



# SHIFT MANAGER CLASS

Growing into Your Leadership Role at Wendy's

COACHING GUIDE

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The Wendy's Company  
1 Dave Thomas Blvd,  
Dublin, OH 43017

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## Shift Manager Class Objective:

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The purpose of this one-day leadership development class is to help Shift Managers develop critical competencies needed to run a shift unassisted.

## Performance Objectives:

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- Demonstrate exceptional customer service skills
- Utilize effective communication skills necessary to coach crew members
- Understand how to best use Wendy's Core Systems and implement a daily pattern of management that will enhance their management skills
- Solve shift problems effectively

## Competency Focus Areas:

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The workshop will target the following competencies:

- Customer Orientation
- Listening Skills
- Decision Making
- Problem Solving

## Pre-Work:

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Shift managers need to complete the following course on WeLearn prior to class:

- 05061: VOC: Overview

Shift managers must have completed the manager curriculum on WeLearn prior to attending Shift Class. If it's been longer than 12 months since your manager has taken the courses, please have them review the following courses:

- 05130: Coaching
  - 05132: Talk to Me (TTM)
  - 05134: Conducting Effective Huddles
- 05182: POPDR
- 05172: Operations Walk-Through
- 05150: Positioning
  - 05151: Daily Operations Plan (DOP)
  - 05152: Sequential Positioning

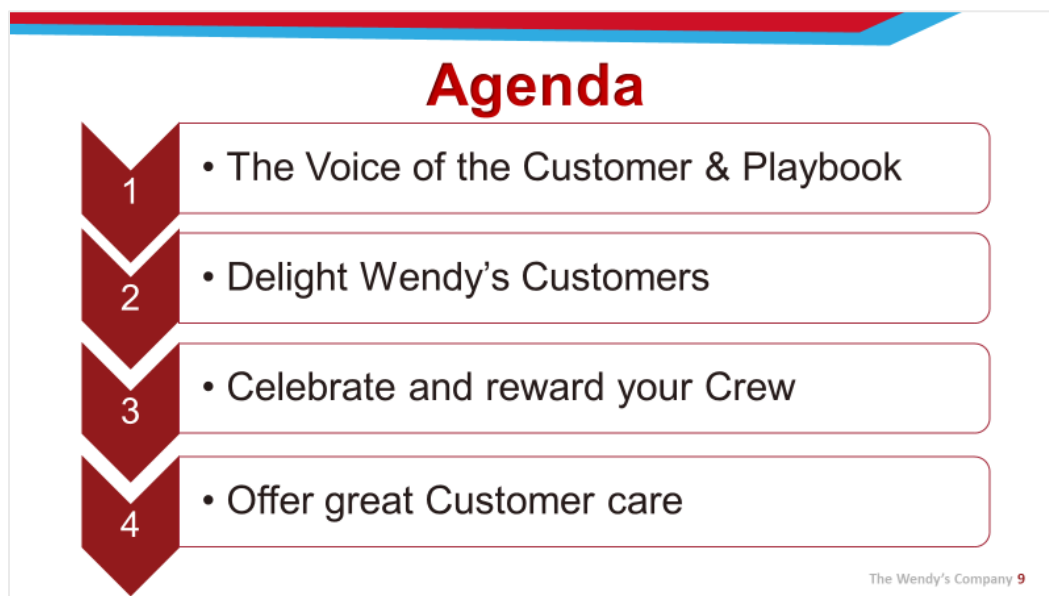
In addition, participants should arrive to class with the following items:

- Print out of SMG Dashboard information (if able)
- Pen

## Module Topics:

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### Module 1 – Creating a Customer First Culture:



The slide features a red and blue header with the word "Agenda" in bold red text. Below the header, there are four numbered items, each in a red chevron shape pointing down, followed by a white rounded rectangle containing the text. The items are: 1. The Voice of the Customer & Playbook, 2. Delight Wendy's Customers, 3. Celebrate and reward your Crew, and 4. Offer great Customer care. In the bottom right corner of the slide, it says "The Wendy's Company 9".

### Agenda

- 1 • The Voice of the Customer & Playbook
- 2 • Delight Wendy's Customers
- 3 • Celebrate and reward your Crew
- 4 • Offer great Customer care

The Wendy's Company 9

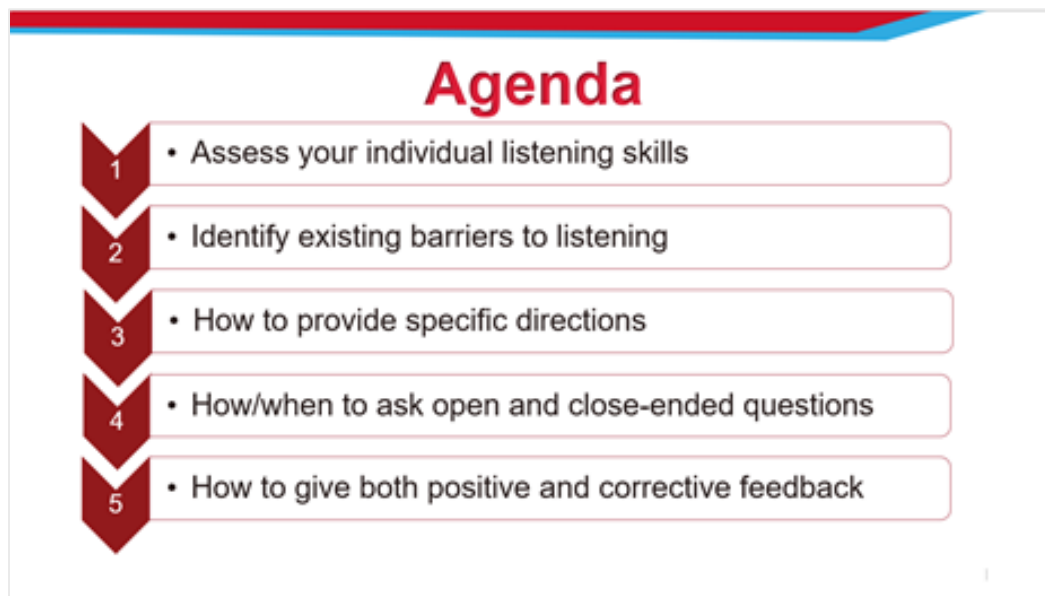
Everything we do at Wendy's revolves around one thing: providing exceptional customer service to Delight Every Customer.

In this segment, Managers will be challenged to think differently about how to provide customer service to both internal and external customers. Additionally, we'll focus on how to engage crew members in adopting a "Customer First" mentality and making connections with every customer that visits Wendy's.

# Module Topics:

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## Module 2 – Communication Basics



**Agenda**

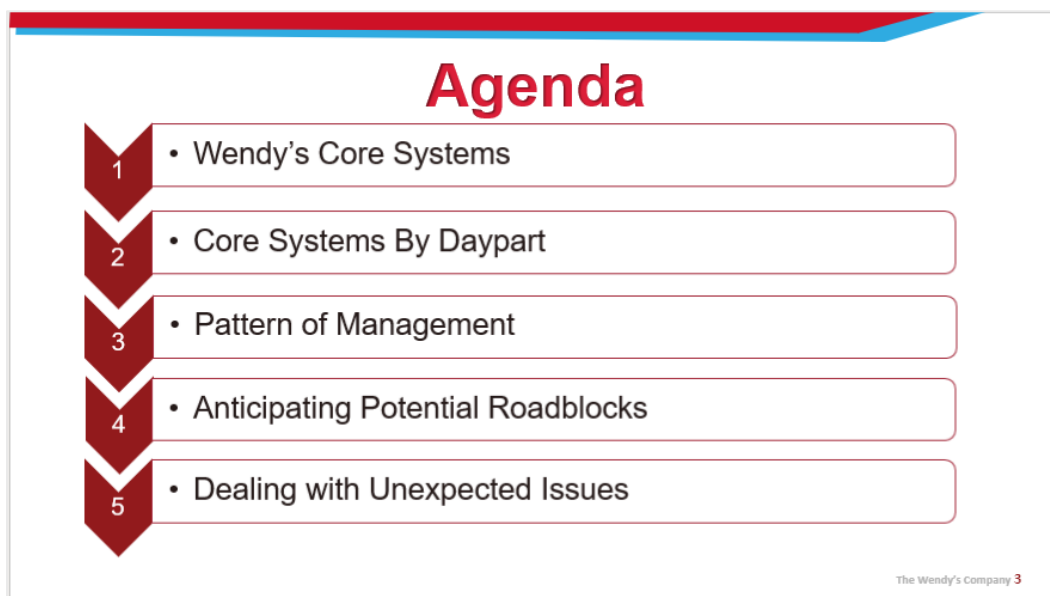
- 1 • Assess your individual listening skills
- 2 • Identify existing barriers to listening
- 3 • How to provide specific directions
- 4 • How/when to ask open and close-ended questions
- 5 • How to give both positive and corrective feedback

Clear and effective communication is a critical skill for all Shift Managers as they interact with crew members and customers throughout the day. Using active listening techniques, asking questions and providing clear, specific direction and feedback will empower a Manager to run the restaurant efficiently.

## Module Topics:

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### Module 3 – Core Systems and Daily Pattern of Management



The slide features a red and blue header with the word "Agenda" in red. Below the header is a list of five items, each preceded by a red arrow pointing down and containing a white number. The items are: 1. Wendy's Core Systems, 2. Core Systems By Daypart, 3. Pattern of Management, 4. Anticipating Potential Roadblocks, and 5. Dealing with Unexpected Issues. In the bottom right corner, there is a small logo for "The Wendy's Company 3".

## Agenda

- 1 • Wendy's Core Systems
- 2 • Core Systems By Daypart
- 3 • Pattern of Management
- 4 • Anticipating Potential Roadblocks
- 5 • Dealing with Unexpected Issues

The Wendy's Company 3

Using core systems and establishing an effective pattern of daily management is essential for all restaurant managers. This module is designed to train managers to optimize in-restaurant tasks using core systems and consistent management practices, which will empower them to run successful shifts regardless of any roadblocks that may occur.

# Module Topics:

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## Module 4 – Shift Level Problem Solving

### Agenda

- 1 • Identifying short vs. long-term problems
- 2 • Determining urgency vs importance
- 3 • The four basic questions of problem solving
- 4 • Resolving customer problems
- 5 • Who's Frances

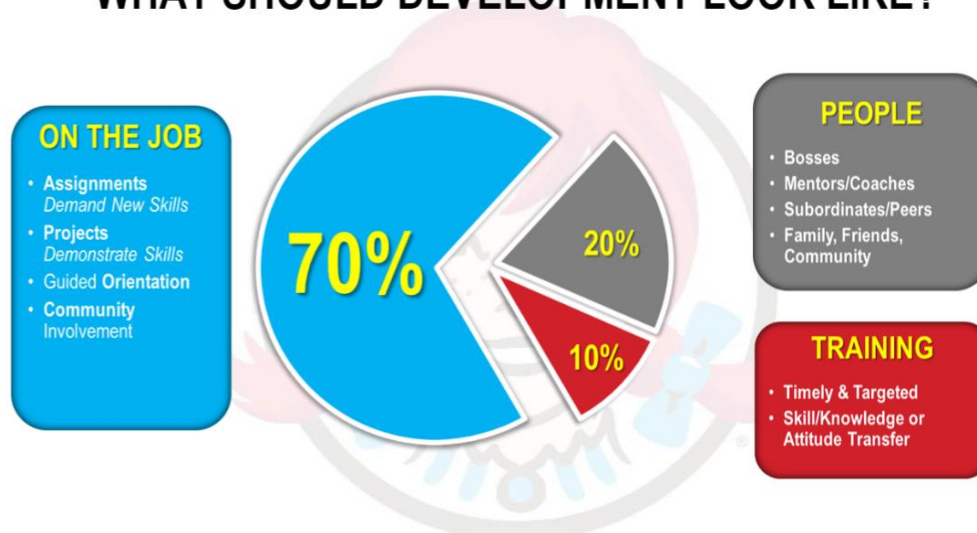
The ability to solve problems as they arise is a critical skill for effectively running a restaurant. From simple problems to complex issues, the Shift Manager's ability to quickly assess a situation, determine the most urgent needs, and then take corrective action will assure that daily operations can continue without negative impact from an unresolved issue.



## Post-Work:

By attending Shift Manager Class, your shift managers have started the journey of developing *knowledge* on the topics presented at class. However, building *skill* is an integral part of development. As the *coach*, you play the most important role in the development of your shift manager. A shift manager's development is started by attending Shift Manager Class, but 70% of their development comes from on the job and 20% from people supporting their development. For this to be successful, *you* must take the time to mentor and coach.

### WHAT SHOULD DEVELOPMENT LOOK LIKE?



Upon leaving class, your Shift Manager was given the following post-work. When your shift manager returns to your restaurant, schedule a meeting to debrief what they learned in class. Plan and organize time to coach your shift manager through the post-class activities:

- Touch base with supervisor
- Review Start, Stop, Continue Exercise
- On-the-job Activities

## Touch Base:

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### **Post Training Discussion:**

Within two weeks of returning from Shift Manager Class, schedule 15-20 minutes to debrief what your shift manager learned at class. Have the shift manager bring their Start, Stop, and Continue exercises from class along with their post training worksheets. A copy of the Start, Stop, and Continue exercise is at the end of this Coaching Guide as a reference. Here are some questions to ask during the debrief:

1. What was the most impactful topic you learned at Shift Manager Class?
2. What is an area or topic you feel you still need help understanding? How can I best help you develop in this area?
3. Prior to coming to class, what did you identify as something not working (something you should STOP)?
4. Now that you've gone to Shift Manager Class, what did you identify as something you should put in place to improve (something you should START)?
5. What are some skills and practices you do that you think have worked well (something you should CONTINUE)?

## Organize and Plan the Post Training Learning:

During your post training discussion, review the class worksheets and plan out dates and times when both the shift manager and the GM can work together to complete the worksheets. Schedule this time on your line bar schedule to ensure you have the staffing necessary to review these worksheets with the shift manager:

<u>Post Class Worksheets</u>	<u>Estimated Duration to Complete:</u>	<u>Completed Date/Time:</u>	<u>Discussed with Manager:</u>
Building Customer Connections: "Table Visit Challenge"	25-30 Minutes		
Listening Assessment	15-20 minutes		
Problem Solving - Urgency vs. Importance	20-30 Minutes		

Next, plan out some development time in the next 30-45 days to review progress. The key is for the shift manager to exhibit behaviors learned from Shift Manager Class. The General Manager should conduct a Post Training Checklist on the shift manager, which is in the appendix. Break each module into four different shifts, only focusing on one module to observe on a shift. After the shift, plan 15-20 minutes to discuss wells and betters with the shift manager and to plan further action on development.

## Continuous Learning:

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Beyond the Shift Manager Class and post-class activities, here are some other resources you can use to build on the knowledge and skills learned in class:

- **MBS Checklists:** WeConnect > Our Wendy's Business > Restaurant Operations > Shift Manager Training Resources
- Conduct a **Service Period MBS** and diagnose the area which needs focus
  - Once you've determined an MBS focus area, conduct an MBS checklist on that specific behavior
    - Four-Corner Training MBS Checklist
    - TTM MBS Checklist
    - POPDR MBS Checklist
    - Food Safety MBS
    - MBS, Positioning Certification Checklist
    - MBS, Huddle Certification Checklist
    - MBS, Walk-Thru Certification Checklist



# APPENDIX

# Shift Manager Class

## Post Training Checklist

Trainee \_\_\_\_\_  
Trainer \_\_\_\_\_

Location \_\_\_\_\_  
Date \_\_\_\_\_

### Creating a Customer First Culture

1. Utilizes BLAST to handle customer complaints
2. Trains and empowers employees to utilize BLAST
3. Understands how to find and utilize VOC data focusing on our Five Key Drivers of Customer Experience
4. Determines Playbook focus and executes Playbook each shift
5. Crew Engagement - Identifies how each team member contributes to a Customer First environment and practices ways to engage the team
6. Consistently conducts effective table visits each shift
7. Creates customer connections at the pick-up window

YES	NO	Notes
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
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<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

### Communication Basics

8. Communicates well to the team using active listening and effective non-verbal communication (body language and tone of voice)
9. Gives specific direction to the team when communicating
10. Utilizes open-ended questions during communication to determine knowledge gap and engage team in conversation
11. Effectively balances positive feedback with corrective feedback
12. Is specific when giving both positive and corrective feedback

YES	NO	Notes
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

### Shift Level Problem Solving

13. Utilizes the four basic questions of problem solving
14. Can identify short vs. long-term problems
15. Prioritizes resolution based on urgency and importance

YES	NO	Notes
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

- 16. Utilizes customer feedback to identify short and long-term problems. Diagnoses the correct solutions
- 17. Prioritizes resolution based on urgency and importance

<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

**Organizing and Planning**

- 18. Utilizes DOP each shift to execute shift planning
- 19. Steers clear of procrastination and time wasters
- 20. Prioritizes tasks by utilizing a daily to-do-list
- 21. Uses ABC system to rank priority of tasks
- 22. Utilizes an individual weekly plan

YES	NO	Notes
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
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**What are some of the skills from Shift Manager Peak that are going WELL?**

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**What are some of the skills from Shift Manager Peak that could be BETTER?**

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# POST CLASS WORKSHEETS

## BUILDING CUSTOMER CONNECTIONS: “TABLE VISIT CHALLENGE”

### Activity Summary

In this activity, you will conduct a “Table Visit Challenge” to gain insight on how you interact with your customers and build connections with them. Your challenge is to:

- Learn** something new about TWO “regular” customer who visit your restaurant.
- Introduce** yourself to TWO “new” customers who visit your restaurant.
- Have Fun!**

After you have completed the challenge, reflect on your interactions. Write down your findings and key learnings in the table below.

### Planning

- **Duration:** 25-30 Minutes
- **Who:** Manager
- **Location:** Front Counter or Dining Room
- **When:** During non-peak times
- **Resources:** This activity guide

### BUILDING CUSTOMER CONNECTIONS

(25-30 Minutes)

	HOW DID YOU “GREET” THEM?	WHAT QUESTIONS DID YOU ASK?	WHAT DID YOU “LEARN” ABOUT THEM?	HOW DID YOU “CLOSE” THE CONVERSATION
REGULAR CUSTOMER #1				
REGULAR CUSTOMER #2				
NEW CUSTOMER #1				
NEW CUSTOMER #2				



## Listening Skills Self-Assessment

To measure the effectiveness of your listening skills, complete this Listening Skills Self-Assessment. To get the most benefit from this questionnaire, be honest with yourself when responding to the statements below.

Once you have completed the Listening Skills Assessment, provide the same questionnaire to the following people:

- Your immediate supervisor.
- A subordinate you work with at least 2-3 times per week.
- A person outside of Wendy's such as a friend, your spouse or a relative.

**Name of person being evaluated:** \_\_\_\_\_

**Instructions:** Consider each of the statements below and place a check mark (✓) in the column that best describes if the person being evaluated demonstrates the behavior.

BEHAVIOR	YES	NO	POINTS
1) Asks open-ended questions for clarification.			
2) Checks for understanding by paraphrasing.			
3) Minimizes emotional reactions that may affect his/her opinions.			
4) Creates a good environment for listening.			
5) Allows time for full understanding before responding.			
6) Loses attention while listening to the person who is speaking.			
7) Lacks interest in discussions.			
8) Stops listening if the topic is boring.			
9) Allows previously formed opinions to reduce his/her attention.			
10) Criticizes the other person's language or the way they talk.			
	<b>Total Score:</b>		



## Listening Skills – Others Assessment

To measure the effectiveness of listening skills, complete this Listening Skills Assessment. To get the most benefit from this questionnaire, be honest when responding to the statements below.

Name of person being evaluated: \_\_\_\_\_

**Instructions:** Consider each of the statements below and place a check mark (✓) in the column that best describes if the person being evaluated demonstrates the behavior.

BEHAVIOR	YES	NO	POINTS
1) Asks open-ended questions for clarification.			
2) Checks for understanding by paraphrasing.			
3) Minimizes emotional reactions that may affect his/her opinions.			
4) Creates a good environment for listening.			
5) Allows time for full understanding before responding.			
6) Loses attention while listening to the person who is speaking.			
7) Lacks interest in discussions.			
8) Stops listening if the topic is boring.			
9) Allows previously formed opinions to reduce his/her attention.			
10) Criticizes the other person's language or the way they talk.			
	Total Score:		



## Listening Assessment Scoring Guidelines

SCORING GRID		
Question	Answered Yes	Answered No
#1.	1	0
#2.	1	0
#3.	1	0
#4.	1	0
#5.	1	0
<b>(A) Subtotal Yes Answers</b>		
#6.	0	1
#7.	0	1
#8.	0	1
#9.	0	1
#10.	0	1
<b>(B) Subtotal No Answers</b>		
<b>Total A+B</b>		

### **If you scored a 9 or 10:**

You are an excellent listener. Continue to role model this behavior and help others become better listeners.

### **If you scored a 7 or 8:**

You are a good listener. You have opportunities for improvement. Make a mental note or write down any opportunities. For example: You interrupted someone talking instead of waiting.

### **If you scored a 1 to 6:**

You know how to listen, but you may not be aware that your listening skills need improvement. It is up to you to decide how you will improve your skills.

### **If you scored a 0:**

You don't listen. The worst listeners usually are not aware of how poorly they listen to others. Create a plan that requires you to make a more conscious effort to pay attention to what individuals are saying.

**Try It Challenge:** Classify problems according to urgency and importance then prioritize for resolution using the four questions of problem solving and the five key Voice of the Customer (VOC) Drivers to guide your decisions.

### Why is This Important?

A Shift Supervisor or Restaurant Manager must be able to quickly recognize which problems need immediate attention. Developing this skill is vital for the successful operation of the restaurant and providing our Customers a positive experience. Learning to integrate these problem solving resources will help develop critical problem solving skills.

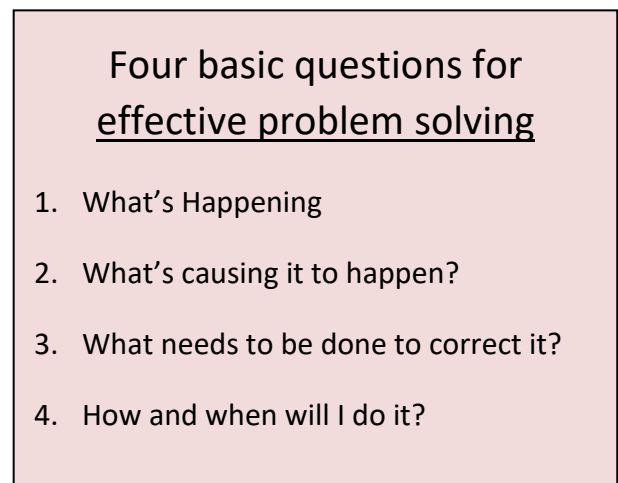
### Instructions:

1. Identify two short term problems that affect you and your team during a shift.
2. Use the “Four questions for problem solving” and the Five Key VOC Drivers to determine how you will resolve them. What long-term problems could develop if these problems are not resolved quickly?
3. After completing this activity, discuss your findings with your Supervisor and ask for feedback. Be sure to included what you thought was most challenging about this assignment.

Short-Term  
Problems  
URGENT



Long-Term  
Problems  
IMPORTANT



## Try It Challenge: Urgency vs. Importance

<b>Problem 1:</b>
<b>Problem Scenario:</b>
<b>Ask the four basic questions to help understand and resolve this problem.</b>
What's Happening?
What's causing it to happen?
What needs to be done to correct it?
How and When will I do it?

*In the space below, write your problem on the Short-term side. Then, draw lines to the possible Long-term problems that could arise if your problem is not resolved in a timely manner.*

Short Term Problem	Potential Long-Term Problem
<hr/> <hr/>	<ul style="list-style-type: none"> <li>a. Crew morale</li> <li>b. Poor quality</li> <li>c. High labor costs</li> <li>d. Reduced profits</li> <li>e. High food cost</li> <li>f. Reduced sales</li> <li>g. Cleanliness of restaurant</li> <li>h. Lack of cross trained crew</li> <li>i. Speed of Service</li> </ul>

## Try It Challenge: Urgency vs. Importance

<b>Problem 2:</b>
<b>Problem Scenario:</b>
<b>Ask the four basic questions to help understand and resolve this problem.</b>
What's Happening?
What's causing it to happen?
What needs to be done to correct it?
How and When will I do it?

*In the space below, write your problem on the Short-term side. Then, draw lines to the possible Long-term problems that could arise if your problem is not resolved in a timely manner.*

Short Term Problem	Potential Long-Term Problem
<hr/> <hr/>	a. Crew morale b. Poor quality c. High labor costs d. Reduced profits e. High food cost f. Reduced sales g. Cleanliness of restaurant h. Lack of cross trained crew i. Speed of Service