



THE JOURNEY TO SHIFT LEADERSHIP

SHIFT LEADER: _____

COACH: _____

Owner/operators may choose to use information from these materials that will be helpful to them in operating their own McDonald's restaurant(s). The following document was designed to be used in conjunction with the "Shift Leadership Training Roadmap" in FRED. If you work for an owner/operator organization please check with your owner/operator, or the person designated by your owner/operator to determine whether and which of these materials apply to your organization. The following are recommendations only, and may be modified based on your organization and needs of your learner.

Table of Contents:

Shift Leader Orientation.....	1
Focus on Foundations.....	3
Shift into Overdrive.....	5
Leadership Transitions.....	6
Verification.....	8
Appendix.....	9

It's time to start your new shift leader on their journey to becoming "certified" to lead shifts! This document is a step-by-step guide for coach's to developing new shift leaders.

Step 1: Shift Leader Orientation *Estimated Time: (1-2 hours)*

- Ensure Shift Leader has correct EID and login credentials to FRED.
- Review and be knowledgeable of crew training program and roadmap in FRED.
- Ensure that the Shift Leader has completed the modules within the "Safe and Respectful Workplace" collection in FRED.
- Ensure Shift Leader has completed or has a plan to complete ServSafe Certification.
- Briefly discuss the role of a shift leader in your organization and have the shift leader share their goals.

Supplemental questions:

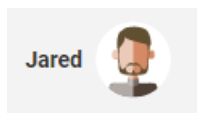
What would you like to accomplish on your shifts?

What will be the first thing you would like to do as a leader?

What will be your impact as a shift leader?

What will you do to lead the team?

- Log into FRED together **under the Shift Leader's EID** and access the Shift Leader Training roadmap.
- If it's their first time in roadmap, have them enter their name and select an avatar.



- Review the "Splash Intro" and Shift Leader Introduction together.



Click Here

Once you select the "New Shift Leader Introduction" icon, you are entering the "Shift Leader toolkit"

- Navigate through the sections in the "Shift Leader Toolkit" together, which provides a high-level overview of what the Shift Leader can expect on their development journey.

Estimated Time: (15 minutes)



Sections included in the toolkit: Foundations, Shift into Overdrive, Leadership Transitions, McDonald's Culture, Expectations, Show up as a Leader, Delegating, and Archways.

Now that you have completed the Shift Leader Introduction, it's time to get the new Shift Leader started on completing their foundations section!

Step 2: Focus on Foundations *Estimated Time: (4 weeks)*

Before letting the Shift Leader jump right in, we recommend you...

- Ensure the leader understands basic FRED navigation:
 - How to Login
 - Where to find the Shift Leader Roadmap
 - How to access the foundations modules
 - How to properly open/close e-learnings that link to CAMPUS throughout the modules
- Review the required e-learnings and time frame for completing. *(See list below)*

Required Pre Requisites	Estimated Time
Welcome to Shift Leadership	15 min
Stepping Up to Leadership	10 min
Delighting Guests on Your Shift	25 min
Leading Operations During Shift	10 min
Leading Operations Post-Shift	20 min
Leading Operations Pre-Shift	20 min
Engaging Crew on Your Shift	20 min
Using Emotional Intelligence	10 min
Maximizing Team Strengths	15 min
Coaching for Success	20 min
Delegating	20 min
Inclusive Shift Leadership	10 min
Safety and Security on Shifts	15 min
Food Safety for Shifts	15 min
Making Effective Decisions	15 min

- Set expectations for note taking throughout e-learnings using the Practice & Grow sections:

Practice & Grow

Make a note of some of your expectations as you start your journey. What do you think your current strengths are? How do you expect to grow?


- Provide any further instructions/requirements that are specific to your organization.


The Shift Leader should now be fully prepared to complete the foundations modules. Make sure to track their progress by using the “Shift Leadership Learner Progress” report from CAMPUS. In addition, we recommend having a touchpoint meeting with your leader at least once per week to discuss what they are learning, and provide the opportunity to ask questions.

Next Meeting Date/Time:

The following timeline is a recommendation for completing the Foundations modules from the “Shift Leadership Training Roadmap” in FRED. Please be aware that the time frame for completing these modules may vary based on the learner.


Week 1


- ▼ Welcome to the Shift Leader Learner Journal 

Completion Date	Coach’s Signature
- ☰ Welcome to the Shift Leader Learner Journal
- ☰ Your Role as Shift Leader
- ☰ Stepping up to Leadership
- ▼ Creating the Guest Experience 

Completion Date	Coach’s Signature
- ☰ Delighting Guests on Your Shift
- ☰ Using the Guiding Principles to Create the Guest Experience
- ☰ Regaining and Retaining Guests

Week 2

- ▼ Leading Operations - Pre-Shift 

Completion Date	Coach’s Signature
- ☰ Leading Operations
- ☰ People Positioning
- ☰ Pre-Shift
- ▼ Leading Operations - Leading the Shift 

Completion Date	Coach’s Signature
- ☰ Leading During-Shift
- ☰ Danger Zones
- ☰ Observation Zones
- ☰ Post-Shift
- ☰ Putting it all Together

Week 3

Leading Feel Good Shifts 


- Engaging Crew on Your Shift
- Getting to Know your Crew
- Build Trust and Respect
- Having a Leadership Mindset
- Concerns about Transitioning to Leadership

Completion Date	Coach's Signature

Week 4

Skills for Shift Leaders 

- Emotional Intelligence
- Coaching for Success
- Maximizing Team Strengths
- Making Effective Decisions
- Delegating

Safe and Secure Shifts 

- Leading Secure Shifts

Completion Date	Coach's Signature
Completion Date	Coach's Signature

After the learner has successfully completed the foundations modules, have a meeting with them and complete the following:

- Check that all modules are marked complete in the tracker.
- Ask the learner to share their note sections from the Shift Leadership Training Roadmap.
- Discuss what they learned from completing the modules, and answer any questions.

Step 3: Shift into Overdrive(SIO)

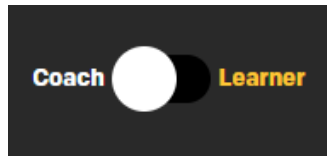
Estimated Time: (7-8 hours in restaurant)

This material is designed to provide you the information that needs to be covered for Shift into Overdrive. How this information is covered at your restaurant may vary. The materials can flex to your circumstances.

It is now time for the Shift Leader to practice and apply what they have learned with Shift into Overdrive! The goal is to spend a full day shoulder-to-shoulder with your new shift leader, showing them how to run a successful shift.

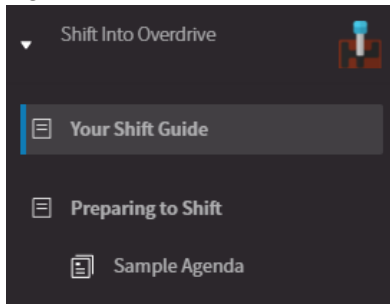
Your role as the Coach is to guide the shift leader through Shift Management using all the tools, processes and procedures needed on every shift. The day will consist of shoulder-to-shoulder walk-throughs and coached practices of the Pre-Shift, During Shift, and Post-Shift processes along with completing all the steps in each phase.

You will need to use the toggle tool at the top of the roadmap to switch between “Coach” view and “Learner” view throughout the SIO section.



Before the shift:

- Both the coach and the shift leader should review the “Preparing to Shift” section, including the “Sample Agenda” on the Shift Leadership Training Roadmap in FRED.

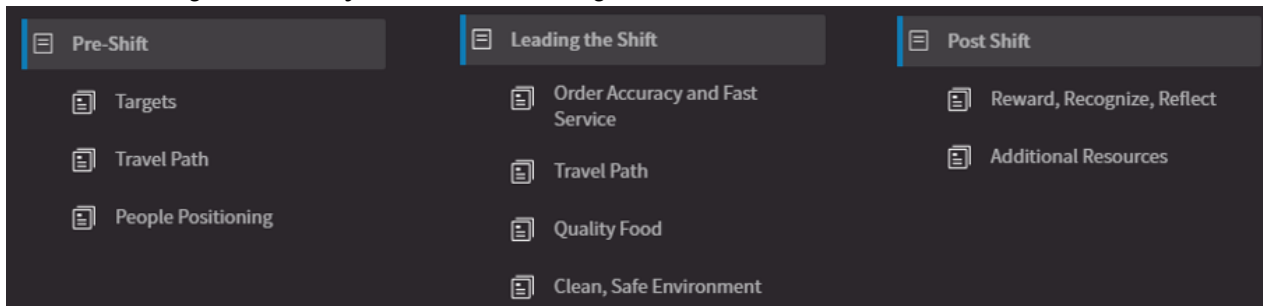


- Schedule the Shift into Overdrive session:

Shift into Overdrive Date/Time:

Completion Date:

During the Shift: Use the Shift Leadership Training Roadmap in FRED to navigate through the following SIO sections throughout the day: (Pre-Shift, Leading the Shift, & Post-Shift)



Step 4: Leadership Transitions

Estimated Time: (6 hours total, 4 consecutive sessions of 90 minutes per day)

How to register for a Virtual Leadership Transitions class if you are the learner:

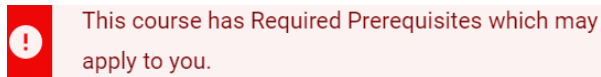
- Have the student log into FRED with their EID and password.
- Navigate to the “Leadership Transitions” tab on the Shift Leadership Training Roadmap.

Click to Register for 2021 sessions!



Click Here

You will be redirected to CAMPUS, where you will see the pre-requisite alert:



Pre Requisites Requirement Met

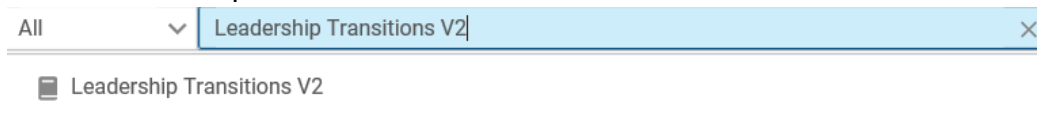
(If the learner has successfully completed the e-learning, the “requirement met” and green check marks will display.)

- Proceed with selecting a class and completing the registration process by selecting “ENROLL”

Class date/Time:

How to register your student(s) if you are the learning manager:

- Log into CAMPUS (*learning manager*)
- Search “Leadership Transitions V2”



[See all results](#)

- Find the class you would like to register your student(s) for

Available classes (49)

Filters

All Languages All Locations Available from All delivery types

CLEAR FILTERS

APPLY FILTERS

15-MAR-2021 - 18-MAR-2021 | 2:00 PM - 3:30 PM (CDT) +3 Others 0 USD

English | Virtual Classroom

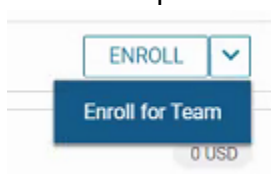
Virtual Central Time

Total duration: 06:00 Hrs | [Check cancellation policy](#)

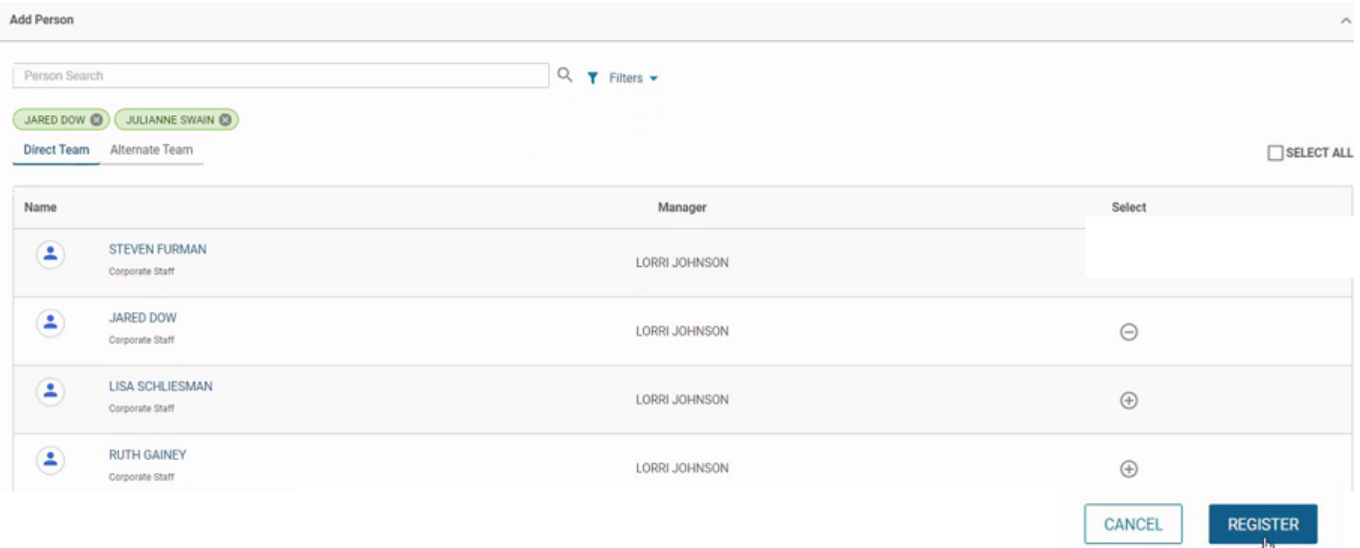
8 seats available | 0 Waitlist available

ENROLL

- Use the drop down arrow beside the ENROLL button, and hit the option “Enroll for Team”



- Scroll down, and select the **+** button beside the student(s) you would like to register. To complete the process, click the **Register** button at the bottom of the page.



You will be redirected to a confirmation page if the registration was successful. All prerequisite e-learnings must be completed before registering a student for class.

Before Class the student should...

- Open the **“Setting Yourself Up for Success”** section on the Shift Leadership Training Roadmap in FRED.
- Read introduction and print a copy of the Participant’s Guide

Printable Participant's Guide



Click Here

- Review “Pre-work Recommendations” and “Technology Set Up Tips”
- Review the “Webex virtual learning participants’ guide” (**no need to print**)

WEBEX VIRTUAL LEARNING PARTICIPANTS' GUIDE



Click Here

- Be ready to join the first session 15-30 minutes before the class start time!
- Schedule “post class” meeting with their coach

Post Class Meeting Date/Time:

After class...

- Visit the **“After Class Next Steps”** section on the Shift Leadership Training Roadmap in FRED.
- Complete the “Post Class Action Plan”
- Have the Shift Leader visit CAMPUS to print their Leadership Transitions Certificate.

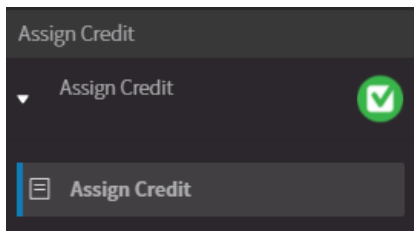
Step 5: Verification

- Access the Shift Leader Verification tool on the Shift Leadership Training Roadmap found under: **Shift into Overdrive>Additional Information**

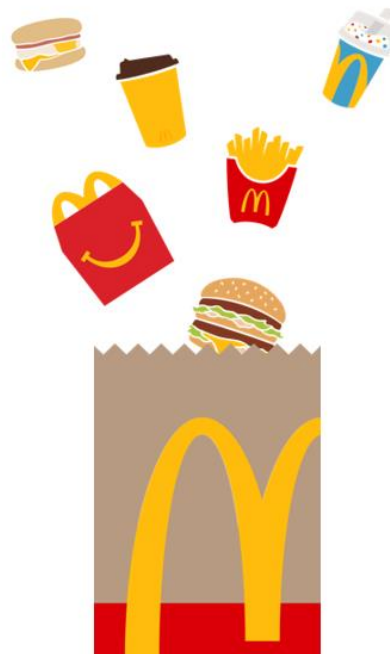


Click Here

- Print the verification form, and use it to observe the shift leader in action.
- Address and coach on areas of opportunity after verification.
- Assign credit to the Shift Leader for fully completing the Shift Leadership Training Roadmap.



Step 6: Celebrate



Now is your opportunity to create a feel good moment for this new shift leader! Find a way for the entire restaurant to celebrate their success. Remember that this is just the start of their leadership journey, and they will need your continued guidance and coaching. We highly recommend you schedule time to meet with your shift leaders on a regular basis to discuss their performance and ongoing development.

Appendix

Shift Leader Performance Verification Tool

Restaurant Name: _____ Store #: _____ Date: _____ Time/Daypart: _____
 Shift Leader Name: _____ Completed by: _____

Operations Score: _____ Service Score: _____
 Quality Score: _____ Cleanliness Score: _____ Verified: Y / N

Purpose

1. To determine if the shift leader can lead the shift successfully.
2. To assess the shift leader to establish what is working well and what would work even better by:
 - Setting performance expectations
 - Reinforcing standards of operations
 - Reinforcing effective people practices

Instructions

- Step 1. The Coach and Participant**
 - Review the document to understand the behaviors of a successful shift leader.
 - Set and record shift targets.
- Step 2. The Coach**
 - Observes pre-shift, managing the area, and post-shift tasks.
 - Complete points assessment for all four sections.
- Step 3. The Coach**
 - Determine the result by totaling the points for each section.
- Step 4. The Coach & Participant**
 - Use the "Shift Leader Key Success Factors" page of this tool to discuss what the participant did well, and what they may need more practice with.
 - Develop an action plan

Drive-Thru Targets				Dine In Targets				Additional Targets			
Cars	Actual	DT OEPE	Actual	Guests	Actual	Time	Actual		Actual		Actual

Operations Critical behaviors	Y	N	Comments
Pre-Shift			
Food Safety daily checklist complete			
Communicates with previous Shift Leader			
Pre-shift checklist complete and actions prioritized			
Any items from the pre-shift checklist that could not be fixed during the shift (broken equipment etc.) are communicated			
Restaurant is stocked for 24/2			
Crew positioned correctly per the DSPT- Second Side Open, Functions Split, Park , Pull Runner Assigned, Beverage Specialist if warranted			
Secondary responsibilities assigned and communicated			
Production Leader in place and effective			
Targets set and communicated			
Conducts Shift Huddle with the team			
During Shift			
Maintains Food Safety procedures and a safe and secure environment			
Leads from the observation zone (not in position)			
Hand washing is taking place a minimum every hour			
Coaches crew using positive and developmental feedback			
Travel paths completed every 15/30 mins and are effective			
Targets are updated and communicated throughout the shift			
Appropriately reacts to and removes danger zones - works through/communicates with area leaders			
Management and Crew Appearance - proper uniforms, name tags, clean/well groomed			
Post Shift			
Communicates results to the team			
Communicates with the incoming manager - sets them up for success			
Reviews schedule for the next shift - sets up DSPT			
Reflects on what went well and what can be improved			
Operations - Need 18 out of 22 to pass			Total

Quality Standards	Y	N	Comments
Results vs targets: KVS targets			
Sandwich/Entrée – Hot, fresh, neat appearance, good taste, properly prepared			
Fries/Hash brown - Hot, fresh, good flavor, salted properly, & golden color – oil meets standards			
Beverages - Properly filled, proper temperature, good flavor, properly made. Bev stickers used			
Desserts - Properly prepared, good flavor and texture, holding time acceptable			
Grill slips are positioned correctly for accuracy			
Cabinet Charts - in place, up to date, and followed. Holding times adhered to			
All products within primary shelf life			
Secondary shelf lives marked / monitored			
Prep table times marked/monitored			
Tempered product properly marked / monitored			
Waste cans in place and counted			
Procedures observed and coached in the production area			
Quality - Need 10 out of 13 to pass			Total

Service Standards	Y	N	Comments
Results vs. targets: In Store GCs +/-			
Results vs. targets: Drive-Thru Car Count +/-			
DT service times - Restaurant targets			
In Store Service times - Restaurant targets			
Employees interact with customers in a polite, friendly and effective manner . Crew look for opportunities to create feel good moments			
Orders accurately and properly assembled including condiments, napkins, straws etc.			
McDelivery orders are properly assembled, packaged, double checked for accuracy, and handed off			
Guest Recovery Process in place, understood and followed using LAST.			
Use back to basics order taking, Ask-Ask-Tell and proper pull forward procedures			
Crew are attentive to the guest: table touch backs, assisting guests, greetings and farewells			
Cars - pull forward happening – 10 second rule			
Service - Need 9 out of 11 to pass			Total

Cleanliness Standards	Y	N	Comments
Guest Conveniences - high chairs clean, music on			
Self Service beverage bar area clean and stocked			
Dining Room - floors, chairs, tables clean			
Kiosks and table locators clean			
Playplace / Patio-seating – trashcans, floor, play unit, clean & well maintained, etc.			
Restrooms - Clean, odor free, supplies stocked , hand dryer working			
Windows/Doors - All windows/mullions clean, Entrance doors and DT windows			
Outside Trash Cans/Sidewalks - Clean – not full			
DT Menu Board and DT lane clean - Promotions properly displayed, and DT window areas clean			
Landscape/Parking Lot - Parking lot free of litter, landscaping well maintained			
Kitchen - floors, walls, stainless, equipment clean, not cluttered			
Front Counter/DT - floors, walls, stainless equipment clean, not cluttered			
Fry station and Shake machine area cleaned			
Office / Crew Room/ Stock Room neat, clean and organized			
Cleanliness - Need 12 out of 14 to pass			Total

Discuss Shift Leader's Role and the Key Success Factors.
 Highlight 1-2 success factors you observed the Shift Leader successfully demonstrated, and 1-2 that appear to be the most important opportunities.

Use them to coach the Shift Leader: What is a strength that they can leverage? What is an opportunity to improve?
 Discuss why all the factors are critical to the success of their shift.

Shift Leader Key Success Factors

Pre-Shift	During Shift			Post-Shift
	Service Standards	Grill Standards	Cleanliness Standards	
24 hours in Advance	Adjust Positioning as conditions change	Maintain & Complete Food Safety Procedures	Quality Products being served	Communicate Target Results / Recognition
Understand & use positioning guide (DSPT recommended)	Coaching team using positive & development feedback	Hospitality Standards/Smiles/Tone of Voice/Eye Contact	McDelivery Standards	Reflect on What Went Well
Knows and Sets Targets and Expectations	Travel Paths every 15/30 Minutes	Product Prep & Pull Thaw Complete	DT Pull Forward Procedures followed / Park Runner & GEL in place	Communicate Necessary Information to Management Team
Executes Pre-shift Checklist	Monitors & communicates progress towards targets	All Products within Code Dates	Role Models Hospitality and interacts with the guests	Transition Shift to Next Manager
Prioritizes Tasks and Assignments or training plan	Identify & Eliminate Danger Zones	HOTG Standards in Place	Dining Room/Beverage Station/Restrooms Clean and Stocked	Prepare Next Shift Positioning
Assist in Shift Management Transition	Customer Recovery steps are utilized as appropriate	UHC Cabinet Levels Correct	Exterior Clean	Continuous Improvement Mindset

Very Good Understanding:

1)

2)

3)

More Practice:

1)

2)

3)

Congratulations!
You have passed your Floor Verification.

Shift Leader Signature _____
 Restaurant Leader Signature _____
 Coach Signature _____ Date: _____

Floor Verification not passed.
Return Date:

Shift Leader Signature _____
 Restaurant Leader Signature _____
 Coach Signature _____ Date: _____