



Customer First Visit Execution Guide

2024



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Introduction

This assessment is designed to put McDonald's Core Values front and center by putting key customer outcomes and restaurant operations performance first. The **Customer First Visit** drives ongoing QSC excellence by assessing everyday performance of the customer outcomes and verifying restaurant operations.

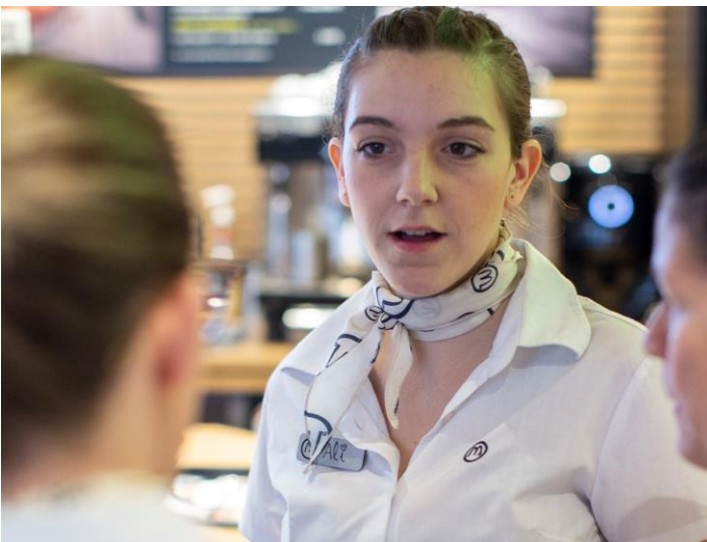
Customer First Visit Basics

What is an **Customer First Visit**?

This short, unannounced assessment combines :

- **Customer outcomes**, assessing key customer outcomes, recognizing right behaviors and capturing missed potential across all order/fulfilment channels.
- **Behind the counter operations check-in**, evaluating if the key systems and processes are in place to enable the delivery of key customer outcomes.

The key customer outcomes and restaurant operations are assessed when observed (“I assess what I see when I see it”).



Key Benefits of the **Customer First Visit**

- Combines key customer outcomes and a view behind the counter operations that protect standards and assess everyday operations.
- Flexibility to select an ordering platform (e.g., McDelivery or Curbside), to support **digital** initiatives, growth and improvements.
- Drives growth across all channels.
- **Supports restaurant Goal Setting.**
- Targeted and flexible tool.

Who conducts the **Customer First Visit**?

A McDonald's Staff Person who is certified through the PACE certification process conducts the **Customer First Visit**.

Additional **guidelines** around conducting assessments have been reviewed (see **Operations** PACE Overview Guide).

Format of the **Customer First Visit**

The assessment should be **conducted** in a customer-centric way by completing a transaction as an unknown customer via ONE of the following channels:

- Drive-thru
- Delivery
- In-restaurant
- Curbside

There are two main sections in the **Customer First Visit**:

- a section assessing key customer outcomes via one of the service channels.
- a section assessing behind the counter operations.

The customer outcomes capture any potential opportunities in the customer journey while evaluating systems and key processes for delivering a great customer experience.

The Behind the Counter Operations section is identical for all platforms. The questions in this section are focused on assessing if the key processes are in place to deliver greater levels of QSC.

How is the **Customer First Visit** scored?

The **Customer First Visit** is designed to support improvement and drive omnichannel growth. Both parts of the **Customer First Visit**- the key customer outcomes and the behind the counter operations – are combined to assess if the restaurant met McDonald's standards.

- OEPE time question offers a tiered scoring approach to encourage and reward the restaurant's improvement while upholding McDonald's standards.
- Non-scored diagnostic questions are featured in the delivery assessment to help diagnose root causes in 3POs.
- A score of 80% or higher meets McDonald's Standards.
- The overall assessment will provide an overview of the restaurant's readiness to deliver a great customer experience and provide a baseline so restaurants can view assessment performance trends over time.

Assessing Digital Service Channels in Operations PACE

As we transform the Digital experience for our customers, our goal is to seamlessly integrate these experiences to provide convenience, fun, and quality food.

- The Operations PACE Portal provides trended performance and aligns with the Customer First Visit service channel visits. This link enables consultation of the restaurant's channel performance with customer experience realized during the visit.
- It is fully supported in GDCT providing flexibility to select a service channel, to support new initiatives, growth, and improvements.



Customer First Visit Guidelines

When does the **Customer First Visit** take place?

The **Customer First Visit** is unannounced and should be **conducted** during a single daypart with the greatest potential growth or opportunities to address performance gaps. The frequency of the assessment depends on the level of support the restaurant requires as determined by the consulting category the restaurant is placed in.



How and when our customers visit our restaurants has changed over time. Based on that, the goal of the **Customer First Visit** is to reflect when customers leverage the various omnichannels (i.e., delivery may trend more towards evening dayparts, while in-restaurant traffic may trend higher during the snack daypart in many restaurants).

Customer First Visits can be conducted beginning at 6 am and begin before 9 pm, Monday through Saturday.

2024 Omnichannels:

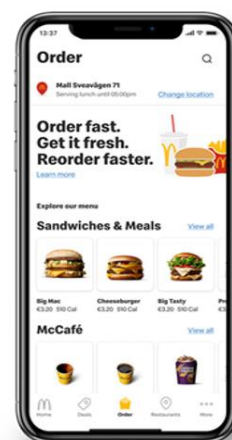
- All restaurants will receive **Customer First Visits** focused on the Business Unit and Field Office priorities.

Ordering Guidelines for all omnichannels:

- Each order will include a sandwich/entrée, french fries/hash browns, a drink, and a dessert item.
- There are no restrictions on items that can be ordered during a **Customer First Visit**, however, do not order customized or special grill orders.

To support the execution of the Accelerating the Arches plan and grow the digital business:

- The person conducting the assessment **can place their order through Mobile Order & Pay** or select the shortest line in drive-thru or in-restaurant, whether that be at the front counter or the kiosk.
- The name of the person conducting the assessment should be accurately displayed in the app to support execute as designed.
- Ensure the linked payment feature is toggled on in the app.



Prior to the assessment

- 1 Ensure you have the following tools for completion:
 - Access to GDCT to log the **Customer First Visit** including taking service times **using the embedded timer in GDCT**
 - McDonald's Global Mobile App **with linked payment**
 - MOP or 3PO apps for delivery orders. **Note:** know the location's full address where you will have the delivery made

During the assessment

- 1 Four items must be ordered; a sandwich, fries/hash browns, drink, with a dessert item. Avoid ordering grilled or **customized** orders.
- 2 **Conduct** the assessment through the omnichannel chosen.
- 3 Evaluate the product quality when safe to do so. If you did not receive the correct items ordered, evaluate the quality of the items you *did* receive.
 - If you are missing an item, indicate not meeting standard for accuracy. Then, request or reorder that item so you can evaluate quality.
- 4 See guidelines below for quality, accuracy, and behind the counter operational standards.

Quality	<ul style="list-style-type: none"> • Sandwich/entree: Served neat, at proper temperature, and tastes good • Fries/hash browns: Served hot, crisp, and taste good. The fries were salted correctly. • Drinks and desserts Served neat, at the correct temperature, and taste good
Service	In the Service components, in addition to evaluating the speed of service, there is an enhanced focus on staff engagement, Execute as Designed (EAD) , and when applicable, the order-taking process, to support order accuracy.
Cleanliness	The questions evaluate general cleanliness standards in the production and service areas (kitchen, beverage cell, front counter, dining room, exterior, and drive-thru).
Accuracy	Order accuracy remains one of our top opportunities. Understanding the order assembly process across omnichannels, including the correct procedure for condiments, will enable you to engage the restaurant teams, discuss your order accuracy. Items are served as a full portion.

Behind the Counter Operations

The Behind the Counter Operations section is the same for all **Customer First Visits**, regardless of the **service** channel, and is designed to evaluate standards that support a great customer experience. It enables you to draw parallels between your experience of the customer outcomes and the corresponding restaurant operations; thereby supporting improved root cause analysis.

Questions are designed to evaluate standards and restaurant operations that connect to key customer outcomes and everyday operations performance. Before conducting the behind the counter operations portion of your assessment, introduce yourself to the Shift Leader and explain the next steps.

- Address any critical food safety or health and safety impacts with the highest-ranking manager immediately before conducting the behind the counter portion.

After the Assessment

- 1 Recognize **those things that went well operationally**.
- 2 Review the results of the assessment, including the score, with the highest-ranking manager and provide an overview of where standards were met or missed, which will allow them to address any opportunities that have been observed that will improve key customer outcomes and operations.
- 3 Your feedback, guidance, and follow-up is a crucial element of the improvement process; communication should be a consulting conversation that addresses what went well and any opportunities to address. Ensure you demonstrate empathy and appreciation.
 - Summarize the results and share the score with the owner/operator or McOpCo operations manager via the completed Comprehensive Visit Report as soon as possible and within 24 hours via Partners email
 - Do not couple other information or observations with the assessment recap; provide those in a separate written communication or discussion with the FBP
- 4 OA & FBP: align on recommendations to provide additional consulting options, e.g., **PACE+ Support Visit**, PACE+ Check-in, etc.
- 5 O/O: monitor performance & **provide guidance**. FBP: provide support **as appropriate when requested by the owner/operator**.



The Four Types of Customer First Visits





Drive-thru



Cleanliness

- The exterior of the restaurant is clean and litter-free, and customer trash bins are not overflowing
- Employees present a neat and clean appearance. Their uniform is clean and in good condition

Service- Loyalty and My McDonald's Rewards

The processes and procedures relative to **EAD** (welcoming and asking if the guest is using the app today and using their name) as a function of Loyalty/My McDonald's Rewards were standardized, enabling us to assess if it is being executed as designed. Note that not one specific digital prompt is required.

Have your four-digit code ready **before** ordering. If not prompted, inform the order taker you'd like to use your four-digit code.

Speed of Service- Drive-thru

We will continue to measure the OEPE and the line time to assess McDonald's standards. In addition, Total Experience Time (TET) will be recorded to enhance focus on what matters most to our customers.

Line Time <70 seconds

- **Starts** – when wheels stop at the 3rd car behind the order point (*not including the car at the order point. If the line is less than 3 cars behind the order point, begin timing when your wheels stop.*)
- **Ends** - on arrival at order point.

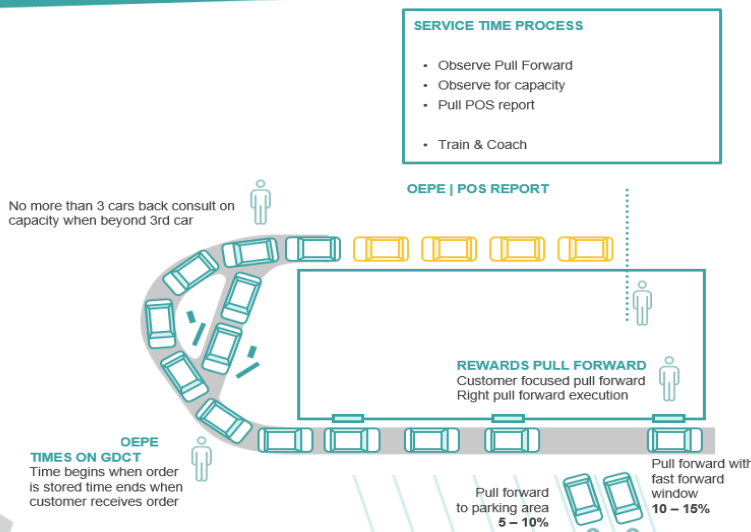
Order End Present End (OEPE) <120 seconds

- **Starts** – when order-taking is complete. **Ends** - when the last item is presented.

Total Experience Time (TET), unscored and diagnostic

- **Starts** – when wheels stop at the back of the line or at the COD. **Ends** – when full order is presented.

Service Time



DRIVE THRU POS SERVICE REPORT

```

=====
STORE# 00999 POS# 39
STORE NAME
BUSINESS DATE: MM/DD/CCYY
MANAGER: 999 MM/DD/YY (Day) hh:mm
=====
DRIVE-THRU SALES REPORT - HOURLY
=====
TIME   CARSV   0T   OECB   CASH   PSNT   OEPE%A   PFWD%
11:00   59     24   23    27    47     82%     10%
12:00   88     26   23    18    38     78%     12%
13:00   110    21   59    21    38     65%     15%
TOTAL   588    388  589   5.72  164   82%   11%
OR AVG   23     39   25    77    141
=====
PRESET OEPE 120
=====
PRINTED ON 07/28/2016 13:30:37
=====

```

UNDERSTANDING THE POS REPORT...

- OEPE – Average OEPE time
- OEPE%A – % of orders that achieve the target time of 120 seconds
- PFWD – Average pull forward time per transactions for those orders
- PFWD% – % of cars pulled forward during that timeframe
- PRESET OEPE 120 – Target time used to calculate OEPE%A



In-restaurant (includes dine-in/table service)

Cleanliness

- The customer areas are clean.
- Restrooms are clean, stocked, and fixtures are in working order.
- Employees present a neat and clean appearance. Their uniform is clean and in good condition.

Service- Loyalty and My McDonald's Rewards

The processes and procedures relative to **EAD** at the front counter (welcoming and asking if the guest is using the app today and using their name) as a function of Loyalty/My McDonald's Rewards were standardized, enabling us to assess if it is being executed as designed. Note that not one specific digital prompt is required.

Have your four-digit code ready **before** ordering. If not prompted, inform the order taker you'd like to use your four-digit code.

Speed of Service - Dine In

We will continue to measure the Wait Time and Receipt to Present (R2P), which are essential to our customers and help us understand the Total Experience Time.

The Table Service Fulfillment Time is an essential indicator of a restaurant's ability to deliver finished orders to customers. Record the combined R2P and Fulfillment time for Table Service orders, with an overall target of 135 seconds (R2P 90 seconds + Fulfillment Time 45 seconds).

Wait time <90 seconds

- **Starts** – when you join the line (*choose the shortest line*). **Ends** – on arrival at order point.

R2P <90 seconds

- **Starts** – on payment, when you receive your receipt. **Ends** – when your full order is presented.

Table Service <135 (R2P + Fulfillment Time)

- **Starts** – on payment, when you receive your receipt. **Ends** – when your full order is presented.



Curbside

- Place your order on the McDonald's Global Mobile App outside the geofence
 - The geofence is set to approximately 3 minutes away from the restaurant
 - Consider that the geofence will not be the same distance for each restaurant and should plan appropriately
- Locate the nearest available Curbside **space** and park safely before **checking in**.
- Note if there is adequate signage **clearly signposted and easily identifiable** to direct guests to Curbside **spaces**.

Cleanliness

- The exterior of the restaurant is clean and litter free, customer trash bins are not overflowing.
- Employees present a neat and clean appearance. Their uniform is clean and in good condition.

Service- Loyalty and My McDonald's Rewards

Greeting the guest by name **is** the standard for all orders using Loyalty/My McDonald's Rewards **and it is** assessed to ensure it is being executed as designed.

Speed of Service

The combined R2P and Fulfillment time for Curbside orders is used to measure speed of service for curbside, with an overall target of 135 seconds (R2P 90 seconds + Fulfillment Time 45 seconds).

Curbside Service <135 (R2P + Fulfillment time)

- **Starts:** Time starts once the **Curbside space** number is entered **into My McDonald's Rewards** and the "Done" button is clicked.
- **Ends:** when the last item is presented.



Delivery

- Please do not park at the restaurant property because this does not represent typical delivery customer behavior.
- Park in a safe and legal place 3-5 minutes away from the restaurant. You will need to know the postal address for your location; you can also add specific details such as car type/registration.
- Note there are non-scored sections to be completed to understand 3PO opportunities.
- Orders **are to be** placed through **McDonald's Global Mobile App** as the first choice for ordering.
 - If **it was determined** through the courier tracking in the app that the order was prepared by a different restaurant than the one being assessed, relocate closer within the restaurant's delivery radii and restart the assessment
 - If you are unable to place a delivery order because the restaurant is not accepting orders or other technology situations, attempt **placing the order through the 3PO Marketplace app**. If **still unable to place an order**, you should pivot to a different omnichannel. An email recap of the situation, time, and restaurant details is sent via Partner's email

Speed of Service

You will record two speed of service elements during this assessment; both are unscored and diagnostic:

Overall Time <30 minutes

- **Starts** – on payment. **Ends** – when full order is presented.

App arrival time deviation

- Record whether there was a timing deviation (delay) between predicted app arrival time and actual arrival time.



Behind the Counter Operations

Questions are designed to evaluate standards and restaurant operations performance at that point in time.

Before conducting the behind the counter portion of your assessment, introduce yourself to the Shift Leader and explain next steps

- Address any critical food safety or health and safety impacts with the highest-ranking manager immediately

Quality

- Tempering, prep, and Made For You processes are in place in order to deliver gold standard quality products.
- Fries/hash browns procedures are followed, and amounts are sufficient to meet demand.
- Beverages and desserts are served correctly and grouped to ensure order accuracy.

Service

- Orders are assembled correctly.

Cleanliness

- General cleanliness routines are in place to positively impact operations and safety.

Shift Leadership

- Shift leaders ensure that employees are properly positioned as conditions dictate.

General

- Shift and Area Leaders take appropriate actions to prioritize & reduce operational barriers to deliver Gold Standard products and a great customer experience.
- The shift leader is aware of the restaurant's priorities and goals and progress is being made.

Roles and Responsibilities



	McDonald's Staff	Restaurant Team
Before Assessment	<ul style="list-style-type: none"> Select appropriate service channel and day/ daypart (refer to Omnichannel Selection section) Familiarize yourself with the assessment questions 	
During Assessment	<ul style="list-style-type: none"> Recognize operational excellence Role model Customer Care behaviors and people skills (Crew and Customer) Enter comments and supporting details in the GDCT if standards are not met Assess standards and understand progress on the restaurant's priorities and goals Evaluate the customer outcomes and assess processes using the behind the counter questions to drive the team toward identifying root causes 	
After Assessment (during recap)	<ul style="list-style-type: none"> Debrief with the Shift Leader or highest-ranking person in the restaurant OA links observations and assessment results to consult to key actions the restaurant can take to meet key customer outcomes and operational standards Dependent on the level of the manager, share available, optional resources such as PACE+ Support Visits or other consulting best bets that can assist the restaurant 	<ul style="list-style-type: none"> Follow up and correct any operations issues brought up during the assessment
After Assessment (ongoing)	<ul style="list-style-type: none"> McDonald's staff person conducting the visit emails the results of the assessment to the owner/operator or McOpCo operations manager OA & FBP: Discuss any additional consulting needs (e.g., PACE+ Support Visit, PACE+ Check-in etc.) O/O: Continue to monitor progress and growth potential/opportunity gaps. FBP: Continue discussing trends in restaurant operations performance 	<ul style="list-style-type: none"> Review the feedback and take action if appropriate based on discussion with your organization leadership Review your Goals and actions, and update if required by your owner/operator Monitor progress

