



## Shift Leadership Development Checklist

**The best shift leaders in our business consistently follow the four key leadership actions.....**

1. Prepares/plans their shift
2. Engages their crew
3. Optimizes their team
4. Creates great customer experiences

Once you and your coach have completed this development checklist and you can consistently perform the duties you are then ready to have a Shift Leader Performance Verification Tool completed by a supervisor. Once you pass this verification you are blessed to be a shift leader!

### **Development work to be completed:**

- \_\_\_\_\_ ServSafe certified
- \_\_\_\_\_ Completed the Fred shift leadership modules
- \_\_\_\_\_ Attended LT class
- \_\_\_\_\_ Performance review (go over what the review entails and what they will be reviewed on during their performance)

### **Behind the scenes work:**

- \_\_\_\_\_ Food safety daily checklist on the Ipad
- \_\_\_\_\_ Daily food safety follow-up checklist
- \_\_\_\_\_ EcoSure questions
- \_\_\_\_\_ EcoSure walk through with a supervisor (this will be scheduled)
- \_\_\_\_\_ Main Power, water and gas shut offs (where and how to)
- \_\_\_\_\_ HazCom App (how to search and can explain)
- \_\_\_\_\_ Planned maintenance calendar (what it is and when tasks get done)
- \_\_\_\_\_ CIT (completing transfers in/out, opening/closing the system)
- \_\_\_\_\_ eHr (how to edit time punches)
- \_\_\_\_\_ How to perform refunds/overrings
- \_\_\_\_\_ 14/15 and 16/17 dos and don'ts
- \_\_\_\_\_ Access to all systems that they need (if missing something get with a supervisor)
- \_\_\_\_\_ Counting tills, making a deposit and safe counts (day deposit must go the bank that day)
- \_\_\_\_\_ Banking (sign them up at bank, when to bank and getting change)
- \_\_\_\_\_ Evacuation plan (where it's posted, crew schedule and first aid kit go with you)



**Before the shift:**

\_\_\_\_\_ DSPT complete 24hrs before shift (how to run one, fill one out and the bottom position what it means)

\_\_\_\_\_ Read messages in eHr (how to read/leave messages)

\_\_\_\_\_ Pre-shift checklist (on the Ipad)

\_\_\_\_\_ Sets targets for the shift and updates team throughout shift

\_\_\_\_\_ Food Safety Daily Checklist completed and signed off on the Ipad

\_\_\_\_\_ Communicates with the previous shift manager (mid and closing shifts)

**During the shift:**

\_\_\_\_\_ Travel paths (how to and reminder is on Ipad)

\_\_\_\_\_ Secondary duties for all positions (utilize when business slows and there is time)

\_\_\_\_\_ Cleanliness from customers point of view (bathrooms, lobby, beverage bar and lot)

\_\_\_\_\_ Communication is key (communicate effectively and honestly- uses positive tone/speaks calmly and professionally/communicates with others not down to them/accepts feedback professionally)

\_\_\_\_\_ Puts the customer first (responds to all customers respectfully/is observant of customer flow/takes action for customer satisfaction/quickly fixes any customer issues and done with a professional manner)

\_\_\_\_\_ eProduction (team is utilizing eProduction for cabinet levels/thaw pull/tempering)

\_\_\_\_\_ Manager and crew appearance (in correct uniform, name tag, hats, hair nets, beard nets and watches/bracelets/rings not worn by grill team)

\_\_\_\_\_ Reacts to danger zones (knows what the rule of 3 is and how to react)

\_\_\_\_\_ Safety through out the shift and what to look for (sweep/mops throughout shift, boxes/bun racks not piled on the floor/wet floor signs/garbage not taking over back rooms)

\_\_\_\_\_ Preparing for the next shift checklist.

\_\_\_\_\_ Towel buckets changed (7am, 10am, 1pm and 4pm)

\_\_\_\_\_ Secondary times (everything is timed)

\_\_\_\_\_  
Manager in Training

\_\_\_\_\_  
Coach

\_\_\_\_\_  
Date Completed

# 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 questions answered "yes" 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
<b>Pre-Shift</b>			
<b>Food Safety</b> daily checklist complete			
<b>Restaurant safeguards</b> (masks, gloves, PED paddles, safety+ signage, etc.) in place/use			
<b>Communicates</b> with previous Shift Leader			
<b>Pre-shift checklist</b> complete and actions prioritized			
Items from the <b>pre-shift checklist</b> that could not be fixed during the shift are communicated			
Restaurant is <b>stocked</b> for 24/2			
<b>Crew positioned correctly</b> per the DSPT- Second Side Open, Functions Split, Park , Pull Runner Assigned, Beverage Specialist if needed, and social distancing positioning is followed			
<b>Secondary</b> responsibilities assigned and communicated			
<b>Production Leader</b> in place and effective			
<b>Targets</b> set and communicated			
Conducts <b>Shift Huddle</b> with the team			
<b>During Shift</b>			
Maintains <b>Food Safety</b> procedures and proper <b>safe and secure</b> environment safeguards			
Ensures proper <b>contactless operations procedures</b> are being followed (PED paddle, etc.)			
Leads from the <b>observation zone</b> (not in position)			
<b>Hand washing</b> is taking place a minimum every hour			
<b>Coaches crew</b> using positive and developmental feedback			
<b>Travel paths</b> completed every 15/30 mins and are <b>effective</b>			
<b>Targets are updated and communicated</b> throughout the shift			
Appropriately <b>reacts to and removes danger zones</b> - works through area leaders			
<b>Management and Crew Appearance</b> - proper uniforms, name tags, clean/well groomed			
<b>Post Shift</b>			
<b>Communicates</b> results to the team			
<b>Communicates with the incoming manager</b> - sets them up for success			
<b>Reviews schedule</b> for the next shift - sets up DSPT			
<b>Reflects</b> on what went well and what can be improved			
<b>Operations - Need 19 out of 24 to pass</b>			<b>Total</b>

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

Service Standards	Y	N	Comments
<b>Results vs. targets:</b> In Store GCs +/-			
<b>Results vs. targets:</b> Drive-Thru Car Count +/-			
<b>DT service times</b> - Restaurant targets			
<b>In Store Service times</b> - Restaurant targets			
Employees interact with <b>customers in a polite, friendly and effective manner.</b> Crew look for opportunities to <b>create feel good moments</b>			
Ensures <b>GESSL is in place</b> , maintaining cleanliness and sanitation and engaging with guests			
Orders <b>accurately and properly assembled</b> including condiments, napkins, straws etc.			
McDelivery orders are <b>properly assembled, packaged, double checked for accuracy, and handed off</b>			
Proper procedures for <b>MOP Orders</b> are followed – designated person to handle orders			
<b>Guest Recovery Process</b> in place, understood and followed using LAST.			
<b>Use back to basics order taking, and proper pull forward procedures</b>			
<b>Crew are attentive to the guest:</b> table touch backs, assisting guests, greetings and farewells			
Cars - <b>pull forward happening</b> – and proper procedures used			
<b>Service - Need 10 out of 13 to pass</b>			<b>Total</b>

Cleanliness Standards	Y	N	Comments
<b>Guest Conveniences</b> - high chairs clean and sanitized, hand sanitizer dispensers in place and stocked, music on			
<b>High Touch Point areas</b> are cleaned and sanitized after each use (tables, chairs/booths, etc.) or every 30 minutes (door handles, push plates, etc.)			
<b>Dining Room</b> - floors, chairs, tables clean			
<b>Kiosks</b> and table locators clean and sanitized			
<b>Playplace / Patio-seating</b> – trashcans, floor, play unit, clean & well maintained, etc.			
<b>Restrooms</b> – Clean and sanitized, odor free, <b>supplies stocked</b> , hand dryer working			
<b>Windows/Doors</b> - All windows/mullions clean, Entrance doors and DT windows			
<b>Outside Trash Cans/Sidewalks</b> - Clean – not full			
<b>DT Menu Board and DT lane clean</b> - Promotions properly displayed, and DT window areas clean			
<b>Landscape/Parking Lot</b> - Parking lot free of litter, landscaping well maintained			
<b>Kitchen</b> - floors, walls, stainless, equipment clean, not cluttered			
<b>Front Counter/DT</b> - floors, walls, stainless equipment clean, not cluttered			
<b>Fry station</b> and Shake machine area cleaned			
<b>Office / Crew Room/ Stock Room</b> neat, clean and organized			
<b>Cleanliness - Need 12 out of 14 to pass</b>			<b>Total</b>

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	Hospitality Standards/Smiles/Tone of Voice/Eye Contact	Communicate Target Results / Recognition
Understand & use positioning guide (DSPT recommended)	Coaching team using positive & development feedback	Quality Products being served	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 & GESSL 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: \_\_\_\_\_