DM Visit Guide

DM Visit Type

Store visit types define the intent of each visit so time, focus, and expectations are clear, and the stores gain specific support to improve. District Managers should determine the visit type during the planning phase.

How to Use Visit Types

- Every store visit has a defined type and objective.
- The visit type determines what you focus on and how often it occurs.
- Not all visits are equal. Select the visit type before scheduling to set clear expectations for yourself and the store.
- Any time a District Manager stops by a store, a minimum of one of the 3 visit types below needs to occur.

	Foundation	Inspection	Purpose
Objective	Evaluate leadership capability, behavioral tactical execution, and root causes across all four business functions	Confirm adherence to required standards, safety, and operational controls	Validate progress from prior visits, or other activities such as interviews, hot market prep, store flip planning, specified training focus, etc.
Frequency	3x per Quarter	Field Leader: 1x per Quarter Store Leader: Weekly Self Inspection	As Needed
Anticipated Duration	½ to full day	½ day	Based on Need

DM Visit Guide: Foundation Visit

Purpose

This guide defines how District Managers execute store visits with Head Coachs using the 4 Foundations and root-cause-driven actions. The goal of each visit is to accurately assess store health, wins and opportunities, and create an action plan that improves results.

Store Visit Standard

The flow and order of the visit may flex based on the store's needs. District Managers observe and assess before determining ratings. Actions are created after opportunities and root cause are identified. The visit produces a clear direction and follow-up.

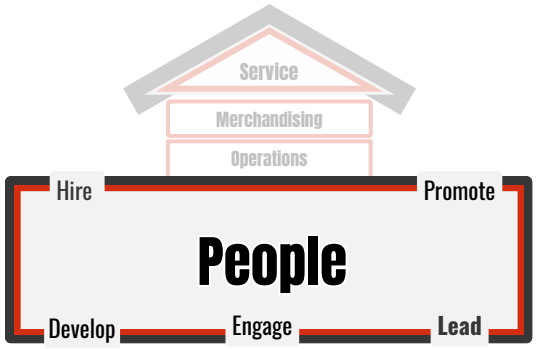
The Store Foundation Visit Model

The store is evaluated using the 4 Foundations. Each Foundation represents a business function and is assessed using defined questions and observable standards.

4 Foundations = the four business functions

- Each Foundation includes four to five objectives
- Each objective includes measurable behavioral and tactical expectations.
  - **Tactical** = Established and expected actions or SOPs
  - **Behavioral** = How leaders think, decide, and coach





Objectives

1. **Hire:** Hiring decisions, training and onboarding result in a team that meets role expectations and reflects the local community.
2. **Develop:** Team demonstrates growth and improvement through consistent training, coaching, and development practices.
3. **Engage:** Team is engaged through positive interaction, initiative, and a demonstrated connection to the store mission and team culture.
4. **Lead:** The store consistently executes company priorities, adapts to change, responds to challenges, and drives results through clear direction, timely decisions, and follow-through.
5. **Promote:** The store builds internal talent, shown by team members taking on added responsibility and stepping into key roles when needed.



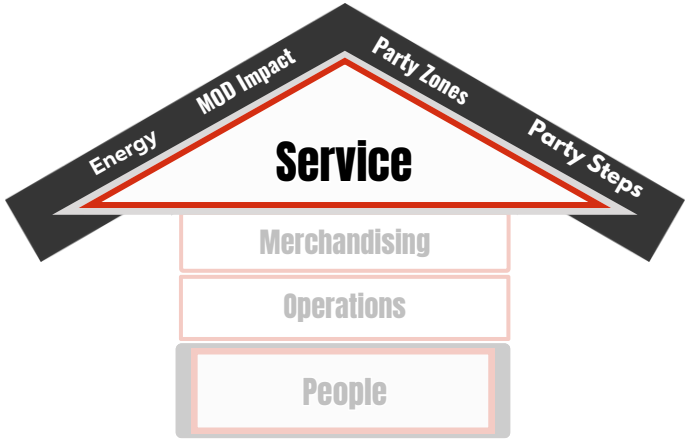
Objectives

1. **Schedule Optimization**: Labor is being used effectively to support service, tasks, coverage, and operational priorities.
2. **Inventory Management**: The store is operating with accuracy in processing, transfers, reflecting strong attention to detail and integrity.
3. **Operational Execution**: Demonstrates consistent adherence to SOPs ensuring organization and operational efficiency.
4. **Orders Objective**: Executes in-store customer orders by managing order staging, pick exceptions, and timely ISPU picking.
5. **Cycle Counts Objective**: Ensures timely, SOP-compliant cycle counts by monitoring dashboards and coaching teams to maintain inventory accuracy.



Objectives

1. **Environment Objective**: The store is effectively using brand marketing, signage, and branded communication to support product storytelling, guest navigation, and conversion.
2. **Impact Objective**: The store is merchandised to enhance the guest experience, drive business opportunities, and amplify the Rally House brand.
3. **Standards Objective**: The team is consistently maintaining required visual standards including correct tools, spacing, signage, sizing, and fixture care.
4. **Impulse Objective**: The register lane is set to the current dominant team, correct signage, full clip strips, and unique product facings that support impulse conversion.
5. **Relevance Objective**: The store is merchandised to reflect the current season, events, and guest demand, with appropriate team footprint layout and visual priorities



Objectives

1. **Energy Objective**: Team Members create an inviting, energetic, and brand aligned atmosphere that sets the tone for guest engagement and team performance.
2. **MOD Impact Objective**: Leaders consistently model and coach service expectations and build service capability, maintaining a continuous awareness of the floor and effectively directing the service experience or output.
3. **The Zones Objective**: Party Zones are executed consistently at entry and exit by the Party Host and Cashiers, with energy, awareness, accuracy, and clear role ownership to create a complete Rally House Party experience.
4. **The 3 Steps Objective**: Team Members are consistently using the 3 Steps of Service to create meaningful connections, understand guest needs, and recommend solutions.

Foundation Visit Play-by-Play

Visit Day



1



FIELD LEADER

Pre-work

Plan the Visits
- Communicate in advance
- Head Coach scheduled to work

Prepare & Review
- Score Card
- Previous Visit

Store Pre-work
- Validate Head Coach is prepared

2

HEAD COACH:

I'm excited to kick-off this visit and share...
1. Wins, Opportunities, Progress from the last visit
2. Score card review and stand out proud of's or strategy



3

Field Leader Start the Assessment

80%/20% GOAL

"What", How and Show Me questions
Head Coach leads dialogue 80%
Root Cause Diagnosis



Coaching Conversation



Store Leader prints Foundation visit

Semi-private location or coffee trip
- Wins, Opportunities, and top 3-5 priorities

District Manager & Store Leader sign-off once reviewed together

DM Visit Prep and Pre-work



Weekly Planning

Intentional planning ensures each store receives timely, focused support. As a District Manager, your role is to bring energy, clarity, and the space for store leaders to engage in productive solutions. Your goal is to plan and prepare with purpose so each visit creates clarity, reinforces commitment, and helps teams win the day and the season.

1 Plan the Visits

- Use designated planning time to prioritize stores requiring support.
- Complete three Foundation visits per quarter for each store.
- Communicate visit dates in advance to ensure adequate store coverage (use 3-4 supplemental for coverage as needed).

2 Prepare

- Review the store scorecard and the most recent Foundation visit.
- Identify trends or concerns indicated by scorecard results.
- Review the Staffing Guide when scorecard results indicate staffing risk.

3 Store Pre-Work: Required materials must be available for review during the visit.

- Store Merch Report (once available)
- Team Sales Report – Last 365 Days
- Team Sales Report – Next 60 Days (LY)
- Team Sales Report – Last 30 Days
- Local event schedule for the next 30 days (events, games, concerts)
- Scorecard

Foundation Visit: Head Coach Action



This is your time to speak to your decisions and results. Be prepared to lead conversation, show Head Coachs own their business and results. Foundation Visits occur with your District Manager. These are working sessions to review performance, set priorities, and agree on next actions.

Bring these materials to the visit:

- Store Merch Report (when available)
- Team Sales Report — Last 365 Days
- Team Sales Report — Last 30 Days
- Team Sales Report — Next 60 Days (Last Year)
- Local event schedule — next 30 days
- Scorecard

Foundation Visit — Head Coach Ownership

The Head Coach opens the visit by clearly presenting the business:

- Recap last visit actions and progress
- Share what you are most proud of since the last visit
- Review scorecard results
- Call out Wins, Opportunities, and Priorities (W.O.P.)
- Clearly state support or resources needed

By the End of the Visit

- Print Emailed Visit from Store Email & Review with District Manager
- Priorities are clear
- Tasks are created
- Alignment is confirmed for Wins, Opportunities, and the top 3-5 Priorities

Visit is posted in back of house, near break table for Team Member review and engagement
Note: After a new visit is completed & posted, the previous visit can be taken down and thrown away.

Foundation Visit Detailed Outline

Begin with the Head Coach Providing a Review

- The prior visit results (celebrate success and identify any outstanding opportunities).
- The scorecard results. The Head Coach shares successes, opportunities, and where support is needed today.

Field Leader Start the Visit Assessment: Observe and Assess

For each objective, the District Manager connects, observes, and assesses then selects one rating. Every visit results in a continued action plan, even when execution Meets or Exceeds, to drive growth and progress.

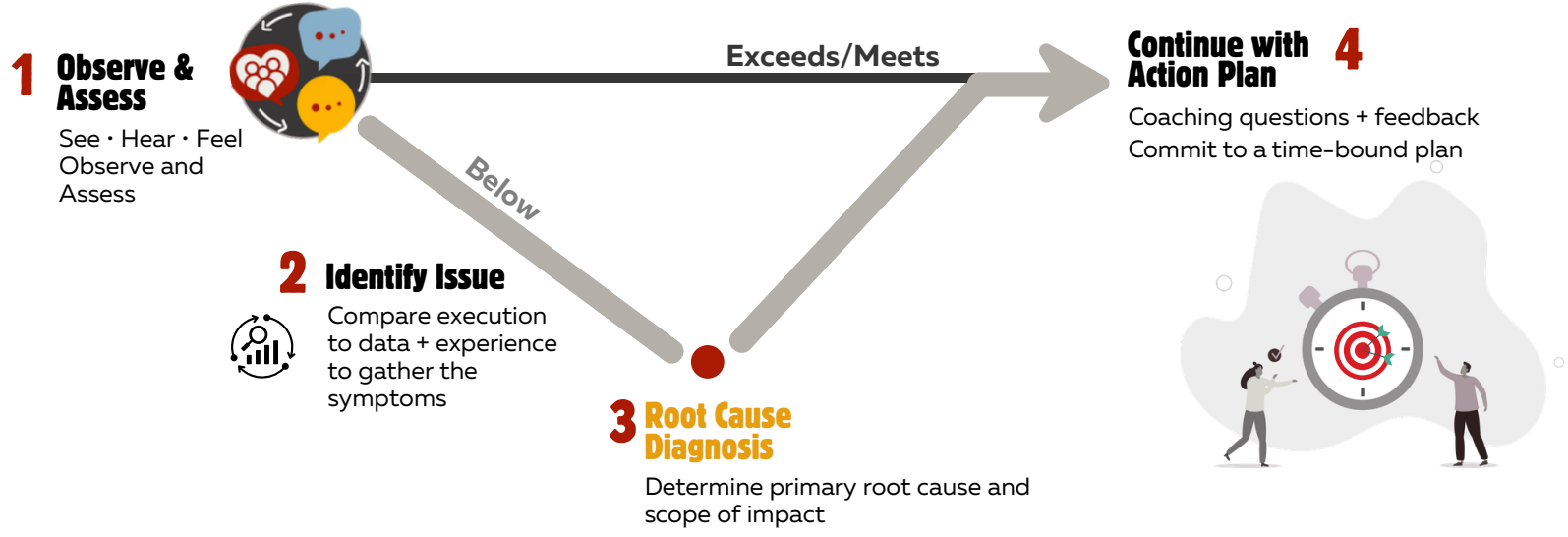
Select the Rating

- **Exceeds** – Execution consistently exceeds expectations
- **Meets** – Execution meets expectations
- **Below** – Execution is inconsistent, reactive, or missing (Triggers Issue Definition, Root Cause Diagnosis, and Action Plan)

Diagnose the Root Cause

When a question is rated Below, the District Manager documents the opportunities. Three freeform fields are completed to ensure clarity and follow-through.

- **Identify Issue:** Describe the issue not meeting the standard.
- **Root Cause Diagnosis:** Identify what the root cause is. The root cause explains the breakdown driving the result, not the symptom. Root causes focus on observable behavior, process gaps, or leadership actions.
- **Action Plan:** What are the actions needed to address the root cause. Actions include clear ownership and may include time-bound tasks.



Foundation Visit Detailed Outline

Action Selection

Each Below rating requires an action that directly addresses the selected root cause. All actions must include clear ownership and timing. Actions focus on coaching, training, task direction, process reinforcement, and resource support.

Continue with an Action Plan

After completing all Foundation visit sections, the District Manager reviews results to identify patterns.

- Confirm one to two primary focus areas representing the highest-impact opportunity for improvement.
- **Conduct a coaching conversation to align on wins, opportunities, the action plan, and agreed-upon completion dates.**
- Complete the conversation in a semi-private location, such as the back room, or, at the field leader's discretion, at a nearby coffee shop.
- Clearly define actions and expectations.
- Finalize and submit the visit before exiting the store.

DM Visit Post-Visit Plan

Post-Visit Follow-Up and Feedback Loop

A strong post-visit ensures progress continues after the District Manager leaves the building. The goal is to reinforce clarity and commitment, and ensure execution through consistent follow-up.

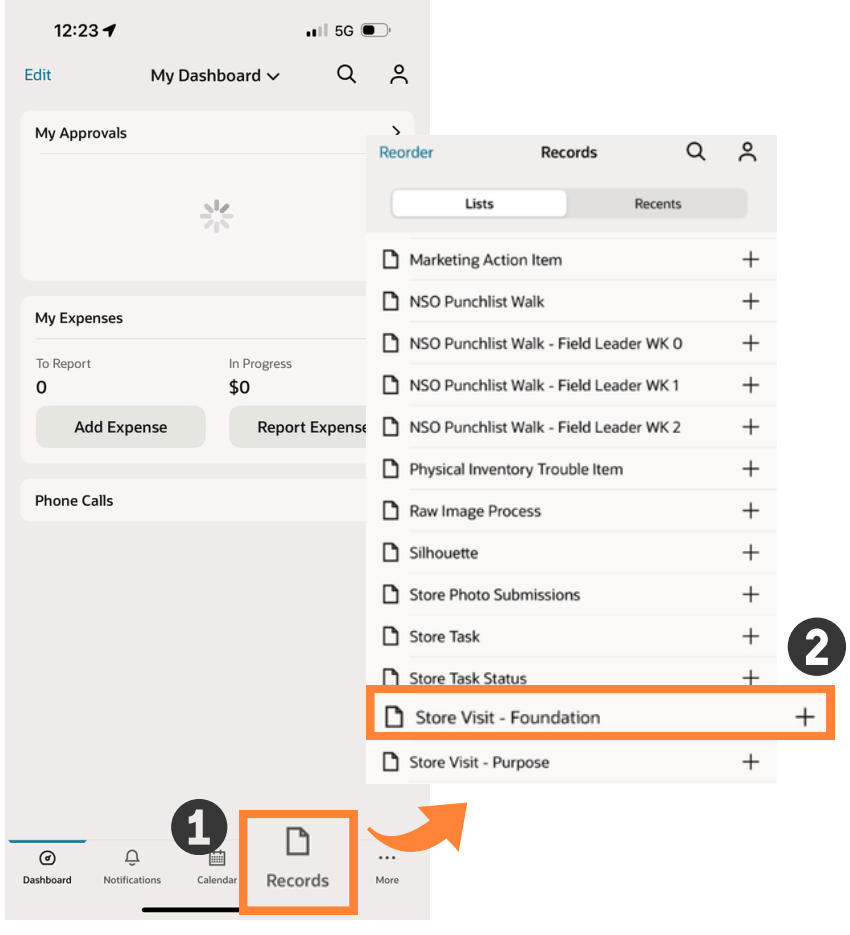
- **Document the focus:** Confirm the primary priorities identified during the visit and the agreed-upon actions tied to root cause.
- **Confirm ownership and timing:** Each action has a clear owner and a defined timeline for completion.
- **Email Visit Summary:** Share visit summary with the store leader(s) that reinforces expectations, wins, and next steps.
- **Coach between visits:** Use follow-up touch points, calls, or messages to reinforce progress, remove barriers, and sustain momentum.
- **Validate improvement:** Revisit the focus area(s) in the next visit or check-in to confirm execution and impact.
- **Close the loop:** Acknowledge improvement, adjust support as needed, and reset focus when progress is sustained.

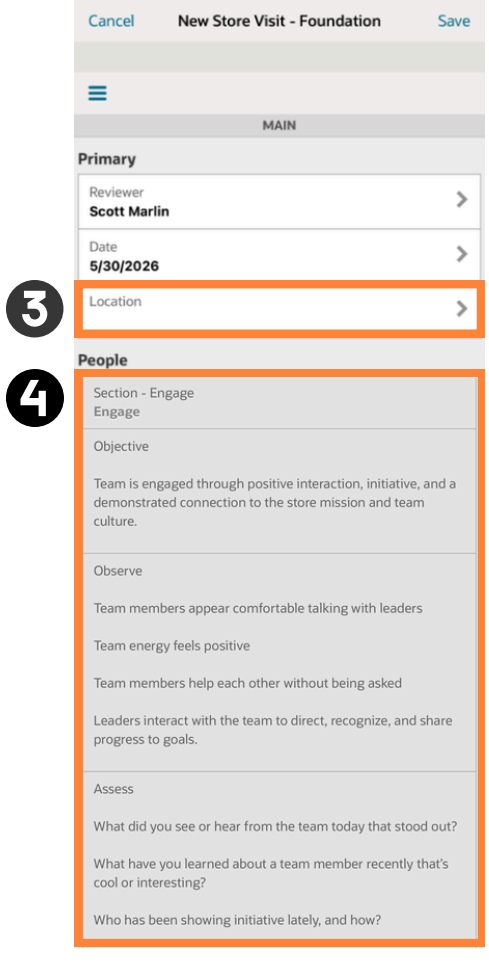
NetSuite Mobile Process: Foundation Visit

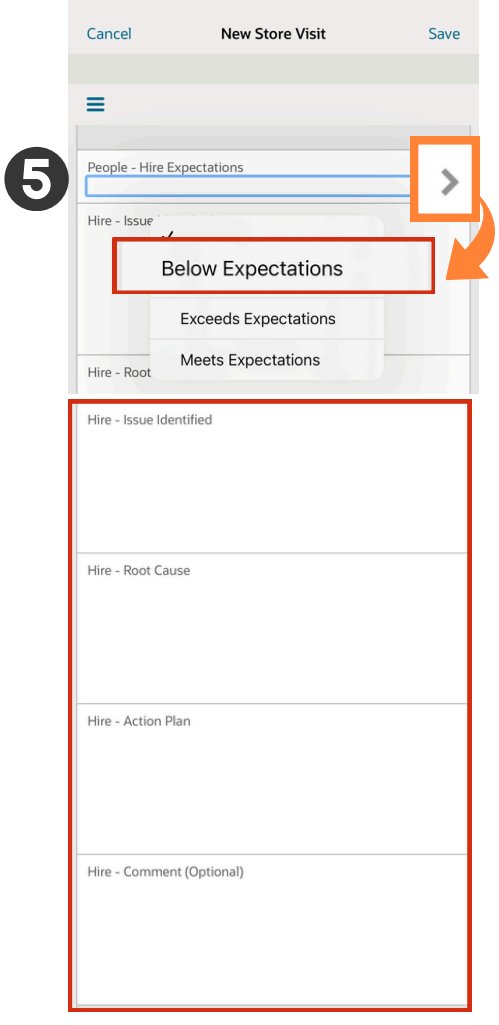
1. Log in to **NetSuite mobile** & tap the **Records** icon at the bottom of the page.
2. Scroll down to **Store Visit - Foundation** and tap the **plus (+)** icon to begin a new visit.
3. Tap into the 'Location' field and **select** the location you are visiting.
4. **Read** each Objective, Observe, and Assess prompts before determining the rating for that specific section.
5. **Select** your rating score.
   - Note: You only need to fill out the Issue Identification/ Root Cause/ Action Plan for the rating of **Below Expectations**.
   - You may leave comments in the comment field regardless of score.

Save

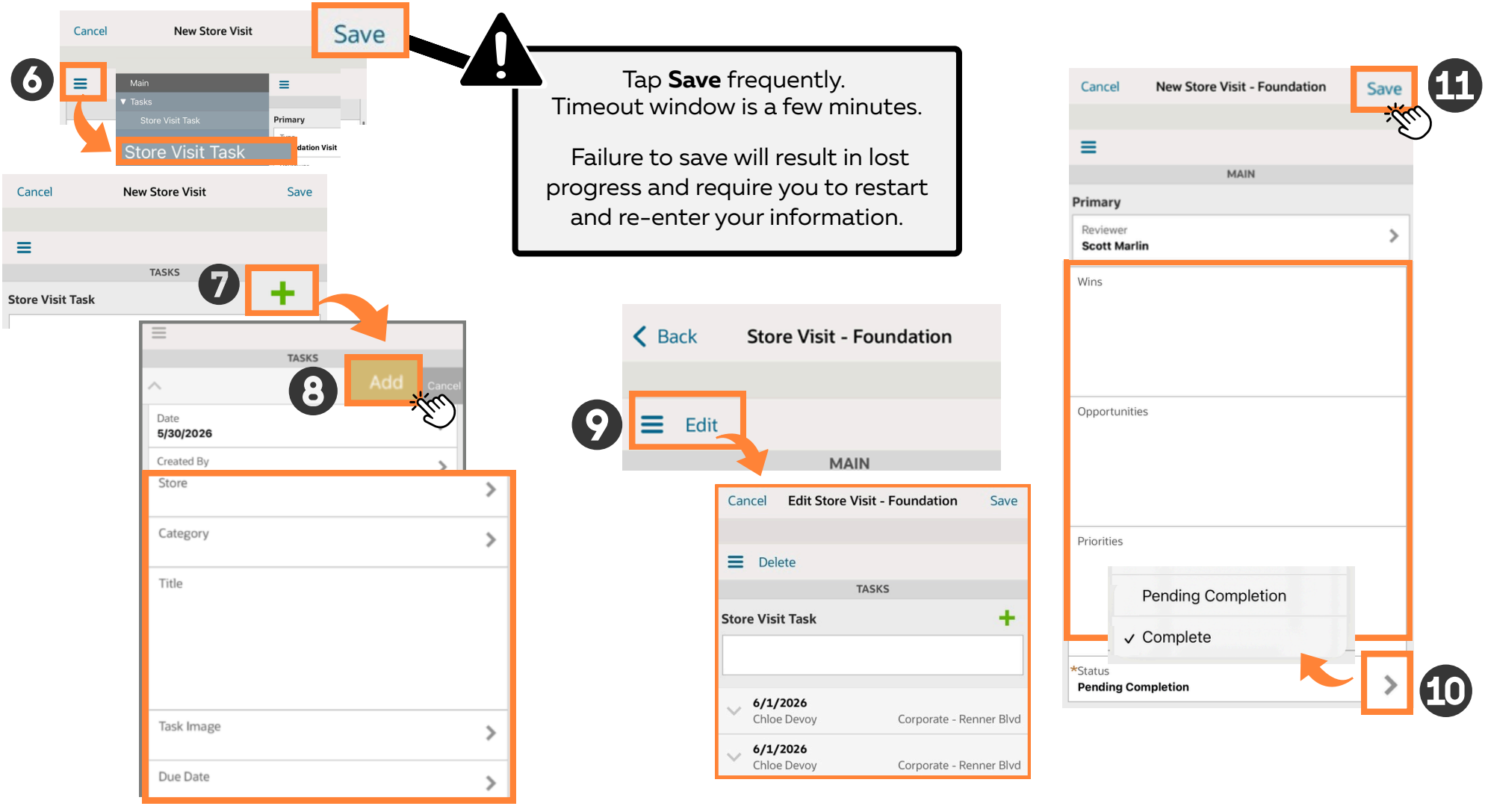
Important Note
Tap Save frequently throughout completing the visit







6. Tap the Triple Bar icon and select Store Visit Task to add relevant tasks.
7. Tap the green **plus (+)** in the upper right.
8. Enter all task details and tap **Add**. Repeat for each task you need to assign, and **Save**
9. Tap
    a. **Triple Bar** icon select **Main** to navigate back into the visit.
    b. **Edit** can also be selected to add or edit tasks
10. **Enter** detailed Wins, Opportunities, and Priorities from the visit and change status to **Complete** *before* leaving the store.
11. Tap **Save.** This will trigger NetSuite to send an automatic email to the DM & Store email address with a copy of the visit.



Printing Foundation Visit

Steps for Store Leader on Printing Foundation Visit:

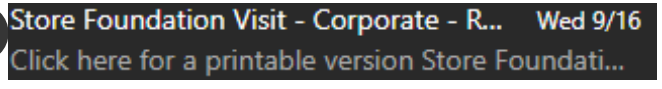
1. Log in to your Rally House email
2. Locate the email titled **Store Foundation Visit - (Store Name)**
3. Click & open the Foundation Visit attachment at the top of the email, note the visit will download
4. Naviate to your downloads, and open the visit
5. The District Manager and Store Leader will review and sign the visit together, ensuring clear alignment on accomplishments, opportunities, and the actions needed to support future success.
6. Before leaving the store, District Manager & Store Leader sign and date in the provided areas.
7. The store team will post the printed visit in their backroom, near their break table for Team Member visbility

Visit Retention: Keep the last 2 Foundation Visits posted, & after a new visit is completed & posted, the previous visit can be taken down and thrown away.

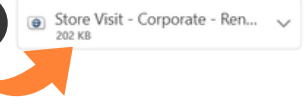
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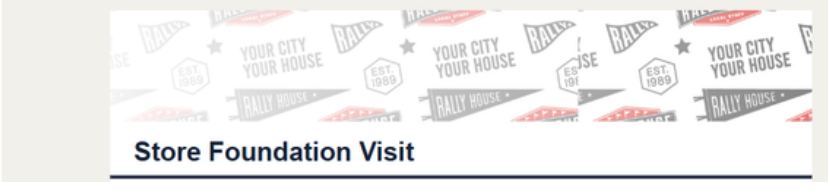


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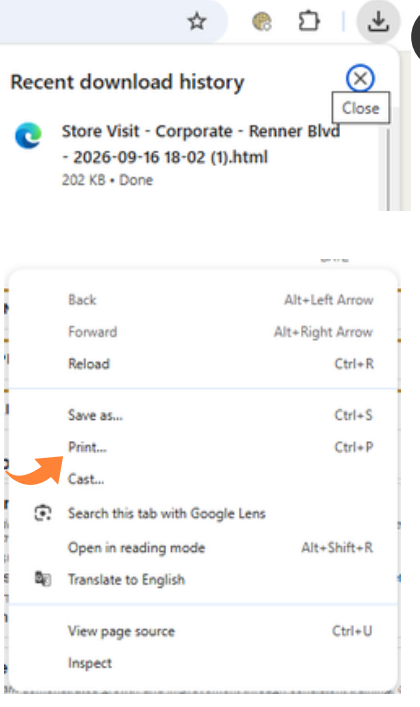


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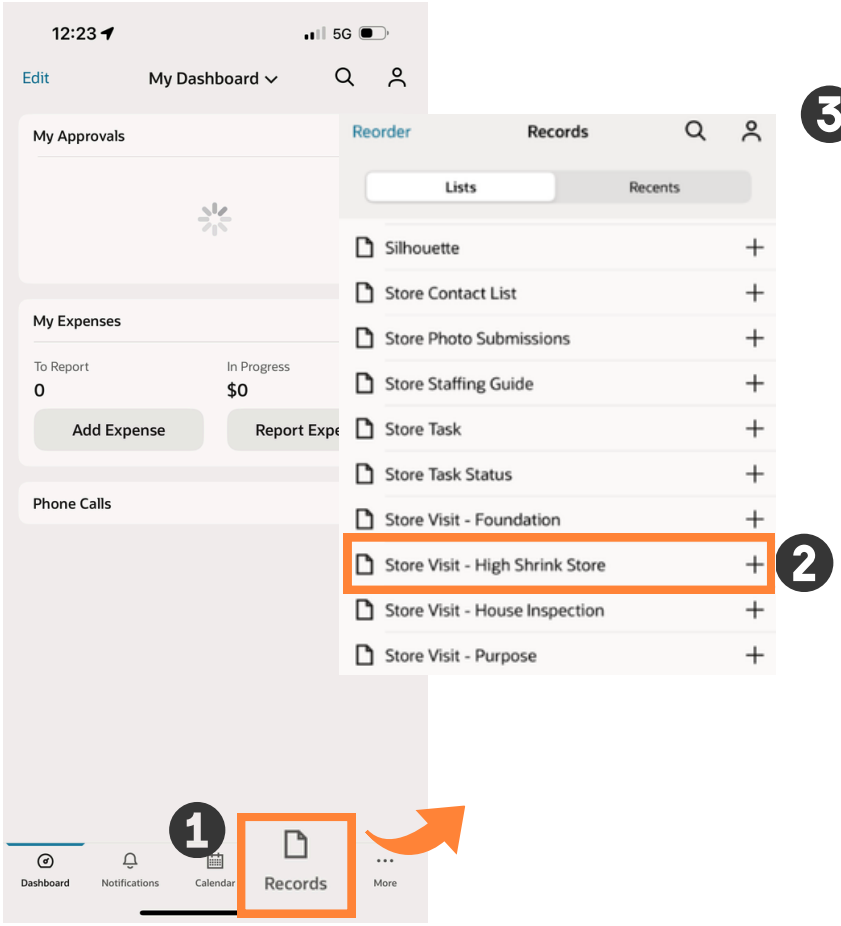
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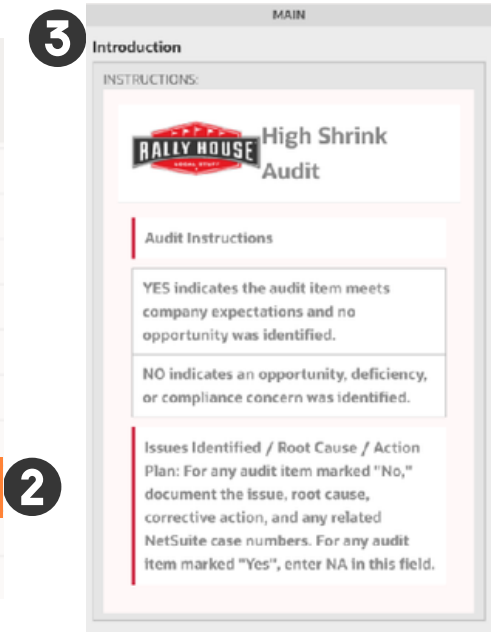
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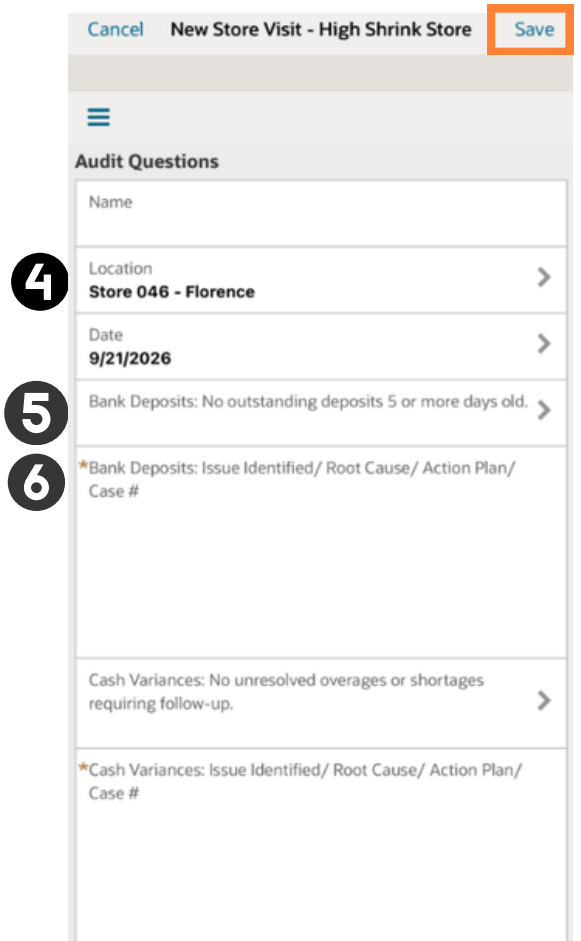


NetSuite Mobile Process: High Shrink Audit (Select Stores)

1. Log in to **NetSuite mobile** & tap the **Records** icon at the bottom of the page.
2. Scroll down to **Store Visit - High Shrink Store** and tap the **plus (+)** icon to begin a new visit.
3. Review the Audit Instructions
4. Tap into the 'Location' field and **select** the location you are visiting.
5. Read & Assess each question prompt before determining the rating for that specific section.
6. Note: You only need to fill out the Issue Identification/ Root Cause/ Action Plan for the rating of **No**
7. When completed with your audit, click **Save** in upper right corner



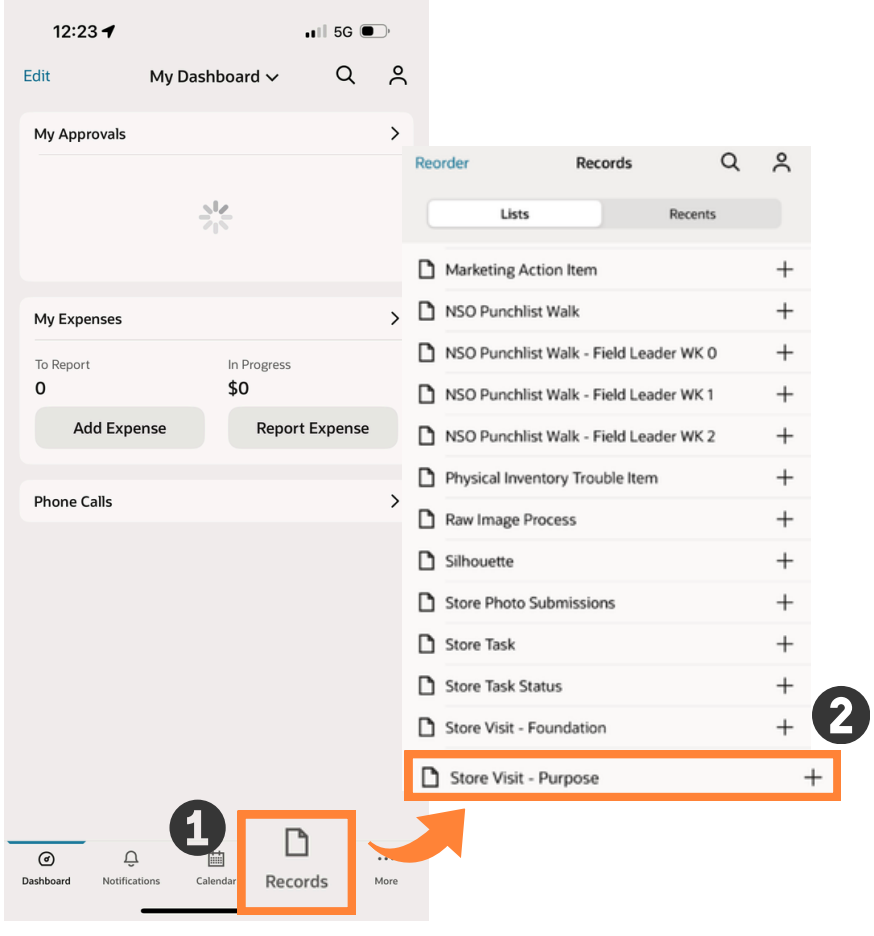


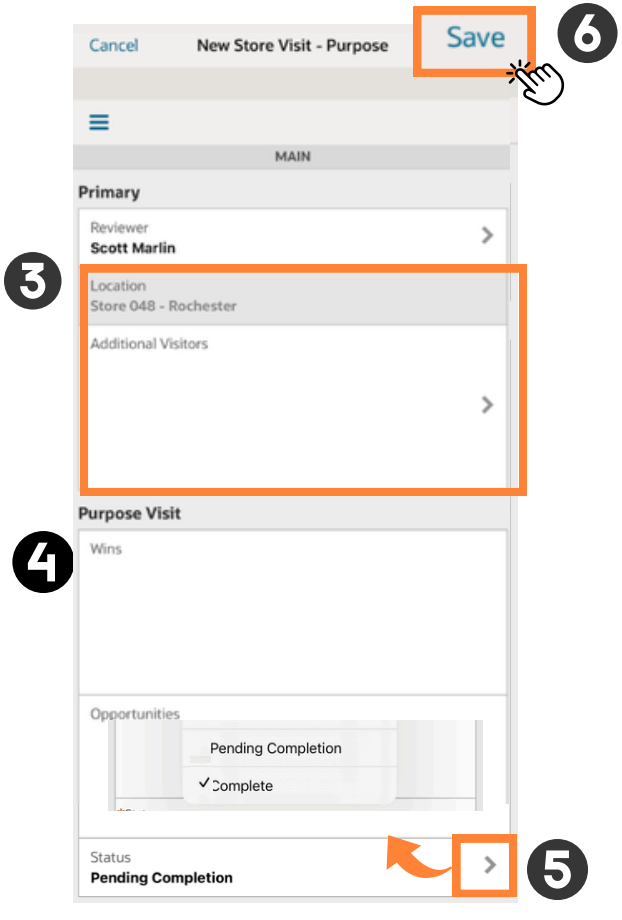


NetSuite Mobile Process: Purpose Visit

1. Log in to **NetSuite mobile** & tap the **Records** icon at the bottom of the page.
2. Select **Store Visit - Purpose** and tap the **plus (+)** icon to begin a new visit.
3. Tap into the 'Location' field and **select** the location you are visiting. Enter in any additional visitors if you have your RD, or other visitors with you during the visit.
4. Enter the **Wins, Opportunities, Priorities** from your visit.
    a. To enter a task, tap the Triple Bar icon and select Store Visit Task to add relevant tasks.
5. Change status to **Complete** before leaving the store and all visit information has been entered.
6. Tap **Save**.

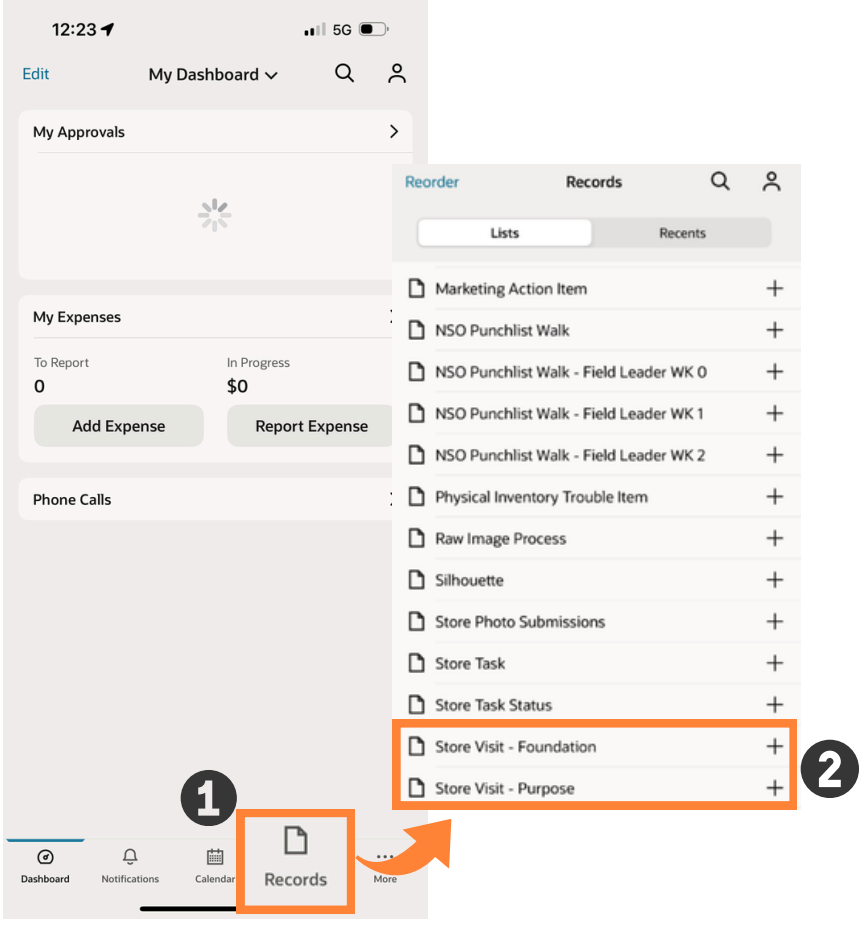
When a visit is marked as "Complete" and saved, NetSuite will trigger an automatic email to the DM & Store email address with a copy of the visit

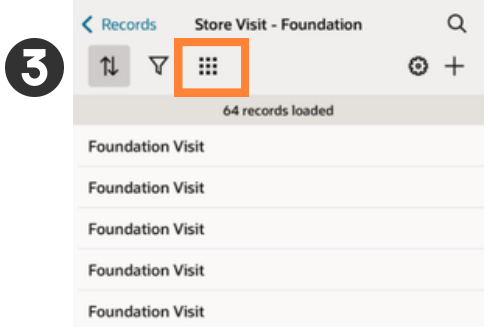


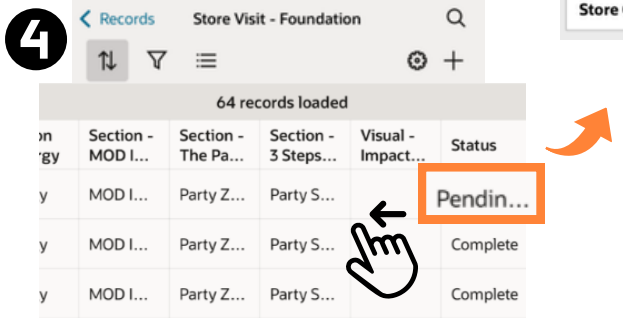


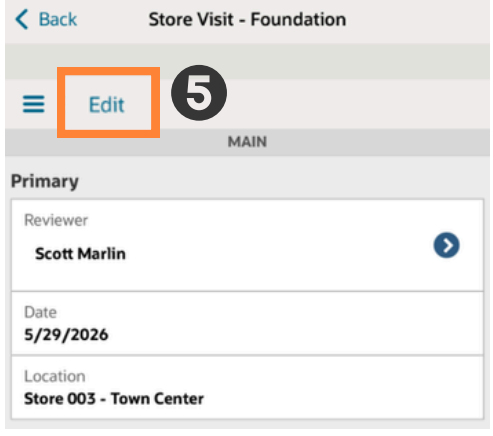
NetSuite Mobile Process: Accessing an In-Progress Visit

1. Log in to NetSuite mobile & tap the **Records** icon at the bottom of the page.
2. Scroll down and tap **Store Visit – Foundation** or **Store Visit – Purpose** based on which type of visit you need to access.
3. Select the 9 dots at the upper left of the screen to change your view, and filter by newest visit to oldest via the up/down arrow icon.
4. Select the visit you would like to access. **Scroll right**, navigating to the end and view the visit status to **view Pending or Completed visits**.
5. Click **Edit** to continue in the visit.







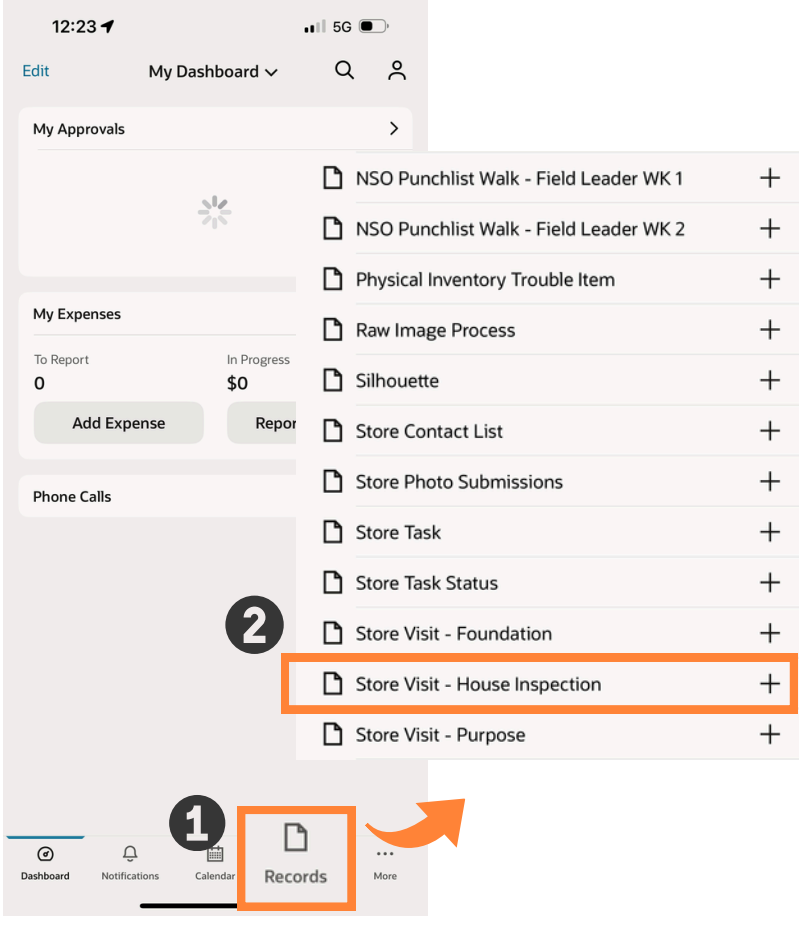


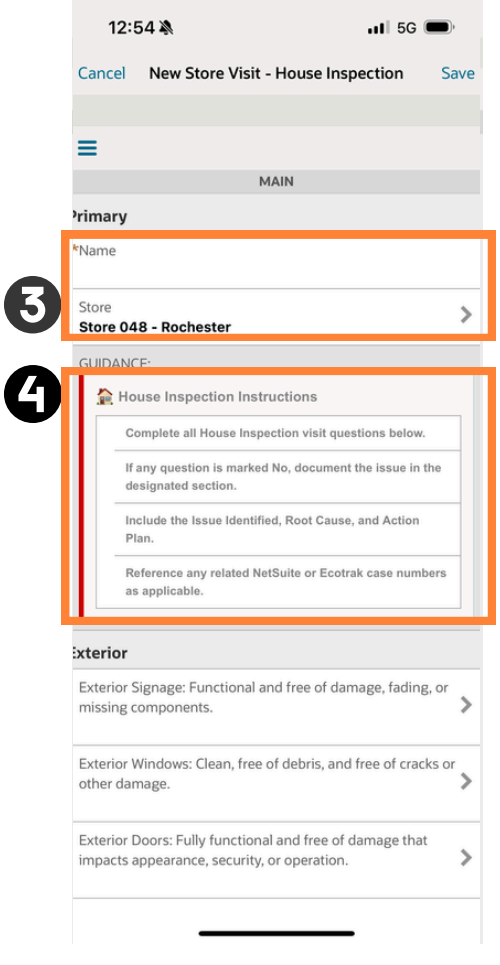
NetSuite Mobile Process: House Inspection Visit

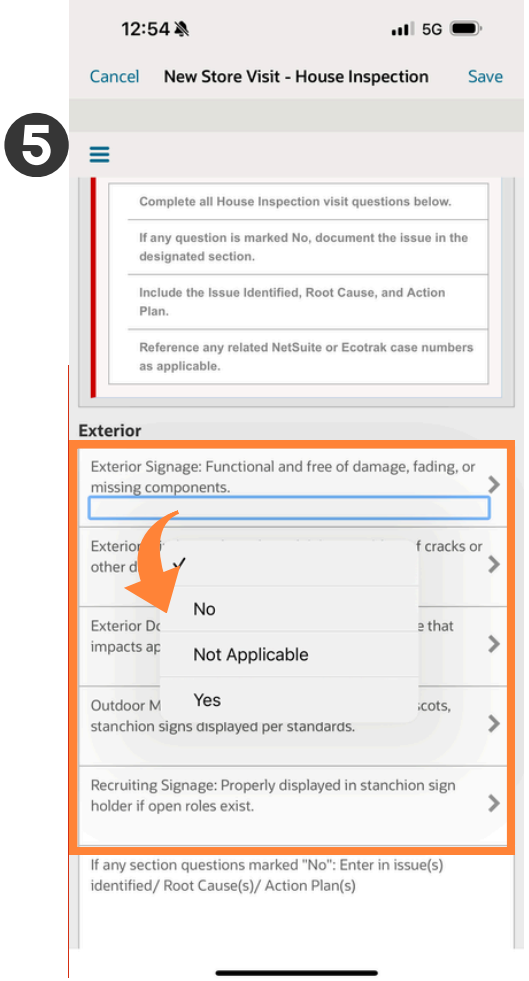
1. Log in to **NetSuite mobile** & tap the **Records** icon at the bottom of the page.
2. Scroll down to **Store Visit - House Inspection** and tap the **plus (+)** icon to begin a new visit.
3. Enter your Name & tap into the 'Store' field and **select** the location you are visiting.
4. **Read** the House Inspection Instructions prompt
5. **Read** each question, and **select** your rating score based on your observation
    - Note: You only need to fill out the Issue Identification/ Root Cause/ Action Plan for the rating of **No**.

Save

Important Note
Tap Save frequently throughout completing the visit







6. Tap the Triple Bar icon and select Store Visit Task to add relevant tasks.
7. Tap the green **plus (+)** in the upper right.
8. Enter all task details and tap **Add**. Repeat for each task you need to assign, and **Save**
9. Tap **Triple Bar** icon select **Main** to navigate back into the visit.
    a. **Edit** can also be selected to add or edit tasks
10. **Calibration: Review** the completed visit compared to the weekly store self-audits via the NetSuite House Inspection search on the District Manager shortcuts. Detail any opportunities where your observations were different than the stores, and the alignment/ root cause opportunities during the review and conversation. Change status to **Complete** *before* leaving the store.
11. Tap **Save.** This will trigger NetSuite to send an automatic email to the DM & Store email address with a copy of the visit.



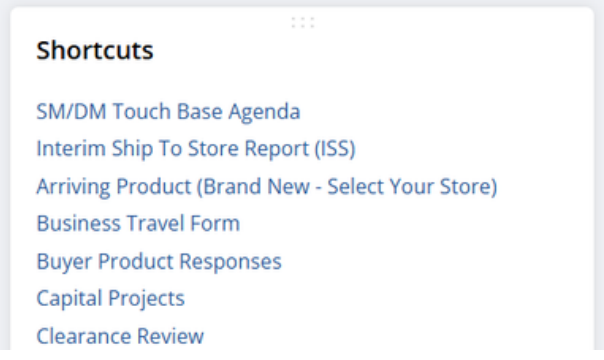
House Inspection Calibration

1. Log in to your NetSuite desktop version from your PC & navigate to the “Shortcuts” section of your dashboard
2. Scroll to the **bottom** of the shortcuts menu, and you will see several links that take you to view your completed visits
    a. **Visit: House Inspection**
3. Click into the link
4. **Filter** by store location at the top
    a. Once you filter by location, your completed House Inspection will be at the top of the page, followed by the store weekly-self audits
    Note that there will be areas of blank answers based on which week those particular questions are asked.
5. **Compare** your ratings to the store’s most recent self-audit and identify any opportunities for alignment between your observations and the store leader’s assessment.
    a. Example: On the Exterior Door question, the Field Leader rated No while the store rated Yes, indicating a potential difference in interpretation or standards.
6. During your calibration discussion, **review** any scoring differences and align on expectations. Afterward, return to your completed House Inspection Visit and document:
    a. What was calibrated
    b. Root cause of any scoring differences
    c. Agreed-upon action plans

EXTERIOR SIGNAGE: FUNCTIONAL AND FREE OF DAMAGE, FADING, OR MISSING COMPONENTS.	EXTERIOR WINDOWS: CLEAN, FREE OF DEBRIS, AND FREE OF CRACKS OR OTHER DAMAGE.	EXTERIOR DOORS: FULLY FUNCTIONAL AND FREE
No	Yes	No
No		
Yes		
Yes		
Yes	No	Yes
Yes		
	Yes	Not Applicable

NetSuite Store Visit Searches

1. Log in to your NetSuite desktop version from your PC & navigate to the “Shortcuts” section of your dashboard
2. Scroll to the **bottom** of the shortcuts menu, and you will see several links that take you to view your completed visits
    a. Visit: Foundation
    b. Visit: Foundation Not Completed L30
    c. Visit: Purpose
    d. Visit: House Inspection
3. Click into the link



Root Cause Resource

Consider These Categories When Assessing Root Causes

- **Identify Key Areas:** Break down the issues into manageable sections.
- **Analyze Contributing Factors:** Look into various elements that may influence the problem.
- **Evaluate Outcomes:** Reflect on the consequences of each potential root cause.

People

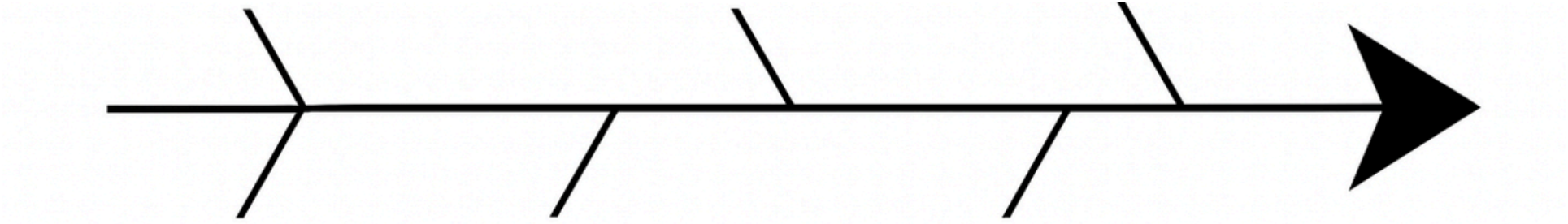
- Skill gap due to lack of training
- Inconsistent expectations
- Lack of bench-strength/development/ high turnover
- Lack of commitment or engagement

Process

- Missing or inconsistent routines
- SOP not executed
- Reactive management vs predictable or proactive response

Environment

- MOD opportunities
- Misaligned staff
- Low energy or inconsistent Party execution



Technology

- Training opportunities
- Digital workflows are not understood
- Tasks back-up or overload

Tools

- Missing physical tools/resources
- Store is missing key supplies
- Operational tools not maintained

Leadership

- Unclear expectations
- Lack of follow-through/ feedback loops
- Lack of recognition/ motivation
- MOD presence not felt

Root Cause: Follow the Evidence

Use questions to move past the first explanation. Each answer should point to the next clue.

Guided questions (reference):

- What are you seeing or hearing that shows the issue?
- Where is execution breaking down?
- What should be happening that is not?
- What step is unclear, skipped, or inconsistent?
- Who is involved when the breakdown occurs?
- What behavior or decision allows this to continue?
- What evidence confirms this is the cause, not the condition?
- Is this isolated or repeated?

Coaching Dialogue Resource

Effective questioning clarifies execution and reveals root cause. Not all questions drive the same outcome.

- **What** questions gather facts and identify actions that produced the result.
- **Why** questions can trigger defensiveness and justification.
- **Show/Walk** questions validate execution:
  - Show me...
  - Walk me through...
- Probing questions dig deeper based on what you hear in the first response.

In-the-Moment Coaching

Use during:
- public, on-the-floor, during live execution

Sample Questions

- What resources did you or the team use?
  - Review together: what is accurate vs. inaccurate?
- Walk me through how the task or process was delegated.
  - What follow-up and feedback were provided?
  - What have you tried so far?
  - What was the result?
- Show me how this is executed. (Validate execution, not explanation.)
- Let's review the VMA(s)
  - Who was assigned
  - Who followed up on results? (Validate Rally Rounds assignment.)
  - How or why were these priorities determined?

VS

Coaching Conversations

Use during:
- private or semi-private, 1:1 settings

Sample Questions

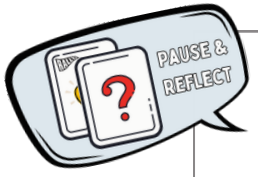
- What were the key successes and opportunities from this visit?
- What needs to happen before the next visit?
- What obstacles do you need to overcome?
- If those obstacles persist, how can I support you?
- How did this visit go from your perspective?
- Who should be recognized from your team, and why?

Foundations Visit Lab

Each DM should reflect on a recent store visit tied to the foundation being discussed. Be prepared to share one example that highlights the below questions. Reflection should focus on how observation, root cause, and coaching influenced ownership of the business.

1 Foundation Visit Learning Moments:

1. Which objective created a shift from tell → show with the Store Manager?
2. What key learning moment surfaced? What did the observation reveal?
3. Where did the root cause expand? What blind spot became visible?
4. What behavior actually changed after the conversation?
5. What follow-up will confirm progress? What will you validate next visit?



2 Champion Mindset:

1. Were any labels or limiting beliefs revealed from the Head Coach or from you as the coach?
2. Where did you use 'Question Everything' inward? What assumption did you challenge?
3. Did you experience a Fail Forward moment? What progress came from it?

