Monthly Drive-thru Health Check
A prescription to your success…

- **Observe DT from the outside and inside**
- **Coach to success**
- **Execute a fast, accurate, and friendly DT**

Step 1 – Complete minimally monthly
(Supervisor, GM and/or GSM)
Step 2 – Answer questions either Yes (Y) or No (N)
Step 3 – Decide should you Fix it Now (FN) or add to Action Plan (AP)
Step 4 – Determine if the root cause for any 'No' answers is
Knowledge, Resources or Motivation (K/R/M)
Step 5- Choose 1-2 items below make a plan to improve
Step 6- Follow up on the plan

		Y/N	FN/AP	K/R/M
People	Has the restaurant been trained on PLX/PLneXt? Click here			
	Are the drive-thru and supporting areas staffed and positioned effectively and DSPT being utilized correctly? Click here			
	Are all DT crew and managers friendly with customers and greeting and thanking appropriately?			
	Are targets set (e.g. cars over last year/OEPE) posted and communicated?			
	Is a DT Leader identified, in place, and providing coaching?			
	Are DT functions split and the second side of the prep table opened when called for?			
	Was an effective DT Pre-shift checklist completed and followed up on?			
	Are support areas (fry /hash brown, McCafé) staffed when called for? If no one scheduled, are these areas assigned as secondary duties?			
Equipment	Are all cells laid out according to Be Well Served? Click here			
	Is a coin changer functional and in use in the cash booth?			
	Are the headsets and speaker working and clear? (listen to orders)			
	Are DT menu boards clean and in good repair?			
	Is DT striping clear and visible including lane indicators? Click here			
	Is the scanner and card reader working properly?			
	Is all of the equipment working today? Ask DT crew to verify.			
Procedures/ Product	Is there a person identified to run out pull forward orders?			
	Are correct procedures followed for service-made products? (Oatmeal, sundaes etc.)			
	Is back to basics/smart order taking being used? Click here			
	Is the cashier trained in all forms of payment (Arch cards, mobile offers, mobile pay, Apple pay, etc.)? **Is the PED paddle available for all cashless transactions?**			
	Are runners assembling orders correctly? Click here			
	Are crew reacting quickly for longer-to- prep items? (e.g. McCafé)			
	Are Shift or Production Managers/PLX Leaders trained on how to react to changes in volume, adjusting eProduction levels using the increase/decrease keys as needed throughout the day based on the previous 15 minute period guest count changes? (RED – below 10%, YELLOW – above 10%, GREEN within 10% of projected guest counts for each 15 minute period)			

Prescriptions to your Success – Choose 1 to 2 on above outcomes

Action 1:_____

Who will own & write a plan:_____

Attach plan & start & end dates: _____

Who will follow up and when?

Action 2: _____

Who will own & write a plan: _____

Attach plan & start & end dates: _____

Who will follow up and when?

Revisión Drive-thru Health Check Mensual
Una receta para el éxito...

- **Observar el DT desde el interior y el exterior**
- **Dar coaching para el éxito**
- **Ejecutar un DT rápido, exacto y amigable**

Paso 1 – Completar al menos mensualmente (supervisor, gerente general y/o gerente de servicio al cliente)
Paso 2 – Contestar las preguntas con Sí (S) o No (N)
Paso 3 – Decidir si se Arregla Ahora (AA) o se añade al Plan de Acción (PA)
Paso 4 – Determinar si la causa principal de las respuestas "No" es por Conocimiento, Recursos o Motivación (C/R/M)
Paso 5- Elije 1-2 resultados de abajo, para hacer un plan para mejorar
Paso 6- Hacer seguimiento al plan

		S/N	AA/PA	C/R/M
Personal	¿El restaurante ha sido entrenado en PLX/PLneXt? Haz clic aquí			
	¿El drive-thru y las áreas de apoyo tienen el nivel de empleados correcto, están posicionados de manera efectiva y se utiliza la herramienta DSPT correctamente? Haz clic aquí			
	¿Todos los empleados y los gerentes del DT son amigables con los clientes, saludan y agradecen de manera apropiada?			
	¿Se establecen objetivos (por ejemplo, automóviles en el último año/tiempos de OEPE), se publican y se comunican?			
	¿Se ha identificado un líder del DT, está en su lugar y da coaching?			
	¿Se dividen las funciones del DT y se abre el segundo lado de la mesa de preparación cuando se pide?			
	¿Se completó una Planilla previa al turno del drive-thru y se le dio seguimiento?			
	Las áreas de apoyo (papas/hash brown, McCafé) ¿tienen los empleados necesarios cuando se pide? Si no hay nadie programado, ¿estas áreas están asignadas como tareas secundarias?			
Equipo	¿La disposición de todas las áreas está de acuerdo a Be Well Served? Haz clic aquí			
	¿El cambiamonedas funciona y se usa en la cabina de cobro?			
	¿Los audífonos y el altavoz funcionan y se escucha claramente? (Escuchar órdenes)			
	¿Los tableros del menú están limpios y en buenas condiciones?			
	¿La señalización del DT es clara y visible, incluyendo indicadores de carril? Haz clic aquí			
	¿El escáner y el lector de tarjetas funcionan correctamente?			
	¿Está todo el equipo funcionando hoy? Pregunta a los empleados del DT para verificar.			
Procedimientos/ Producto	¿Hay una persona identificada para llevar las órdenes a los autos que se han avanzado?			
	¿Se siguen los procedimientos correctos para los productos preparados en el área de servicio servicio? (Avena, sundaes etc.)			
	¿Se usan los procedimientos básicos/orden inteligente en la toma de órdenes? Haz clic aquí			
	¿El cajero está entrenados para manejar todas las formas de pago (tarjetas Arch Card, ofertas móviles, pago móvil, Apple Pay, etc.)? **¿Se utiliza la paleta de mango largo para el dispositivo PED para todas las transacciones sin efectivo?**			
	¿Están los corredores ensamblando las órdenes correctamente? Haz clic aquí			
	¿Están los empleados reaccionando rápidamente para los productos que tardan más tiempo en prepararse? (Por ejemplo, McCafé)			
	¿Están capacitados los gerentes de turno o de producción/líderes de PLX sobre cómo reaccionar a los cambios en el volumen, ajustando los niveles de eProduction usando las teclas de aumento/disminución según sea necesario a lo largo del día en función de los cambios en el conteo de invitados del período anterior de 15 minutos? (ROJO: menos del 10 %, AMARILLO: más del 10 %, VERDE dentro del 10 % del recuento de invitados proyectado para cada período de 15 minutos)			

Receta para el éxito - Elije de 1 a 2 de los resultados anteriores

Acción 1:_____

Quién será el responsable y escribirá un plan:_____

Adjunta el plan y las fechas de inicio y terminación: _____

¿ Quién y cuándo dará seguimiento?

Acción 2:_____

Quién será el responsable y escribirá un plan:_____

Adjunta el plan y las fechas de inicio y terminación: _____

¿ Quién y cuándo dará seguimiento?

Drive Thru Order Accuracy Health Check

REMEMBER: *Right people, right time, right position*

Purpose: To improve execution and remove barriers to **improve accuracy**, which can have a tremendous impact on every aspect of restaurant operations.

- Improved Drive Thru order accuracy can lead to improved VOICE Customer Satisfaction.
- Improved Drive Thru order accuracy can lead to an improved guest experience.
- Fewer guest complaints can lead to an improved work experience for managers and crew.

- Answer each question: Yes (**Y**) or No (**N**)
- Decide if you should Fix it Now (**FN**) or add this to the Action Plan (**AP**)
- Determine if the root cause for any No answers is Knowledge, Resources or Motivation (**K/R/M**)

Shift Operations		Y/N	FN/AP	K/R/M
	Was a Pre-Shift Checklist completed and action items addressed?			
	Is the Drive Thru and BDAP Cell staffed and positioned effectively using the Staffing, Scheduling & Positioning tools?			
	Are all areas of Drive Thru and BDAP cell set up according to Be Well Served and stocked before peak (including Drive Thru cart)?			
	Is all the equipment working in both the Drive Thru and BPAD cell?			
	Do all printers have the correct printer paper (sticky printer paper for BDAP cell) installed and working properly?			
	If you have a side-by-side Drive Thru, does your Drive Thru stripping include a merge point strip?			
	Are all **High 5 cards** posted in each position, BDAP cell and being followed?			

Crew Position		Y/N	FN/AP	K/R/M
Order Taker: **CLARIFY** for Accuracy	Are the headsets and batteries charged, and is there a minimum of 5 headsets and 7 batteries in good working condition and in use?			
	Does the headset system sound clear when communicating with guests?			
	Are all orders displaying correctly on the Digital Menu Board?			
	Does the order taker store the orders in the proper sequence? (Refer to Drive Thru Execution Manual for your specific configuration.)			
	Are the order takers interrupting guests during the order taking process?			
Cashier: **CONFIRM** for Accuracy	Are the correct orders being confirmed with the correct car?			
	Are all members of the Drive Thru team and shift managers wearing a headset so that if there is a change the team can communicate immediately via the headset, so they are aware and to help ensure accuracy?			
Kitchen:	Has the restaurant developed people to lead the kitchen? PLX / PL neXt Development Program			
	Is there a system in place to have a Production Leader when 2 or more are in the kitchen?			
	Are all grill slips being placed on grilled products properly?			
	Are grilled orders being double checked by finisher (including plain items with cheese)?			

BDAP Cell:	Are all crew that prepare beverages been trained and verified on all McCafé Beverages?			
Assembler/ Runner:	Has the shift manager designated a person to prepare and run out pulled forward orders?			
	Are the Expeditor monitors labeled to indicate complex orders?			
	Is the assembler/runner/expeditor selecting the proper bag size?			
	Are napkins and condiment bags (if applicable) being added to the bag?			
	Is there a 2-1 Ready board or order divider sticks in use to separate orders on the Drive Thru cart?			
Presenter: **COMPLETE** for Accuracy	Is the yellow text and parked car image enabled on the POS? (Atos or OTP Pro can make this change.)			
	Is the presenter double checking the order for accuracy, handing the open bag out the window, and then serving the order off the monitor (including items that are not bagged)?			

Please visit the Drive Thru Resource Guide & Toolkit for more information, including other health checks that restaurants can use to do additional diagnosis.

Restaurant Action Items/Next Steps:

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Drive Thru Assembler/Expeditor Health Check

Purpose: Improve the execution and remove barriers at the ==assembly point==, to meet the optimal of 50 seconds or less to assemble and present the guests order while remaining friendly, accurate, and fast to keep the wheels moving in the Drive Thru and capture the full potential.

- 50% of delays in DT are caused by assembling orders.
- Most orders include both hot and cold menu items.
- It is important to assemble the orders in a specific sequence so that the food's temperature is as close as possible to McDonald's quality standards.
- To eliminate the back and forth, items are displayed by "like locations" (i.e. cooler for milk, bottled water, etc.) and separated by lines per category for ease of use.
- If the runner prepares service area items while the kitchen is producing product, all items can be completed at the same time. Items that are produced in the service area are shown first in the sequence.
- For best taste and temperature, assemble orders in the proper sequence for breakfast and regular menu orders (shown below).

Gather Employee Input	Why is this important?	Comments
Is all the equipment working and are they missing anything?	Improperly working equipment or missing equipment can cause crew frustration.	
Does the restaurant have a tracking board? Is the shift manager tracking DT results? Does the crew know the targets?	Ensuring the targets have been communicated keeps everyone focused.	
Does the shift manager know how to coach crew if they see red or yellow on the DT timer?	Crew and managers should all be aware of the colors on the DT timer and what needs be done to remove bottlenecks.	
Evaluate the comfort of the employee. (e.g. HVAC working, jackets/gloves available in cold weather, etc.)		
Equipment		
Is the HLZ/HLS/OAT and order assembly area set up according to Be Well Served?	Having each area set up to reduce the bends, steps, turns and reaches also saves time.	
Does the Present booth window function correctly?	The window should open/close without binding, moving easily on the track.	
Are the headsets and batteries charged, and is there a minimum of five headsets and seven batteries in good working condition and in use? Are the headsets being sanitized between uses?		
Is the Assembler/Expeditor wearing a headset?	This allows the entire DT team the ability to communicate with each other.	
Are all bump bars working properly?		
Are the monitors labeled to indicate complex orders?	Complex orders are any orders that have more than 8 lines on the monitor. Colored tape or arrows affixed to the monitors at 8 lines is a good visual for presenters and runners indicating the order is complex and should be pulled forward.	
Are orders appearing on the Expo monitors "on store" or "on the fly"?	This setting can be changed on the BOS Manager's configuration tool. By default, the setting is "on store" – meaning DT orders will not appear on the monitor until the employee "stores" the order.	
Is a fry monitor present? Is it displaying fry size totals or fries needed by order (legacy)?	Displaying fries by order instructs the fry person which sizes are needed first vs. how many of each size. An OTP Pro can make this change.	

Are there extra bags readily available?	Stock all positions prior to the peak to keep people in position.	
Are there adequate condiment bags pre-prepared?		
Is the HLZ and order assembly area stocked prior to peak?	If properly stocked for the peak, crew won't have to leave their positions which could impact service times.	

Procedures

Has the shift manager designated a person to prepare and run out pulled forward orders?	The pull forward runner should not be a member of the DT team.	
Is the assembler/expeditor selecting the proper bag size to prevent going back and forth?		
Are napkins and condiment bags (if applicable) being added to the bag to help with order accuracy?		
If no one is scheduled or positioned, has the drink position been assigned as a secondary role?	If using a coordinator, they should be coordinating beverages and assisting with McCafe, coordinating non-bagged items, keeping orders together and sharing responsibilities of the runner.	
If using an expeditor, they should be bagging the orders for the runner.		

Depending on staffing and positioning, the hot drinks, cold drinks and refrigerated drinks, unless a McCafe beverage has been ordered should be prepared first. If there is a McCafe beverage, that's first. Then assemble the refrigerated items especially if there is no refrigerator in the drive thru.

Assemble the shakes, sundaes/McFlurries before the sandwiches and fries/hash browns are bagged. This way, the kitchen still has time to finish preparing the sandwiches – saving time and ensuring all parts of the order are complete at the same time.

Drinks should be in a drink carrier if there are more than two in the order. The drinks should be side by side so that the bag can be placed on the carrier and handed out in one motion. This saves time and builds drive thru capacity.

Assemble orders in this sequence:

Breakfast	Regular Menu
Oatmeal	Hot Beverages
Hot Beverages	Cold Beverages
Cold Beverages	McCafé shakes, sundaes, cones, and McFlurry desserts
McCafé shakes, sundaes, cones, and McFlurry desserts	Refrigerated items
Refrigerated items	Condiments
Condiments	Entrees
Entrees	Pies and Cookies
Pies and Cookies	French Fries or Hash Browns
Hash Browns or Fries	

Guidelines for Assembling Orders:

Bag Size	Capacity (number of items)
A	1 to 3
B	4 to 6
C	7 to 9
Salad bag/breakfast bag	3 salads or breakfast entrees

Bag Capacities

Breakfast Product	Number of items a product equals when packing a bag	Regular Menu Product	Number of items a product equals when packing a bag
Bagel only	1 item	Big Mac	2 items
Bagel sandwiches	2 items	Cheeseburger or Hamburger	1 item
Big Breakfast	6 items (use breakfast bag)	Chicken McNuggets (4 piece)	1 item
Big Breakfast with Hotcakes	6 items (use breakfast bag)	Chicken McNuggets (6 or 10 piece)	2 items
Biscuit only	1 item	Cookies	1 item
Biscuit sandwiches	2 items	Double Cheeseburer/McDouble	2 items
English Muffin Only	1 item	Filet-o-Fish	2 items
McMuffin sandwiches	2 items	Fries – small	1 item
Fruit 'n Yogurt Parfait	2 items (only 1 can go in a bag, if there are 2 parfaits, they shold be placed in a beverage carrier)	Fries – medium or large	2 items
Hash Brown	1 item	McChicken	1 item
Hotcakes with Sausage entrée/Hotcakes only	6 items (use breakfast bag)	Pies	1 item
McGriddles only	1 item	Crispy Chicken	2 items
McGriddle sandwiches	2 items	Quarter Pounders	2 items
Oatmeal	1 item	Salads	2 items (use salad bag)
Sausage Burrito	2 items	Sandwiches without buns	2 items (use salad bag)
Bakery	2 items		

Restaurant Action Items/Next Steps:

Drive Thru Cashier Health Check

Purpose: Improve the execution and remove barriers at the ==cashier window,== to meet the optimal 15 seconds or less target of cashing out orders while remaining friendly, accurate, and fast to keep the wheels moving in the Drive Thru and capture the full potential.

Cashiering causes 19% of Drive Thru delays.

Gather Employee Input	Why is this important?	Comments
Is all the equipment working and are they missing anything?	Improperly working equipment or missing equipment can cause crew frustration.	
Does the restaurant have a tracking board? Is the shift manager tracking DT results? Does the crew know the targets?	Ensuring the targets have been communicated keeps everyone focused.	
Does the shift manager know how to coach crew if they see red or yellow on the DT timer?	Crew and managers should all be aware of the colors on the DT timer and what needs be done to remove bottlenecks.	
Evaluate the comfort of the employee. (e.g. HVAC working, jackets/gloves available in cold weather, safety vest if outside, etc.)		
Equipment		
Is the DT Cash booth set up according to Be Well Served? No overshelf – no Be Well Served!	Having the cash cell set up to reduce the bends, steps, turns and reaches also saves time.	
Does the Cash booth window function correctly?	The window should open/close without binding, moving easily on the track.	
Is the cash drawer secured to the DT stand or is it loose and moving around? Are there any missing or broken springs in the cash drawer?	The drawer should be secured to prevent employees from constantly moving it back into position. Missing or broken springs could cause the drawer to jam.	
Are the cameras, monitors working, and pointed at the correct angle? The danger zone camera would alert the manager if they need to assist the drive thru crew. Merge monitors would assist order takers when storing orders if video capture is not available.	Danger Zone camera should be pointed 12-20' above the ground to provide a wide viewing area of the DT. It should show the COD and the danger zone area in front of the COD to be able to see the DT stacking.	
Are the headsets and batteries charged, and is there a minimum of five headsets and seven batteries in good working condition and in use? Are the headsets being sanitized between uses?		
Does the customer's order display on the digital menu board? **** With ODMB, it is no longer necessary to repeat the order at the cash booth.**	As long as the order is correct on the menu board, there is no need to repeat the order. This could save as much as 15 seconds in the cash time.	
Does the restaurant have the required PED Paddle for contactless cashiering? Is it being offered?	Coach employees on the use and angle of the paddle if handing out.	
Has the volume on the PED been increased to 100%?	Customers and crew know when the credit transaction has been completed	
Is the offers scanner working properly and is it being stored in the holder when not in use?	Scanning offers is quicker than manually entering the code on the POS.	
Is the coin changer in use and filled prior to peak?	Coin changers save 3 – 5 seconds on cash orders in Drive Thru.	
Is the cash drawer stocked prior to the peak?		
Are Arch Cards readily available?	Lost seconds due to manager's having to run to get Arch Cards.	
Is the PED device being cleaned every 5000 uses with the approved cleaning card?	Regular cleaning prevents guests from having multiple attempts when swiping cards. Encourage "tapping" if the card is enabled.	

Procedures

Is the cashier proficient at making change?		
Is the cashier proficient at basic cashiering? Examples: POS knowledge, exact cash keys, Arch card sales/redemption, use of multi-order.		
Does the cashier look ahead to the next car for visual cues as to how the guest will be paying? If the guest has a credit card in their hand, the cashier can pull the order down quicker, press "credit" sooner on the POS.		
If the order is changed at the cash window, does the cashier notify the rest of the DT team immediately via the headsets so they are aware and to help ensure order accuracy.		
When receiving cash payments, does the cashier lay the bills face down across the cash drawer and leave it there until the customer receives the correct change?	Putting cash away as it's received takes valuable time, plus there is less chance of confusion (I thought I gave you a twenty). It also makes spotting counterfeits easier.	
When returning change to the guest, does the cashier state the amount of change to the guest?		
When returning change to the guest, does the cashier place the coins in the guest's hand first followed by the bills and receipt?	Employees should encourage guests to use the "tap" method as it processes faster than dip or swipe.	
Is the cashier assigned any secondary duties that will potentially add seconds to cash times? Examples include building happy meal boxes, tray cleaning, condiment bags and multi-tasking during peak (order taking and cashiering simultaneously)?		
Is the cashier aware of all current mobile offers and/or promotions, how to describe them, and where to find them on the POS?	Being aware of all promotions saves valuable time in the order taking process.	
Are receipts being handed out with every order? The receipt printer may be located in the present booth however all guests should receive their receipt.		

Restaurant Action Items/Next Steps:

Drive Thru Order Taker Health Check

Purpose: Improve the execution and remove barriers at the <mark>order taker point</mark>, to meet the optimal 25 seconds or less target of taking the guests order remaining friendly, accurate, and fast to keep the wheels moving in the Drive Thru and capture the full potential.

Order taking causes 9% of Drive Thru delays. The order taker should be an elite crewmember that is not easily distracted.

Gather Employee Input	Why is this important?	Comments
Is all the equipment working and are they missing anything?	Improperly working equipment or missing equipment can cause crew frustration.	
Does the restaurant have a <u>tracking board</u>? Is the shift manager tracking DT results? Does the crew know the targets?	Ensuring the targets have been communicated keeps everyone focused.	
Does the shift manager know how to coach crew if they see red or yellow on the <u>DT timer</u>?	Crew and managers should all be aware of the colors on the DT timer and what needs be done to remove bottlenecks.	
Evaluate the comfort and safety of the employee. (e.g. HVAC working, jackets/gloves available in cold weather, safety vests if outside, etc.)		
Equipment		
Is the order taker position set up according to <u>Be Well Served</u>?	Having the order taker cell set up to reduce the bends, steps, turns and reaches also saves time.	
Is the DT menu board clean and in good repair, not blocked by any landscaping?	If guests cannot see or read the menu board, it will affect order-taking times.	
Is the DT lot striping appropriate for your restaurant's configuration? (e.g. side by side merge stripe)	Consistent use of signage and striping guides the drive thru traffic. The striping should define the drive thru lane by starting at the entrance of drive thru and stopping at the exit.	
Are the cameras, monitors working, and pointed at the correct angle? The danger zone camera would alert the manager if they need to assist the drive thru crew. Merge monitors would assist order takers when storing orders if video capture is not available.	Danger Zone camera should be pointed 12-20' above the ground to provide a wide viewing area of the DT. It should show the COD and the danger zone area in front of the COD to be able to see the DT stacking.	
Are the headsets and batteries charged, and is there a minimum of five headsets and seven batteries in good working condition and in use? Are the headsets being sanitized between uses?		
Does the customer's order display on the <u>digital menu board</u>? **** With ODMB, it is no longer necessary to repeat the order. State "if your order is correct on the screen your total is XXX."**	As long as the order is correct on the menu board, there is no need to repeat the order. This could save as much as 15 seconds in the order taking time.	
Are both order points (lanes) in use?	Multiple order points increase capacity and sales. When both order points are always open, sales can grow every hour of the day.	

Procedures

Is the order taker aware of all current mobile offers and/or promotions, how to describe them, and where to find them on the POS?	Being aware of all promotions saves valuable time in the order taking process.	
Does the order taker greet the guests immediately and friendly? Hospitality in their voice?	Save up to 10 seconds by greeting guests on the first beep.	
Is the order taker only taking orders at one order point and not at both order points during peak periods?		
Does the order taker wait for guests to finish ordering before asking any questions? (not interrupting)	Every question asked during the order taking process add 9 seconds.	
Is the order taker able to answer any of l the guest's questions and requests?		
Does the order taker store the order in the proper sequence? (refer to DT Execution manual for your specific configuration	If cashiers do not have to re-sequence orders, it will save 5 seconds at the cash booth.	
Does the order taker repeat the entire order each time or only if they are uncertain?	Repeating the entire order can add significant time to the order taking process.	
Does the order taker use back to basics / smart order taking?		
Is the order taker multi-tasking?	During peak periods, separating the order taking and cash functions can save up to 5 seconds.	
Are other DT members assigned secondary duties to flex in to help take orders?		
Has the order taker been verified in FRED?		

Restaurant Action Items/Next Steps:

Drive Thru Presenter Health Check

Purpose: Improve the execution and remove barriers for the **Presenter**, to meet the optimal 15 seconds or less target of presenting the guests with their order in a friendly, accurate, and fast manner to keep the wheels moving in the Drive Thru and capture the full potential.

50% of delays in DT are caused by waiting on food/drinks. Time spent at the Present window can be driven by assembly or production, but can be managed by using Pull Forward. If it takes 40 seconds per car at the Present window, you will serve only 90 cars in an hour. If it takes 20 seconds, this equates to 180 cars in an hour.

Gather Employee Input	Why is this important?	Comments
Is all the equipment working and are they missing anything?	Improperly working equipment or missing equipment can cause crew frustration.	
Does the restaurant have a tracking board? Is the shift manager tracking DT results? Does the crew know the targets?	Ensuring the targets have been communicated keeps everyone focused.	
Does the shift manager know how to coach crew if they see red or yellow on the DT timer?	Crew and managers should all be aware of the colors on the DT timer and what needs be done to remove bottlenecks.	
Evaluate the comfort of the employee. (e.g. HVAC working, jackets/gloves available in cold weather, safety vest if outside, etc.)		
Equipment		
Is the Present booth set up according to Be Well Served?	Having the order taker cell set up to reduce the bends, steps, turns and reaches also saves time.	
Does the Present booth window function correctly?	The window should open/close without binding, moving easily on the track.	
Are the headsets and batteries charged, and is there a minimum of five headsets and seven batteries in good working condition and in use? Are the headsets being sanitized between uses?		
Does the customer's order display on the digital menu board? ** With ODMB, it is no longer necessary to repeat the order at the present booth.	As long as the order is correct on the menu board, there is no need to repeat the order. This could save as much as 15 seconds in the present time.	
Is the ABS functioning correctly? Are the cup grabbers working? Is the ABS being cleaned correctly?		
Are all bump bars working properly?		
Are the monitors labeled to indicate complex orders?	Complex orders are any orders that have more than 8 lines on the monitor. Colored tape or arrows affixed to the monitors at 8 lines is a good visual for presenters and runners indicating the order is complex and should be pulled forward.	
Is the yellow text and parked car image enabled on the POS? (Atos or OTP Pro can make this change)	Enabling the text and image makes the orders easier to read. The POS will also display the parking stall for the car to be sent to.	
Is there a process in place to keep the pulled forward cars organized? Is the restaurant using a "board" with sticky paper receipts or pick lists to keep organized?	Keeping the orders organized helps ensure order accuracy.	
Is there an adequate number of stalls available for pulling cars forward?	With the increase in DT visits, it may be necessary to add (or temporarily add) additional stalls for pulled forward cars. Ensure appropriate signage is available to clearly mark the stalls.	
Is the present booth and condiment cart stocked prior to peak?		

Procedures

Is the presenter double checking the orders for accuracy?	All bags should be open when handing to the guest.	
Is the presenter checking the accuracy of all items that are not bagged?		
Does the presenter make sure that the straws are either included in the bag or visible on the cup carrier?	A best bet is to "separate" the drink carriers ahead of time so they are easier to grab when putting the drinks in.	
Is the presenter hanging the bags out (HBO) the window for the approaching car?		
When presenting orders with two drinks or less, does the presenter hand out the order with the drinks in the carrier and the bag on the carrier?	The side with the drinks should be in the presenter's hand.	
When presenting orders, is the food going out first followed by the beverages?		
Is the presenter bumping the orders from the screen before they are served out the window?	Orders **should not** be served off the monitor until the guest receives their order	
Is the presenter listening for cues from the runner to indicate when a car should be pulled forward? Is the presenter looking at the RED hold on the monitors?	The presenter should not have to ask the runner if they should pull the car forward! If asking to pull the car forward, it should have already been done!	
Is the presenter looking ahead on the monitors for complex orders so they are prepared to pull the car forward?		
If orders need to be pulled forward, is the presenter pressing the "Held" button on the bump bar?	Orders should not be served off the monitor if they are held. This impacts order accuracy.	
When pulling cars forward, is the presenter telling the guest **what** they are waiting on, how long the **wait** will be and **where** to pull forward to?	When guests are told the 3 W's (Why, Wait and Where), guest satisfaction scores improve greatly.	

Restaurant Action Items/Next Steps:

Pull Forward Health Check

Purpose: Improve the execution and remove barriers for the **Presenter** to meet the optimal 15 seconds or less target of presenting the guests with their order in a friendly, accurate and fast manner to keep the wheels moving in the Drive Thru and capture full potential.

- The hours that have an effective use of the second side of the prep table, combined with proper use of Pull Forward have higher car counts
- The Optimal Pull Forward range is 10-15%
- Pulling cars forward does not help if the kitchen is unresponsive.

Gather Employee Input	Why is this important?	Comments
Is all the equipment working and are they missing anything?	Improperly working equipment or missing equipment can cause crew frustration.	
Does the restaurant have a <u>tracking board</u>? Is the shift manager tracking DT results? Does the crew know the targets?	Ensuring the targets have been communicated keeps everyone focused.	
Does the shift manager know how to coach crew if they see red or yellow on the <u>DT timer</u>?	Crew and managers should all be aware of the colors on the DT timer and what needs be done to remove bottlenecks.	
Evaluate the comfort of the employee. (e.g. HVAC working, jackets/gloves available in cold weather, safety vest if outside, etc.)		
Equipment		
Is the HLZ and order assembly area set up according to <u>Be Well Served?</u>	Having each area set up to reduce the bends, steps, turns and reaches also saves time.	
Are the headsets and batteries charged, and is there a minimum of five headsets and seven batteries in good working condition and in use? Are the headsets being sanitized between uses?		
Is the Pull Forward Runner wearing a headset?	This allows the entire DT team the ability to communicate with each other.	
Are all bump bars working properly?		
Are the monitors labeled to indicate complex orders?	Complex orders are any orders that have more than 8 lines on the monitor. Colored tape or arrows affixed to the monitors at 8 lines is a good visual for presenters and runners indicating the order is complex and should be pulled forward.	
Are orders appearing on the Expo monitors "on store" or "on the fly"?	This setting can be changed on the BOS Manager's configuration tool. By default, the setting is "on store" – meaning DT orders will not appear on the monitor until the employee "stores" the order.	
Is a fry monitor present? Is it displaying fry size totals or fries needed by order (legacy)?	Displaying fries by order instructs the fry person which sizes are needed first vs. how many of each size. An OTP Pro can make this change.	
Are there extra bags readily available?	Stocking all areas prior to the peak keeps crew in position.	
Are there adequate condiment bags pre-prepared?		
Is the HLZ and order assembly area stocked prior to peak?	If properly stocked for the peak, crew won't have to leave their positions which could impact service times.	

Layout and Signage

Are there adequate park stalls designated?	These stalls are typically in sight of the drive thru window so the presenter can direct the customers which stall to pull into. If the POS has been configured, that will tell the presenter the stall number also.	
Is there adequate space and layout to utilize roll forward? Not all sites can utilize this. Reference the DT Execution page for more details..	If there is 40' from the present window to a reserved sign, roll forward can be utilized. The guests like being connected to the building and it is easier to run orders out.	
Is the forward present (3rd window) being utilized? (if applicable)		

Procedures

Has the shift manager designated a person(s) to prepare and run out pulled forward orders?	The pull forward runner should not be a member of the DT team or the GESSL.	
Is the assembler/expeditor selecting the proper bag size to prevent going back and forth?	Overfilling bags makes it harder to double check for accuracy.	
Are napkins and condiment bags (if applicable) being added to the bag to help with order accuracy?		
Is the Pull Forward runner wearing an apron stocked with condiments and straws to prevent running back inside? Is a safety vest being worn?		
If no one is scheduled or positioned, has the drink position been assigned as a secondary role?	If using a coordinator, they should be coordinating beverages and assisting with McCafe, coordinating non-bagged items, keeping orders together and sharing responsibilities of the runner.	
If using an expeditor, are they should be bagging the orders for the runner?		
Is the yellow text and parked car image enabled on the POS? (Atos or OTP Pro can make this change)	Enabling the text and image makes the orders easier to read. The POS will also display the parking stall for the car to be sent to.	
Is there a process in place to keep the pulled forward cars organized? Is the restaurant using a "board" with sticky paper receipts or pick lists to keep organized?	Keeping the orders organized helps ensure order accuracy. Pick lists or simply writing on the receipts the location of the car will help the pull forward runner.	
Are more than 2 orders being run out at a time?	This could cause confusion for the crew and the guests and will take longer if the orders aren't organized.	
Forward Present: Is the second present station fully stocked with straws, napkins, salt, ketchup to assist with quick requests?	Stocking the second stations saves time running back and forth.	
Forward Present: If more than one order is marked "paid" on the monitor, is the first car to arrive at the present window sent to the 2nd window?	The second presenter should run and present that guest with their order – bagged items first then drinks. This allows for double present at both windows.	
Forward Present: Is the presenter looking ahead to orders with only drinks?	Orders that appear on the screen that have drink only orders behind them should be pulled to the forward present window – allowing for double present at both windows.	
Forward Present: If any part of an order is not ready, is the presenter directing the guest to a designated park stalls?	If the order is not ready, never pull the car forward to the forward present window. Orders sent to this window should sit no longer than 30 seconds – keep the wheels moving!	

Restaurant Action Items/Next Steps:

Drive Thru Runner Health Check

Purpose: Improve the execution and remove barriers at the ==runner position==, to meet the optimal OEPE time of 120 seconds or less to keep the wheels moving in the Drive Thru and capture the full potential.

- For every 20 seconds OEPE goes up, we decrease our DT capacity by 10 cars per hour.
- OEPE times should be two times that of KVS times
- If the runner prepares service area items while the kitchen is producing product, all items can be completed at the same time. Items that are produced in the service area are shown first in the sequence.

Gather Employee Input	Why is this important?	Comments
Is all the equipment working and are they missing anything?	Improperly working equipment or missing equipment can cause crew frustration.	
Does the restaurant have a tracking board? Is the shift manager tracking DT results? Does the crew know the targets?	Ensuring the targets have been communicated keeps everyone focused.	
Does the shift manager know how to coach crew if they see red or yellow on the DT timer?	Crew and managers should all be aware of the colors on the DT timer and what needs be done to remove bottlenecks.	
Evaluate the comfort of the employee. (e.g. HVAC working, jackets/gloves available in cold weather, safety vests if outside, etc.)		
Equipment		
Is the Present booth, HLZ and order assembly area set up according to Be Well Served?	Having each area set up to reduce the bends, steps, turns and reaches also saves time.	
Does the Present booth window function correctly?	The window should open/close without binding, moving easily on the track.	
Are the headsets and batteries charged, and is there a minimum of five headsets and seven batteries in good working condition and in use? Are the headsets being sanitized between uses?		
Is the Assembler/Expeditor wearing a headset?		
Are all bump bars working properly?		
Are the monitors labeled to indicate complex orders?	Complex orders are any orders that have more than 8 lines on the monitor. Colored tape or arrows affixed to the monitors at 8 lines is a good visual for presenters and runners indicating the order is complex and should be pulled forward.	
Are orders appearing on the Expo monitors "on store" or "on the fly"?	This setting can be changed on the BOS Manager's configuration tool. By default, the setting is "on store" – meaning DT orders will not appear on the monitor until the employee "stores" the order.	
Is a fry monitor present? Is it displaying fry size totals or fries needed by order (legacy)?	Displaying fries by order instructs the fry person which sizes are needed first vs. how many of each size. An OTP Pro can make this change.	
Are there extra bags readily available?		
Are there adequate condiment bags pre-prepared?		
Is the DT Runner cart set up by Be Well Served standards? Not used as extra storage?	Having commonly used condiments on the top row saves time by minimizing reaches and bends by the runner and presenter.	
Is there a 2-1-Ready board or order divider sticks in use to separate orders?	Keeping the bags and drinks organized helps with order accuracy.	
Is the HLZ and order assembly area stocked prior to peak?	If properly stocked for the peak, crew won't have to leave their positions which could impact service times.	

Procedures

Has the shift manager designated a person to prepare and run out pulled forward orders?	The pull forward runner should not be a member of the DT team.	
Is the person chosen to be the runner one of the elite crew.	An experienced runner will reduce inaccurate orders and maintain service speed.	
Is the runner aware and "managing the green border" on the monitor? Green on runner expo monitor could mean seconds are being added for changes.	If the monitor is full and orders are pending, but the green box is on the first or second position, check to see if the production area needs assistance.	
	If the monitor is full and orders are pending with no green box position, check to see if the present area needs assistance.	
Is the runner communicating the decision to pull forward based on entrees and/or fries?		
Is the runner selecting the proper bag size to prevent going back and forth?	Overfilled the bags makes it hard to double check for accuracy.	
Are napkins and condiment bags (if applicable) being added to the bag to help with order accuracy?		
If no one is scheduled or positioned, has the drink position been assigned as a secondary role?	If using a coordinator, they should be coordinating beverages and assisting with McCafe, coordinating non-bagged items, keeping orders together and sharing responsibilities of the runner.	
If using an expeditor, they should be bagging the orders for the runner.		

Depending on staffing and positioning, the hot drinks, cold drinks and refrigerated drinks, unless a McCafe beverage has been ordered should be prepared first. If there is a McCafe beverage, that's first. Then assemble the refrigerated items especially if there is no refrigerator in the drive thru.

Assemble the shakes, sundaes/McFlurries before the sandwiches and fries/hash browns are bagged. This way, the kitchen still has time to finish preparing the sandwiches – saving time and ensuring all parts of the order are complete at the same time.

Drinks should be in a drink carrier if there are more than two in the order. The drinks should be side by side so that the bag can be placed on the carrier and handed out in one motion. This saves time and builds drive thru capacity.

Assemble orders in this sequence:

Breakfast	Lunch
Oatmeal	Hot Beverages
Hot Beverages	Cold Beverages
Cold Beverages	McCafé shakes, sundaes, cones, and McFlurry desserts
McCafé shakes, sundaes, cones, and McFlurry desserts	Refrigerated items
Refrigerated items	Condiments
Condiments	Entrees
Entrees	Pies and Cookies
Pies and Cookies	French Fries or Hash Browns
Hash Browns or Fries	

Guidelines for Assembling Orders:

Bag Size	Capacity (number of items)
A	1 to 3
B	4 to 6
C	7 to 9
Salad bag/breakfast bag	3 salads or breakfast entrees

Bag Capacities

Breakfast Product	Number of items a product equals when packing a bag	Regular Menu Product	Number of items a product equals when packing a bag
Bagel only	1 item	Big Mac	2 items
Bagel sandwiches	2 items	Cheeseburger or Hamburger	1 item
Big Breakfast	6 items (use breakfast bag)	Chicken McNuggets (4 piece)	1 item
Big Breakfast with Hotcakes	6 items (use breakfast bag)	Chicken McNuggets (6 or 10 piece)	2 items
Biscuit only	1 item	Cookies	1 item
Biscuit sandwiches	2 items	Double Cheeseburer/McDouble	2 items
English Muffin Only	1 item	Filet-o-Fish	2 items
McMuffin sandwiches	2 items	Fries – small	1 item
Fruit 'n Yogust Parfait	2 items (only 1 can go in a bag, if there are 2 parfaits, they should be placed in a beverage carrier)	Fries – medium or large	2 items
Hash Brown	1 item	McChicken	1 item
Hotcakes with Sausage entrée/Hotcakes only	6 items (use breakfast bag)	Pies	1 item
McGriddles only	1 item	Crispy Chicken	2 items
McGriddle sandwiches	2 items	Quarter Pounders	2 items
Oatmeal	1 item	Salads	2 items (use salad bag)
Sausage Burrito	2 items	Sandwiches without buns	2 items (use salad bag)
Bakery	2 items		

Restaurant Action Items/Next Steps:

Performance Excellence Session

Order Accuracy

Purpose

This session helps **identify and improve restaurant order accuracy** challenges that impact employees and customers by maximizing existing tactics and solutions for running great shifts (e.g., Be Well Served, Execute as Designed, crew training, shift management, etc.).

Session Overview & Preparation

When to use this session

- To identify barriers, verify standards, share best practices and provide insights, to improve order accuracy and elevate the customer experience
- To determine an objective and actions to support accuracy improvement

Preparing for your session

Familiarize yourself with the Performance Excellence Session process and additional accuracy tools & resources.

Performance Excellence Session Process							
2 weeks prior	**1 week prior**		**Day of Session**				
Hold prep call/meeting	Review pre-work	Tailor session to org/restaurant	Align on plan for the day; set expectations	Group pre-work review	Observe focus areas	Debrief	Insights to Action Planning

2 Weeks Prior to Performance Excellence Session

Conduct a preparation call/meeting:

✓ **Explain the Performance Excellence Session purpose:**
- Diagnose and coach areas of opportunity.
- Foster meaningful conversations that contribute to actionable plans for improving accuracy.

✓ **Review data around KPIs using the Portal, Global Performance Matrix, VOICE, and 3PO portals** and discuss the strengths and opportunities the data is indicating to ensure focus in the right area.

✓ **Discuss timing and schedule the Performance Excellence Session**. The session may take approximately 3 hours, completed over an Owner/Operator identified time with the greatest growth opportunity.

✓ **Schedule a PACE Follow Up 4-6 weeks after the Performance Excellence Session.** This 30 to 60-minute coaching discussion recognizes progress, coaches, to continuous improvement, and provides additional support to the restaurant to achieve their goals. **(Coordinate follow-up date with FBP before the call)**

✓ **Discuss the Accuracy Foundations pre-work.** Pre-work may take about 2 hours to complete.

✓ **Discuss the restaurant's routines** and expectations during the session (e.g., wellness checks; procedures/standards for visiting the kitchen and back areas of the restaurant).

Send the Production Foundations pre-work and request they complete it one week prior to being prepared for the session (complete pages 15-18 of this document).

1 Week Prior to Performance Excellence Session

✓ **Review completed Accuracy Foundations pre-work.** Analyze the data and compare it with KPI targets and the restaurant's trending performance in the PACE Portal, Global Performance Matrix, VOICE, 3PO portals, and any tracking the owner/operator has on accuracy opportunities. Ensure observations of the KPIs are well thought through in preparation for the session.

✓ **Tailor the session to meet the needs of the organization/restaurant.** Prepare to be flexible to changes during the session.

2

Day of Session Overview

Desired outcomes

Improve order accuracy for our customers by maximizing existing order accuracy tactics and solutions.

Session details

When and how long?
- Completed during a time identified by the owner/operator with the greatest opportunity
- Announced and scheduled session (approximately 3 hours).

The session is designed to be conducted and attended by:
- A McDonald's staff member with a leader from the owner/operator organization and the Restaurant Manager
- Restaurant Leadership with the Restaurant Manager present.

Rules of Thumb

- Recognize the power of greetings, smiles, and showing appreciation.
- Be on purpose and not on task in your approach to coach and support.
- Consider how your engagements/interaction builds and impacts trust (Trust Equation video link).
- Consulting: Utilize this session to provide distinctive insights to grow your influence.

Session flow and expectations

1 **Alignment discussion: recommend in the dining room (page 4)** *30 mins*

- Present and discuss insights gathered from the pre-work.
- Review existing restaurant goals, action plans, and expectations for the day.

2 **Observations at Production, Order Assembly, Drive Thru Order Point and Present, and Delivery Handoff** (consider splitting the participants into smaller groups and rotating within each area) *100 mins*

- **Production**: In the kitchen, observe grill procedures and processes. Also, observe McCafé beverage operational procedures.
- **Order assembly:** Identify the order assembly process for Drive Thru and Delivery and observe procedures.
- **Drive Thru**: observe the order-taking and present procedures. Also, observe sequencing of cars is correct at the cash booth.
- **Delivery order assembly, courier collection point:** Observe order finalization and presentation.
- **Curbside, Pick-up, Table Service:** Observe the final assembly and checking processes prior to fulfillment.
- Engage with crew and managers on the successes and opportunities of accuracy tactics, listening to their ideas and feedback to improve accuracy.

3 **Observations debrief (page 11)** *20 mins*

- Summarize observations, identify strengths, connect data to provide insights, and determine the root cause(s) of opportunities.

4 **Insights-to-action planning (page 12)** *30 mins*

- Transform insights into actionable plans to solve root causes and close performance gaps.

3

Alignment discussion in dining room 🕐 *30 mins*

1 **Restaurant Lead (or Restaurant Manager) reviews their Accuracy Foundations pre-work**

- Review and discuss KPIs and observations.

2 **Review the existing action plan and discuss the following questions**

- What do you expect to get out of today?

- What is currently on your Action Plan that supports improvements to Order Accuracy?

- How have you prioritized these actions for the restaurant?

- How are you using the PACE Portal, GPM, VOICE, and 3PO data to monitor Order Accuracy?

- How are you performing on Drive Thru Accuracy? What trends and insights do you see from customer feedback about accuracy? Does your Action Plan reflect any opportunity?

- How are you performing on Curbside and In-restaurant with Accuracy? What trends and insights do you see from customer feedback about accuracy? Does your Action Plan reflect any opportunity?

- How are you performing on Delivery Accuracy? What trends and insights do you see about accuracy from customer feedback, 3PO data, and CSAT? Does your action plan reflect any opportunity?

- Based on the prework information gathered, what are your Restaurant's strengths? What are the top areas of opportunity?

- How do these numbers relate to your Business Plan?

- How is your overall customer experience? What areas do your customers want you to improve?

3 **Shift Manager reviews plan for the day**

- Is the team ready for the day?

- Shift staffed in line with projections and positioned to maximize potential?

- Are you missing any **products**?

- Is all **equipment** in good working order?

4 **Discuss and decide the area of focus for the session**

- Tailor observation activities based on your discussion.

5 **McDonald's Staff/Restaurant Leadership reviews observation process**

- **Objective:** Identify barriers that, when removed, will help improve order accuracy and elevate the customer experience.

- **Do:** Observe and record findings. Look for root causes of inaccuracy.

- **Don't:** Try to "fix" a situation or jump to solutions.

These observation activities are designed to help identify root causes and support action on any recurring barriers. Throughout the session, note observations in the following areas:

People (positioning, pace/workload, crew interaction)

Product (location, availability, flow, quality)

Equipment (position/location, capacity, equipment needs, good working order)

Process (complexity, bottlenecks, clear pathways, pull forward, operating as designed)

Physical Plant (interior/exterior)

Communications (targets, direction, and coaching, shift management, technology)

- Determining **accuracy**: Customers receive the correct order, food, condiments, and size of products. Product builds include all ingredients, and customized orders are prepared as the customer requests.

- Condiments include sauces/dips, additional beverage condiments, straws, napkins, and cutlery reflecting the order size and product types purchased.

4

② Observations and fact gathering ⏱ *Total 100 mins*

In this section, observe the service process for all omni-channels, including assembly for all orders, drive thru order taking and present processes, and Delivery order handoff. Refer to the restaurant volume conditions and your prework (pages 16-18).

Observe Shift Leadership. The following key points will guide observation and conversation throughout completing all observations in this session Make a note of the top opportunities in the box below.
- ✓ Is the team customer-led and focused on creating conditions for the crew to provide consistent, accurate orders?
- ✓ Is the shift staffed in line with projections?
- ✓ Are people positioning guides being followed?
- ✓ Is the shift manager reacting to danger zones?
- ✓ Is there clear responsibility assigned for checking orders?
- ✓ Crew and managers are aware of the most common order inaccuracies and restaurant improvement actions.

Shift Leadership top opportunities

Engage with crew and managers on the successes and opportunities of accuracy tactics, listening to their ideas and feedback to improve accuracy. The following key points will guide all observations and conversations in this section. Make a note of the top opportunities in the box below.

Crew & Manager Conversations
- ✓ What are the barriers to improving order accuracy?
- ✓ Are crew aware of the restaurant's accuracy priorities?
- ✓ Why is it important to provide accurate orders to customers?
- ✓ What accuracy challenges do you experience at:
  - • Production areas
  - • Order assembly
  - • Drive thru order-taking & present window
  - • Hand-off to delivery couriers
  - • Table service, curbside & counter pick-up, ROA in-restaurant fulfillment
- ✓ How can the restaurant improve order accuracy?

Crew & Manager opportunities

5

Observations and fact gathering

Observe the production procedures and processes in the kitchen and service areas. Through observation, activities identify root causes and support action on recurring barriers with order accuracy in the following areas: People, Product, Process, Equipment, and Communications.

<u>**Kitchen Area:**</u> Identify production barriers and observe crew behaviors and shift leadership.

People
- ✓ Crew positioned correctly per guidance with VLH
- ✓ Is there a Production Leader identified (if they're not a Production Manager) and is in the best position to provide coaching?

Product
- ✓ Grill stickers attached as per training material
- ✓ Is the finisher double-checking grill orders for accuracy?

Process
- ✓ Orders are served from the screen once the product has been pulled from the initiator or placed in the HLZ/HLS/OAT if assembly by one person
- ✓ Crew assembling products/sandwiches '2 at a time'

Equipment
- ✓ All grill printers are in working order and are in the correct location

Communications
- ✓ Shift and Production Manager/Leader set and communicate targets, objectives, and results for the production area

<u>**Service Area:**</u> Observe production barriers and customer experiences.

McCafé People
- ✓ Crew positioned correctly per guidance with VLH

McCafé Product
- ✓ Is the beverage specialist preparing orders correctly, and cups are full?
- ✓ Beverages are properly identified (sticker/marked/) and grouped by order

McCafé Process
- ✓ Is the beverage specialist placing finished product on BLZ to enable pick and go by the runner?

McCafé Equipment
- ✓ Are printers in working order and are in the correct location?
- ✓ Equipment layout set up by product mix (Be Well Served)

McCafé Communications
- ✓ Crew understand the danger zone (3 or more w/beverage specialist and 1 w/o beverage specialist) appropriately

Production top opportunities

6

② Observations and fact gathering

Observe order assembly process for in-store and process for double checking orders prior to present. Consider if the 3 Principles of Order Assembly are activated: SPACE, COMMUNICATION, and PEOPLE. Review the key points below and record the top opportunities in the box below. *Reference your Order Assembly Health Check pre-work.*

Order assembly SETUP
- ✓ Crew assigned to assemble orders are positioned correctly per guidance with VLH
- ✓ All areas stocked 24/2 to avoid missing condiments – napkins and straws
- ✓ Dedicated delivery roles used when over 10 deliveries per hour
- ✓ Delivery assembly area available to support the volume of the restaurant (see Delivery Operation Solutions Matrix)

Order assembly SPACE
- ✓ Order Assembly starts at the HLZ/HLS/OAT – orders are assembled away from the HLZ/HLS/OAT using the Pick'n Go principle
- ✓ HLZ/HLS/OAT assembly surfaces kept clear to support the assembly team

Order assembly COMMUNICATION
- ✓ HLZ/HLS/OAT Expo screen set to show eight orders
- ✓ Pick tickets print and easy to read (printer in good order)
- ✓ 2nd FC Expo screen is in use if conditions dictate
- ✓ Order Ready Board (ORB) working and used correctly

Order assembly PEOPLE
- ✓ Crew can identify the correct omni-channel
- ✓ Starts assembling orders when all sandwiches have landed in the HLZ/HLS/OAT
- ✓ Bumps from the screen (or by number using the bump bar) after checking remaining items are ready
- ✓ Uses pick ticket to finish order until it is presented to the customer
- ✓ Adds condiments at the HLZ/HLS/OAT assembly area and serves
- ✓ Checks accuracy of order against presenter screen if double bump in use
- ✓ Match pick ticket order number to customer receipt to provide connection and farewell
- ✓ Presents the order to the customer before scanning or serving from mini-ORB
- ✓ For ROA, an unassisted delivery pick ticket is placed correctly on the bag, and the order is placed at the fulfillment center

Expeditor role
- ✓ Sort sandwiches, and if utilizing HLZ/HLS/OAT, move DT sandwiches to the DT side
- ✓ Crew can identify the correct omni-channel, places items on a tray or in a bag when the last sandwich has landed in the HLZ
- ✓ Communicates with the runners as orders are ready and with the shift manager when a danger zone occurs (more than three orders waiting)

Order assembly top opportunities

Observations and fact gathering (Drive Thru)

Observe Drive Thru. Position yourself inside and outside the restaurant to observe Order Taking, Cash, Present, and Pull Forward, identifying areas of opportunity. When moving outside the restaurant, ensure you observe the Drive Thru from a safe location. Conduct observations at each point.

Order Taking ➡ **Cash** ➡ **Order Assembly** ➡ **Check & Present** ➡ **Pull Forward**

The following key points will guide observation and conversation. Record top opportunities for management, order assembly, and order taking in the box below. Record cash, present, and Pull Forward observations on the following page.

Drive-Thru management
- ✓ Is the DT team correctly staffed in line with projections and VLH guidance?
- ✓ Are people positioning guides followed (recommend DSPT)?
- ✓ Is a Drive Thru area leader always identified?
- ✓ Is the Drive Thru Area Leader reacting to danger zones?

Drive-Thru order assembly
- ✓ Does the DT runner have clear access to the HLZ/HLS/OAT?
- ✓ Is the DT area correctly set up and stocked for the projections?
- ✓ Is the DT runner monitor in use?
- ✓ Did the DT runner start assembling orders when all sandwiches landed in the HLZ?
- ✓ Is the DT runner distracted by other Omni channels?
- ✓ Are Pull Forward orders assembled and fulfilled by a designated person (not a member of the DT team)?
- ✓ Is the DT runner effectively using the complex order markings on the monitor to pull cars forward?

Drive Thru order taking
- ✓ Are the Order Taker and Cash functions split when the appropriate conditions apply to enable accurate order-taking?
- ✓ Are the order taker(s) unnecessarily distracted by secondary duties?
- ✓ Are headsets all in working order, and are spare batteries charged (minimum of 5 headsets for all DT configurations and recommended 7 headsets for side-by-side/tandem)?
- ✓ Is the speaker volume level correct?
- ✓ Is the digital menu board confirmation screen working correctly and easy to see by the customer?
- ✓ Is POP correct (no suggestive selling past the order points)?
- ✓ Do the crew ask the customer to check their order on the COD/ODMB before moving to payment?
- ✓ Are sauces being offered with McNuggets/burritos?
- ✓ Is the order taker interrupting the customer while placing their order?
- ✓ If applicable, are Handheld Order Taking Tablets (HHOT) in working order, charged & ready for use?
- ✓ Are orders being sequenced correctly? SBS – is the merge point visible and clearly identified?
- ✓ Are staff adequately trained to handle digital orders?

Drive Thru top opportunities: management, order assembly, and order taking

❷ Observations and fact gathering (Drive Thru continued)

The following key points will guide observation and conversation—record the top opportunities in the box below.

Drive-Thru cash
- ✓ Is the cashier rushing or distracted if taking orders when a dual role is in use?
- ✓ Is the receipt printer in good working order, with extra rolls of paper available?
- ✓ Does the crew provide customers with a receipt?
- ✓ In an SBS DT, is the cashier using image recall to validate the correct car at the window?

Drive Thru check & present
- ✓ Is a Drive Thru coordinator in position when called for? Or is there clear responsibility for the final check of orders to ensure accuracy when there is no DT coordinator?
- ✓ Are orders being bumped at the right time (bumped at present when complete order has been presented)?
- ✓ Is the presenter bump bar in good condition and working correctly?
- ✓ Is the presenter in control of the bump bar?
- ✓ Is the runner communicating to the presenter when and why to pull customers forward and to inform the dedicated Pull Forward person?
- ✓ Is a system in place to identify pull-forward orders in which stall?
- ✓ Are stock levels of bags/condiments/toys etc., sufficient?
- ✓ Is the presenter area set up correctly using Be Well Served to minimize bends, steps, turns, and reaches?
- ✓ Is the runner using the DT cart with stainless steel divider bars to separate the orders correctly for accuracy?

Drive Thru Pull Forward
- ✓ Are all condiments available in the Pull Forward window (if applicable) and set up using Be Well Served?
- ✓ Is there a separate assembler/runner for pull-forward orders?
- ✓ Is the runner wearing condiment aprons or using condiment trays to allow them to satisfy customer requests for additional condiments?

Drive Thru top opportunities: cash, present & pull forward

② Observations and fact gathering (Delivery)

Observe Delivery assembly, including final assembly and checking processes prior to courier handoff. The following key points will guide observation and conversation—record the top opportunities in the box below.

Delivery order assembly

✓ Are the correct delivery team members in position per the guidance in the Delivery Operations Solutions Matrix?

Delivery Position	Coordinator	Assembler	Presenter	Beverage & Dessert	Delivery Assembler
Deliveries per hour	10-19	20-29	30-39	40-49	+49

✓ In restaurants with a dedicated Delivery station (>10 orders in an hour), ensure it is open and correctly set up for current projections (if available, the Delivery runner monitor is in use >30 orders in an hour)

✓ Do all staff react to the Delivery danger zone (3 orders) at the HLZ/HLS/OAT expo or Delivery station KVS?

✓ Is the delivery/curbside person staffed/positioned when called for? Recommend restaurants utilize VLH 2022 to get delivery/curbside recommendations on the schedule.

✓ Is the pick ticket used to assemble the order, check the order contents and coordinate where multiple bags are required?

✓ Are all standards for condiments (including ketchup for all orders with French fries), sauces, napkins, and straws included within the sealed bags?

✓ Is the pick ticket visibly attached to the bag and for orders with multiple bags, numbers written on every bag (e.g., 1 of 2, 2 of 2) for customer awareness?

✓ Are Delivery crew interacting well / assisting when not busy with delivery with other service channels; is there a positive, cohesive team spirit?

Delivery order handoff to courier

✓ Are Delivery orders checked for accuracy before handoff to the courier? Is there a process in place?

✓ Is the pick ticket used to validate the correct order number with the courier?

✓ Are there processes in place for checking the order numbers and the total number of bags per order?

✓ Do the crew visibly check the order number on the courier device to ensure accuracy/prevent theft?

✓ Are multiple bags always handed to the courier at the same time only when the entire order is ready?

✓ Do the crew ensure the courier has 'swiped' the order from their device/app to confirm collection?

✓ Is the Delivery collection counter well organized and neatly stocked to promote accuracy?

*Delivery Best Bets – reference McDelivery Resource Guidebook 6_McDelivery_Recovery_Guide.pdf

Delivery top opportunities

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2 # Observations and fact gathering (Curbside, pick-up, table service)

Observe Curbside, Pick-up & Table Service in the final assembly and checking processes prior to fulfillment. The following key points will guide observation and conversation—record the top opportunities in the box below.

Pick-up
- ✓ Are order numbers being displayed on the ORB for pick-up orders?
- ✓ When presenting orders, does the crew use the pick ticket to help identify the right customer?
- ✓ Are the crew connecting with MOP customers by name (if applicable)?
- ✓ Are orders placed correctly on the fulfillment center with pick ticket showing for ROA unassisted orders?

Table Service
- ✓ Is the table server wearing condiment aprons to allow them to satisfy customer requests for additional condiments?
- ✓ If available, is the locator system in use? Are table tents available at kiosks? Are table numbers available for Mobile Order & Table service and in good condition?
- ✓ Are table service check backs happening where applicable?
- ✓ Is a table number map available to locate the right customer?

Curbside
- ✓ Is the curbside runner wearing condiment aprons or using condiment trays to allow them to satisfy customer requests for additional condiments?
- ✓ Are curbside stalls correctly identified and numbered?
- ✓ Does the crew assemble the order using a pick ticket and deliver it to the correct Curbside stall?
- ✓ Is the delivery/curbside person staffed/positioned when called for? Recommend restaurants utilize VLH 2022 to get delivery/curbside recommendations on the schedule.

Curbside, pick-up & table service fulfilment top opportunities

❸ Observations debrief – discuss and add "Top" opportunities in each area

Come together as a group and combine your observations. Assess and identify top learnings and opportunities and categorize them into the six areas below.

Omni Channels/Preparation / Areas	Digital			Drive Thru			Preparation	
	CURBSIDE, TABLE SERVICE & PICK-UP	Delivery	Order Taking	Cash	Present/Pull Forward	Order Assembly	Production	
People Positioning, Pace/Workload, Crew Interaction								
Product Location, Availability, Flow, Quality								
Equipment Position/Location, Capacity, Equipment Needs, Good Working Order								
Process Complexity, Bottlenecks, Clear Pathways, Pull Forward, Operating as Designed								
Physical Plant Interior/Exterior								
Communication Targets, Direction, and Coaching, Shift Management, Technology								

③ Observations debrief

Input data from the day and prework below. Discuss the root causes of top opportunities from the previous page and list them below.

Consolidated	Overall Accuracy (OSAT Data)	% of Inaccurate Orders (OSAT Data)	Accuracy Complaints Per 100K GC (Global Performance Matrix)	% of Inaccurate Delivery Orders (3PO Portal)	% of Delivery Refunds (3PO Portal)
Priority	Channel	Daypart	Weekday / Weekend	Inaccuracy Reason	Product
1					
2					
3					

Order Assembly Identified Root Cause(s)	Drive Thru Identified Root Cause(s)	Delivery Identified Root Cause(s)

- How do pre-work accuracy trends compare to the observations from today?
- What impacted results today (e.g., scheduling, shift management, motivation)?
- Did you observe anything today that appears to be a new opportunity?
- Was the team motivated? Were accuracy targets communicated effectively and was there ongoing feedback during peak? Were results shared and celebrated?

Overall observations

4 **Insights to Action Planning** ⏱ *30 mins*

Looking at your top learnings and data, identify one area (Digital, Drive Thru, or Production) with top opportunities for improvement. *Refer to the Accuracy Solution Matrix in the prework.*

List two to three root causes for your identified area *(reference findings from observations debrief on pages 12 & 13).*

What will your new objective be? Remember to enter a SMART (Specific, Measurable, Attainable, Relevant, and Time-bound) objective *(e.g., reduce dinner inaccuracy by 15% per day by improving Delivery accuracy from 1 January – 31 January).*

List the actions (minimum of two) that will be implemented to achieve your objective and who are accountable for implementing actions *(e.g., Designating a Delivery and Drive Thru coordinator position for all peak periods).*

Does the existing Action Plan need to evolve? If yes, please note how below.

Restaurant leader: recommend entering your updated Action Plan into the PACE Portal. Resources to help you achieve your objective and improve Order Accuracy are available on Operations – Order Accuracy NABIT (atmcd.com)

McDonald's staff, Owner/Operator, conducting the session: please enter session results into the GDCT.

Post Session

- **Once action planning is complete**, recommend working on your key areas of opportunity, monitor trending performance in the delivery portals, Global Performance Matrix, and VOICE, and share progress.

- Recommend scheduling a follow-up session 4-6 weeks after the Performance Excellence Session.

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ORDER ACCURACY FOUNDATIONS PREWORK

Operations KPI's: OSAT, Customer Contact Center & 3PO data prework review

Recommended: The Accuracy Foundations prework reviews the restaurant set up for Order Assembly, Drive-Thru, and Delivery and your latest KPI data performance. Trend analysis will provide a broad set of observations about how the restaurant performs over a significant period of time. This will help you plan and steer the Performance Excellence Session.

Step 1: Document the existing restaurant and channel conditions and the restaurant configuration, and review and analyze the trailing three-month Accuracy Ops KPI data (pages 16-17).

Step 2: Complete the [Drive Thru Order Accuracy Health Check PES](#) and document your findings and actions. The Drive Thru Order Accuracy Health Check is designed for you to complete as a quick check of the setup and operation of your Order Assembly platform. Record observations on page 18.

The Key Principles of Order Assembly:

- **SPACE**
- **INFORMATION**
- **PEOPLE**
- **BALANCE**

Step 3: Review the [Delivery Operation Solutions Matrix](#) and the [Delivery Accuracy Toolkit](#) to help understand the impact order inaccuracy has on your business and provide ideas, initiatives, and best practice solutions. Record observations on page 18.
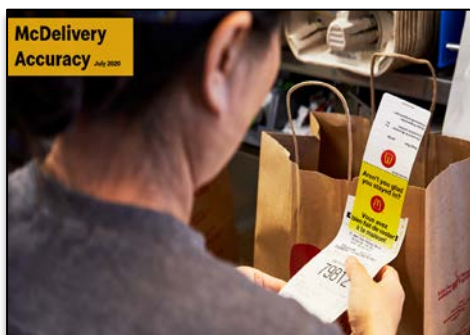
Please complete the charts in the prework; if you have consolidated 3PO data, recommend using this. If multiple 3PO's exist, collect data for the most utilized 3PO. These results and observations will be presented to the Performance Excellence Session group during the setup session.

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ORDER ACCURACY FOUNDATIONS PREWORK

Owner Operator Organization

NSN

Date

Complete the Accuracy Foundations Prework (below and on the following page) and submit it at least one week prior to your Accuracy Performance Excellence Session.

Step 1: Restaurant Conditions & Setup

*Collect restaurant conditions data from QSRSoft

Conditions	Drive Thru	Delivery	Table Service	Curbside	Takeaway	MOP
% GC						
Peak GC						
Peak Daypart						
Average Check						
Operating Hours						

Set Up (Y or N) Except Drive-Thru Type	Drive Thru Type	Delivery Station	Delivery Monitor	# of 3PO	Curbside	Table Service
Drive Thru & Digital						

Step 1a: Operations KPI's: prework review

*Collect restaurant conditions data from VOICE, Global Performance Matrix, and 3PO Data

Consolidated	Overall Accuracy (OSAT Data)	% Of Inaccurate Orders (OSAT Data)	Accuracy Complaints Per 100K GC	% Of Inaccurate Delivery Order (3PO Data)	% Of Delivery Refunds (3PO Data)

Step 1b: Operations KPI's: Customer Satisfaction prework review

*Collect restaurant conditions data from VOICE

CUSTOMER SATISFACTION OSAT (T3M)						
	Overall	Drive Thru	Delivery	In Restaurant	Curbside	To Go
Accuracy OSAT (VOICE)						
Daypart	**Breakfast**	**Lunch**	**Dinner**	**Night**	**Weekday**	**Weekend**
Accuracy OSAT (VOICE)						
Product	**Big Mac**	**Nuggets**	**McChicken**	**Quarters**	**Fries**	**Beverages**
Accuracy OSAT (VOICE)						
Rank						
Inaccuracy Reason (Accuracy Dissatisfaction-VOICE)	**Missing Food**	**Missing Condiment**	**Missing Utensils**	**Not Made Correctly**	**Wrong Item**	**Wrong Size**
Rank						
# Inaccuracy Complaints						

ORDER ACCURACY FOUNDATIONS PREWORK

Step 1c: Operations KPI's: Customer Complaints prework review

*Collect restaurant conditions data from Global Performance Matrix

Customer Contact Center - Customer Complaints			
#800 Complaint Issues per 100,000	Current	Baseline	Change
Trailing 3 Months			
Year to Date			

Top 5 Most Frequent Complaint Issues #800 (T3M)	% Issues	# Complaint Issues	Change From Baseline

Step 1d: Operations KPI's: Delivery prework review

*Use the data from the 3PO that is most prevalent in your area

3PO Portal, Market Delivery Report or Performance Matrix							
Daypart	Total Delivery	Breakfast	Lunch	Dinner	Night	Weekday	Weekend
% Inaccurate Orders							
% Refund Orders							
Product	Big Mac	Nuggets	McChicken	Quarters	Fries	Coffee	
Rank							
# Inaccuracy Complaints							
Inaccuracy Reason	Missing Food	Missing Drink	Missing Condiment	Wrong Item	Wrong Order	Wrong Size	
Rank							
# Inaccuracy Complaints							

Conditions Observations & Operations KPIs Opportunities

ORDER ACCURACY FOUNDATIONS PREWORK

Step 2: Drive Thru Setup & Operations

Drive Thru Order Accuracy Health Check Observations & Actions

Step 3: Delivery Setup & Operations

Delivery Matrix & Accuracy Toolkit Observations & Actions

COMMUNICATION/RESULTS DAY AGENDA: Guest Service Focus

The following routine is designed to help the General Manager and Guest Service Manager conduct their Service Evaluation
Sample Topics:

Core Service Discussion
- Discuss Crew Training Proficiency on Service Area crew stations
- Discuss Planned Maintenance in Service Department
- Rewards and recognition in your department
- Discuss service equipment/cleanliness walk thru results and spot check areas
- Action steps to improve your department (GM & DL work together to pick 3 action items for DL to work on each month)

Service

(Note: Bring Voice Reporting & Guest Service Monthly Action Plan from last month)	Y/N
Meeting Target: PACE VOICE O Sat; Make a plan to improve or recognize	
Meeting Target: PACE VOICE EPB2B; Make a plan to improve or recognize	
Meeting Target: PACE R2P; Make a plan to improve or recognize	
Service Area Operations: Executing as designed? Complete PACE Service Excellence assessments of Accuracy, DT, Shift Management, Digital and Delivery done monthly; DT Health Check, YY/NN,	
OEA Visit Review and Make a plan	
"Service Area Aces" staffed at peak dayparts?	
Crew trained on DT Runner? (NOT MGRS ONLY) DT Team trained and EAD?	
McCafe staffed and trained? Equipment Maintained, Limited Product Outages	
Service Area Vocie Operations Digital Satisfaction score	
Marketing/POP	
Cover Monthly Marketing Bulletin fromo GIO/BOA	
Team Knowlegeable of Initiavtes and Promotions, Digital Ambassador	
Local Store Marketing planned and executed to grow guest counts?	
Digital Days planned ? ROA Ready? MOP/Curbside executed as designed	
Accuracy scores on Voice, Customer 800 Complaints: Make a plan	

Service: Priority Action Items

1

2

3

- Discuss Transaction growth and Service Targets by daypart and Weekly Action Items (if completed reward, if not recommit or redirect)
- Discuss Ordering/Service Accuracy, Voice and 1800 Complaints, Voice Clean score
- Discuss Crew Training, Service Staff Verification of "Service Aces" - monthly targets % trained, DSPT Service Coverage & Service Performance with Shift Leaders

Limited Time Offers:
Nabit Webcast viewed Monthly & Communicated to Managers and Crew
- Discuss Product Outages and develop plan to REDUCE outages
- Discuss monthly GC Growth , LTO Product Mix and PAC goals
- Manages LTO Product Deployment and works with Kitchen Mgr on LTO Phase out)

Service System
- Number of Service Crew Trainers and Verified Service Crew meets needs
- Discuss Service Hospitality Drivers and SHINE Expectations for all staff
- Discuss Service Procedures EAD: Dine In, Digital, Delivery and Drive Thu
- Review "Service Ace" role effectiveness in service area
- Service Team 90-day turnover results
- Discuss OEPE, R2P, EPB2B, PARKED CAR % GOALS

Individual Development Planning
- Discuss your professional development plan. What have you accomplished? Is the plan working? If not, how are you changing it?
- Discuss Service Crew Training or upcoming opportunities. Is department development on track for crew, McCafe, crew trainers, Service Area Managers, Service Aces, etc?

Service Area Ace Verification Requirements

Is a SHINE Ambassador:
Creates Feel Good Moments
Role Model:
Smile
Host
I am not Rude.
Uses Name and Customer Names
Executes as Designed: Must demonstrate consistently

CANDIDATE MUST SUCCESSFULLY PASS ALL SERVICE AREA HEALTH CHECK
PROCEDURES

QR CODE TO SERVICE HEALTH CHECKS:

Customer Recovery Expert:
BLAST
Zero Rude Complaints

VOICE: Positive Comments received from Customers

Teamwork:
- Recommended by Peers for this position
- Approved unanimously by Shift Leaders
- Written recommendation from GM (With details of why they recommend them for this position

Dependability & Kindness:
No lateness, No absenteeism, No documentation of customer concerns