Shift Management

The goal of this module is for you to:

- Meet desired business results using the shift management process
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Introduction to Shift Management

Shift management focuses on the big picture by fitting all the areas of the restaurant together. As the shift manager, you have a different view of the restaurant than area leaders do. You observe not only what is happening in each area, but also what is happening between areas – you must solve problems across areas.

As you train to manage the entire shift, you will apply the area management and people skills you learned to coordinate people and restaurant operations in all areas. You will be working through the area as well as the crew to help you meet your targets and goals. Communication between you and the area leaders is critical.

As the shift manager, you are responsible for the business results of your shift. In addition to managing people, equipment, and product for fast, accurate, and friendly service, you now will manage for profitability. You manage this responsibility by:

- Consistently meeting the standards for QSC.
- Meeting and exceeding customer expectations.
- Following safety and security procedures to prevent accidents or theft.
- Managing restaurant controls (i.e., food and labour).

The process you use to manage the shift is the same as you used in managing areas:

- Develop a pre-shift plan.
- Implement the plan.
- Conduct a post-shift analysis in preparation for your next shift.

You will use the Shift Management Verification tool to assess your performance as you learn and practice managing the shift. This is the same tool that will be used to verify your performance as a shift manager.

The Shift Management Program helps you build the skills and knowledge to be a shift manager.
Shift Management

**Shift Manager is shift certified**

**Working Day before shift**
- Review schedule for next day
- Review partner’s sales pattern (promotions, upcoming special events, etc.)*
- Check crew schedule and complete positioning plan
- Check product stock levels
- Review Guest Count/Sales Projections

**Pre-shift**
- Observe cleanliness of restaurant exterior upon arrival
- Greet team
- Read messages from ISP and/or manager’s log
- Communicate with manager on shift to identify sales trends or problems
- Consult with sales partners*
- Properly complete the Pre-shift Checklist (i.e. stocking for 24/2)
- Identify shift priorities and secondary duties
- Prevent/handle bottlenecks
- Watch danger zones

**During shift** (dotted lines indicate responsibilities can be performed in any order)
- Manages the shift by observing
  - service, production barriers
  - danger zones
  - crew positions
- Guide, encourage, and assist crew when necessary
- Communicate progress of targets to crew
- Monitor progress towards targets throughout shift
- Interact with customers/role models hospitality and follow customer recovery process when necessary
- Conduct Travel Path every half hour (set priorities and take action)
- Maintains safety and security during the shift

**Post-shift Changeover**
- Evaluate results against shift targets
- Recognise and reward crew for meeting shift targets or excellent performance
- Change-over with next shift’s manager
- Prepare deposit
- Review schedule for next shift

*Items unique to Special Site Restaurants (such as: Shopping Centres, Airports, Retail Sites)

**Items in bold italics are key success factors**
**Systems Map**

- **Change-over**
  - Review sales projections and current sales from today
    - Training schedule
    - LSM activities
  - Crew are positioned according to the positioning guide and stay in position
  - Communicate shift targets to crew
  - Communicate other relevant information (new products, promotions*)
  - Coordinate breaks for team
  - Skim drawers and prepare deposits
  - Check employee appearance, hand washing and glove procedures
  - Maintain food safety
  - Maintain Minimum level of QSC
  - Tell team good-bye and thanks

**Output:** A well run shift

**Key success factors**
- Manager’s visible on floor actively managing by observing service and production barriers, danger zones and crew positions
- Pre-shift Checklist is used
- Shift Manager is shift certified
- Crew are positioned according to the positioning guide and stay in position
- Shift targets/ information are communicated to all employees
- Crew recognised and rewarded for meeting targets or excellent performance
- Shift manager interacts with customers and follows customer recovery process when necessary and role models hospitality
- Travel Path is conducted by manager every half hour, priorities are set and action taken

**Systems Impacted:**
- Production
- Service
Shift Management

Shift Management Process

Your thought process and activities should be the same for both area management and shift management, but with the additional activities:

- Controlling costs.
- Completing the floorplan for your next shift.
- Overseeing all areas.
Pre-shift
• Am I mentally prepared?
• What do I hear, see, smell and taste as I prepare my pre-shift check?
• Are people, equipment and product ready for the shift?
• Are there any issues to address or to be aware of from the previous shift
• Do I know the targets for my shift?

Managing the shift
• How will I meet QSCV standards and customer expectations?
• How will I work through others, and give and receive feedback?
• How will I solve problems?
• How will I maintain a safe and secure shift?
• How will I manage customer feedback (compliments, inquiries, complaints)?

Post-shift
• What do I need to communicate to the next manager?
• What did I do well today?
• How can I improve my next shift?
• How can I prepare for my next shift?
Impact of Key Success Factors

Listed below you will find the 7 of the 8 key success factors of the Shift Management System. As you review each of these take a few minutes to reflect on what you might see in a restaurant if this key success factor was missing.

Example: “Crew are positioned according to the positioning guide and stay in position”

What might you see in a restaurant if this key success factor was missing

• Crew out of position and not available when needed to take or prepare orders
• Confusion in production or service area

Key Success Factor
Manager’s visible on floor actively managing by observing service and production barriers, danger zones and crew positions.

What might you see in a restaurant if this key success factor was missing?

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Key Success Factor
Pre-shift Checklist is used.

What might you see in a restaurant if this key success factor was missing?

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**Key Success Factor**
Crew are positioned according to the positioning guide and stay in position.

What might you see in a restaurant if this key success factor were missing?
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**Key Success Factor**
Shift targets/information are communicated to all employees.

What might you see in a restaurant if this key success factor was missing?
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**Key Success Factor**
Crew recognised and rewarded for meeting targets or excellent performance.

What might you see in a restaurant if this key success factor was missing?
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Key Success Factor
Shift Manager interacts with customers and follows customer recovery process when necessary and role models hospitality.

What might you see in a restaurant if this key success factor was missing?
__________________________________________________________________________
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Key Success Factor
Travel Path is conducted by manager every half hour; priorities are set and action taken.

What might you see in a restaurant if this key success factor was missing?
__________________________________________________________________________
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__________________________________________________________________________
CHALLENGE ACTIVITY

Are you ready to take the first shift management challenge?

Using the Shift Management Verification

Use the Shift Management Verification, found in the Appendix, to observe your coach or business manager managing the shift. Observe for 30–60 minutes. List any questions you have about the shift below and review them with your coach after the observation period.

Questions:

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Shift Management

Pre-Shift

REVIEW

Pre-shift checkpoints

1 Preshift

• Day before shift - prepare crew positioning
  – Use the 8/10 rule
  – Split order taking and cashier at 4 in Drive-Thru
  – Position for the entire shift
• Communicate with previous shift manager about problems/issues.
• Complete pre-shift travel path and Pre-Shift Checklist

• Address people, equipment, product issues from pre-shift travel path and checklist
  – People: Adjust positioning based on sales trends and crew availability
  – People: Review shift training plan
  – Equipment: Troubleshoot as needed
  – Product: Stock for 24/2
• Set and communicate shift targets
Positioning Principles

• **Fries 8/10 rule**
  The fry station is a critical part of the production area, and must be assigned to a dedicated crew person when there are 8 crew on shift for an instore or 10 crew on for a Drive-Thru.

• **Split order-taker and cashier functions at 4 crew in the Drive-Thru.**
  Order taking is the slowest function so splitting order taking and cashiering will have a positive impact on service times.

• **Position for the entire shift**
  It is important to plan positioning for the entire shift—not just for the rush. Don’t forget to plan for breaks and for shift changes.
Travel Path
As a shift manager, your travel path includes all areas of the restaurant, as well as the car park and outside the building. Take a 10-minute walk to see what has been done well and what needs to be fixed before you take over the shift. You can take care of smaller problems as you walk around. Note large problems on your Pre-Shift Checklist.
Pre-Shift Checklist
The Pre-Shift Checklist helps you evaluate people, equipment, product, and cleanliness issues in the restaurant.
## Shift Management

### Shift to-do list

**Miscellaneous**
- Dusting Ayes clean and tidy, sufficient stock levels of straws, napkins & information leaflets
- Customer toilets clean and tidy, sufficient stock levels of AMT, toilet paper, handwash & soap
- Drive-Through parks clean, tidy & litter free

**People**
- Check people positions - floor plan vs. actual
- Plan for crew breaks - maintaining outstanding QSC
- Check crew appearance and hygiene standards
- Follow up on Area Managers and their responsibilities

**Product**
- Complete shift BSC checks
- Primary & secondary staff adherence to system for secondary staff levels
- Production modules set = han-lay/pull-lay/pull-drop/short-pull/call as needed
- Forecast bin/stock/product levels set - in line with sales volume/patterns
- Verify finished product quality - check temperature/colour/appearance
- Big Breakfast/Big Mac/French Fries
- Time cards used at all times - food is discarded after 10 mins
- Minions & controls waste levels - red & grey bins used correctly
- Stock levels sufficient to meet demand - kitchen/front counter / F&B booths

**Equipment**
- Breakfast equipment cleaned & continued after the breakfast shift - follow-up on cleanliness standards (4 Step method used)
- All equipment kept clean & tidy - CAMHS monitored/budgeted
- Minions the performance & efficiency of all equipment - actions & follows up on all equipment issues
- Back door service - closed & alarmed
- Pre-closing cleaning tasks are completed hygienically & not at the expense of the customer
- Equipment cleaned, sanitised and set up correctly - using the 4 Step Method

### Post-shift

**People**
- Dual cash shift floats - BCR & cash book completed correctly
- Manager checks/updates floor plan for next shift
- Communicate with the next shift - using the manager's diary on a close shift

**Product**
- Check stock levels for next shift
- Defect products - e.g. Donuts/Muffins
- Log in meats and waste
- Complete reordering/tag delivery/tag transfers
- Inventory completed - deviations double-checked

**Equipment**
- Safe handover to next manager is witnessed & correct - Safe scrambled after a close shift
- UP system close completed
- Restaurant service - doors & windows locked & activate/set security alarms

### What did I do today?

**How can I improve my next shift?**
**Shift Management Verification**

For shoulder to shoulder activities and verification use the Shift Management Verification found in the appendix.

**Shift Management Verification**
This form is used for internal and external verification and for reinforcing standards.

**Targets**
Goals you will be measured against.

**Pre-shift and Managing the shift checkpoints**
Verifiers will check that you demonstrate the key actions during each step of the shift management process.

**Danger Zones and decision making**
Verifiers will track your reactions to danger zones and note your use of the decision making process.

**Post-shift checkpoints**

**Service time recording sheet**

**Verifier notes and observations**
You will meet with your verifier to discuss strengths and opportunities.
Shift Management

Decision Making Model
During your pre-shift travel path you use the decision making process to prioritise issues.

**Observe**
Observe during your travel path to identify problems. Observation requires you to use your five senses: sight, hearing, smell, taste, and touch.

**Prioritise**
You will need to prioritise if more than one problem exists.
A. • Food Safety or Health and Safety
   • Handle these problems immediately!
   • Quality/Service
   • Problems that prevent production of a quality product or prolong service to the customer

B. • Operational Barriers
   • Daily Management Systems
   • Customer comfort and convenience

C. • Restaurant appearance or function

**Decide**
Decide who will take care of each problem.

**Communicate**
Communicate to others the actions you want them to take. Coordinate with previous shift manager if necessary.
Shift Targets
As a shift manager you need to set and communicate your targets before the shift begins. Communicating targets to the crew keeps you all focused on delivering QSC. You will work with your manager to determine targets for your shift. As part of the verification process you will set targets focused on ensuring the delivery of QSC and impressive customer service as well as targets that indicate a profitable shift. These include:

- Service Times
- Peak Hour Customer and Car counts
- Cash (+ or -)
- Raw food waste
- Completed food waste
- Labour
Pre-Shift

EXERCISE

Positioning for the shift
It is Monday afternoon and you are preparing your shift plan for Tuesday. Position the crew for the hours listed below based on the positioning principles. Use the first letter of the employees' first name on the charts below. Your crew schedule is posted to the left.

Crew schedule
Arther: 5:30 am – 1:00 pm
Bill: 5:30 am – 2:00 pm
Carmen: 5:30 am – 2:00 pm
Daniel: 5:30 am – 2:00 pm
Emily: 6:00 am – 1:00 pm
Fred: 7:00 am – 2:00 pm
Gary: 8:00 am – 2:00 pm
Henry: 8:00 am – 4:00 pm
Ian: 9:00 am – 4:00 pm
James: 12:00 pm – 8:00 pm
Kathy: 12:00 pm – 4:00 pm

Some information about your crew:
• Daniel is your maintenance person.
• Emily has only been trained on the front counter and Drive-Thru areas.
• Henry has only been trained on production.
<table>
<thead>
<tr>
<th><strong>Shift Preparation Tool</strong></th>
<th>The shift preparation tool should be used to accurately position the entire shift.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stay balanced</strong></td>
<td>Balance must be maintained throughout the shift, especially while giving out breaks.</td>
</tr>
<tr>
<td><strong>Aces</strong></td>
<td>Remember to put your aces in key positions, while still maintaining balance.</td>
</tr>
<tr>
<td><strong>Stay in place (SIP)</strong></td>
<td>The crew people stay in place, and are ready to wait on our customers.</td>
</tr>
<tr>
<td><strong>Most likely danger zones</strong></td>
<td>The most likely danger zone is the next position to be filled.</td>
</tr>
<tr>
<td><strong>Adjust based on danger zones</strong></td>
<td>When danger zones occur during the shift, it is up to the Shift Manager to react and adjust what they are doing to address the new circumstances they are facing.</td>
</tr>
</tbody>
</table>
### Shift Management

#### Match the definition to the shift vocab word:

<table>
<thead>
<tr>
<th>Definition</th>
<th>Shift Vocabulary Word</th>
</tr>
</thead>
<tbody>
<tr>
<td>A A tool used by the Shift Manager to determine priorities when preparing the shift to deliver QSC</td>
<td>G Aces</td>
</tr>
<tr>
<td>B 3 or less orders of fries prepared</td>
<td></td>
</tr>
<tr>
<td>C Universal Holding Cabinet</td>
<td></td>
</tr>
<tr>
<td>D Stepping in and helping out the crew, but without taking over fully or working a station</td>
<td></td>
</tr>
<tr>
<td>E The concept of keeping crew from leaving their position during the peak period to avoid danger zones</td>
<td></td>
</tr>
<tr>
<td>F Tool to correctly position the entire shift</td>
<td></td>
</tr>
<tr>
<td>G High performing crew people that a Shift Manager should position in key positions</td>
<td>H Stay in Place (SIP)</td>
</tr>
<tr>
<td>H Where the Shift Managers should position themselves so that they are best able to observe the front counter, production and drive thru</td>
<td>K Stock Build To charts</td>
</tr>
<tr>
<td>I Telling someone specifically what they did so they will NOT repeat the behaviour again</td>
<td></td>
</tr>
<tr>
<td>J Tools used to check that the shift is stocked for 24/2</td>
<td></td>
</tr>
<tr>
<td>K Telling someone specifically what they did well so they repeat the behaviour again</td>
<td></td>
</tr>
</tbody>
</table>
Pre-Shift

CHALLENGE ACTIVITIES

Shift Targets
Work with your coach or business manager to fill in the targets below for your restaurant. At the end of the shift compare targets to actual. Select one target to discuss with your coach.

Service Time – Front Counter
Target Actual

Service Time – Drive-Thru
Target Actual

Peak Hour Drive-Thru Car Count
Target Actual

Peak Hour Front Counter Customer Count
Target Actual

Other Restaurant Targets
Target Actual
Target Actual
Target Actual

Pre-Shift Travel Path and Checklist
Shoulder to shoulder with your coach complete a Pre-Shift Checklist. Determine priorities for this shift. Discuss the priorities with your coach or business manager.
Shift Management

Managing the Shift

REVIEW

Pre-shift checkpoints

2 Manage the Shift

Monitor progress toward targets
Conduct a travel path every 30 minutes and make decisions as appropriate.
Manage from the observation post.
Maintain positioning according to Positioning Principles.

Manage through others
Give clear direction & follow up.
Provide specific, appreciative feedback.
Observe procedures and give constructive feedback in a timely and appropriate manner.
Work through Area Leaders.

Ensure service quality/speed
Model hospitality behaviours.
Observe and correct service procedures.
Observe and react appropriately to danger zones.

Ensure Customer Satisfaction
Respond to customer feedback.
Seek customer feedback as appropriate.
**Ensure food safety**
Complete DPSC.
Respond to food safety issues immediately.
Follow up on proper food handling and preparation procedures.

**Ensure food quality**
Monitor cabinet levels.
Enforce holding times for all products.
Troubleshoot issues.
Observe and correct procedures.

**Ensure cleanliness**
All areas of the restaurant are clean, sanitised and clutter free.
Outside Car Park is clean and free of debris.

**Maintain a safe and secure restaurant**
Follow opening procedures.
Follow closing procedures.
Follow restaurant safety and security procedures.
Follow cash security procedures.

**Building employee commitment**
Encourage teamwork.
Maintain a fun environment.
Communicate progress towards targets and goals.
Monitor execution of training plan.
**Stand here!**

When I first started managing the shift by myself, I really struggled. Things that I thought required my attention always seemed to happen in all 3 areas at the same time. I became very frustrated because the minute I focused on a problem in 1 area, another problem in a different area occurred. It seemed that I was always putting out fires instead of taking the time to find out what was causing the flames!

After watching me struggle with this situation, my manager said, “Stand here!” and he pointed to a spot near the fry station. After I stood where he told me to, he said, “Look around and tell me what you see at the front counter, on the Drive-Thru monitor, and in the production area.” Suddenly I realised what I could see – all 3 areas at the same time! With some coaching from my manager about observing, communicating and taking action, I was almost able to anticipate what was going to happen, before it actually did. It was great! Finally, I was able to identify the problems that always seemed to cause a lot of other problems. I began to communicate to my area leaders about things I saw, and I realised that I could solve many problems at one time.

**Moral of the story:**

When you position yourself, in the observation post, where you can see what is happening everywhere, you will be able to respond more quickly to events as they occur.
Manage from the Observation Post

There is no such thing as an isolated problem — a problem in one area can cause problems in other areas and result in lower QSCV or increased cost.

As a shift manager you are responsible for:

- Correcting problems.
- Preventing them from happening again.
- Recognising when something has been done well.
- Encouraging repeat performance through positive recognition.

By managing from the observation post you can observe and react to danger zones.

The illustration below highlights the 4 danger zones that require immediate action to prevent service problems from occurring. These 4 areas must be in balance to deliver service in 60 seconds or less, and hot, fresh-tasting, good-tasting, and attractively presented food. If any one of these areas is not delivering to the established target, the cycle is broken and standards cannot be met.
Shift Management

★ Manage through others
Do not try to solve all problems yourself.

A key part of your reaction to a problem is to decide who will do what needs to be done. You must delegate. This is another aspect of prioritising.

A manager who assigns work to others will do more and be able to handle more situations. If you are too busy with smaller problems, you will not be able to give major problems your full attention when they occur. Work through your team. Match skills with job needs.

Let your area leaders or crew trainers solve the less urgent problems that you identify. While you are taking action to solve the highest-priority problem, they can be working on other problems. Always follow up with your crew to:

• Make sure the problem has been solved.
• Find out why it happened.
• Gather facts so that you can take future action to prevent the problem from recurring.

Remember! Manage through others. Stay focused. Do not try to do everything yourself. Work through your area leaders and your crew. Communicate your needs and expectations. Follow up and recognise results.
Managing the Shift

EXERCISE

On-the-level-feedback
Directions: Review each scenario and choose the (M) most effective response and the (L) least effective response. Next, consider the impact the most effective action would have on the employee compared to the impact of the least effective action.

1. During a slow period you notice a crew member talking with a friend over the counter. A family of five comes in to place an order. The crew member continues talking with his friend for another minute before greeting the customer. You should:
   • Walk up to the crew member and politely direct them to greet the customer.
   • Get the crew member’s attention by calling out his name and telling him to put his personal conversation on hold to take the customer’s order.
   • Walk up to the crew member and politely direct them to greet the customer.
     As soon as the order is complete, provide specific feedback related to service expectations.
   • Do nothing. The family is deciding what they want to order anyway.

Most effective:

Least effective:
2. The business manager has called a crew meeting to discuss the results of the commitment survey. As you are waiting for the business manager to begin the meeting, you and several of the crew members are talking. Sally complains about taking the survey indicating that it is a waste of time. Before you are able to respond to the employee, John, a 4-year crew member, speaks about all the recent changes that have taken place at the restaurant over the last year and the overall positive impact it has made on the scheduling system. You should:

- Praise John after the meeting for sticking up for you.
- Ask others for their opinions.
- Praise John immediately in front of others for his observations and his commitment to improving the overall operations of the business.
- Reprimand Sally for her negative attitude in front of others so they learn that behaviour is unacceptable.

**Most effective:**

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**Least effective:**

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3. During a shift you hear sounds of an argument taking place at the Drive-Thru. When you get there, you see a crew member and a customer in the middle of an argument at the window that has escalated to shouting. You should:

- Immediately instruct the crew member to take a break. Respond to the customer’s situation and check for customer satisfaction. Immediately follow-up with the crew member to determine how the situation could have been handled differently and discuss appropriate ways to handle customer complaints in the future.
- Let the crew member and customer work it out.
- Immediately reprimand the crew member in front of the customer for arguing and direct them to take a break. Respond to the customer’s situation. Call a crew meeting that afternoon to explain how best to handle customer complaints in hopes that the crew member gets the message.
- Ask the customer to leave.

Most effective:

Least effective:
EXERCISE

Now and future actions
Below are 4 sets of problems that are occurring on the floor.

You must:
- Prioritise these problems.
- Describe what now action you would take to solve the problem you have identified as Number 1.
- Describe what future action you would take to prevent the number 1 problem from happening again.

Set 1:
- A crew person shows up for the shift wearing a dirty uniform.
- A customer mentions that there are several dirty tables in the lobby.
- The grill area is out of 10:1 meat.

Now action
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__________________________________________________________________________

Future action
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__________________________________________________________________________

Set 2:
- The toilet in the men’s room is blocked up.
- Customers are waiting on their food (4 at the front counter, 2 parked cars at the Drive-Thru).
- The Big Macs being assembled have over caramelised buns.

Now action
__________________________________________________________________________
__________________________________________________________________________

Future action
__________________________________________________________________________
Set 3:
- A customer at the Drive-Thru window is claiming he was shorted on his order.
- The car park is covered with litter.
- A crew person at the front counter is being rude to customers.

**Now action**


**Future action**


Set 4:
- One of your grill people has not shown up for the shift.
- The Drive-Thru sound system has broken down.
- The walk-in refrigerator is not functioning properly.

**Now action**


**Future action**


**EXERCISE**

During your next shift make note of any time you are in the danger zone, note the actions taken by the shift manager and record them below. Discuss your findings with your coach or business manager.

<table>
<thead>
<tr>
<th>Danger zone</th>
<th># of occurrences</th>
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<tbody>
<tr>
<td>Front counter</td>
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<tr>
<td>Actions taken:</td>
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<td></td>
<td></td>
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<tr>
<td>Drive-Thru</td>
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<tr>
<td>Actions taken:</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Fries</td>
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<tr>
<td>Actions taken:</td>
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<tr>
<td>Bin Level</td>
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<tr>
<td>Actions taken:</td>
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</table>
POST-SHIFT

Handing over the shift appropriately is one of your responsibilities as Shift Manager. Talk with the next Shift Manager about any issues or problems that you were unable to resolve and that may affect their shift or other shifts. Use the managers diary if appropriate.

Also use post-shift analysis as a way to evaluate how well you did on the job by asking yourself the following questions:

• What did I do well? How can I be sure to do it again?
• What would I do differently next time?
• What did I learn?
• What problems can I prevent from happening again?
• What can I do to make sure others will see me as their best boss?
• What can I do to better motivate employees?

The post-shift analysis is extremely important, and it doesn’t need to take much time. You can ask yourself these questions on your way home.

When outstanding managers were asked how they got so good at their jobs, most of them said the same thing: “I made mistakes. Lots of them. But I never made the same mistake twice.”
Understanding Profitability

Sustainable profitability at McDonald’s is the outcome of increasing sales and controlling costs.

Building sales
As a shift manager you build sales through committed employees delivering QSC to our customers everyday.

Controlling costs
As a shift manager you are responsible for managing food cost and crew labour on your shift. However, controlling costs at the expense of employee commitment and customer satisfaction will make it difficult to keep customers coming back.

To learn more about controlling costs without sacrificing employee commitment and customer satisfaction review the pages that follow.

Food cost
Food cost is usually the biggest expense for the restaurant. You can make a significant impact on food cost by focusing on restaurant controls. The following restaurant controls are costs that you are responsible for controlling on your shift:

- Raw food waste
- Full food waste
- Employee meals
- Condiments
- Yields

Waste is defined as raw or finished products that must be thrown away rather than served to customers. It is a cost of doing business the McDonald’s way.
Keep in mind, some waste is expected and acceptable. Think about it: It is more profitable in the long run to throw away an unacceptable product than to serve it to your customers. A dissatisfied customer may not return to your restaurant, which causes a loss of sales. Do not lower QSC standards in an effort to reduce waste.

You can control waste by following procedures. For example, using the proper product build-to levels will enable you to consistently deliver outstanding QSC and optimise food costs.

**Raw Food Waste**

Raw food waste is any cooked or uncooked product that is not packaged and ready to serve to the customer. Some examples of raw food waste include buns, meat patties, and cheese slices. Raw food waste can be caused by:

- **Equipment that is either broken or set up improperly.**
  Freezers and chillers with improper temperature settings reduce shelf life and cause spoilage.

- **Overstocking, causing product to expire before it can be used.**
  Most items stored at room temperature in the grill area have a short secondary shelf life. To minimise waste, avoid putting out too much product, especially during low-volume time periods.

- **Overproduction of products held in UHC.**
  Cabinet level charts must be posted on holding cabinets for so that the production team knows the build-to levels. The build-to levels, however, must allow for the proper supply of product to be held, without exceeding holding times.

- **Crew not following procedures.**
  The grill team is responsible for maintaining correct bin levels, but they can only be effective if the information they have is accurate and easy to access. It is your responsibility to follow up directly, or through the area leader, to make sure crew are following correct procedures.

- **Poor teamwork within the areas and across areas.**
  For example, the front counter person receives a grill order for 2 cheeseburgers with no mustard and extra onions. Two different people make the order. As a result of poor communication, 2 cheeseburgers go to waste.
Full Food Waste

Full food waste includes products that have exceeded the holding times in the transfer bin, fry station, pie merchandiser, or salad display. Completed food waste can be controlled through correct management of production control. There are some principles that you can apply to help you balance supply with demand and keep completed food waste levels down.

• Learn customer flow patterns.
  Over time, as you work the same shift, you will develop a sense of the customer flow and what kind of products these customers order. This information can help you anticipate demand. Sometimes, however, there may be special events planned during your shift. This information needs to be communicated to the production caller so calls can be adjusted.

• Help your management team accomplish completed waste objectives.
  Record completed waste on the waste sheet as expired product is put into the waste bin.

Develop an action plan for reducing waste level and follow up frequently to assess progress. For example, you might assign Full Waste duty to a crew person, who then is responsible for monitoring and recording waste. Or you might coordinate area leaders to make sure that completed food waste is being monitored within areas.
**Yield**

Yield is the number of servings recommended from a given amount of product that gives customers a high value and McDonald’s a fair profit. Each product has a recommended yield target. If a product falls outside the yield target range, the balance between customer satisfaction and profitability is not optimised.

If the yield for a product is too low, product is being wasted. Some causes of low yields are:

- Frozen fries that are not handled carefully.
- An overfilled bag of fries.
- Improper ice levels in cups.

If the yield for a product is too high, the customer is not receiving a full serving or a quality product. Examples of how high yields can occur include:

- Partially filled bags of fries.
- Too little ketchup on hamburgers.
- Drinks not filled to the top.

If the yield is not controlled, it can lead to customer dissatisfaction and lower profits. Yields are affected by:

- Handling of raw product. Make sure cases are properly handled during deliveries and when stocking up. Cases that are dropped or crushed can ruin product, which then has to be thrown away. Avoid product waste by scraping and emptying all products that come in containers.
- Equipment setup and calibration. Follow up on equipment setup while opening shifts, and complete the assigned daily and weekly calibrations. Failure to do so could result in product waste. For example, if calibrations on the drink tower are not done, cups will either overflow or not be completely filled.
- Improper procedures. Improper handling of product, cooking, and preparation can reduce yield quantities or reduce product quality.
Theft
Minimise the occurrences of the following to reduce your chances of theft:

- The back door is propped open or the keys are in the lock.
- Employees ask for your keys.
- Freezer and/or refrigerator doors are left unlocked.
- Certain people are frequently loitering in the dining area when a particular individual is working.

I’ll take the rubbish out!
I had a crew person on my shift who was always volunteering to take the rubbish out. It was the middle of winter and freezing outside. I was pleased that this person did not mind going out in freezing weather, and I assumed that he was demonstrating initiative. I learned, but unfortunately not soon enough, why this person was so eager to take the rubbish out. He was hiding product underneath the trash bags. He was stashing the boxes in the corral and then picking them up when he left work. I lost about £300 worth of product before I realised what was happening.

Moral of the story:
Expect the unexpected. Follow recommended security procedures to reduce the risk of theft and pilferage.
Order Proposal

Another very important part of helping to control foodcost in the restaurant is to ensure we have the correct stock levels.

Too little stock and the restaurant may run out of stock. This will mean extra costs and extra time getting stock in from a nearby restaurant and if product is unavailable this will lead to dissatisfied customers.

Too much stock and restaurant could have stock going out date. This will cost money, as this stock will have to be wasted.

Therefore is it vital that stock is ordered correctly to ensure customer satisfaction and prevent unnecessary expense.

The ordering system we use in McDonald’s is called “Order Proposal.” This system is used to order all food and packaging items for restaurants via the “Weblog” system. Weblog is an Internet based system that managers can use to check and amend the Order Proposals and also order stationery and operating supplies.
**Shift Management**

**How Does It Work?**
Each store has a dedicated planner who manages the Order Proposal system from the McDonald’s regional office in Salford. Some of the planners are former business managers and Assistant Managers, so have a good working knowledge of McDonald’s restaurants.

The planners use a statistical programme called Manugistics to forecast what restaurants will need to order. This is based on historic POS data from the past two years. The data is downloaded from the restaurants every night on an on-going basis to keep the information up-to-date.

The planners will analyse this data carefully and look at any exceptional sales figures and take these into account when proposing the order. They will also take into account special factors such as promotions and seasonality.

The Marketing department will inform the planning team of future promotions. If the promotion has been run before the system can apply a special factor to the future forecast, if not the Marketing department’s sale projections are used to help with the forecast.

The planners will also apply other factors that affect sales, some of this information is supplied by the store and some is gathered from other sources, for example:
- School Holidays – gathered from Local Education Authority (LEA)
- Teacher Training Days - gathered from Local Education Authority (LEA)
- Local Elections – gathered from local councils
- Local special events – store to inform planner
- Change in opening hours – store to inform planner

What other special events affect sales in your restaurant?
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
The order proposal is then calculated for all of the raw items and sent to individual restaurants.

**Inventory Control**
The order proposal takes into account the previous stock count for each item when calculating the order. This means that if the stock count is inaccurate, then either too little or too much stock may be ordered.

It is vital that all Inventory Counts are accurate.
Daily, Weekly and Monthly counts should all be done carefully as they will have an impact on the order proposal. To ensure accuracy when counting, make sure the Main Freezer, Chiller and Stockroom are neat and tidy. When deliveries are put away, make sure stock is rotated to ensure First In First Out. Keep all like items in the same area, it is more difficult to count three boxes of cups if they are stored in three different locations and much more likely that they will all end up being opened at the same time.

The kitchen should be stocked for 24/2. Enough dry stock to last 24 hours and enough frozen and chilled stock for a two-hour period. This will ensure your crew are not having to go to the stockroom to continually replenish dry stock and it will ensure that all frozen and chilled stock meet McDonald’s quality standards.

Stock items are usually counted on specific days

**Daily:** Perishable items and problem items

**Weekly:** Full count of Food and Paper Items

**Monthly:** Full count of Food and Paper Items

Why is the “Full Count” completed at these times?

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
Weblog
Weblog is an Internet based communication tool used by the restaurants to review and amend the order proposal.

During this section you will need to work alongside another member of the management team who is competent using weblog.

You will help to place an order when you in next on an order day.

You will help to book a delivery onto the ISP

You will need to complete an exercise on Operating Supplies and Office ordering

The Order Days in my restaurant are _______________________________________

_______________________________________________________________________

The Delivery Days in my restaurant are _______________________________________

_______________________________________________________________________

Operating Supplies are ordered on _______________________________________

_______________________________________________________________________
Getting Started

When you log into ISP between the hours of 2pm and 7pm you will be prompted to check whether you have a Weblog Order.

You will then have to enter your user name and password to confirm.

If you enter ‘No’, this screen will appear every time a manager logs in until a ‘Yes’ is entered. Once you have entered ‘Y’ and entered ISP I.D. you will not be prompted again. The system will NOT take you directly to Weblog after entering ‘Yes’. You will need to use Internet Explorer to enter Weblog.

To log onto Weblog, enter the Intranet and click on Weblog on the top banner. This will take you to the Restaurant Supply Planning Department page and from here you need to click on the Start Weblog icon. This will take you to the Weblog login page.
Enter your unique Log-in name and Password

Remember
Your log-in and password are both case sensitive. You will have 10 attempts to log-in, otherwise you will be locked out for 45 minutes.

Weblog Home Page
You will be taken to the Home Page

TOP TIP
If you ever get lost in Web-log, just click on HOME.

The planners can send a message to your store.

This could have an effect on your order, so make sure you acknowledge this every time you order.

From the Home Page, you can navigate to all other areas waitin Weblog from the left hand tool bar.

In the same way as the internet you just click on the underlined word to take you to where you want to go.
Placing an Order
You will need to complete this section on an order day. Sit down with the manager when they complete the order and work through with the whole order process together. The Order Proposal can be viewed on an order day between 2pm and 7pm. During this time the Order Proposal can be viewed and amended if required.

You need to cover the following topics with your manager:

- Viewing an Order Proposal
- How to amend an Order Proposal if required
- Red, Yellow and Purple highlighted stock items and what action to take
- How to add items to an Order Proposal
- How to order Office and Operating Supplies

Click on “Order” to open up a list of order

ORDER LIST PAGE
Status
Open Order - Order that has not been confirmed
Confirmed Order - Order that has already been sent to the Supplier

Clicking on ‘Order’ will let you know the status of all current orders.

On this page you will find a list of all current orders.

Completed orders from the last 3 months can be found in the Archive.

Click on the Yellow Arrow to go into Today’s Open Order.

It is better to review you order as near to 2pm as possible so you have plenty of time to make any changes. If you go into Weblog at 6.55pm you will only have 5minutes to make any changes.
When you open up an order you will see some items are highlighted.

**Items highlighted**

**YELLOW:** You should check the count on these items – there may be a count error on the inventory.

**PURPLE:** You will start using your safety stock more than 1 day before this delivery is scheduled to arrive and may run out of stock. We have included within this order an EXTRA 1 days worth of stock.

**RED:** You will need to pay particular attention to these items and refer to the 'Message of the Day'.

Check the order, if you need to make any changes enter the number of cases you require.

Click on 'Save' to confirm the changes.
How do I check the order proposal?

When hovering the tool tip over the Order Proposal, you will see some valuable usage information e.g. Regular Buns.

TOP TIP
The tool tip for the weekend orders is based on Thursday nights information. Orders placed on Friday and Saturday WILL NOT be reflected in Sunday’s tool tip. But previously proposed amounts are accounted for within them.

What does the usage Information mean?

Number of cases used in the last 7 days: 124.87 cases of regular buns were used in last 7 days.

Average number of cases used per day: 17.84 – trays of regular buns used every day.

Theoretical Stock: 55 – This is calculated from the last count for this item from 01/07/05 2:20 am.

Open Deliveries: 0 – trays being delivered.
How do I check the order proposal?

If an item has not been delivered to your restaurant in the last six weeks (stationery 12 weeks) and the system sees no need for it, it will automatically drop out of your order assortment. You can still add an item by clicking on 'Add Item'. This includes Ops, Supplies and Stationery.

Click on Add Item
You can now search for the item that you need to add to your order.

Once you have saved a vendor – the cost will be displayed, this total will change after every time you have re-saved the vendor.

TOP TIP
Do not confuse the binoculars to search for items within the order and add item. The binoculars search for items already within the order proposal or the delivery note.
Only items that are within the vendor groups on this delivery will be shown when searching or adding items.

**TOP TIP**
Keep your search string as short as possible. ie, MOP or DPSC. You can type a single character which will return all products starting with this character. ie M will return Muffin, Milk, Mop etc.

Type in the MRI no. or any part of the description. Then click on ‘SEARCH’. This will give you search results on the right hand column.

Clicking on the ‘CAMERA’ icon will display a photograph of the item to allow you to ensure that you have ordered the correct product.

Click on the ‘TROLLEY’ image to add an item on the left. This will add the item to your “SHOPPING BASKET” – all you need to do is enter the quantity.

Once you have finished adding to your “shopping basket” Press SAVE.

The ‘?’ means that item is ALREADY within the Order Proposal, even though the quantity may be zero.

Press ‘MAINTAIN ORDER’ to proceed with the rest of your Order Proposal.
INSERT: An exercise to match photos with MRI numbers

How do I find an item within an Order Proposal?

Once you have viewed the Order Proposal and made any additions or amendments, you can save the order proposal for that vendor by pressing the Save button.

You will be able to go back and amend orders further after clicking “Save,” as long as you have not yet committed the order.

If you click “Reset,” the screen will show all of the amendments and additions you have made and give you the option to either keep the changes or confirm that you wish to reset to the original Order Proposal.

How do I confirm an Order?

When clicking on the ‘BINOCULARS’ a box will open.

If you are looking for an item that is contained within the Order Proposal – enter a description on the MRI of the item you are searching for. Continue pressing the search button to highlight ALL of the items contained within the search.

When the Status has been changed to ‘SAVED’ for all of the orders in the list you should then click on ‘CONFIRM’.

Once you have saved a vendor – the cost will be displayed, this total will change after every time you have re-saved the vendor.
Once you have clicked “Confirm,” a message will appear reminding you that it is your responsibility to check the order before you confirm.

Once you click “Confirm,” on this page will not be able to change the order. Once the order is confirmed your planner will not be able to change the order, so you would have to contact Keystone Customer Services to make any changes.

What would happen if you did not view/amend you Order Proposal by 6pm?
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

**Loggin Off Weblog**

Always log off using the ‘LOG-OFF’ link otherwise you will have to wait for up to 45 minutes to Log-on again.
Deliveries
You will need to complete this section on a delivery day. Sit down with the manager when they enter the delivery note on the ISP and work through the process together.

You need to cover the following topics with your manager:
- Entering a delivery note
- How to log out correctly update inventory cards with delivery details

Click on “Deliveries” to open up a list of all current deliveries.

Loggin Off Weblog
The Weblog deliveries page will let you know the status of your deliveries.

**Status**
Open = Delivery that has not been booked onto the ISP.
Prepared = Problem with download.
Downloaded = Delivery that has been downloaded onto the ISP.
Reorg = Deleted by the system as obsolete information

**TOP TIP**
It is important to book the delivery onto the ISP on the day the delivery arrives in your restaurant - otherwise it could affect future orders.

On this page you will find a list of all current deliveries.

Click on the arrow next to the delivery you wish to check.

If the delivery is correct, click on “Start delivery note download” without saving the vendors.
Click on “Confirm” to continue download process

If there are any items missing from the delivery, manually amend the quantity and save the changes.

**TOP TIP**
Your download will always exactly match the contents of the printed delivery note & invoice from keystone as they are created at the same time. You will only need to amend any manual changes on the paper invoice made by the DC. Or items highlighted as missing or rejected when the delivery is checked.

Click on ‘Delivery note download’ to start download process.
If the download fails you will see a Red “FAILED” message instead of the Green “SUCCESSFULLY FINISHED” message.

Click on “All” and the delivery status will show “Prepared”. Click on the yellow arrow to start the download process again. If it fails again you will need to contact iTSC.

Whilst the delivery note is transferring the information from Weblog to RDS the ’RED TEXT’ message will flash. When the ’Successfully Finished’ message appears it is safe to exit the screen.

TOP TIP
For the inventory cards to be successfully updated, you need to be at ’SYSTEM ENTRY’ point in RDS.

TOP TIP
To confirm if the update has been successful, check first items within the RDS inventory cards.

Once completed, click ’ALL’. Then log off WebLog.
What happens if I am unable to find an Item I am searching for?

Typing in ‘BAG’ results in the following search:

If you cannot find the item it may not be available to order on the vendors within that Order Proposal. To find the vendor that the item is within you can use the RAW ITEMS section of Weblog, accessed from the Main Menu on the left hand side of the Weblog Screen.

Raw Items work exactly the same way as the Add Item function but are not restricted to the vendors that day but DOES NOT ALLOW you to order anything.

Click on the arrow next to the item that you are interested in.

This shows the vendor that the item is within so you know when you can order it by checking the store order schedule.
EXERCISE

What does the yellow highlight indicate in the Order Proposal and what action would you take?
__________________________________________________________________________
__________________________________________________________________________

What does the purple highlight indicate in the Order Proposal and what action would you take?
__________________________________________________________________________
__________________________________________________________________________

What does the red highlight indicate in the Order Proposal and what action would you take?
__________________________________________________________________________
__________________________________________________________________________

Using the Raw Item Search:

What is the MRI number for the Red Mop Bucket?_________________________________

What vendor group are Cheeseburger Wraps found in?____________________________

What item has an MRI of 60179?_______________________________________________

What information is displayed if you hover the pointer over the Order Proposal?
__________________________________________________________________________
__________________________________________________________________________

What information is displayed if you hover the pointer over the Item Description?
__________________________________________________________________________
__________________________________________________________________________

How often should you complete a Full Food and Paper count? Why?
__________________________________________________________________________
__________________________________________________________________________

What can happen if you count the stock on the inventory incorrectly?
__________________________________________________________________________
Labour
Balancing profitability with customer satisfaction also involves balancing service and labour. You cannot blindly add labour hours to achieve impressive service, and you cannot sacrifice impressive service to achieve low labour.

During your shift, you are responsible for maintaining the right number of people for the volume. If you try to manage the shift without enough people, you will affect service times and your customers will have a poor experience. You have the responsibility to maintain and build sales through outstanding QSC.

You must also remember that labour control decisions affect employee performance as well as employee image. If you are constantly short-staffed, crew may feel overworked and customers may see your restaurant as a less than desirable place to eat or work. Employee commitment, which includes morale, job satisfaction, and retention, can be affected which will ultimately affect sales. On the other hand, having the right people to provide impressive QSC will build the crew’s commitment to the job and positively affect service, customer satisfaction, and re-visit intent.

Making adjustments to Labour
During your pre-shift planning, you must determine if adjustments need to be made to the positioning plan you created at the end of your previous shift. Some reasons for adjustments may include: Weather changes, special events that were not known at the time the plan was made (e.g., a road closure), shifts in sales trends.

As you manage the shift, you should monitor what the actual sales are and how they compare to the projections used to make the crew schedule. Is your labour in line with what is actually happening in your restaurant, or has there been a shift in sales volumes that is causing you to be overstaffed or understaffed?

If adjustments are needed, make them using the information you have. If you need more people, call in extra crew or ask crew to stay on. As you adjust to the schedule, keep the following in mind:

- Extending some shifts may require giving an extra break.
- Do not tell crew to stay later. Instead ask them if they can stay later.
- Always document any shift changes on the master schedule.
- Ensure all actions are within the working time directive.

If you need to adjust hours because volume is lower than anticipated, ask people to volunteer to go home early, ask people to volunteer to come in later, or ask people to volunteer to not come in at all.
EXERCISE

Rain rain go away!
It is Tuesday morning at 10:30 am. You are the shift manager. The crew schedule is posted to the left.

You have positioned your crew (see the diagram below) based on the recommended guidelines for your restaurant’s operating system and sales projections (posted to the left) and your knowledge of the crew’s skill level.

It has been raining all morning. According to the weather report, another 10 hours of rain is expected.

Crew schedule

<table>
<thead>
<tr>
<th>Name</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Noah</td>
<td>5:00am - 2:00pm</td>
</tr>
<tr>
<td>Haley</td>
<td>5:00am - 2:00pm</td>
</tr>
<tr>
<td>Matthew</td>
<td>5:00am - 2:00pm</td>
</tr>
<tr>
<td>Mickey</td>
<td>5:00am - 2:00pm</td>
</tr>
<tr>
<td>Carlos</td>
<td>7:00am - 1:30pm</td>
</tr>
<tr>
<td>Donnell</td>
<td>8:00am - 2:00pm</td>
</tr>
<tr>
<td>Celia</td>
<td>8:00am - 2:00pm</td>
</tr>
<tr>
<td>Patrick</td>
<td>8:00am - 4:00pm</td>
</tr>
<tr>
<td>Charles</td>
<td>9:00am - 4:00pm</td>
</tr>
<tr>
<td>Pedro</td>
<td>12:00pm - 8:00pm</td>
</tr>
<tr>
<td>Maria</td>
<td>12:00pm - 4:00pm</td>
</tr>
</tbody>
</table>

Some information about your crew:

Patrick and Noah are your outstanding employees.

- Noah has worked primarily at the front counter. The customers love him!
- Carlos is your ace in the production area.
- Patrick has been trained in all areas, but he prefers to work in the Drive-thru because it is the most challenging.
- Mickey is the Maintenance person.

Sales projections

<table>
<thead>
<tr>
<th>Time</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>6-7</td>
<td>50</td>
</tr>
<tr>
<td>7-8</td>
<td>100</td>
</tr>
<tr>
<td>8-9</td>
<td>250</td>
</tr>
<tr>
<td>9-10</td>
<td>300</td>
</tr>
<tr>
<td>10-11</td>
<td>325</td>
</tr>
<tr>
<td>11-12</td>
<td>400</td>
</tr>
<tr>
<td>12-1</td>
<td>650</td>
</tr>
</tbody>
</table>
Everything is stocked at the front counter and ready for the lunch rush. Haley is cleaning the lobby and mopping the floors. Carlos is stocking the prep table, and Donnell is preparing salads. Matthew asks you if he can leave early since it is slow today. He just bought a new car and is nervous about driving it in the rain.

Based on this information, would you make any changes in the schedule? If yes, show your changes on the shift positioning tool and explain why you chose to make these changes.

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

If you do not think changes are necessary, why not?
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

How does your decision affect:

Quality?
__________________________________________________________________________

Service?
__________________________________________________________________________

Cleanliness?
__________________________________________________________________________

Profit?
__________________________________________________________________________

Crew morale?
__________________________________________________________________________
Maintaining a Safe and Secure Restaurant

Special situations
Special situations are those that fall outside the normal day-to-day operations. These call for your immediate attention. Special situations generally fall into 4 categories:

- **Personnel**
  Examples include crew injuries, accusations of harassment or discrimination, drug or alcohol use, and theft.

- **External agencies**
  These include EHO’s, the media, and anyone outside the McDonald’s System who wants access to information about your restaurant.

- **Customers**
  There are a number of customer situations that can be unrelated to your delivery of QSC, such as loiterers or drug addicts who can potentially affect the personal safety of others.

- **Physical plant**
  Major equipment failures or damage to the building, such as major leaks, that can affect your ability to conduct a normal shift.

When incidents occur:

- Gather the facts.
- Resolve the immediate issue or problem.
- Report the incident to the proper people (e.g., your business manager).

The sooner you report the incident, the more you will prevent the problem from escalating and potentially causing an expensive outcome.
Shift Activities

Now that you have reviewed the Shift Management System map we would like you to consider some of the key activities you might complete during a shift.

These activities may be completed either before, during or after your shift.

Please review the following list of activities and indicate when each activity should happen.

Hint: Some activities may apply to more than one part of your shift.

<table>
<thead>
<tr>
<th>Shift Activity:</th>
<th>Pre Shift</th>
<th>During the Shift</th>
<th>Post Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check that you are stocked for your shift</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finalise positioning for the shift</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check the front of the restaurant for litter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check toilets for cleanliness</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communicate shift targets</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Customer Counts/ Sales projections</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Say hello to a customer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conduct a travel path</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare crew positioning</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monitor progress towards targets</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coach a crew who is improperly salting fries</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check crew appearance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thank and recognise crew for excellent performance</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Knowledge Assessment

1. When is the best time to complete a Pre-shift checklist?
   a. The night before your shift
   b. 30 minutes before your shift
   c. 60-90 minutes before your shift
   d. 60 minutes before your shift

2. What should a Shift Manager do when completing a pre-shift or during the shift travel path?
   a. Observe for quality, service and cleanliness opportunities
   b. Prioritise and take action on opportunities
   c. Interact with customers and crew and be a role model for an exceptional service experience
   d. All of the above

3. What is an example of a speed target?
   a. Waste %
   b. Cash +/-
   c. Drive-thru TTL
   d. Labour %

4. Where should you position a second manager when there are 8 or more crew on the floor?
   a. Drive-Thru
   b. Maintenance
   c. Production
   d. Front Counter

5. Which of the following issues found on a travel path would be the Shift Manager’s number one priority?
   a. Wet floor by the front counter
   b. Dirty highchair
   c. Dead bush
   d. Soap dispenser in toilets empty
6. When do you coach a person?
   a. Only when the performance involves safety or cleanliness
   b. Only when the performance is negative
   c. Only when the performance is positive
   d. When you want to recognise positive performance and/or when you want to improve performance

7. Which of the following is a benefit of ensuring you have the correct stock levels?
   a. The availability of prepped products is assured
   b. Improves service and drive-thru times
   c. Improves shift morale by eliminating stress
   d. All of the above

8. What should shift targets be focused around?
   a. Delivery of QSC
   b. Impressive customer service
   c. Profit
   d. All of the above

9. Which of the following is one of the five hospitality cues?
   a. Hospitality Gestures
   b. Accuracy of order
   c. Cleanliness
   d. All of the above
   e. B and C only

10. Which of the following is not a critical element of Managing Production?
    a. Pre-Shift Checklist
    b. Cabinet Management
    c. Crew Rotation
    d. Using Targets
About Your Restaurant

As part of the Restaurant Operations Improvement Process (ROIP) it is likely that your restaurant will have already received a visit – either a System Training Day, FOR or SOR.

Enter details of the last ROIP visit your restaurant received

Type of visit: _______________________________________________________________
Date: _______________________________________________________________

What three systems were identified as your restaurants' top priorities?

1. ________________________________________________________________________
2. ________________________________________________________________________
3. ________________________________________________________________________

If you have received your FOR or SOR what were the scores on the last visit?

<table>
<thead>
<tr>
<th>Section</th>
<th>Score</th>
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<tbody>
<tr>
<td>Quality</td>
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<td>Food Safety</td>
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<td>People</td>
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Discuss these results with your coach or business manager.
What can you do to help improve these results?

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What Next

• Discuss the next steps with your coach or business manager
• Prepare for the Basic Shift Management Entrance Exam
• Review the Basic Shift Management prerequisites
Appendix

Shift Management Verification
Observation Checklist

Shift Manager: ___________________________  Coach: ___________________________  Date: ___________________________

Purpose
This tool is used to verify that all Shift Managers are able to run shifts:
• To be completed on Managers prior to their attending the Shift Managers Course.
• Post course, they should be completed on all Shift Managers once every 2 months. To act as a follow up tool for Business Managers providing analysis and feedback on how to improve shift results.
• Re-infering expectations of performance for all Shift Managers.
• Re-infering QSC standards and good shift routines, including travel paths
• Encouraging Shift Managers to apply good problem solving techniques
• Encouraging the Shift Manager to take immediate and effective action to ensure the safety of employees, customers and food at all times.

How to use this Tool
To determine if performance expectations for running the shift are being met use the following process:
• The Manager and Shift Manager work together
  1. Review the verification to understand how the manager will be measured.
  2. Establish and record shift targets and objectives.
• The Manager observes Pre Shift Preparation
  1. Check the Shift Manager’s actions against desired behaviours.
  2. Note observations and areas of improvement.
• The Manager observes the Shift Manager’s management of the shift
  1. Record service times.
  2. Record instances of Danger Zones and document Shift Manager’s actions and decisions.
  3. Record decisions made by the Shift Manager and document observations.
  4. Note observations and areas of improvement.
• The Manager observes Post Shift Analysis
  1. Check the Shift Manager’s actions against desired behaviours.
  2. Note observations and areas of improvement.
• The Manager summarises the Shift Manager’s strengths and opportunities.
• The Manager and Shift Manager review results of the verification and develop an action plan for performance improvement.

Targets
These are the targets you will be measured against. Areas of opportunities will be based on the variation between actual measures and the restaurant targets.
Ensuring the delivery of OSCLY and impressive Customer Service.

Service Times
Front Counter: Drive-Thru
Target: ________  Actual: ________

A profitable shift:
Cash +/-:
Target: ________  Actual: ________

Raw Food Waste
Target: ________  Actual: ________

Completed Food Waste
Target: ________  Actual: ________

Labor
Target: ________  Actual: ________

Other Restaurant Targets
Target: ________  Actual: ________

How do I achieve these Targets?

Pre-shift
☐ Prepares for the shift the day before.
☐ Organises Crew Positioning using Positioning Guide.
☐ Completes Pre-Shift Travel Path and Pre-Shift Checklist.

Manage the Shift
☐ Monitors progress towards targets and shift objectives.
☐ Conducts QSC travel path every 36 minutes, makes decisions based on observations.
☐ Maintains Crew Positioning according to guide, sales patterns.

Maintain Through Others
☐ Gives clear direction and follow up on assigned tasks.
☐ Provides specific, appreciative feedback to Area Leaders.
☐ Observes procedures and gives constructive feedback in a timely manner. Never walks past a problem.
☐ Works through Area Leaders to achieve shift targets and objectives.
☐ Adjusts People Positioning depending on business needs.

Ensure Service Quality and Speed
☐ Models hospitality behaviours.
☐ Observes and corrects service procedures.
☐ Observes and reacts appropriately to danger zones.

Ensure Customer Satisfaction
☐ Deals effectively and promptly with customer dissatisfaction.
☐ Responds to customer feedback.
☐ Seeks customer feedback as appropriate.
☐ Addresses people, equipment and product issues from pre-shift travel path and checklist. Takes appropriate action.
☐ Promotes and models hospitality gestures.
☐ Equipment: Troubleshoots as needed, does not use faulty equipment.

Ensure Food Safety
☐ Product: Sticks for 24/2.
☐ Seals and communicates shift targets and objectives to Area Leaders and Crew.
☐ Allocates duties from To Do List to Area Leaders.
☐ Checks Crew appearance and fitness to work.

Ensure Food Quality
☐ Monitors hot holding and UHC cabinet leaves match charts.
☐ Enforces holding times for all products.
☐ Monitors production modes to ensure that fresh food is served.
☐ Observes and corrects procedures.
☐ Troubleshoots issues.

Ensure Cleanliness
☐ All areas of the restaurant are clutter free, clean and hygienic.
☐ Outside of restaurant is clean, free of food debris and litter patrols are being completed.
☐ Planned maintenance/cleaning tasks are allocated to Area Leaders, moniors progress throughout shift.

Maintain a Safe and Secure Restaurant
☐ Follows opening/closing procedures.
☐ Follows safety and security procedures, addresses any safety concerns.
☐ Follows cash/security procedures.

Build Employee Commitment
☐ Encourages teamwork.
☐ Maintains a fun environment.
☐ Communicates progress to shift targets.
☐ Monitors execution of training plan.
Danger Zones
Use the diagram to evaluate how the Shift Manager responded to the four danger zones during the shift.

Evaluate Observations Made
Record the number of times you observed a danger zone during the shift and note the actions the Area Leader made.

Drive-Thru

Front Counter

French Fries

Production

Evaluate Decisions Made

Step 1
Observe People, Equipment and Product. What problems were identified?

Step 2
Prioritize problems. Action taken. How were problems prioritized?

Step 3
Decide now on future actions.

Step 4
Communicate actions for others (and you) to take.

Complete Post-Shift Analysis

- Ensure cash procedures are followed
- Administration tasks are completed (waste/employee meals etc.)
- Compares results to targets
- Provides feedback and recognition to Area Leaders and Crew for actual results versus targets
- Completes and actions shift to-do-list resolving issues before leaving shift
- Communicates to next Shift Manager
- Creates initial plan for next shift
### Service-Times

Manager to observe and record service times throughout shift, making appropriate comments. If service times are not met, then feedback must be given to the Shift Manager.

**Front counter** target times: service time 60 secs. Total experience time 210 secs.

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**Drive Thru** target service times 90 secs. Total experience time 210 secs.

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**comments:**

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Shift Management Evaluation

Manager: Record your observations below for each segment of the shift. Agree key action points to improve Shift Manager’s management of shift.

Pre-Shift

Managing the Shift

Post-Shift

Strengths Shift Manager Displayed during Shift

Opportunities Observed during Shift

Provide comments on the following personal attributes:

**Teamwork** – Works co-operatively and collaboratively with others and acts in ways that will support the overall success of the McDonald’s team

**Speed** – Productivity; works quickly and continuously during the shift; works hard while on shift

**Accuracy** – Ensures work is right first time; attends to critical details

**Customer Engagement** – Understands the needs and perspectives of the customer; shows no hesitation in taking actions to serve them better

**Personal Interaction** – Demonstrates enthusiasm and friendliness in conversation; communicates clearly in conversation; uses eye contact and smiles

**Planning and Organising** – Develops and communicates a shift plan to exceed customer satisfaction by co-ordinating people, product and equipment

---

Shift Management Evaluation

<table>
<thead>
<tr>
<th>Key Action points to be prioritised</th>
<th>Tools/Training required</th>
<th>Person</th>
<th>End Date Accountable</th>
<th>Measurement</th>
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Operational Rating: $\square/48=\%$

Coach’s Signature __________________________ Shift Manager’s Signature __________________________