of retail middle managers.*

Selling	
78%	Handling customer complaints
70	Insuring customer satisfaction after transaction
64	Interpreting store policies to customers
62	Greeting customers
58	Explaining technical and sales features of merchandise
57	Approving customer returns and allowances
55	Providing comfort and convenience service to customers
Sales Promotion	
90%	Presenting the firm in a favorable image
73	Determining merchandise display location
71	Coordinating advertising with merchandise display
67	Planning & scheduling promotional & special sales events
62	Evaluating effectiveness of advertisements
61	Planning advertising programs and schedules
59	Coordinating advertising with personal selling
58	Deciding what merchandise is to be advertised
50	Approving advertising proofs
Buying	
81%	Determining appropriate quantities to order
80	Deciding when to take markdowns
77	Deciding how much markdown to take
73	Using the law of supply and demand in ordering merchandise
72	Buying to meet consumer demand
69	Using purchase order and requisition forms
66	Determining styles to order
66	Determining shrinkage loss
65	Following vendors or company suggested retail prices
65	Buying merchandise for special promotions
65	Working with buying office
64	Determining timing of merchandise pruchases
61	Ordering merchandise from central warehouse
60	Maintaining buying records
58	Estimating markdowns for a month or a season
56	Figuring markon
54	Determining markups
53	Working with home office or division on buying
53	Computing "open to buy"
51	Using federal and state regulatory laws in decision-making
51	Communicating with vendors about adjustments or returns

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*"Core crucial" activities are those reported crucial to job success by 50 per cent or more retail middle managers.

TABLE 17.--Continued.

Operations

82%	Developing and applying measures to prevent store shrinkage
77	Supervising inventory-taking
77	Conducting a physical inventory
77	Insuring store or department cleanliness
74	Maintaining a perpetual or basic stock inventory
68	Meeting local, state and federal laws
67	Establishing basic stock count schedules and reorder plans
66	Using a telephone
63	Keeping proper payroll control
61	Checking condition of merchandise received
61	Recording stock count information
59	Watching for and preventing accident hazards
58	Insuring adherence to store credit policies
57	Keeping files of invoices and purchase orders
56	Organizing a perimeter (reserve) stock
55	Maintaining and using a unit control system
53	Receiving, checking, and marking merchandise

Market Research

80%	Determining consumer demand
80	Recognizing fashion influences and trends
75	Keeping informed of public opinion
70	Determining strengths and weaknesses of competitors
70	Shopping local competitors
65	Forecasting sales for a future period
59	Forecasting future trends or events
56	Searching for new items and lines
53	Obtaining market information from buying or home office

Managerial--Planning

99%	Following instructions from superiors
91	Reading company memorandums and reports
87	Establishing procedures to accomplish goals
82	Determining the goals of a department or area
80	Determining responsibilities of employees
79	Establishing standards for the department or area
75	Planning for the future from current operations data
74	Evaluating proposals and suggestions
72	Determining priorities
65	Preparing budgets
59	Determining a sales budget for a season
52	Determining expenses for a season
50	Deciding action to take based on data processing information

TABLE 17.--Continued.

Managerial--Directing	
98%	Making proper, timely decisions
97	Supervising employees
95	Communicating ideas to others
94	Delegating responsibilities to others
94	Motivating employees
93	Assigning work to be done by others
91	Keeping employees' morale high
89	Insuring that employees comply with their assignments
81	Instructing employees on store policies and procedures
77	Handling employee complaints
76	Using "on-the-job" training methods
74	Evaluating employees' progress
74	Disciplining employees
73	Teaching salespeople new merchandise information
69	Training new salespeople
55	Hiring employees
55	Using training aids and equipment
55	Training new non-selling employees
53	Promoting employees
51	Interviewing job applicants
Managerial--Coordinating	
90%	Keeping superiors informed
89	Exchanging information with superiors in the firm
79	Exchanging information with subordinates in the firm
79	Organizing a department's or store's effort
75	Communicating with other departments or areas
71	Seeking cooperation of other departments or areas
70	Conducting meetings
70	Expediting proper merchandise handling
67	Exchanging information with equals in the organization
66	Reporting on employee's traits and abilities to superiors
Managerial--Controlling	
92%	Handling responsibilities that cannot be delegated
85	Comparing operations with past performance or expectations
85	Insuring accuracy in paperwork
81	Analyzing sales figures
77	Evaluating performance of subordinates
77	Collecting information and preparing reports
75	Controlling operating expenses
70	Controlling selling expenses
69	Working with percentages, fractions and decimals
69	Controlling the finances of a department or area
66	Training employees to be accurate in sales transactions

TABLE 17.--Continued.

Managerial--Controlling (continued)

64	Analyzing operating costs
64	Analyzing a retail profit and loss statement
62	Analyzing selling costs
62	Maintaining "open to buy" records
60	Calculating stock turnover
55	Taking part in making store policy
50	Analyzing information provided by data processing

Managerial--Innovating

95%	Searching for ways to make my position more effective
88	Adopting ideas to improve performance
70	Seeking ways to eliminate paperwork

CHAPTER VI

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS AND IMPLICATIONS FOR CURRICULUM DEVELOPMENT AND INSTRUCTION

Purpose of the Study

This study was an analysis of marketing activities performed by retailing mid-managers. The purpose of the study was to derive a taxonomy of job activities that could be employed in appraising the appropriateness of "mid-management" courses in post-secondary institutions. The specific objectives of the study were the following:

1. Establish a list of common and identifiable marketing and distribution activities performed by a wide range of retail middle managers.
2. Determine if activities of middle managers differ between retail organizations, and their differences, if any.
3. Determine if activities of middle managers differ at various levels of management, and their differences, if any.
4. Determine if activities of middle managers differ according to functional area of employment, and their differences, if any.

5. Determine if there exists a discrete hierarchy of middle management positions or if the positions are overlapping and continuous?
6. Translate the data describing job activities into a taxonomy that post-secondary curriculum planners and teachers can use in assessing or developing the retailing courses in their mid-management programs.

Need for the Study

The basic need for this study evolved from a consideration of the following economic and educational conditions in our society as they relate to post-secondary "mid-management" programs:

1. The changing structure of our labor force and the continual upgrading of manpower skills required in our economy.
2. The continued expansion of the retail trade industry and concomitant requirement for greater numbers of middle management personnel.
3. The demand for retail management personnel reflected in the rapid growth of post-secondary programs to train students for these positions.
4. Current employers tend to prefer students entering the labor market to be older and to possess a greater degree of occupational preparation in their specific field.

5. There have been very few research studies concerned with the post-secondary terminal mid-management program.
6. Educational instructors and leaders, prospective students, and the general public need to be alerted to current information about marketing functions and activities that could be performed by prospective graduates of a two-year post-secondary educational institution.
7. Post-secondary mid-management programs need to be adapted to the present job market.

Assumptions of the Study

For the purpose of this study, it was assumed that there are certain similar activities performed by a wide range of retailing management personnel and that these activities are important to successful job performance. Further, that the knowledge of these activities can be the basis for deriving instructional objectives leading to the development of more efficient, effective, and relevant post-secondary mid-management programs.

Additional assumptions established were that the middle manager was located organizationally between rank and file employees and corporate officers, that there were four levels of retail management which could be identified, and that activities performed by mid-managers are

essentially the same regardless of the size of community in which they are employed.

Limitations of the Study

The study was limited to an analysis of the activities performed by retail management personnel occupying merchandising and operations positions in Standard Industrial Classification Group No. 531 Department Stores and SIC Group No. 533 Variety Stores. The study was further limited to include only those employees who met the following criteria:

1. The middle manager was employed on a full-time basis and had occupied his position for one full year.
2. The individual had displayed an ability to succeed in that position.
3. The employee was considered promotable by the firm.

Procedures for the Study

The study was conducted in five phases: (1) determination of population and sample, (2) development of research instruments, (3) interviewing and data collection, (4) analysis of data, and (5) preparation of a taxonomy of retail middle management activities.

Phase I. Determination of Population and Sample

The retail trade industry is divided into 11 Standard Industrial Classifications by the United States Census Bureau. Major Group 53 "Retail Trade--General Merchandise" was selected for investigation because a good proportion of post-secondary retail mid-management students enter positions within this group. The group consists of Traditional Department Stores, Department Store Chains, Discount Stores, and Variety Stores and accounts for approximately $25 billion dollars in annual sales with over one-half of this volume generated by large multi-unit organizations. Fifteen firms, ranging in size from about $20 million to over $2 billion in annual sales, and representative of firms in this group were selected and agreed to participate in this study.

Phase II. Development of Research Instruments

Two research instruments were used in this study. The Retail Management Survey (Appendix B) was a questionnaire containing 202 statements that describe activities performed by a wide range of management personnel. The questionnaire was developed to ascertain the crucialness of each activity to job success and frequency of performance of each activity. The activities, scrambled in order of appearance in the questionnaire, were grouped into the major competency areas of selling, sales promotion, buying,

operations, market research, and management. Two pilot tests, a jury of experts review, and a pre-test were conducted prior to administering the instrument to the sample. The Structured Retail Executive Interview (Appendix C) was a questionnaire used by the researcher in personal meetings with retail executives. The purpose of the interview was to gain insight into the retail management hierarchy, secure expert opinion concerning definitions and criteria used by firms in the retail trade industry, and to gain background information related to the study.

Phase III. Interviewing and Data Collection

A personal visit was made to the home office of the 15 participating retail firms. At each firm, one or more executives was interviewed and a proportional sample of mid-managers selected from various levels of management and functional area of employment. The individual selected occupied his position for at least one year, displayed an ability to succeed in that position, and was considered promotable by the firm.

Questionnaires, together with postage-paid return envelopes and a letter from the firm explaining the study were mailed by each firm to a total sample of 846 middle managers. Altogether, 701 respondents returned usable questionnaires. This represented an 83% return of questionnaires distributed and 4% of the total population of

17,538 investigated. Responses were received from mid-managers in 48 of the 50 states. Forty-two per cent of the respondents were located in the East North Central States of Ohio, Michigan, Indiana, Wisconsin, and Illinois.

Phase IV. Analysis of Data

The responses on each questionnaire were coded and transferred to punch cards. Tabulation and statistical computations were performed by the computer of The Computer Institute for Social Science at Michigan State University. Computer print-outs provided a rank order listing of activities by all respondents, by levels of management, by functional area of employment, by retail classification, and by major competency areas. Total responses to each activity, the relationships between frequency of performance and crucialness to job success, significant differences between management levels, functional areas of employment, retail classification, and major competency areas were also computed. Four major analyses of the data were: (1) In-Total Response of all 701 mid-managers to each activity, (2) Response based upon type of firm, (3) Response based upon level of management, and (4) Response based upon functional area of employment.

Phase V. Preparation of a Taxonomy of Retail Middle Management Activities

A taxonomy of retail middle management activities was prepared for use in post-secondary institutions and was based upon an analysis of the activities of middle managers in a wide range of multi-unit general merchandising organizations and interviews with retail executives concerning mid-management skills and abilities needed at present and in the future. The taxonomy consists of a classification of activities by major marketing and distribution competency areas ranked according to their relative importance, their crucialness to success on the job, and frequency of performance. The format was planned to assist post-secondary personnel in initiating and assessing "mid-management" programs.

Findings

All findings in the study relate to retail middle managers occupying merchandising and operations positions in 15 general merchandising firms. The firms, all multi-unit organizations, represent four classifications of retail organizations.

Profile of Mid-Managers

The average age of the 610 male and 91 females participating in the study was 35. Over 97 per cent of the respondents completed high school, with close to 50 per indicating completion of at least two years of college.

Over one-fourth of the mid-managers held college degrees, generally earned in a business curricula. Approximately one-half of the respondents reported that they had never taken a retailing course in an institution beyond the high school level.

While 35 per cent of the middle managers entered retailing in a supervisory or management capacity and reported that they never held a rank and file position, 22 per cent worked in rank and file positions for at least one year prior to promotion to management. Eighty-seven per cent of all respondents had three or more years of management experience.

The mid-managers, responding from 48 states, were evenly divided among the job functions of merchandising and operations and reported working an average of 50 hours per week.

Common and Identifiable Activities of Middle Managers

1. The 11 top-ranked Selling activities, although customer-oriented, relate to satisfying customers, not actually selling to them. Direct customer sales efforts are made by rank and file employees with mid-managers serving as a backup to handle complaints and insure customer satisfaction.

2. The Sales Promotion clusters of display location and advertising were both ranked "core-crucial" (crucial

to the success of over 50 per cent of the middle managers). Both clusters involve activities based upon judgments that must be made by the mid-manager. However, the actual activities, e.g. window display, preparation of advertisements, are performed by specialists in the firm.

3. Decision-making, a responsibility which is a vital component of the managerial competency, is clearly illustrated in the crucial Buying judgments that must be made by mid-managers. Key decisions concerning what to buy, how much, and when, are all activities reported very crucial to success in the Buying competency.

4. The two major clusters of activities in the Operations competency reported crucial to middle managers were the safeguarding of merchandise and the knowledge of current stock positions. Several clerical-type tasks such as checking merchandise, keeping files, and organizing stock, although basically rank and file activities and supervised by the mid-manager, were also reported as contributing to his job success.

5. In the Market Research competency area, three clusters of activities were found to be crucial to the 701 mid-managers: (1) knowledge of the consumer and his demands, (2) knowledge of one's competitors, and (3) forecasting sales and future events.

6. The activities in the competency areas of Selling and Operations were usually performed on a daily basis.

The Managerial, Sales Promotion, Buying, and Market Research activities were usually accomplished on a daily and/or weekly basis.

7. The activity which received the highest cruciality rating of all 202 activities was "Following instructions from superiors" which was rated crucial to success by 99 per cent of the mid-managers.

8. The Managerial competency was reported as the most crucial of all competency areas. Sixty-four out of 78 managerial activities were judged "core-crucial" (crucial to the job success of 50 per cent or more mid-managers). The activities that cluster around supervision, decision-making, problem-solving, communicating, human relations, analysis, and innovation were found to be most crucial to the success of mid-managers.

Variations in Activities of Middle Managers in Different Types of Firms

1. The null hypothesis, "No significant difference exists in the proportion of middle managers performing the activity when compared by type of firm," was rejected at the .05 level of significance. Therefore, the activities of middle managers do differ depending upon the type firm in which they are employed.

2. A major difference exists between activities performed by middle managers in traditional department

The Managerial, Sales Promoting, Buying and Market

Research activities

and/or weekly

Selling

Pre

stores when compared to middle managers in discount, chain, and variety organizations.

3. The middle manager in a traditional department store is more of a specialist with fewer activities to perform than mid-managers in discount, chain, and variety stores. Traditional department store mid-managers viewed most activities as less crucial than the average of all respondents.

4. The middle manager in a variety organization is more of a generalist with a great number of activities to perform. The variety store mid-manager indicated most activities as more crucial than the average of all respondents.

5. The responses of discount and chain store middle managers to activities in all competency areas were quite similar.

6. No significant difference was found between mid-managers in the four retail classifications in respect to 22 general activities such as following instructions, establishing standards, evaluating proposals, motivating employees, and collecting information and preparing reports.

Variations in Activities of Middle Managers in Different Levels of Management

1. The null hypothesis, "No significant difference exists in the proportion of middle managers performing the activity when compared by level of management," was

rejected at the .05 level of significance. Therefore, the activities of middle managers do differ depending upon the level of management in which they are employed.

2. Routine rank and file marketing and distribution activities were found to be more crucial to lower levels of management whereas managerial-type activities were found to be more crucial to the higher levels of middle management.

3. Of the four levels of management (Level 1 being the lowest):

A. Level 1 reports that Selling activities are most crucial to their success and more crucial to them than to any other level; the competencies of Planning and Controlling received the lowest cruciality rating from Level 1.

B. Level 2 reported Sales Promotion, Buying, and Operations activities as most crucial to their success. On the whole, their view of the crucialness of activities was between that of Level 1 and Level 3.

C. Level 3 reported Sales Promotion, Buying, Operations, and Directing activities as most crucial to their success. No other level reported these competency areas as being so crucial.

D. Level 4 mid-managers (the highest level) reported Managerial activities as the most crucial tasks they performed. The Managerial competency also received the highest ranking from Level 4 when compared with the other levels. On the other hand, Level 4 provided the lowest rating for the activities concerned with Selling, Sales Promotion, Buying, and Operations.

Variation in Activities of Middle Managers in Different Functional Areas of the Firm

1. Job titles and functions of positions vary depending upon the type of firm and its organizational strategy. Also, merchandising and operations functions tend to overlap creating a situation in which it is often very difficult to clearly distinguish between merchandising and operations positions.

2. The null hypothesis, "No significant difference exists in the proportion of middle managers performing the activity when compared by functional area of employment," was rejected at the .05 level of significance. Therefore, the activities of middle managers do differ depending upon the functional area in which they work.

3. The greatest difference between Merchandising and Operations mid-managers was found in the Buying, Operations, and Managerial competencies. The Merchandising

mid-manager viewed Buying as most crucial; the Operations mid-manager reported Operations and Managerial activities as most crucial.

4. The responses of Merchandising and Operations mid-managers in the Selling, Sales Promotion, and Market Research competency areas tended to be quite similar. The slight difference was one of emphasis with the Merchandising mid-manager more concerned with product-related activities whereas the Operations mid-manager was more concerned with merchandising-support activities.

Hierarchy of Middle Management Positions

1. The level "middle management," defined for purposes of this study as all management from first-line management up to but not including the corporate level, actually does exist in retail firms. However, the term is generally not used by firms when referring to the wide range of positions included within the definition just described.

2. Although retail executives reported that middle management positions are not organized in discrete levels but are overlapping and continuous, each firm had developed its own system for placing individuals on a management hierarchy.

3. From the retail executive's viewpoint, the graduate of a two-year "mid-management" program is generally

considered a mangement trainee with potential to rise to the highest management level. This contrasts with professional educators in post-secondary institutions who use the term "mid-management" to describe career retail management programs.

Taxonomy of Retail Management Activities

1. Of the 202 activities in the questionnaire, 128 (63%) of them were rated as "core crucial," meaning that they were judged crucial to job success by 50 per cent or more of all mid-managers.

2. One-half of the 128 "core crucial" activities (64 activities) were activities in the managerial competency area.

3. Eighty-five per cent of all managerial activities in the questionnaire were "core crucial," whereas 52 per cent of all non-managerial activities were reported "core crucial."

4. Twenty-three rank and file-type activities were found to be "core crucial."

Executives' Belief Concerning Mid-Management Education

1. There are many supervisory and management positions presently available and the demand for personnel to fill such positions will be even greater in the years ahead. The large retail firms are actively seeking

post-secondary students for employment in these supervisory and management positions. Students with retailing experience are preferred since they are familiar with both the advantages and disadvantages of retailing. Management trainee turnover is considerably less among individuals who have had retail work experience.

2. The executives believe that rank and file activities should be learned on the job, preferably in a supervised cooperative program. They feel strongly that post-secondary educational institutions should not teach rank and file activities or provide highly specialized training, but rather provide a broad education in subjects such as psychology, sociology, and communications which will better equip the student for responsibilities beyond initial job entry positions.

3. The growing use of computers in large multi-unit organizations will not lessen, but instead increase the importance of middle management personnel.

4. The number of operating positions has increased at a greater rate than merchandising positions and, therefore, more operating personnel with administrative and managerial skills are needed.

5. The biggest weakness of many middle managers is an inability to manage. This weakness is also the most crucial skill needed by them. Additional glaring weaknesses are an inability to handle administrative detail,

lack of planning and organizing, an inability to delegate work, and an inability to teach and develop subordinates.

Conclusions

1. There are a set of common and identifiable activities crucial to the success of retail middle managers in different types of firms, by levels of management, and by job functions. This identifiable set of activities can be used as the basis for "mid-management" curriculum development.

2. Mid-managers cope with a wide range of activities in fulfilling the requirements of their positions. It follows then, that the education of post-secondary students for such positions should be broad enough to encompass the activities found most crucial to the success of middle managers. The Taxonomy of Retail Management Activities can be useful in establishing teaching priorities and determining the breadth of training desired.

3. The successful middle manager needs technical as well as managerial skills. The technical skill is of greatest importance at the lowest level of middle management. However, the managerial skill is also very important to the lowest level of middle management, for it is at this level that the number of contacts between managers and subordinates is greatest.

4. Because there are significant differences between the activities performed by middle managers in traditional

(independent) department stores and mid-managers in discount, chain, and variety stores, "mid-management" curricula should not be based on the traditional department store model. The major differences between types of firms should be considered when developing a "mid-management" curriculum and providing individualized instruction for students planning careers in one type of firm.

5. Retail middle management positions are difficult to classify since they are not organized into discrete levels of management. However, four levels of management were identified in this study, and knowledge of the crucial activities of each level should be considered when planning for the career development of students.

6. Many rank and file activities found to be crucial to the success of the middle manager operating at the lowest management level are activities performed most frequently in the student's first job. Therefore, the higher the degree of competency by the "mid-management" graduate in performing these activities, the greater the chances of his initial success on the job.

7. Curriculum planners should carefully evaluate the level of competency of students enrolled in their programs. Those students without rank and file experience should be exposed to such activities prior to entry into management trainee positions. Many of these activities

can best be learned on the job in a cooperative program between the school and a firm.

8. Although there were differences between activities performed by mid-managers in Merchandising and Operations functions, there were sufficient similarities to indicate that graduates of "mid-management" programs need to be proficient in both functions.

9. The managerial competency, judged to be the most crucial of all competency areas by the middle managers and confirmed by executive belief, should receive primary instructional emphasis in a "mid-management" curricula. The expansion of retail organizations and the accelerating use of computers as a management tool indicates that retailing is becoming more of a science and less of an art. Since operating positions are increasing in importance relative to merchandising positions, the demands for persons with administrative and managerial skills are increasing.

10. Since retail firms are seeking post-secondary "mid-management" students for management positions and the demand for qualified graduates exceeds the supply, "mid-management" curriculum planners and instructors should assess the local and regional needs of retail organizations in cooperation with other area institutions and personnel executives from retail firms to insure that these needs can be met.

Recommendations and Implications for Curriculum Development

The following recommendations and implications for curriculum development have been derived from the findings and conclusions of this study.

1. The Taxonomy of Retail Management Activities, presenting a list of common and identifiable marketing and distribution activities performed by a wide range of middle managers should be used by curriculum planners in appraising the appropriateness of mid-management courses and in determining teaching priorities and instructional activities in post-secondary institutions.

2. Since rank and file activities were so crucial to the lowest level of middle management, the level at which the post-secondary graduate enters, it is recommended that students secure at least one term of rank and file retail work experience before graduation. The recommended arrangement is a cooperative program between the institution and retail firms. Cooperative education provides the student with valuable first-hand retail experience tied to classroom instruction and equips him with practical as well as theoretical understandings of retailing activities.

3. Although many rank and file activities were found to be crucial to the success of middle managers, it is not necessary that they be taught in school. However, the teaching of certain concepts may actually require that an activity be performed so that students can learn to

Recommendations and Implications for Curriculum Development

The following [illegible]

curriculum development [illegible]

and conclusions [illegible]

appreciate its overall importance to the success of the retail middle manager. As an example, 70 per cent of the mid-managers at Level 1 (lowest level) indicated that "Using purchase orders and requisition forms" was crucial to their success. For this activity, the crucial concept to be learned is the understanding of why this seemingly routine activity is so important and its relationship to the flow of paperwork in the business operation.

4. Since significant differences exist in activities performed by mid-managers in different types of firms and functions, each student's career objective should be determined early in his course of study and an instructional strategy developed to prepare him for initial job entry and career objectives. The strategy should provide for individualized instruction and make use of projects and special activities related to the student's career choice.

5. This investigation indicated that a successful middle manager performs a wide range of activities from those that are highly conceptual to those that are skill-oriented. It seems likely, therefore, that instructors should develop and use varied instructional techniques in order to insure that students achieve competency in all activities found "core crucial" to the success of the mid-manager.

6. This study indicated that job entry positions of post-secondary graduates can be identified, and that various management levels do exist. It is recommended

that further research be conducted with the goal of developing career ladders for post-secondary "mid-management" students.

7. Because activities and responsibilities of retail mid-managers are continuously changing as newer merchandising and operations techniques emerge, post-secondary "mid-management" instructors should work closely with employers so that the instructors will be kept abreast of these changes.

8. If faculty are to be consistent with executive belief, post-secondary educational institutions should provide training in supervisory and management skills, psychology, sociology, human relations, communications, and other courses which broaden the educational background of the prospective mid-manager. The institutions should also establish in-service, refresher, or up-dating courses for mid-managers and management trainees in retail firms with a view toward widening the perspective of these individuals and enhancing their career development.

9. The review of current literature which indicated the pressing need for qualified middle managers was confirmed in interviews with retail executives. Since retail firms are seeking prospective managerial talent from post-secondary institutions, the opportunity exists to expand and establish more "mid-management" programs in these institutions.

10. There is a need for studies similar to the present investigation in other retailing and distributive occupations such as food retailing, insurance, banking, wholesaling, and manufacturing to identify clusters of concepts common to a wide range of distributive occupations.

11. There is need for a study of the job mobility patterns of graduates of post-secondary mid-management programs. This study should be made to determine if graduates of this program advance into management positions at an earlier age or a greater rate than the general population of retail store employees.

12. Since the retail executives that were interviewed indicated that the attitudes of middle managers were a primary factor in determining their success, there is need for research to learn more about the attitudes that contribute to a successful mid-manager.

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APPENDICES

APPENDIX A

RETAIL MIDDLE MANAGER SURVEY

APPENDIX A

MICHIGAN STATE UNIVERSITY
Research Project in Middle Management
115 Erickson, College of Education, East Lansing, Michigan

RETAIL MIDDLE MANAGER SURVEY

This survey represents the first step in a study of middle managers in retailing. Later, based upon the results of this survey, an analysis will be made of the activities of a wide range of middle managers. The ultimate purpose of this project is to secure data that will help teachers and curriculum planners in junior and community colleges develop realistic retail programs. We believe that this study will result in more efficient and effective training of young people and, therefore, will be of great benefit to you in producing students better equipped to work for your organization. Your cooperation is greatly appreciated.

TENTATIVE CRITERIA

The term middle management is a catchall phrase which is defined in many ways by many people. Because middle managers occupy various levels in the management pyramid, we are dividing middle management into three levels for the purpose of this study. The three levels have been designated as Lower Middle Management, Middle Middle Management, and Upper Middle Management.

Shown below are tentative criteria for describing these three levels. NOTE: because of the wide range of middle management positions, there is bound to be a duplication and overlapping of titles, responsibilities, and salary between levels. All possible titles have not been included.

Position Level		Description
Lower Middle Management	Titles:	Consists of positions with the following typical titles: Assistant Buyer; Sales Supervisor; Non-selling Supervisor; Department Manager; Assistant Store Manager; Management Trainee.
	Responsibility:	These are positions at the first level of supervision. They are commonly referred to as beginning or trainee management positions.
	Salary:	Basic salary range: $4,500 to $8,000.
Middle Middle Management	Titles:	Consists of positions with the following typical titles: Store Manager; Assistant Division Manager; Assistant Regional Manager; Department Manager; Staff Assistant; Department Head; Buyer.
	Responsibility:	These are positions at a second or possible third level of supervision.
	Salary:	Basic salary range: $7,000 to $14,000.

Upper Middle Management	Titles:	Consists of positions with the following typical titles: Regional Manager; Assistant Divisional Manager; Assistant Merchandise Manager; Department Head; Buyer.
	Responsibility:	These positions are within the upper echelon of middle management and immediately below top management.
	Salary:	Basic salary range: $10,000 to $25,000.

NOTE: It would be helpful if you would glance at the remainder of the survey at this time.

QUESTION 1 Please define middle management according to your firm's definition. In your definition, indicate the upper, middle and lower boundaries of middle management. (For example, you might state that the upper boundary is defined by those positions immediately beneath the vice-presidential level and the lower boundary as beginning with supervisory positions.) Please write your answer on the back page of the survey.

REVISED CRITERIA

After examining the tentative criteria and defining middle management according to your firm's policies:

(please check one)

☐ I agree with the tentative criteria

or

☐ I agree partly, but suggest the following changes

Position Level	Description
Lower Middle Management	
Middle Middle Management	
Upper Middle Management	

****

QUESTION 2 Are middle management positions discretely and distinctly organized into three levels or are the positions overlapping and continuous?

(please check one) ☐ The three levels are discrete and distinct

or

☐ The three levels are continuous and overlapping

****

QUESTION 3 (please check one)

☐ Based on the tentative criteria

or

☐ Based on the tentative criteria plus the changes I have suggested,

The number of middle managers in our (entire) organization is as follows:

Lower Middle Managers	☐
Middle Middle Managers	☐
Upper Middle Managers	☐
TOTAL	☐

****

QUESTION 4 (please check one)

☐ Based on the tentative criteria

or

☐ Based on the tentative criteria plus the changes I have suggested,

The number of middle managers functioning in the areas of merchandising and operations in our (entire) organization is as follows:

(NOTE: If there is a question as to where to classify some middle managers, please classify them in the area in which they spend the greatest percentage of their time.)

Merchandising	☐
Operations	☐
All Other Areas (i.e., Sales Promotion, Personnel & Control)	☐
TOTAL	☐

****

QUESTION 5 (please check one)

☐ Based on the tentative criteria

or

☐ Based on the tentative criteria plus the changes I have suggested,

The number of middle managers functioning in the areas of merchandising and operations according to level of management is as follows:

(NOTE: The figures and totals should be the same as those in Questions 3 and 4.)

Level \ Function	Merchandising	Operations	All Other	Total
Lower Middle Mgmt				
Middle Middle Mgmt				
Upper Middle Mgmt				
TOTAL				

****

QUESTION 6 The number of persons employed in our (entire) organization is as follows:

Top Management ☐

Middle Management ☐

Rank and File ☐

TOTAL ☐

****

Company Name______________________________ Telephone___________

Street Address_________________ City___________ State_________

Name of Person Reporting__________________________________

Title__________________________________

****

ADDITIONAL COMMENTS If you have any additional comments about the criteria or definition of middle management, please feel free to write them on the back of one of the survey pages.

Thank you very much for taking the time to complete this form.

John H. Carmichael

APPENDIX B

RETAIL MANAGEMENT SURVEY QUESTIONNAIRE

RETAIL MANAGEMENT SURVEY

115 ERICKSON, MICHIGAN STATE UNIVERSITY, EAST LANSING, MICHIGAN

Listed below are brief descriptions of activities that may or may not be a part of your position. Please follow the Instructions as you judge each activity. Four examples are provided for your assistance.

INSTRUCTIONS: Place a checkmark in either Column A, B, or C.

If you check Column A, go on to the next activity.

If you check either Column B or C, place a checkmark in Column D.

ACTIVITY	(A) NOT DONE BY ME	(B) NOT DONE BY ME BUT I MUST KNOW	(C) DONE BY ME ON THE AVERAGE (AT LEAST)					(D) CRUCIAL TO SUCCESS IN MY POSITION	
			Daily	Weekly	Monthly	Seasonally	Annually	YES	NO
EXAMPLES									
Operating a cash register	☐	☑	☐	☐	☐	☐	☐	☐	☑
Disciplining subordinates	☐	☐	☐	☑	☐	☐	☐	☑	☐
Trimming store windows	☑	☐	☐	☐	☐	☐	☐	☐	☐
Buying from wholesalers	☐	☐	☐	☐	☐	☑	☐	☐	☑
1. Reading company memorandums and reports	☐	☐	☐	☐	☐	☐	☐	☐	☐
2. Determining merchandise display locations	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
3. Selecting buying sources	☐	☐	☐	☐	☐	☐	☐	☐	☐
Scheduling inventories	☐	☐	☐	☐	☐	☐	☐	☐	☐
Requesting datings from vendors or home office	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
Keeping superiors informed	☐	☐	☐	☐	☐	☐	☐	☐	☐
Determining consumer demand	☐	☐	☐	☐	☐	☐	☐	☐	☐
Organizing perimeter (reserve) stock	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
Determining markups	☐	☐	☐	☐	☐	☐	☐	☐	☐
Motivating employees	☐	☐	☐	☐	☐	☐	☐	☐	☐
Analyzing information provided by data processing. . .	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
Greeting customers	☐	☐	☐	☐	☐	☐	☐	☐	☐
Insuring store or department cleanliness	☐	☐	☐	☐	☐	☐	☐	☐	☐
Selling to customers on the floor	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
Determining the goals of a department or area	☐	☐	☐	☐	☐	☐	☐	☐	☐
Searching for ways to make my position more effective.	☐	☐	☐	☐	☐	☐	☐	☐	☐

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ACTIVITY	(A) NOT DONE BY ME	(B) NOT DONE BY ME BUT I MUST KNOW	(C) DONE BY ME ON THE AVERAGE (AT LEAST)					(D) CRUCIAL TO SUCCESS IN MY POSITION	
			Daily	Weekly	Monthly	Seasonally	Annually	YES	NO
17. Ordering merchandise from central warehouse	☐	☐	☐	☐	☐	☐	☐	☐	☐
18. Handling employee complaints	☐	☐	☐	☐	☐	☐	☐	☐	☐
19. Inspecting lunch area for cleanliness	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
20. Selecting themes for displays	☐	☐	☐	☐	☐	☐	☐	☐	☐
21. Analyzing sales figures	☐	☐	☐	☐	☐	☐	☐	☐	☐
22. Attending vendors' shows or visiting markets to buy .	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
23. Operating a cash register	☐	☐	☐	☐	☐	☐	☐	☐	☐
24. Evaluating performance of subordinates	☐	☐	☐	☐	☐	☐	☐	☐	☐
25. Assessing proposed retail legislation	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
26. Controlling selling expenses	☐	☐	☐	☐	☐	☐	☐	☐	☐
27. Controlling perishable goods	☐	☐	☐	☐	☐	☐	☐	☐	☐
28. Determining shrinkage loss	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
29. Planning for the future from current operations data .	☐	☐	☐	☐	☐	☐	☐	☐	☐
30. Recording stock count information	☐	☐	☐	☐	☐	☐	☐	☐	☐
31. Assigning work to be done by others	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
32. Planning advertising programs and schedules	☐	☐	☐	☐	☐	☐	☐	☐	☐
33. Forecasting sales for a future period	☐	☐	☐	☐	☐	☐	☐	☐	☐
34. Ordering from catalogs	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
35. Supervising inventory-taking	☐	☐	☐	☐	☐	☐	☐	☐	☐
36. Processing customer returns and allowances	☐	☐	☐	☐	☐	☐	☐	☐	☐
37. Communicating with other departments or areas	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
38. Determining appropriate quantities to order	☐	☐	☐	☐	☐	☐	☐	☐	☐
39. Preparing budgets	☐	☐	☐	☐	☐	☐	☐	☐	☐
40. Working with percentages, fractions, and decimals . .	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
41. Insuring adherence to store credit policies	☐	☐	☐	☐	☐	☐	☐	☐	☐
42. Requesting display and sign services	☐	☐	☐	☐	☐	☐	☐	☐	☐
43. Collecting information and preparing reports	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
44. Providing information to be submitted to data processing	☐	☐	☐	☐	☐	☐	☐	☐	☐
45. Preparing delivery tickets	☐	☐	☐	☐	☐	☐	☐	☐	☐
46. Using vendors' reorder procedures	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
47. Controlling warehouse stockkeeping functions	☐	☐	☐	☐	☐	☐	☐	☐	☐
48. Reading trade publications	☐	☐	☐	☐	☐	☐	☐	☐	☐
49. Meeting local, state, and federal laws	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
50. Interviewing job applicants	☐	☐	☐	☐	☐	☐	☐	☐	☐

ACTIVITY	(A) NOT DONE BY ME	(B) NOT DONE BY ME BUT I MUST KNOW	(C) DONE BY ME ON THE AVERAGE (AT LEAST)					(D) CRUCIAL TO SUCCESS IN MY POSITION	
			Daily	Weekly	Monthly	Seasonally	Annually	YES	NO
51. Analyzing a retail profit and loss statement	☐	☐	☐	☐	☐	☐	☐	☐	☐
52. Figuring markon	☐	☐	☐	☐	☐	☐	☐	☐	☐
53. Instructing employees on store policies and procedures	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
54. Buying merchandise for special promotions	☐	☐	☐	☐	☐	☐	☐	☐	☐
55. Using a telephone	☐	☐	☐	☐	☐	☐	☐	☐	☐
56. Keeping files of invoices and purchase orders	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
57. Making proper, timely decisions	☐	☐	☐	☐	☐	☐	☐	☐	☐
58. Controlling the finances of a department or area . . .	☐	☐	☐	☐	☐	☐	☐	☐	☐
59. Using advertising mats	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
60. Completing customer sales transactions	☐	☐	☐	☐	☐	☐	☐	☐	☐
61. Keeping informed of public opinion	☐	☐	☐	☐	☐	☐	☐	☐	☐
62. Deciding how much markdown to take	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
63. Establishing procedures to accomplish goals	☐	☐	☐	☐	☐	☐	☐	☐	☐
64. Using "on-the-job" training method	☐	☐	☐	☐	☐	☐	☐	☐	☐
65. Using ratios to determine deviation from standards . .	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
66. Conducting a physical inventory	☐	☐	☐	☐	☐	☐	☐	☐	☐
67. Determining trade-in prices	☐	☐	☐	☐	☐	☐	☐	☐	☐
68. Trimming show cases	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
69. Expediting proper merchandise handling	☐	☐	☐	☐	☐	☐	☐	☐	☐
70. Recognizing fashion influences and trends	☐	☐	☐	☐	☐	☐	☐	☐	☐
71. Communicating with vendors about adjustments or returns	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
72. Using the retail price accounting system	☐	☐	☐	☐	☐	☐	☐	☐	☐
73. Following instructions from superiors	☐	☐	☐	☐	☐	☐	☐	☐	☐
4. Supervising employees	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
5. Handling customer complaints	☐	☐	☐	☐	☐	☐	☐	☐	☐
6. Determining a sales budget for a season	☐	☐	☐	☐	☐	☐	☐	☐	☐
7. Arranging meetings	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
8. Assessing events that may affect the firm	☐	☐	☐	☐	☐	☐	☐	☐	☐
9. Using the law of supply & demand in ordering merchandise	☐	☐	☐	☐	☐	☐	☐	☐	☐
0. Keeping proper payroll control	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
1. Checking merchandise returned to stock from display .	☐	☐	☐	☐	☐	☐	☐	☐	☐
2. Discharging employees	☐	☐	☐	☐	☐	☐	☐	☐	☐
3. Analyzing selling costs	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
. Demonstrating merchandise	☐	☐	☐	☐	☐	☐	☐	☐	☐

ACTIVITY	(A) NOT DONE BY ME	(B) NOT DONE BY ME BUT I MUST KNOW	(C) DONE BY ME ON THE AVERAGE (AT LEAST)					(D) CRUCIAL TO SUCCESS IN MY POSITION	
			Daily	Weekly	Monthly	Seasonally	Annually	YES	NO
85. Maintaining and using a unit control system	☐	☐	☐	☐	☐	☐	☐	☐	☐
86. Scheduling the buying shipment dates	☐	☐	☐	☐	☐	☐	☐	☐	☐
87. Using data processing information to forecast sales	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
88. Exchanging information with equals in the organization	☐	☐	☐	☐	☐	☐	☐	☐	☐
89. Training new salespeople	☐	☐	☐	☐	☐	☐	☐	☐	☐
90. Providing comfort and convenience services to customers	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
91. Requisitioning supplies, equipment, or fixtures	☐	☐	☐	☐	☐	☐	☐	☐	☐
92. Evaluating effectiveness of advertisements	☐	☐	☐	☐	☐	☐	☐	☐	☐
93. Dealing with vendors' salesmen	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
94. Taking part in making store policy	☐	☐	☐	☐	☐	☐	☐	☐	☐
95. Keeping employees' morale high	☐	☐	☐	☐	☐	☐	☐	☐	☐
96. Determining strengths and weaknesses of competitors	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
97. Scheduling repairs on customer or store merchandise	☐	☐	☐	☐	☐	☐	☐	☐	☐
98. Buying to meet consumer demand	☐	☐	☐	☐	☐	☐	☐	☐	☐
99. Evaluating employees' progress	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
100. Determining expenses for a season	☐	☐	☐	☐	☐	☐	☐	☐	☐
101. Establishing price lines for department	☐	☐	☐	☐	☐	☐	☐	☐	☐
102. Determining responsibilities of employees	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
103. Approving customer checks	☐	☐	☐	☐	☐	☐	☐	☐	☐
104. Working with buying office	☐	☐	☐	☐	☐	☐	☐	☐	☐
105. Operating an adding machine	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
106. Searching for new items and lines	☐	☐	☐	☐	☐	☐	☐	☐	☐
107. Handling responsibilities that cannot be delegated	☐	☐	☐	☐	☐	☐	☐	☐	☐
108. Deciding what merchandise is to be advertised	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
109. Seeking ways to eliminate paperwork	☐	☐	☐	☐	☐	☐	☐	☐	☐
110. Insuring proper lighting and heating or cooling	☐	☐	☐	☐	☐	☐	☐	☐	☐
111. Determining styles to order	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
112. Training employees to be accurate in sales transactions	☐	☐	☐	☐	☐	☐	☐	☐	☐
113. Interpreting store policies to customers	☐	☐	☐	☐	☐	☐	☐	☐	☐
114. Organizing a department or store's effort	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
115. Selecting fixtures for merchandise displays	☐	☐	☐	☐	☐	☐	☐	☐	☐
116. Using business mathematical formulas	☐	☐	☐	☐	☐	☐	☐	☐	☐
117. Working with a code system in marking merchandise	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
118. Analyzing operating costs	☐	☐	☐	☐	☐	☐	☐	☐	☐

ACTIVITY	(A) NOT DONE BY ME	(B) NOT DONE BY ME BUT I MUST KNOW	(C) DONE BY ME ON THE AVERAGE (AT LEAST)					(D) CRUCIAL TO SUCCESS IN MY POSITION	
			Daily	Weekly	Monthly	Seasonally	Annually	YES	NO
119. Writing sales slips	☐	☐	☐	☐	☐	☐	☐	☐	☐
120. Planning & scheduling promotional & special event sales	☐	☐	☐	☐	☐	☐	☐	☐	☐
121. Estimating markdowns for a month or season	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
122. Maintaining a perpetual or basic stock inventory	☐	☐	☐	☐	☐	☐	☐	☐	☐
123. Teaching salespeople new merchandise information	☐	☐	☐	☐	☐	☐	☐	☐	☐
124. Dictating letters or reports	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
125. Developing & applying measures to prevent store shrinkage	☐	☐	☐	☐	☐	☐	☐	☐	☐
126. Using purchase order and requisition forms	☐	☐	☐	☐	☐	☐	☐	☐	☐
127. Explaining technical & sales features of merchandise	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
128. Planning or revising department or store layout	☐	☐	☐	☐	☐	☐	☐	☐	☐
129. Reporting sales by the split-ticket system	☐	☐	☐	☐	☐	☐	☐	☐	☐
130. Counseling employees on their personal problems	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
131. Watching for and preventing accident hazards	☐	☐	☐	☐	☐	☐	☐	☐	☐
132. Exchanging information with subordinates in the firm	☐	☐	☐	☐	☐	☐	☐	☐	☐
133. Keeping records of merchandise on display	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
134. Buying from wholesalers	☐	☐	☐	☐	☐	☐	☐	☐	☐
135. Scheduling and controlling delivery to customers	☐	☐	☐	☐	☐	☐	☐	☐	☐
136. Hiring employees	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
137. Calculating stock turnover	☐	☐	☐	☐	☐	☐	☐	☐	☐
138. Communicating ideas to others	☐	☐	☐	☐	☐	☐	☐	☐	☐
139. Coordinating advertising with personal selling	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
140. Preparing merchandise for display	☐	☐	☐	☐	☐	☐	☐	☐	☐
141. Maintaining buying records	☐	☐	☐	☐	☐	☐	☐	☐	☐
42. Preparing price tickets	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
43. Using a typewriter	☐	☐	☐	☐	☐	☐	☐	☐	☐
44. Assessing socio-economic trends in the community	☐	☐	☐	☐	☐	☐	☐	☐	☐
45. Evaluating proposals and suggestions	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
46. Promoting employees	☐	☐	☐	☐	☐	☐	☐	☐	☐
47. Controlling operating costs	☐	☐	☐	☐	☐	☐	☐	☐	☐
48. Adopting ideas to improve performance	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
49. Negotiating with vendors about terms & discounts	☐	☐	☐	☐	☐	☐	☐	☐	☐
50. Establishing standards for the department or area	☐	☐	☐	☐	☐	☐	☐	☐	☐
51. Conducting meetings	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
52. Checking and reporting on cash register	☐	☐	☐	☐	☐	☐	☐	☐	☐

ACTIVITY	(A) NOT DONE BY ME	(B) NOT DONE BY ME BUT I MUST KNOW	(C) DONE BY ME ON THE AVERAGE (AT LEAST)					(D) CRUCIAL TO SUCCESS IN MY POSITION	
			Daily	Weekly	Monthly	Seasonally	Annually	YES	NO
53. Deciding when to take markdowns	☐	☐	☐	☐	☐	☐	☐	☐	☐
54. Establishing basic stock count schedules & reorder plans	☐	☐	☐	☐	☐	☐	☐	☐	☐
55. Checking condition of merchandise received	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
56. Approving requests that deviate from normal procedures	☐	☐	☐	☐	☐	☐	☐	☐	☐
57. Following vendors' or company suggested retail prices	☐	☐	☐	☐	☐	☐	☐	☐	☐
58. Recording non-cash transactions (e.g. C.O.D., charge)	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
59. Approving advertising proofs	☐	☐	☐	☐	☐	☐	☐	☐	☐
60. Determining timing of merchandise purchases	☐	☐	☐	☐	☐	☐	☐	☐	☐
61. Obtaining market information from buying or home office	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
62. Determining finances necessary to accomplish sales budget	☐	☐	☐	☐	☐	☐	☐	☐	☐
63. Analyzing charts and graphs	☐	☐	☐	☐	☐	☐	☐	☐	☐
64. Disciplining employees	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
65. Using training aids and equipment	☐	☐	☐	☐	☐	☐	☐	☐	☐
66. Preparing information for public relations staff . . .	☐	☐	☐	☐	☐	☐	☐	☐	☐
67. Insuring accuracy in paperwork	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
68. Insuring preventative maintenance of equip & fixtures	☐	☐	☐	☐	☐	☐	☐	☐	☐
69. Confirming customer delivery dates	☐	☐	☐	☐	☐	☐	☐	☐	☐
70. Working with home office or division on buying	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
71. Trimming store windows	☐	☐	☐	☐	☐	☐	☐	☐	☐
72. Insuring prompt service in customer lunch area	☐	☐	☐	☐	☐	☐	☐	☐	☐
73. Establishing an advertising budget	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
74. Seeking cooperation of other departments or areas . .	☐	☐	☐	☐	☐	☐	☐	☐	☐
75. Maintaining "open to buy" records	☐	☐	☐	☐	☐	☐	☐	☐	☐
76. Wrapping and packing merchandise	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
77. Presenting the firm in a favorable image	☐	☐	☐	☐	☐	☐	☐	☐	☐
78. Determining priorities	☐	☐	☐	☐	☐	☐	☐	☐	☐
79. Insuring that employees comply with their assignments	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
80. Exchanging information with superiors in the firm . .	☐	☐	☐	☐	☐	☐	☐	☐	☐
81. Insuring customer satisfaction after transaction . . .	☐	☐	☐	☐	☐	☐	☐	☐	☐
82. Determining prices for individual items	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
83. Submitting merchandise facts & rough copy for adv'tments	☐	☐	☐	☐	☐	☐	☐	☐	☐
84. Receiving, checking, and marking merchandise	☐	☐	☐	☐	☐	☐	☐	☐	☐
85. Shopping local competitors	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
86. Training new non-selling employees	☐	☐	☐	☐	☐	☐	☐	☐	☐

ACTIVITY	(A) NOT DONE BY ME	(B) NOT DONE BY ME BUT I MUST KNOW	(C) DONE BY ME ON THE AVERAGE (AT LEAST)					(D) CRUCIAL TO SUCCESS IN MY POSITION	
			Daily	Weekly	Monthly	Seasonally	Annually	YES	NO
187. Adding columns of figures by hand	☐	☐	☐	☐	☐	☐	☐	☐	☐
188. Working with home office on sales promotion planning .	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
189. Using federal & state regulatory laws in decision-making	☐	☐	☐	☐	☐	☐	☐	☐	☐
190. Recommending employees for transfer	☐	☐	☐	☐	☐	☐	☐	☐	☐
191. Improving dep't or area operation by use of innovations	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
192. Computing "open to buy"	☐	☐	☐	☐	☐	☐	☐	☐	☐
193. Delegating responsibilities to others	☐	☐	☐	☐	☐	☐	☐	☐	☐
194. Comparing operations with past performance or expectatations	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
195. Deciding action to take based upon data processing info.	☐	☐	☐	☐	☐	☐	☐	☐	☐
196. Approving customer returns and allowances	☐	☐	☐	☐	☐	☐	☐	☐	☐
197. Forecasting future trends or events	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
198. Recording sales on unit control records	☐	☐	☐	☐	☐	☐	☐	☐	☐
199. Reporting on employees traits & abilities to superiors	☐	☐	☐	☐	☐	☐	☐	☐	☐
200. Using professional & local shopping services	☐	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
201. Coordinating advertising with merchandise displays . .	☐	☐	☐	☐	☐	☐	☐	☐	☐
202. Analyzing computer print-outs to determine inventory	☐	☐	☐	☐	☐	☐	☐	☐	☐

Please list any activities that you believe are crucial to success in your position & which did not appear above. Check columns B, C, D, and E for each activity listed.

______________________________	☐	☐	☐	☐	☐	☐	☐	☐
______________________________	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
______________________________	☐	☐	☐	☐	☐	☐	☐	☐
______________________________	☐	☐	☐	☐	☐	☐	☐	☐
______________________________	☐	☐ D	☐ W	☐ M	☐ S	☐ A	☐	☐
______________________________	☐	☐	☐	☐	☐	☐	☐	☐

Please feel free to write about activities that you believe are crucial to success in your position.

Please complete the additional research information on the back page.

ADDITIONAL RESEARCH INFORMATION

1. Sex: __Male __Female

2. Age: __Under 25 __25-29 __30-34 __35-44 __45-54 __55-64 __65 or over

3. What was the highest educational level you completed?
   __Less than high school
   __High school graduate
   __Less than 2 years of college
   __At least 2 years of a 4-year college
   __Graduate of a 2-year post-high institution
   __Bachelor's degree
   __Some graduate study
   __Graduate degree

4. When you were in high school, what type of educational program did you take?
   __College preparation or general academic
   __Business or commercial (bookkeeping, typing, office practice, etc.)
   __Distributive education (retailing /merchandising courses w/supervised work experience)
   __Other (please specify____

5. If you attended college, what type of educational program did you take? (Check one and write your major.)
   __Liberal Arts (Major____
   __Business (Major____
   __No major
   __Other (Major____

6. How many retailing courses have you had in an institution beyond high school?
   __None __1 __2-3 __4-5 __6-8 __9-11 __12-15 __16-20 __21 or more

7. How many years have you been in retailing as an employee having no supervisory or management responsibility? (Please count only fully completed years.)
   __None __1 Year __2 Years __3 Years __4 Years __5 Years __6 or more

8. How many years have you been in a retailing position having at least some supervisory or management responsibility? (Please count only fully completed years.)
   __Under 1 Year
   __1-2 Years
   __3-4 Years
   __5-6 Years
   __7-10 Years
   __11-15 Years
   __16-20 Years
   __21-25 Years
   __26-30 Years
   __31-35 Years
   __36-40 Years
   __41 or more

9. What is the length of your average work week during the year?
   __Under 40 hours
   __40 hours
   __41-44 hours
   __45-48 hours
   __49-52 hours
   __53-56 hours
   __57-60 hours
   __61-64 hours
   __65 or more

10. With what primary function is your position directly concerned?
    __A store and its operation and not a specific line of goods
    __Merchandising a line of goods, e.g. ready-to-wear, appliances, hardware, etc.
    (please specify the line of goods________________________________
    __Other (please specify____

11. Name____

Official title____

Company____

Address____

City________________________ County________________________

State____

THANK YOU VERY MUCH FOR YOUR VALUED PARTICIPATION IN THIS STUDY

APPENDIX C

STRUCTURED RETAIL EXECUTIVE INTERVIEW

APPENDIX C

STRUCTURED RETAIL EXECUTIVE INTERVIEW

PURPOSE:
1. To obtain insight into the management hierarchy and functional areas of employment in the firm and provide a check on the management matrix used in the sampling.
2. To secure expert opinion concerning the definition and criteria of middle management used by the firm and the retail trade industry.
3. To provide the researcher with general background information about the beliefs of executives concerning personnel needs.

1. Management hierarchy and sampling

1a. Does your firm have a company organizational chart? Secure a copy if possible.

1b. Examine the levels of management in the firm. How many persons are employed at the first level of management? What title designation is given persons at this level? How many are employed in a merchandising function? an operations function? (Continue until all levels of management have been covered.)

2. Definition and criteria of middle management

2a. Is it realistic to divide middle management into lower middle management, middle management, and upper middle management?

2b. Are middle management positions discrete or continuous? (Explain)

2c. What is your reaction to the term middle management?

2d. What term or terms would you prefer to use to describe various management levels in the retail trade industry? in your firm?

2e. What term is most commonly used by your firm and/or the retail industry to describe the level we have called middle management?

3. Skills and abilities needed by management personnel

3a. What do you consider the biggest weakness of middle managers in your firm? (Probe for some other weaknesses.)

3b. What do you consider to be the biggest strengths of middle managers in your firm? (Probe for some other strengths.)

3c. What do you look for when you hire a person for the 1st level management positions in merchandising? in operations? for 2nd level management positions? 3rd level? etc.

3d. What criteria do you use in promoting management employees?

3e. What do you expect a junior college (two-year post-secondary graduate) to know when he enters your organization?

3f. What subjects or topics do you believe are the most important for him to know?

3g. What skills and abilities are going to be needed by middle management personnel five or ten years from today? (e.g. Probe the impact of the computer and its effect on middle managers.)

3h. Do you find the operations function increasing in comparison with the merchandising function? (e.g. Probe the growing specialization in retailing.)

APPENDIX D

MARKETING AND DISTRIBUTION ACTIVITIES GROUPED ACCORDING TO MAJOR COMPETENCY AREA

APPENDIX D

Retail Management Project
115 Erickson, Michigan State University
East Lansing, Michigan

RETAIL MANAGEMENT SURVEY

[Marketing and Distribution Activities
Grouped According to Major
Competency Areas]

SELLING: (19) The closely related activities and understandings involved in waiting on customers, acquainting them with available goods, influencing buying decisions, and providing required services.

12 Greeting customers
14 Selling to customers on the floor
84 Demonstrating merchandise
127 Explaining technical & sales features of merchandise
60 Completing customer sales transactions
119 Writing sales slips
198 Recording sales on unit control records
158 Recording non-cash transactions (e.g., C.O.D. charge)
23 Operating a cash register
103 Approving customer checks
45 Preparing delivery tickets
169 Confirming customer delivery dates
90 Providing comfort and convenience services to customers
176 Wrapping and packing merchandise
113 Interpreting store policies to customers
181 Insuring customer satisfaction after transaction
196 Approving customer returns and allowances
36 Processing customer returns and allowances
75 Handling customer complaints

SALES PROMOTION: The closely related activities and understandings which include advertising, display, public relations, and coordination of media with personal selling, all of which induce customers to come to the store and which assist in the advertising and sales of goods.
(22)

20 Selecting themes for displays
115 Selecting fixtures for merchandise displays
140 Preparing merchandise for display
2 Determining merchandise display locations
133 Keeping records of merchandise on display
81 Checking merchandise returned to stock from display
120 Planning & scheduling promotional & special event sales
188 Working with home office on sales promotion planning
68 Trimming show cases
171 Trimming store windows
42 Requesting display and sign services
128 Planning or revising department or store layout
166 Preparing information for public relations staff
59 Using advertising mats
32 Planning advertising programs and schedules
108 Deciding what merchandise is to be advertised
183 Submitting merchandise facts & rough copy for advertisements
159 Approving advertising proofs
92 Evaluating effectiveness of advertisements
201 Coordinating advertising with merchandise displays
139 Coordinating advertising with personal selling
177 Presenting the firm in a favorable image

BUYING: The closely related activities and understandings in securing goods for resale.
(34)

3 Selecting buying sources
22 Attending vendors' shows or visiting markets to buy
98 Buying to meet consumer demand
34 Ordering from catalogs
104 Working with buying office
170 Working with home office or division on buying
17 Ordering merchandise from central warehouse
93 Dealing with vendors' salesmen
71 Communicating with vendors about adjustments or returns
134 Buying from wholesalers

157 Following vendors' or company suggested retail prices
160 Determining timing of merchandise purchases
38 Determining appropriate quantities to order
111 Determining styles to order
149 Negotiating with vendors about terms and discounts
86 Scheduling the buying shipment dates
126 Using purchase order and requisition forms
46 Using vendors' reorder procedures
101 Establishing price lines for department
182 Determining prices for individual items
54 Buying merchandise for special promotions
192 Computing "open to buy"
141 Maintaining buying records
9 Determining markups
153 Deciding when to take markdowns
62 Deciding how much markdown to take
52 Figuring markon
121 Estimating markdowns for a month or season
67 Determining trade-in prices
5 Requesting datings from vendors or home office
44 Providing information to be submitted to data processing
79 Using the law of supply & demand in ordering merchandise
189 Using federal & state regulatory laws in decision-making
28 Determining shrinkage loss

OPERATIONS: The closely related activities and understandings which support the selling, sales promotion, buying, and market research functions, which include such items as transportation, storage, credit, customer services, protection, & reporting.
(35)

4 Scheduling inventories
35 Supervising inventory-taking
66 Conducting a physical inventory
122 Maintaining a perpetual or basic stock inventory
202 Analyzing computer print-outs to determine inventory content
72 Using the retail price accounting system
85 Maintaining and using a unit control system
30 Recording stock count information
154 Establishing basic stock count schedules & reorder plans
117 Working with a code system in marking merchandise

8 Organizing perimeter (reserve) stock
184 Receiving, checking, and marking merchandise
56 Keeping files of invoices and purchase orders
129 Reporting sales by the split-ticket system
155 Checking condition of merchandise received
135 Scheduling and controlling delivery to customers
47 Controlling warehouse stockkeeping functions
168 Insuring preventive maintenance of equipment & fixtures
13 Insuring store or department cleanliness
19 Inspecting lunch area for cleanliness
172 Insuring prompt service in customer lunch area
97 Scheduling repairs on customer or store merchandise
142 Preparing price tickets
49 Meeting local, state and federal laws
105 Operating an adding machine
143 Using a typewriter
55 Using a telephone
125 Developing & applying measures to prevent store shrinkage
80 Keeping proper payroll control
91 Requisitioning supplies, equipment, or fixtures
110 Insuring proper lighting and heating or cooling
41 Insuring adherence to store credit policies
131 Watching for and preventing accident hazards
27 Controlling perishable goods
200 Using professional and local shopping services

MARKET RESEARCH: (14) The closely related activities and understandings which require investigation of the market environment in which the sale of goods takes place and match the goods to the market in which they are to be sold.

7 Determining consumer demand
33 Forecasting sales for a future period
87 Using data processing information to forecast sales
161 Obtaining market info. from buying or home office
197 Forecasting future trends or events
185 Shopping local competitors
96 Determining strengths and weaknesses of competitors
61 Keeping informed of public opinion
78 Assessing events that may affect the firm
144 Assessing socio-economic trends in the community
106 Searching for new items and lines
70 Recognizing fashion influences and trends
48 Reading trade publication
25 Assessing proposed retail legislation

MANAGERIAL (78)

PLANNING: (15) Determining what needs to be done in a priority order, who will do it, and when and where it will be done.

1 Reading company memorandums and reports
15 Determining the goals of a department or area
178 Determining priorities
29 Planning for the future from current operations data
39 Preparing budgets
76 Determining a sales budget for a season
162 Determining finances necessary to accomplish sales budget
100 Determining expenses for a season
173 Establishing an advertising budget
63 Establishing procedures to accomplish goals
102 Determining responsibilities of employees
150 Establishing standards for the department or area
73 Following instructions from superiors
145 Evaluating proposals and suggestions
195 Deciding action to take based upon data processing information

DIRECTING: (23) Overseeing the performance of work.

10 Motivating employees
50 Interviewing job applicants
136 Hiring employees
164 Disciplining employees
82 Discharging employees
146 Promoting employees
190 Recommending employees for transfer
130 Counseling employees on their personal problems
18 Handling employee complaints
74 Supervising employees
193 Delegating responsibilities to others
123 Teaching salespeople new merchandise information
64 Using "on-the-job" training method
165 Using training aids and equipment
89 Training new salespeople
186 Training new non-selling employees
53 Instructing employees on store policies and procedures
57 Making proper, timely decisions
138 Communicating ideas to others
95 Keeping employees' morale high
31 Assigning work to be done by others

99 Evaluating employees' progress
179 Insuring that employees comply with their assignments

COORDINATING: Working with other units of the organization and the group in assembling personnel and other resources to accomplish the planned objectives.
(11)

6 Keeping superiors informed
180 Exchanging information with superiors in the firm
88 Exchanging information with equals in the organization
132 Exchanging information with subordinates in the firm
199 Reporting on employees' traits & abilities to superiors
114 Organizing a department or store's effort
37 Communicating with other departments or areas
151 Conducting meetings
77 Arranging meetings
174 Seeking cooperation of other departments or areas
69 Expediting proper merchandise handling

CONTROLLING: Establishing standards of performance, measuring performance, and correcting any deviations.
(25)

194 Comparing operations with past performance or expectations
21 Analyzing sales figures
83 Analyzing selling costs
118 Analyzing operating costs
26 Controlling selling expenses
147 Controlling operating expenses
58 Controlling the finances of a department or area
163 Analyzing charts and graphs
175 Maintaining "open to buy" records
167 Insuring accuracy in paperwork
112 Training employees to be accurate in sales transactions
137 Calculating stock turnover
43 Collecting information and preparing reports
107 Handling responsibilities that cannot be delegated
124 Dictating letters or reports
24 Evaluating performance of subordinates
152 Checking and reporting on cash registers

156 Approving requests that deviate from normal procedures
94 Taking part in making store policy
65 Using ratios to determine deviation from standards
40 Working with percentages, fractions, and decimals
187 Adding columns of figures by hand
51 Analyzing a retail profit and loss statement
116 Using business mathematical formulas
11 Analyzing information provided by data processing

INNOVATING: Introducing new ideas and insuring successful change.
(4)

16 Searching for ways to make my position more effective
148 Adopting ideas to improve performance
109 Seeking ways to eliminate paperwork
191 Improving department or area operation by use of innovations

APPENDIX E

JURY PANEL FOR RETAIL MANAGEMENT SURVEY QUESTIONNAIRE

APPENDIX E

Retail Management Survey Questionnaire

JURY PANEL

Mr. Edward Ebinger, Store Manager
J. W. Knapp Company, East Lansing, Michigan

Mrs. B. Redfield, Buyer
J. W. Knapp Company, East Lansing, Michigan

Mr. Robert Borst, Manager
Meijer Thrifty Acres, Lansing, Michigan

Mr. W. C. Schroeder, District Manager
W. T. Grant Company, Lansing, Michigan

Mr. Harry Kirk, Assistant to the Operations Vice President
Federal Department Stores, Detroit, Michigan

Mr. Virgil Stewart, Personnel Director
Sears Roebuck Company, Lansing, Michigan

Mr. A. B. Dusseau, Manager
F. W. Woolworth Company, Lansing, Michigan

Mr. C. E. Davis, Store Manager
Arlan's Discount Store, Lansing, Michigan

Mr. Samuel Hammond, Assistant Store Manager
W. T. Grant Company, Lansing, Michigan

APPENDIX F

LETTER ACCOMPANYING RETAIL MANAGEMENT SURVEY QUESTIONNAIRE

APPENDIX F

BLANK RETAIL COMPANY

MEMORANDUM

TO: (Name of Management Person)

FROM: (Name of Company Executive)

SUBJECT: Michigan State University Management Study

Enclosed is a copy of a Retail Management Survey Form prepared by members of a Research Staff at Michigan State University in cooperation with management personnel from many retail firms. The survey is part of a national study to provide information to assist in the development of retailing education in community and junior colleges throughout the United States.

Blank Retail Company is vitally interested in retailing education and is pleased to be one of several retailing organizations thought highly enough of to be selected to participate in this research project. Since the answers provided in this study will help to shape retail education instruction in hundreds of colleges throughout the United States for years to come, we want to have this form completed by individuals of proven ability and experience. That's why you were selected from our firm. Your answers, therefore, are of great value to this study.

The form is self-explanatory and will take thirty minutes to complete. When you have completed the survey form, please return it to Michigan State University in the enclosed envelope. All information will be held in strict confidence.

Because of the limited nation-wide sample, a 100% response is needed. Therefore, to follow up and assure Michigan State University in this matter, please detach the form at the bottom of this page and return it to me when you have completed and mailed the survey form. Let's try to have all responses in by .
Your prompt response to this request will be greatly appreciated.

Thank you very much for your participation in this study.

TO: (Name of Company Executive)

FROM: (Name of Management Person)

I completed and mailed the Retail Management Survey

form to Michigan State University on ______________________
(date)

____
(signed)

APPENDIX G

LETTER RETURNING INCOMPLETED QUESTIONNAIRE TO RESPONDENTS FOR COMPLETION

APPENDIX G

RETAIL MANAGEMENT PROJECT

115 ERICKSON MICHIGAN STATE UNIVERSITY

East Lansing, Michigan

TO:

FROM: John H. Carmichael, Director
Retail Management Project

SUBJECT: Retail Management Survey

Thank you very much for participating in our research project to improve retail education. The time you spent completing the questionnaire is greatly appreciated.

The questionnaire is being returned so that you can place check marks in the boxes that have been circled in "red." This information is needed to fully complete the questionnaire and include it in the study.

Thanks again for your help.

Sincerely,

P.S. A return envelope is enclosed for your convenience.

APPENDIX H

MARKETING AND DISTRIBUTION ACTIVITIES RANK ORDERED FROM 1 TO 202 ACCORDING TO CRUCIALNESS TO SUCCESS ON THE JOB AS REPORTED BY 701 RETAIL MIDDLE MANAGERS

APPENDIX H.--202 marketing and distribution activities rank ordered from one to 202 according to crucialness to success on the job: N = 701.*

Rank Order	Crucial to Success	Activity	Not Done By Me	Not Done By Me But Must Be Known	Done By Me	Frequency of Performance				Competency
						Daily	Weekly	Monthly	Seasonally or Annually	
1	99	Following instructions from supervisors	0	0	99	92	6	1	0	Planning
2	98	Making proper, timely decision	1	1	98	94	4	0	0	Directing
3	97	Supervising employees	1	2	96	96	0	0	0	Directing
4	95	Searching for ways to make my position more effective	0	2	97	91	3	3	0	Innovating
5	95	Communicating ideas to others	1	1	97	92	5	0	0	Directing
6	94	Delegating responsibilities to others	2	1	97	93	3	1	0	Directing
7	94	Motivating employees	2	2	94	86	7	1	0	Directing
8	93	Assigning work to be done by others	2	2	95	90	4	1	0	Directing
9	92	Handling responsibilities that cannot be delegated	3	2	93	83	9	1	0	Controlling
10	91	Reading company memorandums and reports	2	2	96	80	15	1	0	Planning
11	91	Keeping employee's morale high	4	3	92	87	5	0	0	Directing
12	90	Presenting the firm in a favorable image	3	3	93	91	1	1	0	Sales Pro.
13	90	Keeping superiors informed	1	1	97	70	24	3	0	Coord.
14	89	Exchanging information with superiors in firm	2	2	96	62	27	5	2	Coord.
15	89	Insuring that employees comply with assignments	4	7	87	83	4	0	0	Directing
16	87	Adopting ideas to improve performance	5	4	90	66	14	8	2	Innovating
17	87	Establishing procedures to accomplish goals	8	7	85	51	21	10	3	Planning
18	85	Comparing operations with past performance or expectation	5	5	89	45	25	15	4	Controlling
19	85	Insuring accuracy in paperwork	8	13	79	69	8	2	0	Controlling
20	82	Determining the goals of a department or area	8	17	64	30	18	16	10	Planning
21	82	Developing and applying measures to prevent store shrinkage	13	10	77	64	7	5	1	Operations
22	81	Analyzing sales figures	9	9	72	44	32	5	1	Controlling
23	81	Instructing employees on store policies and procedures	5	13	82	48	27	6	1	Directing
24	81	Determining appropriate quantities to order	13	17	69	44	21	3	1	Buying
25	80	Determining consumer demand	12	15	73	54	13	3	3	Mkt. Res.
26	80	Deciding when to take markdowns	13	14	74	34	36	11	3	Buying
27	80	Determining responsibilities of employees	8	13	78	52	14	8	4	Planning
28	80	Recognizing fashion influences and trends	11	15	74	55	9	3	7	Mkt. Res.
29	79	Exchanging information with subordinates in the firm	6	1	92	76	13	2	1	Coord.
30	79	Establishing standards for department or area	13	12	75	50	13	7	5	Planning
31	79	Organizing a department or store's effort	15	7	77	46	19	9	4	Coord.
32	78	Handling customer complaints	9	16	74	64	8	2	0	Selling
33	77	Deciding how much markdown to take	15	15	71	40	19	10	2	Buying
34	77	Evaluating performance of subordinates	6	9	84	37	13	14	20	Controlling
35	77	Supervising inventory-taking	11	13	75	6	8	5	56	Operations

36	77	Conducting a physical inventory	12	21	66	3	6	6	51	Operations
37	77	Collecting information and preparing reports	9	18	71	25	28	13	5	Controlling
38	77	Handling employee complaints	9	12	78	60	13	5	0	Directing
39	77	Insuring store or department cleanliness	8	19	72	69	3	0	0	Operations
40	76	Using "on-the-job" training method	12	13	74	64	6	2	2	Directing
41	75	Planning for future from current operations data	18	10	71	21	18	20	12	Planning
42	75	Communicating with other departments or areas	6	4	90	72	15	2	1	Coord.
43	75	Keeping informed of public opinion	8	15	77	67	7	3	0	Mkt. Res.
44	75	Controlling operating costs	21	15	65	52	7	6	0	Controlling
45	74	Evaluating employee's progress	6	10	80	25	12	22	21	Directing
46	74	Maintaining a perpetual or basic stock inventory	17	27	56	23	20	11	2	Operations
47	74	Evaluating proposals and suggestions	12	8	80	57	18	4	1	Planning
48	74	Disciplining employees	11	14	73	48	15	8	2	Directing
49	73	Using the law of supply and demand in ordering merchandise	21	12	67	47	17	1	2	Buying
50	73	Teaching salespeople new merchandise information	73	20	67	39	20	5	3	Directing
51	73	Determining merchandise display locations	11	14	75	50	21	3	1	Sales Pro.
52	72	Determining priorities	20	7	72	67	4	1	0	Planning
53	72	Buying to meet consumer demand	24	15	59	40	15	3	1	Buying
54	71	Seeking cooperation of other departments or areas	13	7	73	60	13	3	2	Coord.
55	71	Coordinating advertising with merchandise displays	[illegible]	16	66	19	38	7	2	Sales Pro.
56	70	Conducting meetings	[illegible]	11	76	9	52	11	4	Coord.
57	70	Improving dep't or area operations by use of innovations	15	11	74	41	17	11	5	Innovating
58	70	Determining strengths and weaknesses of competitors	15	11	74	34	36	11	3	Mkt. Res.
59	70	Controlling selling prices	23	15	62	46	12	4	0	Controlling
60	70	Expediting proper merchandise handling	14	30	56	49	6	1	0	Coord.
61	70	Insuring customer satisfaction after transaction	17	25	57	50	6	1	0	Selling
62	70	Shopping local competitors	11	13	76	9	40	23	4	Mkt. Res.
63	69	Working with percentages, fractions & decimals	12	12	77	55	18	3	1	Controlling
64	69	Using purchase order and requisition forms	11	20	70	46	19	3	12	Buying
65	69	Training new salespeople	15	32	49	20	8	8	13	Directing
66	69	Controlling the finances of a department or area	25	20	55	39	9	6	1	Controlling
67	68	Meeting local, state, and federal laws	16	16	66	59	3	2	2	Operations
68	67	Exchanging information with equals in the organization	7	3	88	55	23	7	3	Coord.
69	67	Planning or revising department or store layout	19	11	70	16	15	13	26	Sales Pro.
70	67	Planning & scheduling promotional & special event sales	25	20	55	5	21	24	5	Sales Pro.
71	67	Establishing basic store count schedules and reorder plans	25	24	51	15	19	10	7	Operations
72	66	Training employees to be accurate in sales transactions	19	28	52	37	11	3	1	Controlling
73	66	Determining styles to order	28	16	55	28	15	4	8	Buying
74	66	Reporting on employees traits and abilities to superiors	10	6	83	24	15	21	23	Coord.
75	66	Determining shrinkage loss	28	24	51	15	19	10	7	Buying

APPENDIX H.-- Continued.

Rank Order	Crucial to Success	Activity	Not Done By Me	Not Done By Me But Must Be Known	Done By Me	Frequency of Performance				Competency
						Daily	Weekly	Monthly	Seasonally or Annually	
76	66	Using a telephone	2	2	95	91	4	0	0	Operations
77	65	Following vendor's or company suggested retail prices	21	14	64	59	3	0	2	Buying
78	65	Buying merchandise for special promotions	26	14	59	9	16	26	8	Buying
79	65	Preparing budgets	29	21	51	4	10	18	19	Planning
80	65	Working with buying office	24	10	66	37	17	7	5	Buying
81	65	Forecasting sales for a future period	23	19	58	6	11	23	18	Mkt. Res.
82	64	Analyzing operating costs	27	18	54	15	13	24	2	Controlling
83	64	Analyzing a retail profit and loss statement	23	20	56	1	3	45	7	Controlling
84	64	Determining timing or merchandise purchases	27	18	54	15	13	24	2	Buying
85	64	Interpreting store policies to customers	15	18	65	47	13	5	0	Selling
86	63	Keeping proper payroll control	30	22	48	25	22	1	0	Operations
87	62	Analyzing selling costs	29	17	55	24	19	9	3	Controlling
88	62	Greeting customers	16	12	70	67	3	0	0	Selling
89	62	Maintaining "open to buy" records	33	33	33	17	8	8	0	Controlling
90	62	Evaluating effectiveness of advertisements	21	16	64	12	43	7	2	Sales Pro.
91	61	Ordering merchandise from central warehouse	22	39	38	14	21	3	0	Buying
92	61	Checking condition of merchandise received	16	39	45	39	5	1	0	Operations
93	61	Planning advertising programs & schedules	26	27	46	5	22	17	2	Sales Pro.
94	61	Recording stock count information	18	50	32	12	14	4	2	Operations
95	60	Maintaining buying record	31	31	38	23	10	4	1	Buying
96	60	Calculating stock turnover	27	25	43	2	1	12	28	Controlling
97	59	Coordinating advertising with personal selling	28	17	55	22	26	6	1	Sales Pro.
98	59	Determining a sales budget for a season	32	25	43	2	1	12	28	Planning
99	59	Watching for and preventing accident hazards	11	9	80	77	2	1	0	Operations
100	59	Forecasting future trends or events	31	19	49	15	10	13	11	Mkt. Res.
101	58	Estimating markdowns for a month or a season	32	21	46	2	4	29	11	Buying
102	58	Explaining technical & sales features of merchandise	20	23	57	33	19	3	2	Selling
103	58	Insuring adherence to store credit policies	24	20	54	49	5	0	0	Operations
104	58	Deciding what merchandise is to be advertised	30	20	51	5	27	17	2	Sales Pro.
105	57	Approving customer returns & allowances	16	26	58	50	7	1	0	Selling
106	57	Keeping files of invoices & purchase orders	22	54	25	20	4	1	0	Operations
107	56	Searching for new items & new lines	36	10	54	39	9	3	3	Mkt. Res.
108	56	Figuring markon	26	27	44	27	10	4	3	Buying
109	56	Organizing perimeter (reserve) stock	15	33	50	25	17	5	3	Operations
110	55	Maintaining & using a unit control system	32	29	37	23	11	2	1	Operations
111	55	Hiring employees	31	28	40	11	9	9	11	Directing
112	55	Providing comfort & convenience services to customers	30	24	46	41	3	2	0	Selling
113	55	Taking part in making store policy	35	15	51	28	14	6	3	Controlling
114	55	Using training aids and equipment	25	17	57	23	17	13	4	Directing
115	55	Training new non-selling employees	30	34	37	16	6	4	11	Directing

116	54	Determining markups	30	28	41	30	6	2	3	Buying
117	53	Working with home office or division on buying	40	10	51	23	15	6	7	Buying
118	53	Receiving, checking, and marking merchandise	29	52	20	15	3	2	0	Operations
119	53	Obtaining market information from buying or home office	35	12	53	22	19	7	5	Mkt. Res.
120	53	Promoting employees	32	21	46	6	4	16	20	Directing
121	53	Computing "open to buy"	40	32	28	8	7	13	0	Buying
122	52	Determining expenses for a season	39	19	43	2	2	10	29	Planning
123	51	Using federal and state regulatory laws in decision making	36	18	45	29	8	6	2	Buying
124	51	Communicating with vendors about adjustments or returns	28	29	43	12	15	14	2	Buying
125	51	Interviewing job applicants	27	24	48	15	16	8	9	Directing
126	50	Analyzing information provided by data processing	39	10	50	12	22	12	4	Controlling
127	50	Delegating responsibilities to others	43	11	45	11	16	13	5	Planning
128	50	Approving advertising proofs	31	20	50	10	31	8	1	Sales Pro.
129	49	Processing customer returns and allowances	19	41	41	35	5	1	0	Selling
130	49	Arranging meetings	27	13	60	6	40	11	3	Coord.
131	48	Assessing events that may affect the firm	37	16	47	25	9	9	4	Mkt. Res.
132	48	Selling to customers on the floor	20	35	44	37	7	0	0	Selling
133	47	Preparing merchandise for display	26	35	39	21	14	3	1	Sales Pro.
134	47	Determining prices for individual items	44	20	37	26	7	2	2	Buying
135	47	Checking and reporting on cash registers	30	37	32	25	6	1	0	Controlling
136	47	Discharging employees	27	28	41	9	5	7	20	Directing
137	46	Scheduling the buying shipment dates	43	19	38	17	9	5	7	Buying
138	45	Requesting display and sign services	23	24	52	20	22	8	2	Sales Pro.
139	45	Completing customer sales transactions	27	43	31	25	5	1	0	Selling
140	45	Approving requests that deviate from normal procedures	27	12	60	32	18	8	2	Controlling
141	45	Dealing with vendors' salesmen	29	12	60	25	21	11	3	Buying
142	44	Using business mathematical formulas	41	13	46	30	12	4	0	Controlling
143	44	Determining finances necessary to accomplish sales budget	49	13	33	6	8	11	8	Planning
144	44	Seeking ways to eliminate paperwork	32	8	60	46	8	5	1	Innovating
145	44	Requisitioning supplies, equipment, or fixtures	22	33	45	7	15	20	3	Operations
146	44	Scheduling inventories	36	27	36	5	10	8	13	Operations
147	43	Submitting merchandise facts and rough copy for advertisements	43	18	40	5	23	9	2	Sales Pro.
148	43	Approving customer checks	13	19	62	58	3	1	0	Selling
149	43	Selecting themes for displays	29	25	47	11	23	9	4	Sales Pro.
150	42	Counseling employees on their personal problems	31	13	55	25	12	14	4	Directing
151	42	Insuring preventative maintenance of equipment and fixtures	36	21	42	25	8	7	2	Operations
152	42	Establishing price lines for department	49	20	31	10	3	3	15	Buying
153	42	Working with home office on sales promotion planning	50	14	36	5	11	15	5	Sales Pro.
154	40	Reading trade publications	9	3	89	17	35	36	1	Mkt. Res.
155	40	Recording sales on unit control records	44	40	17	10	5	2	0	Selling

APPENDIX H.--Continued.

Rank Order	Crucial to Success	Activity	Not Done By Me	Not Done By Me But Must Be Known	Done By Me	Frequency of Performance				Competency
						Daily	Weekly	Monthly	Seasonally or Annually	
156	39	Working with code system in marking merchandise	50	14	36	5	11	15	5	Sales Pro.
157	39	Providing information to be submitted to data processing	45	22	31	11	13	5	2	Buying
158	39	Using vendors' reorder procedures	41	26	32	15	14	3	0	Buying
159	39	Keeping records of merchandise on display	37	30	32	18	12	2	0	Sales Pro.
160	39	Adding columns of figures by hand	31	13	56	45	10	1	0	Controlling
161	37	Controlling perishable goods	48	20	31	23	6	1	1	Operations
162	37	Using the retail price accounting system	48	24	27	21	3	2	1	Operations
163	36	Demonstrating merchandise	42	30	28	19	6	2	1	Selling
164	36	Using data processing information to forecast sales	56	16	27	5	10	8	4	Mkt. Res.
165	35	Assessing socio-economic trends in the community	48	18	34	11	6	10	7	Mkt. Res.
166	35	Scheduling repairs on customer or store merchandise	37	31	31	15	11	5	0	Operations
167	35	Establishing an advertising budget	56	20	24	0	0	11	13	Planning
168	35	Selecting fixtures for merchandise displays	42	23	35	15	10	5	5	Sales Pro.
169	34	Buying from wholesalers	53	13	34	11	13	6	4	Buying
170	33	Using advertising mats	42	32	26	3	18	3	2	Sales Pro
171	33	Analyzing charts and graphs	54	13	22	6	11	12	3	Controlling
172	33	Checking merchandise returned to stock from display	30	33	37	15	16	5	1	Sales Pro.
173	33	Dictating letters or reporting	53	10	36	19	12	4	1	Controlling
174	32	Using ratios to determine deviation from standards	55	14	30	12	10	6	2	Controlling
175	32	Preparing price tickets	40	48	12	9	2	1	0	Operations
176	32	Recommending employees for transfer	43	17	37	4	3	9	21	Directing
177	31	Recording non-cash transactions (e.g., C.O.D., charges)	44	39	17	13	3	1	0	Selling
178	31	Reporting sales by the split-ticket system	49	31	21	15	5	1	0	Operations
179	30	Insuring proper lighting and heating or cooling	42	23	35	28	3	2	2	Operations
180	29	Operating a cash register	19	55	26	19	5	1	1	Selling
181	27	Writing sales slips	33	44	22	16	5	1	0	Selling
182	27	Insuring prompt service in customer lunch area	62	16	20	18	2	0	0	Operations
183	26	Inspecting lunch area for cleanliness	45	17	39	27	10	2	0	Operations
184	25	Operating an adding machine	24	23	53	37	13	3	0	Operations
185	25	Trimming show cases	49	36	15	3	8	3	1	Sales Pro.
186	25	Controlling warehouse stockkeeping functions	62	21	16	12	4	0	0	Operations
187	24	Ordering from catalogs	60	16	24	6	10	5	3	Buying

188	24	Analyzing computer print-outs to determine inventory	67	10	21	2	6	10	3	Operations
189	24	Selecting buying sources	62	18	19	7	3	2	7	Buying
190	23	Negotiating with vendors about terms and discounts	69	16	14	7	3	2	2	Buying
192	21	Wrapping and packing merchandise	51	33	15	12	2	1	0	Selling
193	20	Scheduling and controlling delivery to customers	61	29	10	7	2	1	0	Operations
194	20	Trimming store windows	63	29	9	1	5	2	1	Sales Pro.
195	19	Attending vendors shows or visiting markets to buy	66	8	26	1	2	5	18	Buying
196	19	Confirming customer delivery dates	65	26	8	6	2	0	0	Selling
197	16	Using professional and local shopping services	71	13	16	3	2	5	6	Operations
198	16	Preparing delivery tickets	64	29	5	4	1	0	0	Selling
199	14	Assessing proposed retail legislation	65	23	11	2	2	4	3	Mkt. Res.
200	9	Determining trade in prices	84	8	7	4	2	1	0	Buying
201	8	Using a typewriter	68	13	14	4	5	4	1	Operation
202	8	Preparing information for public relations staff	85	10	6	1	1	2	2	Sales Pro.

CUT AND PASTE FOOTNOTE FOR BOTTOM OF FIRST PAGE:

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*The following steps were taken in order to break ties that existed when figures were rounded and enable the activities to be rank ordered from one to 202: The computer print-out provided two-decimal figures for each heading. Starting with "Crucial to Success," if one activity was still tied with another, the heading "Done By Me" was used as the tie-breaker. If still tied, the heading "Not Done By Me But Must Be Known" was used, then Daily, Weekly, or Monthly until the tie was broken. There were no ties existing after following this procedure.

APPENDIX I

CONFERENCE WITH RETAIL EXECUTIVES TO ANALYZE RESULTS OF RETAIL MANAGEMENT SURVEY

APPENDIX I

CONFERENCE WITH RETAIL EXECUTIVES

(Participants who met to analyze
the results of the Retail
Management Survey in
New York City,
August 8, 1968)

Bawcom, Richard D., Manager, Field Training
S. H. Kress and Company

Chalifaux, Richard, Personnel Director
Interstate Department Stores

Fraser, John, J., Training Director
Abraham and Straus Department Stores

Harvey, Thomas, College Relations Coordinator
J. C. Penney Company

Katzer, Jeffrey, Management Development
Interstate Department Stores

McGeorge, R., Director, Management Recruitment and
Placement
W. T. Grant Co.

Zulauf, Addison, Management Training Specialist
J. C. Penney Company

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