



Virtual Leadership Transitions

Participant Guide

Agenda Session 1

Item	Session 1
1	Welcome
2	Values Led Leadership
4	Session 1 Wrap Up

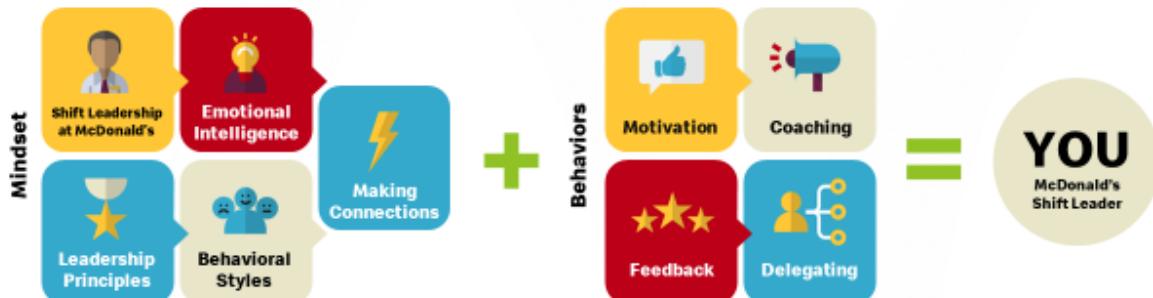
1. Welcome

Owner/Operators are independent employers. If you work for an Owner/Operator organization, the Owner/Operator is your employer, not McDonald's USA. Owner/Operators are solely responsible for making all employment-related decisions regarding their employees and for compliance with all applicable statutes, laws, and regulations.

This training and any related materials provided as an optional resource for independent Owner/Operators. Owner/Operators determine which, if any, of their employees participate in the training, and may choose to use all, some or none of the information from these materials in operating their own McDonald's restaurant(s). 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 your Owner/Operator has chosen to use, if any.

Leadership Transitions

...from leading self to leading others



Course Goals

By the end of the course, you will

1. Have a deep understanding of what it takes to transition to become a great shift leader.
2. Connect with your new elevated role and the McDonald's brand's core purpose and values to run great shifts.
3. Apply appropriate mind and skillsets to achieve shift balance and achieve consistent guests' satisfaction.
4. Recognize the importance emotional intelligence, motivation, feedback and coaching have in leading individuals and building a team.

2. Values Led Leadership



Notes



Values Activity 1

Today is all about understanding the big picture of McDonald's Values and how you can bring them to life through your behaviors. This is fundamental to the experience of the customer, the success of the McDonald's brand, and the personal results you can achieve.

Using the map on the previous page, what do you see on this map that represents the McDonald's system?

Notes

Values Activity 2

McDonald's is made up of many diverse individuals who come together to form teams from restaurants, franchisees, suppliers, and corporate staff.

What are some of the teams that you can see on the map (see page 4)? How do these teams contribute to the success of McDonald's?

Notes

Values Activity 3

McDonald's Growth Pillars speed up the 'Accelerating the Arches" plan and help the company and its franchisees in Running Great Restaurants.

McDonald's Grown Pillars are:

- Maximizing Marketing
- Commitment to the Core (burger, chicken, coffee)
- The 3 D's (Deliver, Drive-Thru, and Digital)

Where can you see examples of the Growth Pillars on the map (see page 4).

Notes

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Values Activity 4

McDonald's Values impact what customers think about McDonald's as a brand.

As a team, rank the following brands (on next page) from most loved to least loved.

Discuss what influenced your decision. Was it more about the product or level of service they offer, or how they act as a company?

In which position would you place McDonald's in your list **and why?**

Notes

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Rank the following brands from most loved to least loved.

Click submit when you have agreed as a team.

		1		6	
		2		7	
		3		8	
		4		9	
		5		10	

Values Activity 5

McDonald's Values influence all McDonald's actions as a business all over the world.

McDonald's Values are designed to build a healthy and strong brand for the future. How each of us lives McDonald's Values every day impacts the experience of McDonald's co-workers and customers.

Where can you see examples of McDonald's Values being demonstrated on the map (see page 4)?

Notes

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Values Activity 6

The phone in the top left corner of the map signifies how McDonald's Values act as a moral compass to guide us through every decision McDonald's Employees make.

Have you ever been in a position where you felt that doing the right thing and getting the job done seemed to work against each other? Discuss and share examples with your team.

Using the map on page 4, locate the roadworks, the constructions on the bridge, and the dead end. What could these signify in everyday work life or when living McDonald's values?

Notes

Values Activity 7

It's one thing to understand McDonald's Values, but they will only make a difference if they are practiced each day.

McDonald's Employees should display focus, energy, and commitment around McDonald's Values at McDonald's and hold ourselves accountable to them each day.

How you behave is important to how you live McDonald's Values.

Discuss as a team which behaviors support which value.

Type the number below the Value where that behavior best fits.



Serve

McDonald's put their customers and people first



Inclusion

McDonald's opens their doors to everyone



Integrity

McDonald's does the right thing



Community

McDonald's are good neighbors



Family

McDonald's gets better together

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Seeks customer and crew feedback and takes action	Takes ownership for results	Creates and environment where people can bring their authentic self to work	Seeks opportunities to champion community groups and events	Acts honestly and ethically at all times	Seek out diverse points of view and leverages to drive better decision making	Recognizes and celebrates team achievements	Maintains local area to build a better environment	Looks for ways to overcome obstacles to get the job done	Seeks out diverse points of view and leverages them to drive better decision making
1	2	3	4	5	6	7	8	9	10

Notes

Values Activity 8

What is important is that McDonald's Employees move words into actions, and McDonald's Employees all take accountability for living McDonald's Values, both as an individual and as a team. McDonald's Employees all have a role to play.

Thinking about the people you serve on a day-to-day basis, what values and behaviors are important for your role and your team's success?

Looking at the map on page 4, consider your role, where you would place yourself on the map to ensure you have a positive impact on the bigger pictures, and why?

Notes



Values Activity 9

Take a moment to reflect individually. How would you rank yourself and your team for living each of McDonald's Values every day?

Use your participant guide to capture your individual reflections.



Notes



Activity: Values Important to You

1. Circle the values that are important to you.
2. Put a star (*) next to the five most important ones.
3. If desired, share with the class.

Achievement	Loyalty	Adventure
Change	Money	Relationships
Honesty	Cooperation	Order
Community	Influence	Creativity
Power	Privacy	Decisiveness
Persistence	Knowledge	Humor
Recognition	Wisdom	Integrity
Involvement	Expertise	Stability
Security	Excellence	Challenge
Competition	Advancement	Independence
Status	Freedom	Service
Other _____	Other _____	Other _____

3. Session 1 Wrap Up

Select one “learn” you think that’s important for your transition or success. Then, write a tweet that you would like to send to your manager, coach, or someone else back at your restaurant, telling them about it. Remember that tweets can only be 140 characters



Agenda Session 2

Item	Session
1	Review Session 1
2	Leadership Principles
3	Emotional Intelligence
4	Behavioral Styles
5	Making Connections
6	Session 2 Wrap Up

1. Review Session 1

Write down your key learnings from the previous session

2. Leadership Principles

1. Record the one characteristic you believe your restaurant leader will see as your biggest strength

2. Record the characteristic you see as an opportunity for you to develop further

Activity: Your Impact

Reflect with these questions and write about the impact you have on others.

Consider

1. What impact have your leaders had on you?
2. What type of impact do you hope to have on those who follow your leadership?
3. What might your crew be saying about the impact you're having on your shifts now?
4. How do you want crew members to respond to your impact, emotionally?
5. Is there anything about your impact you'd like to change that would allow you to gain more trust and build more respect?

Reflections on the impact you have on others



3. Emotional Intelligence

How Emotions Relate to Leadership

- When describing the ideal Shift Leader, there was an element of how that leader makes us feel.
- When discussing the leadership principles of trust, respect, and impact, we're really talking about how leaders make us feel.
- When talking about the leader's impact, we're talking about the emotions leaders provoke in those around them.
- A purpose statement is based on our personal values, and our personal values are based on how we feel about the important things in our lives.

Definition of Emotional Intelligence

Emotional intelligence has two parts

- The ability to recognize and appropriately express your own emotions
- The ability to accurately perceive and respond to the emotions of others

Being an Authentic Leader

Definition of Authentic: A quality of being genuine and worthy of belief. A person who is completely trustworthy is often also described to be authentic. (Merriam-Webster)

Improving Your Emotional Intelligence

- Practice Awareness of Self
- Practice self-Management.
- Practice Awareness of Others
- Practice Relationship management.

Ideas for Improving Emotional Intelligence

Awareness:

The first step to managing your emotions is recognizing them. Start by taking the time to recognize your emotions and what triggers them.

- Are there certain situations, words or other circumstances that create a specific emotion for you?
- How does your body feel in certain emotional situations?
 - How is your breathing?
 - How do your muscles feel?
 - What facial expression do you show?

It can be helpful to ask those closest to you to describe their observations when you feel a particular emotion.

Management:

The power of a pause.

- If you feel an intense emotion, take a moment to pause and think about how you want to react and what you want to say.
- Take a deep breath or silently count to 10 to give yourself a pause.

Check your assumptions.

- Do you know everything you need to know about the situation?
- Have you really listened to the other person's point of view?
- Are you assuming positive intent on the part of the other person?
- Is the reaction of the other person personal to you, or would they have that reaction with anyone?

Make a game plan.

- What do you want to do or say in this situation?
- How does that reaction fit with your values?
- How will your reaction impact you and others involved?
- Would loved ones or others you respect think highly of your actions?

4. Behavioral Styles

Key ideas

- A behavioral style is a predictable, describable pattern of behavior.
- When working with others, you can detect their behavioral styles by using your emotional intelligence.
- There are four major behavioral styles.

Activity: Behavioral Styles, Part 1

Complete the assessment as instructed by your facilitator.

My primary behavioral style is: _____

Directions for Taking the Assessment

Circle the number and letter that best represents your perception on each scale. For example, are you more “go along” or “take charge”? If you feel strongly about it, you will circle the outer number in relation to your perception of yourself. Then, total the number of each letter (A, B, C, or D) and number (1, 2, 3, or 4) circled, and find the appropriate quadrant in the Style Matrix. Focus on the entire scale, not only the extremes, for each category.

Behavior Style Assessment

The following assessment is designed to measure your primary behavior style. Please answer the following questions considering your behaviors **at work**. For each question, first choose the word or phrase that you feel best describes you, then circle if that word "mostly" or "sometimes" describes your behavior. Once you've completed all questions for each column, total how many times you circled each letter and number at the bottom of the page.

Go Along		Take Charge		Timid		Welcoming	
Mostly D	Sometimes C	Sometimes B	Mostly A	Mostly 1	Sometimes 2	Sometimes 3	Mostly 4
Quiet		Talkative		Calm		Excitable	
Mostly D	Sometimes C	Sometimes B	Mostly A	Mostly 1	Sometimes 2	Sometimes 3	Mostly 4
Supportive		Challenging		Relaxed		Animated	
Mostly D	Sometimes C	Sometimes B	Mostly A	Mostly 1	Sometimes 2	Sometimes 3	Mostly 4
Compliant		Dominant		Task-oriented		People-oriented	
Mostly D	Sometimes C	Sometimes B	Mostly A	Mostly 1	Sometimes 2	Sometimes 3	Mostly 4
Asks Questions		Makes Statements		Serious		Friendly, attentive	
Mostly D	Sometimes C	Sometimes B	Mostly A	Mostly 1	Sometimes 2	Sometimes 3	Mostly 4
Cooperative		Competitive		Discusses business		Discusses feelings	
Mostly D	Sometimes C	Sometimes B	Mostly A	Mostly 1	Sometimes 2	Sometimes 3	Mostly 4
Introverted		Extroverted		Reserved		Outgoing	
Mostly D	Sometimes C	Sometimes B	Mostly A	Mostly 1	Sometimes 2	Sometimes 3	Mostly 4
Slow, studied		Fast-paced		Wants facts		Wants opinions	
Mostly D	Sometimes C	Sometimes B	Mostly A	Mostly 1	Sometimes 2	Sometimes 3	Mostly 4
Non-assertive		Assertive		Non-emotional		Emotional	
Mostly D	Sometimes C	Sometimes B	Mostly A	Mostly 1	Sometimes 2	Sometimes 3	Mostly 4
Reserved		Unreserved		Considers options		Acts quickly	
Mostly D	Sometimes C	Sometimes B	Mostly A	Mostly 1	Sometimes 2	Sometimes 3	Mostly 4

Count the number of times each letter and number was chosen and write totals in spaces provided below.

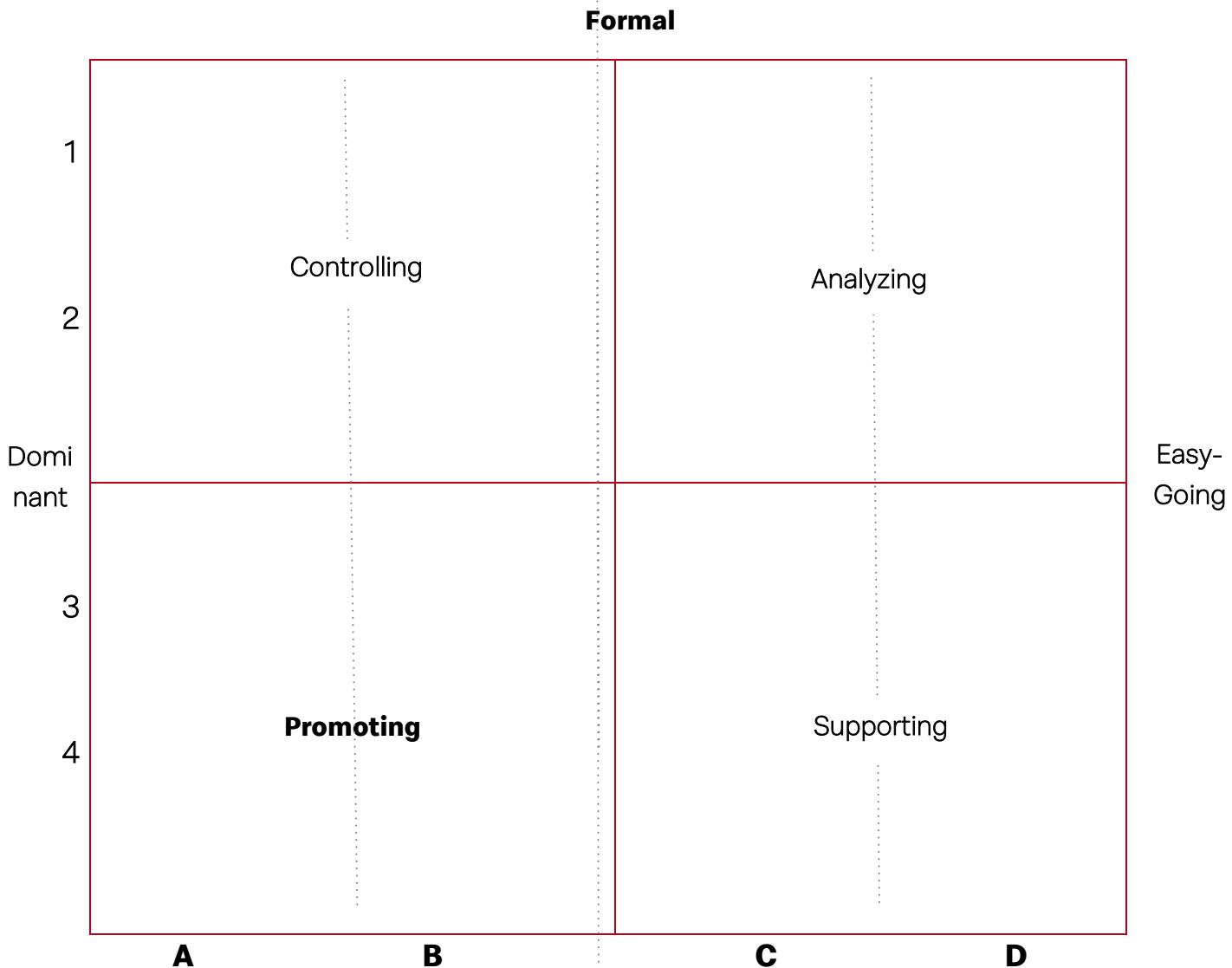
Totals:

D	C	B	A	1	2	3	4
---	---	---	---	---	---	---	---



Directions for Plotting Results

Find the highest scored letter (A, B, C, or D) and the highest scored number (1, 2, 3, or 4), and then find the corresponding area in the matrix chart by plotting the two points.



Activity: Behavioral Styles, Part 2

1. Form groups based on your primary behavioral style or four groups if there are not enough of each behavioral style.
 - Controlling
 - Promoting
 - Analyzing
 - Supporting
2. Your group will be given additional information about your style.
3. Work with your group to prepare a presentation that will help others understand your style.
4. Be creative and have fun!

Behavioral Styles Summary

		More Formal	
		Controlling	Analyzing
More Dominant	Strengths	Take charge Decisive Results focused	Strengths Thorough Organized Good planner
	Potential Liabilities	Impatient Insensitive Domineering	Potential Liabilities Indecisive Too detailed Avoids risks
Easier Going	Promoting	Promoting	Supporting
	Strengths	Stimulating Inspirational Idea generator	Strengths Team player Consensus builder Relationship-oriented
	Potential Liabilities	Impulsive Poor follow-through Poor planning	Potential Liabilities Too agreeable Avoids conflicts Not assertive enough
	More Informal		



Understanding Others' Behavioral Styles

Purpose	Use this tool to help you understand how to interact with others with different behavior preferences.			
Benefits	This tool helps you interact with others in a way that keeps them motivated and builds mutual respect.			

FACTORS	PROMOTING	CONTROLLING	SUPPORTING	ANALYZING
How to recognize:	They get excited.	They like their own way, are decisive, and have strong points of view.	They like positive attention, to be helpful, and to be regarded warmly.	They seek a lot of data, ask many questions, behave methodically and systematically.
Tends to ask:	Who? (The personal dominant question.)	What? (The results- oriented question.)	Why? (The personal non-goal question.)	How? (The technical analytical question.)
What they dislike:	Boring explanations, wasting time with too many facts.	Someone wasting their time, trying to decide for them.	Rejection, impersonal treatment, uncaring and unfeeling attitudes.	Making an error, being unprepared, spontaneity.
Reacts to pressure and tension by:	"Selling" their ideas or being argumentative.	Taking charge, or taking more control.	Becoming silent, withdrawn, and introspective.	Seeking more data and information.
Best way to deal with:	Get excited with them. Show emotion.	Let them be in charge.	Be supportive; show you care.	Provide lots of data and information.
Likes to be measured by:	Applause, feedback, recognition.	Results.	Friends, close relationships.	Activity and business that leads to results.
Must be allowed to:	Get ahead quickly. Likes challenges.	Get into a competitive situation. Likes to win.	Relax, feel, care, know you care.	Make decisions at own pace, not cornered or pressured.
Will improve with:	Recognition and some structure within which to reach the goal.	A position that requires cooperation with others.	A structure of goals and methods for achieving each goal.	Interpersonal and communication skills.
Likes to save:	Effort. They rely heavily on hunches, intuition, feelings.	Time. They like to be efficient, get things done now!	Relationships. Friendship means a lot to them.	Face. They hate to make an error, be wrong, or be caught without enough information.
An effective leader will:	Inspire them to bigger and better accomplishments.	Allow them freedom to do things their own way.	Care and provide detail, specific plans, and activities to be accomplished.	Structure a framework or a "track" to follow.



Key Things to Know about My Style

Key Takeaways from the Discussion on Behavioral Styles

Reflect:

Understanding Emotional Intelligence and Behavior Styles can help me lead better shifts and deliver good moments by...



5. Making Connections – Guiding Principles of Good Communication

Good communication skills are important to making connections. Connecting with the guest is being emphasized as part of the experience of the future.

Key Points

1. Seek to understand the situation fully.
 - Observe and listen.
 - Assess the situation.
 - Get both sides of the story.
 - Ask open-ended questions such as "Can you tell me more about it?"
 - Paraphrase what you think you heard, and ask, "Is that right?" Be a faithful translator.
2. Make a genuine emotional connection.
 - Empathize.
 - Put yourself in the other person's shoes.
 - Apologize, if appropriate.
3. Reach a flexible resolution.
 - Suggest alternatives.
 - Ask for ideas.
 - Reach agreement on a satisfactory resolution.
 - Thank the other person for working with you on a resolution.

6. Session 2 Wrap-Up

- What did you learn in this session?
- Write two short sentences to complete these two starters:

Reflect

Understanding Emotional Intelligence can help me lead better shifts and deliver good moments by...

I will make sure to (action) in order to create good moments for my team and guests...



Agenda Session 3

Item	Session
1	Review Session 2
2	Motivation
3	Delegation
4	Feedback
5	Coaching
6	Session 3 Wrap Up

1. Review Session 2

Write down your key learnings from the previous session

2. Motivation

Activity: Motivating the Behavioral Styles

1. Read the scenarios.
2. Try to determine the person's behavioral style from the information provided.
3. Think of how to motivate this person.

Scenario	What You Can Do to Motivate
<p>Scenario 1: Ramon gets excited about everything. Every tiny change in the restaurant is a big deal to him, and he wants to celebrate it. He always wants to know how he's doing and seems to need a lot of feedback. In many ways, he is self-motivated, but you want to keep him engaged with the job.</p> <p>Behavioral Style: _____</p>	
<p>Scenario 2: Carla joined McDonald's with other food service experience. She questions McDonald's procedures and feels she has better ways of doing things. When the shift gets busy, she gives direction to other team members, even though she has no formal authority. You admire her skillset but want to motivate her in the right direction.</p> <p>Behavioral Style: _____</p>	
<p>Scenario 3: Sanjay is willing to help anywhere he's needed. Sometimes, he helps on stations where he hasn't been trained. You want to make use of his energy but need him to focus on his own tasks.</p> <p>Behavioral Style: _____</p>	
<p>Scenario 4: Tiani takes a lot of your time by asking for an explanation of everything. She loves studying procedures and is sometimes late from break because she's been studying the food service standards for the new promotional menu items. She likes correcting teammates when they do things wrong. You appreciate that she's interested in the standards, but you need her to improve speed of service.</p> <p>Behavioral Style: _____</p>	



Notes from Class Discussion

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3. Delegation

Tips for Delegation:

- You may delegate to someone who knows how to perform the task.
- You may wish to delegate to someone who's never performed the task.
- So, what does delegation look like? Here are some Tips or Best Practices.
 - You're asking, not telling someone to do something.
 - Check that you are delegating to the correct person based on experience level.
 - Use "please" and "thank you" and positive body language, smile, direct and friendly eye contact, etc.
 - Use a pleasant tone of voice.
 - Provide clear direction, what you expect them to accomplish, and when you need it completed.
 - Follow up and provide feedback and coaching, if needed.
 - Remember: delegation is a component of training and development and a way to get more done.

Notes from Class Discussion

4. Feedback

When considering feedback, there are four main types:

- Negative
- No Feedback
- Appreciative/Positive
- Developmental

It is important to avoid **negative feedback** so as not to have a negative impact on the team and the restaurant. Also, not giving feedback can be just as demotivating as giving negative feedback. People need to know if they are doing things right!

Appreciative, also known as Positive feedback focuses on what someone is doing right. It is not general encouragement comments. It should be specific to the task to help the person know that what they are doing is right so that they can continue doing it.

Developmental feedback focuses on guiding someone on how to do something better. Sometimes, this one is best given in private.

Appreciative and developmental feedback used together is very effective.

Also, the more specific is our feedback, the more effective.

Activity: Identifying Behavior vs. Personality and Creating a Feedback Statement

Work to identify the behaviors and personality characteristics of each team member.

Behavior: Can you observe it? Can you hear it?

Personality: Is it a characteristic? Is it about who the person is as an individual?

Team Member	Behavior or Personality? Write a "B" for Behavioral or a "P" for "Personality" next to each
Pierre - He moves quickly. - He takes pride in his work.	
Samir - He enjoys being the fastest in anything he does. - He doesn't focus on customers.	
Jennifer -Claims she's the best dining area person the restaurant has. -She stops filling napkins and approaches a mom who has entered the restaurant with one child in her arms and two others running in front of her.	

5. Coaching

Feedback and Coaching

Feedback:

- Focuses on past behavior
- Solidifies previous training
- Is responsive to a situation
- Is frequently one-way communication
- Can be quick and simple
- Is telling oriented: positive or corrective
- Describes consequences
- Positive feedback is given to encourage repeat behavior. Corrective feedback is given to change behavior

Coaching:

- Focuses on future behavior
- Is proactive toward obtaining a goal (improvement)
- Requires two-way communication
- Requires one-on-one time
- Is discussion and problem solving
- Can be goal orientated
- Explores options and alternatives
- Motivates the recipient to take responsibility for improvement
- Is an investment that pays off over time

Activity: Characteristics of Great Coaches

Notes from Class Discussion



Activity: Timely Feedback

1. You will be split into three breakout teams and be assigned a crew member
2. Your team will work on one of the crew members in the following page and read the assigned crew member (see below)
3. You will read the description of the assigned crew member and decide whether they will get positive or developmental feedback based on their behavior.
4. Then, you will write down specific feedback for that crew member, as if you were their Shift Leader, making sure you are:
 - a. Focusing on behavior
 - b. Following the Feedback Steps
 - c. Using the guiding principles to understand and connect
 - d. Using a positive tone
5. One spokesperson in each team will report to the class.
6. You will have 10 minutes to complete the activity.

Team Member	Feedback Statement
Pierre -Prides himself on exceeding speed of service standards. -Sometimes, he moves so quickly that he takes the wrong sandwiches. Items like French fries and utensils fall off the trays.	
Samir -Is an experienced crew member who enjoys being the fastest in the team. -He is hyper-focused on the task and not necessarily on the customer. -Tray presentation doesn't meet standards. - He pushes the limits of the dress code by often forgetting his hat and nametag.	



Jennifer

- Claims she's the best dining area/lot person the restaurant has.
- She stops filling napkins and approaches a mom who has entered the restaurant with one child in her arms and two others running in front of her.
- She goes to get a highchair, and helps the family get settled in their seats.

Notes from Class Discussion

6. Session 3 Wrap-Up

Think of the most important behaviors, skills or characteristics of a great Shift Leader



Agenda Session 4

Item	Session
1	Review Session 3
2	Hospitality Mindset
3	Safe and Respectful Workplace
4	Putting It All Together
5	Wrap Up and Close

1. Review Session 3

Write down your key learnings from the previous session



2. Hospitality Mindset

Notes:

3. Safe and Respectful Workplace

Notes:

4. Putting It All Together: Leading the Shift Challenge

The Big Day – Part 1

The Restaurant

- Corner Brook McDonald's
- Medium volume restaurant with 75% of the Customers visiting through Drive Thru.

The Shift

- You are working mid-shift today. As you settle in, you see Jill – she waves you over and is ready to hand over the shift. Jill tells you that:
 - One of the crew members has called off sick.
 - There were 10+ cars each hour from 6:00-10:00 am
 - OPE is 137
 - Earlier, there was a Delivery order for 25 Crispy Chicken Sandwiches Jill tells you to expect larger-than-normal orders because of a local event taking place nearby
- It's time for your pre-shift travel path. As you run through the checklist, you take note of the following items:
 - The Drive Thru windows are dirty and that there's litter in the lot.
 - One of the Drive Thru menu boards is not working.
 - Back inside, the restrooms are fully stocked and cleaned.
 - Your Drive Thru assembler is not smiling and is short when speaking to a fellow crew member.
 - Two delivery drivers are waiting in the collection area, and one more has just entered the restaurant.
 - The Kiosks are still displaying the promotional product that finished yesterday.
 - You notice Lisa added an extra pump of syrup to an iced coffee beverage.
 - Both kitchen production lines are open and fresh produce has been fully stocked.
 - In the crew room, the wrong Happy Meal poster is on display.
 - There is a small rip on a seat in the Dining Room
 - The printer in the Drive Thru is out of paper.

Notes:



Discuss

In your teams discuss the following:

- What would you do to set the shift up to success based on what you know?

- How will you prioritize the tasks?

- What tasks will you complete yourself?

- Which tasks will you delegate? Who will you delegate them to and why?



The Big Day - Part 2

Sam lets you know that he's having a better day today, thanks to your feedback conversation on your last shift together.

It's now peak period and Sam is the second side assembler. The next thing you know, Sam has left his position to take a call in the crew room.

Your Drive Thru assembler Tom is yelling at the production crew because a guest is waiting on Crispy Chicken Sandwich. As the previous shift leader mentioned, the restaurant is selling more Crispy Chicken sandwiches than usual because of a local event taking place nearby. What do you do?

The Big Day Part 2 Notes

Reflection

Take a moment to reflect on all that we have covered today. Then, write a tweet or short message that summarizes the key learnings from Day 2. (Limit 140 characters.)



3. Wrap Up and Close

Reflection: Behavioral Commitment

Reflection Questions

1. What do you want to do when you get back to your restaurant?
2. What barriers do you anticipate and how might you overcome them?

When I return to my restaurant, I will:

Conversation with Your Manager

1. When you return to your restaurant, take time to plan and rehearse the conversation you'd like to have with your manager.
2. Take the manager's behavioral style into consideration.

Notes about your upcoming conversation with your manager:

Remember

1. To keep from becoming overwhelmed, work on one skill at a time.
2. When you become comfortable with that skill, choose another one.

