



## Performance Excellence Session

# Order Accuracy

## Follow Up



# Performance Excellence Follow-up Discussion Guide for Accuracy

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This document is designed to help all participants prepare for an impactful follow-up discussion; the document includes a facilitator guide and a restaurant leader guide, followed by the discussion questions. Please provide the restaurant team with pages 3, 4, 5, and 6 (if applicable).

## Table of Contents

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### **PAGE 3 | Planning Your Follow-Up Discussion: Facilitator**

As a McDonald's staff member or owner/operator operations leader, this guide will assist you in planning and conducting a Performance Excellence follow-up discussion with the restaurant team.

### **PAGE 4 | Planning Your Follow-up Discussion: Restaurant Leader**

Intended for the restaurant team to help them prepare for the discussion.

### **PAGE 5 & 6 | Discussion Guide**

All discussion questions, with sections 1-3 led by the restaurant leader and sections 4-5 led by the facilitator.

### **PAGE 7 | Accuracy observations (if applicable)**

If this discussion is conducted in person, it should include areas of observation and discussion questions intended for completion after the discussion led by the restaurant leader.

# Planning Your Follow-up Discussion: Facilitator

**WHAT** | A coaching discussion following a support activity in a target area.

**WHEN** | Use this guide whenever needed; however, 4-6 weeks after a support activity is recommended to recognize and evaluate progress.

**WHY** | It offers coaching to help restaurants achieve their goals, helping us get better together.

**WHO** | An operations leader in an owner/operator organization with a McDonald's staff member.

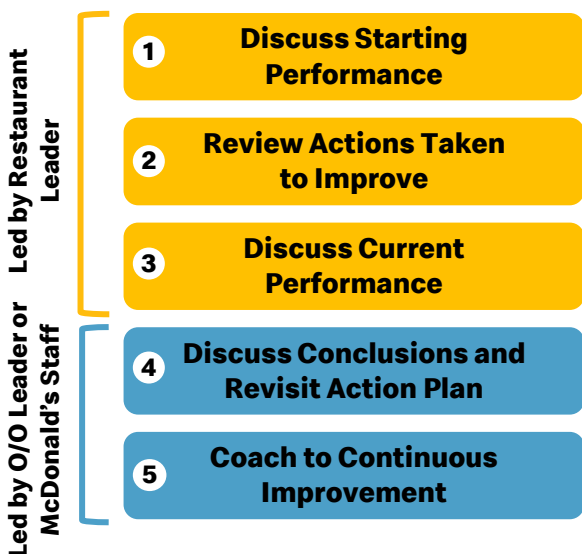
**HOW** | The discussion is announced and can be completed virtually or in person. The discussion should focus on one target area and last approximately 30-60 minutes.

## Discussion Considerations

Below, you'll find the recommended discussion sequence and considerations for each step.

### Discussion Sequence

### Considerations For Each Step



#### 1 2 Discuss Starting Performance | Review Actions Taken to Improve

- Focus on gathering information rather than solving the problem.
- Remain open-minded to potential solutions.
- Are there observations and/or data trends demonstrating sustained performance? Are they embedding change into everyday behaviors and processes?
- Ask open-ended questions.
- Use the “5 Whys” tactic to reach the core of the issue.

#### 3 Discuss Current Performance

- Focus on patterns or trends in the information rather than individual results.
- Can you identify any correlations – is one event causing another to occur?

#### 4 Discuss Conclusions and Revisit Action Plan

- Based on the conditions observed and business needs, tailor your approach to deliver feedback and recommendations
- Focus on developing solutions together.
- Ensure that the right accountability is in place at the restaurant level for next steps – use PACE Portal to monitor progress.

#### 5 Coach to Continuous Improvement

- Set stretch targets as needed.
- Ensure a process is available for review.
- Discuss routines for tracking progress.
- Make note of any key learnings to apply to future solutions.

## Supporting the Restaurant Leader

It's critical that the restaurant leader owns the discussion in sections 1-3 as they are accountable for improvements. Engage the restaurant leader in advance to set them up for success.

# Planning Your Follow-up Discussion: Restaurant Leader

**WHAT** | A coaching discussion following a support activity in a target area.

**WHEN** | Use this guide whenever needed; however, it is recommended 4-6 weeks after a support activity to recognize and evaluate progress.

**WHY** | It offers an opportunity to support and recognize your time for progressing towards or achieving your goals.

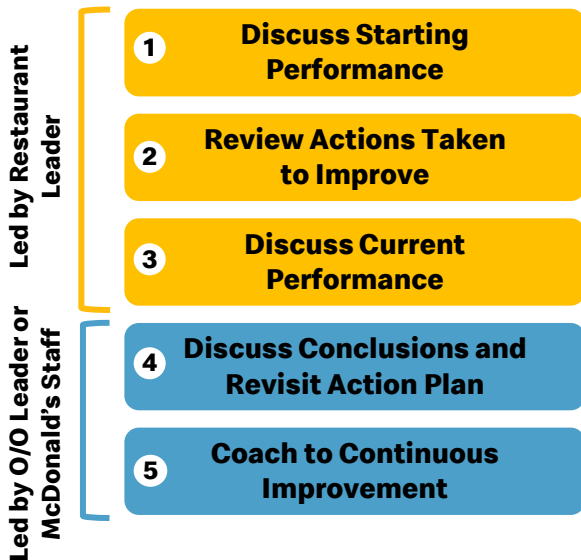
**WHO** | An operations leader in an owner/operator organization or a McDonald's staff member, with the restaurant leader.

**HOW** | The discussion is announced and may be virtual or in person. The discussion focuses on (1) target area and lasts approximately 30-60 minutes.

## Discussion Considerations

Below, you'll find the recommended discussion sequence and planning considerations.

### Discussion Sequence



### Planning Considerations

Remember that this discussion is intended to support **you** in achieving **your** restaurant goals. This is your opportunity to share what you've observed and learned, the actions taken, and what support, if any, your team needs.

- You'll lead the discussion for sections 1, 2 and 3.
- Leverage the information from the portal, and any other relative information, to highlight your progress.
- Let the O/O operations leader or McD operations staff know if you need any assistance preparing for the discussion.
- Consider:
  - Behaviors or processes that have changed based on the actions you've taken to improve in the target area.
  - Strengths and opportunities in the target area.
  - Where you may need guidance or support
- Be prepared to update your PACE Portal action plan(s) with your progress or additional updates, as needed.

## Restaurant Leader Led Discussion

**1 Discuss Starting Performance** *since Business Acceleration Session (BAS) or the target area was identified*

- Why was accuracy chosen as a target area (e.g., underperforming, market decision, OSAT results, 3PO data, trending performance in the portal)?
- What was performance in accuracy across all service channels, before action(s) were taken?
- Were there any conditions that contributed to performance at that time?
- What are the current objective(s)?

**2 Review Actions Taken to Improve**

- What steps have you taken to improve performance since the BAS?
- What is currently in the action plan that supports performance improvement in order accuracy?
- How are you monitoring accuracy performance (e.g., portal, 3PO data, OSAT)?

**3 Discuss Current Performance**

*Review trending performance since actions/support activities*

- What are your strengths in accuracy, and in which service channels? Where do you still see areas of opportunity?
- Have you experienced any barriers?
- Have any of your conditions changed (internally or externally)?
- Since action(s) were taken to improve, are you seeing any performance trends?
- Is customer feedback for each service channel aligned with the trending performance?
- What are your next steps?

### Observations & Notes


# Performance Excellence Follow-up Discussion Guide for Accuracy

## McDonald's staff member or Owner/Operator Leader Led Discussion

### 4 Conclusions and Action Plan Revisit

- Recognize and celebrate progress.
- Highlight areas of opportunity.
- Does the action plan need to evolve to focus on the right area(s)?
- Have they achieved their goals? Are the restaurant goals for accuracy still applicable and do they need to evolve?

### 5 Coach to Continuous Improvement

- **If they've had success in accuracy**, take time to celebrate. As a next step, either reach for further improvement in accuracy, or establish a new target area to focus on, potentially scheduling new support activities in that area.
- **If improvements are not being seen**, determine the appropriate level of support needed. Next steps may include regularly scheduled touchpoints to check in on progress; scheduling shoulder to shoulder support activities; or a separate conversation with the owner/operator to discuss next steps.
- Ask the restaurant leader – what support do they need?
- Together, update the action plan or goals in the portal.
- The restaurant should continue to work on key areas of opportunity in accuracy, or in their new target area, measuring and sharing progress along the way.

### Observations & Notes

Observations & Notes

# Accuracy Observations *(if applicable)*



If this discussion is conducted in person, and if there's time, review/observe the following areas in the restaurant and discuss observations **after restaurant leader led discussion**. Following the follow up discussion, review and observe any items that were a part of the action plan for accuracy.

## Areas of Observation

### People

- Review shift positioning; observe workload, crew interaction/experience, customer experience.

### Product

- Observe product location, availability, flow and quality.

### Process

- Observe complexity, bottlenecks, clear pathways, pull forward, operating as designed, any delays.
- Observe the order assembly process at the order assembly point or delivery station.

### Equipment

- Observe position/location, capacity, equipment needs; is the equipment in good, working order?
- Was there any equipment changes recommended in the initial visit?

### Physical Plant

- Observe the service area, particularly the courier collection point; pay attention to process and any impacts on instore customer satisfaction.

### Communications

- Are targets and feedback communicated? Observe shift leadership and technology.

## Discuss Observations

Share your top observations around accuracy. Consider the following questions:

- Was the team motivated?
- Were there any complexity or bottleneck issues that prohibited operating as designed?
- Was all equipment in good working order?
- Are there any pinch points at the service area with the courier collection of orders that would impact instore customer satisfaction?

Has the restaurant team already noticed these as areas of opportunity? If yes, have actions been taken to address any of these areas?

## Tools and Resources

[Be Well Served](#)

[Site Signage Guide](#)

[McDelivery Operations Solutions Matrix Operations – Order Accuracy NABIT \(atmcd.com\)](#)

Observations & Notes