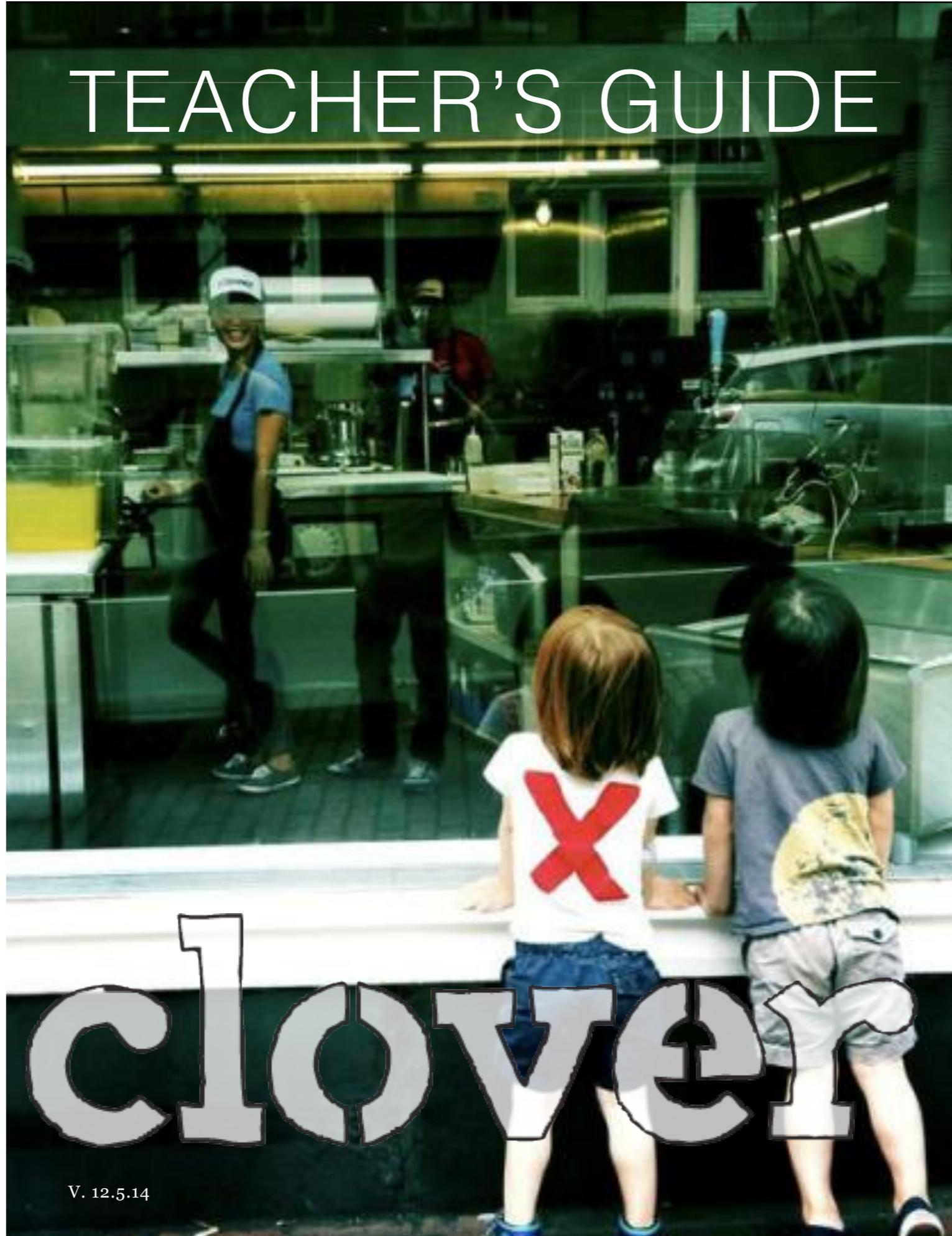


# TEACHER'S GUIDE



clover

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# Introduction to the Clover Teacher's Guide

*Welcome.*

*You're either about to train somebody, or curious about how we train. Here are the most up-to-date methods we use at Clover.*

*Training is the backbone of our company. It's how we bring new people into our family, share with them all that we've worked so hard to build and prepare them to work with us to achieve great things.*

*As you use this guide please try to think back to what it feels like to learn something new. Stop for a second and remember that feeling. It can be scary, frustrating, exciting, confusing. We're working hard with these materials to give you the tools you need to connect with your employees. We've deliberately used a bunch of different media formats with the hope that there will be something for every learning style.*

*Make the training fun. How hard did you work to learn the rules of your favorite sport? Learning through play can not only feel painless but it can be extremely effective. Think about how to make this fun for your employees.*

*Use this to better understand the training tools, use it as a reference, use it for inspiration. If you have ideas/improvements share them. You can help us make this guide better. You will find aspects of the training are deliberately open-ended. Just as in many other places in our company, you'll notice consistent directions for how to train whether someone is learning to make a sandwich or open up a restaurant in the morning. Try to view the training through that Clean Clover lense: we don't want training to be overly complicated or have missing pieces - let's strive for clean, consistent training across the board. If you are unsure of how to use any of these materials please ask! Thanks for taking part in training the next generation of Clover!*

# Clover Restaurant Training

This chapter outlines basic training practices for the Restaurants and Trucks.



# Provisional Employee v. REST

Remember your first day at Clover?

Each manager has the opportunity to put their new employees at ease. These first few days are exciting times. This is your first glimpse of your new colleague. Imagine where they may be in 2 years!



# Onboarding

## ACTIONS

- ❑ [Distribute Comic Book Chapter 1 (Manager, pending)]
- ❑ Review Employee Handbook (Trainee, Manager)
- ❑ Review Onboarding Packet (Trainee, Manager)
- ❑ Review Safety and Sanitation guide (Trainee, Manager)
- ❑ Administer quiz 1: Sanitation (Trainee, Manager)
- ❑ Train on When I Work (Trainee, Manager)
- ❑ Record progress in training log (Manager)

## MATERIALS

1. [Comic Book: Chapter 1 (pending)]
2. On-boarding packet (printed and online)
3. Sani reference cards: Safety and Sanitation (laminated and online)
4. Quiz 1: Safety and sanitation (wufoo, 100% to pass)



## INTRODUCTION

Onboarding combines some very practical goals with lofty ambitions. We need to make sure each employee will be paid properly. That's very practical. We want every employee to do some amazingly great stuff. That's a lofty ambition.

If you've hired this person there is a reason. So this should be an exciting moment for everybody, the beginning of an adventure. Treat it with respect. Work with them efficiently, but with a sense of enthusiasm.

## COMIC BOOK [pending]

The comic book is meant to be sent home with new employees. This is their first introduction to Clover, training, and our

values. Each employee is meant to keep 1 comic book as a gift from Clover.

## EMPLOYEE HANDBOOK

### ONBOARDING PACKET

The onboarding packet must be reviewed by all employees prior to any paid work. Please walk through the printed onboarding packet with your new employee. All new employees should understand how to set their availability, how to access the employee handbook online, and have shared all critical employment information with Clover.

### SAFETY AND SANITATION

Review the Safety and Sanitation reference guide using your physical environment and employees as reference.

This is the first time you're going to introduce Clean Clover to your new hire. When you're discussing the importance of a clean appearance and uniform, it's a great place to tie in our food and the straight forward flavors we're aiming for. Clean floors, fryers, systems, uniforms, and flavors go hand in hand. We want employees learning about the company for the first time to understand these connections and that you can't have one without the other.

When you feel the new employee has adequate exposure to the Safety and Sanitation procedures please have them take

the **quiz**. Employees should not work in a kitchen, restaurant, or on a truck until this is complete.

If the employee gets less than a 100% on the quiz review the wrong answers and have them re-take the test.

### WHEN I WORK

#### PREFERENCES:

-this should be used to set your UNAVAILABILITY. This should be used to block of parts of the day or entire days that your unavailable. If you don't have it blocked as UNAVAILABLE, there is a chance that you might be scheduled on that day and your required to be there during that time that your scheduled. This should be used for reoccurring instances for events and travel. This needs to be set 2 weeks in advance. Once the schedule is made, IT IS FIRM unless there is a bona fide emergency.

#### REQUEST TIME OFF:

-This is used for one time instances that you need a day or time off. This might be inside your normal work schedule. This needs to be done two weeks in advance.

#### BREAKS:

-if you are working over 6 hours IT IS REQUIRED BY LAW THAT YOU TAKE A 30 MIN, un-paied break. You have to report to the manager and they approve if it is a good time to take a break.

#### ATTANDANCE:

-If you are scheduled you are expected to be there on time in FULL uniform at the beginning of your shift. The only exception is if there is a bona fide emergency. You are part of a team and the only way a team can function together is if everyone is following the rules. You can only punch in when you are ready to start work. That means, dressed and ready to go.

-You CAN NOT clock in any earlier than 5 minutes before your shift, unless it's authorized by a manager.

#### CONFIRMING THE SCHEULE:

-after the schedule is released, you need to confirm your shifts with-in WIW using the virtual handshake. Once the schedule is made, you are committed to the shift.

#### COMMUNICATION: (SEND A MESSAGE)

-if there is an emergency or need to call out, the only acceptable form is a message through WIW and it has to go to Chris,

nobody else. No Phone call or email. The only acceptable way is a WIW message.

#### OPEN SHIFTS:

-these are ways that you pick up extra shifts or pick up a shift that someone called out on. If you see one and you want the shift, just grab it. Once you grab it IT'S A VIRTUAL HAND-SHAKE and your required to be there for that shift, no exceptions, except a bona fide emergency.

# When I Work

## ACTIONS

- Review critical functions one-on-one with Manager during Onboarding (Trainee, Manager)

## MATERIALS

1. 1-on-1 (WIW and this guide)



## WIW Training

With the managers computer, make their profile, send invite, and have them set up their preferences, show them how to update their availability, and how to communicate through WIW. This would help everyone understand that the schedule is made a week in advance and they are responsible to update their availability. Also note that once the schedule is published, a weekly email is sent and their are required to respond to confirm their schedule.

## PREFERENCES:

-this should be used to set your UNAVAILABILITY. This should be used to block of parts of the day or entire days that

your unavailable. If you don't have it blocked as UNAVAILABLE, there is a chance that you might be scheduled on that day and your required to be there during that time that your scheduled. This should be used for reoccurring instances for events and travel. This needs to be set 2 weeks in advance. Once the schedule is made, IT IS FIRM unless there is a bona fide emergency.

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team and the only way a team can function together is if everyone is following the rules. You can only punch in when you are ready to start work. That means, dressed and ready to go.

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#### OPEN SHIFTS:

-these are ways that you pick up extra shifts or pick up a shift that someone called out on. If you see one and you want the shift, just grab it. Once you grab it IT'S A VIRTUAL HANDSHAKE and your required to be there for that shift, no exceptions, except a bona fide emergency.

# 5 Stages of Training

## ACTIONS

- Review 5 stages of training
- Review TTG
- Review YouTube training videos

## MATERIALS

1. 1-on-1 (this guide)
2. Training videos (iPad, YouTube)



Every single time your employee is about to do a task, are they asking themselves: have I been trained on all 5 stages of training?

**Stage 1: Video and Recipe**

**Stage 2: Station Set-Up**

**Stage 3: Ask employee to watch you perform the given task and have them taste what amazing tastes like.**

**Stage 4: Ask employee to try the task while you watch and then taste it to see if it's just as amazing.**

Stage 5: Check-in and coach employee until their skills are up to expectation. Once complete, have them take the quiz if applicable.

Update training in WIW once you and your team are signing off that this employee can work the station solo. If it's not in WIW, it didn't happen.

# Cleaning

## ACTIONS

- Watch cleaning videos (Trainee)
- Review cleaning cards (Trainee, Lead Trainer/AM)
- Review MSDS and proper use of and care for chemicals (Trainee, Lead Trainer/AM)
- Administer cleaning quizzes (Trainee, Lead Trainer/AM) [pending]
- Record progress in training log (Manager)

## MATERIALS

1. Cleaning videos (iPod, YouTube)
2. Cleaning reference cards (iPod)
3. Cleaning quizzes (WuFoo) [pending]



### List of training in this section:

- Mopping
- Bathrooms
- Kitchen Surfaces
- Customer Surfaces
- Loading Dirty Bin

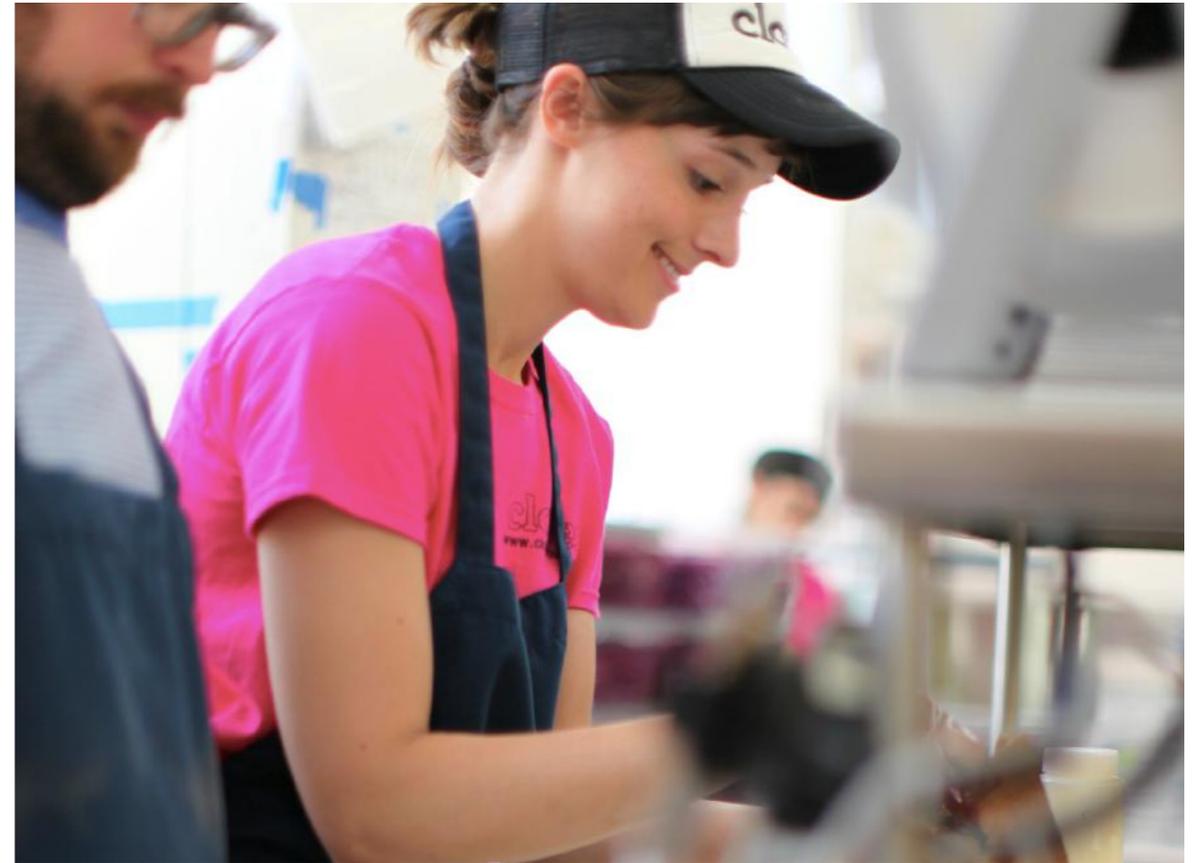
# Sandwiches and Middle

## ACTIONS

- Watch station videos (Trainee)
- Review reference cards (Trainee, Lead Trainer/AM)
- One-on-one with trainer (Trainee, Lead Trainer/AM)
- Administer station quizzes (Trainee, Lead Trainer/AM)
- Record progress in training log (GM)

## MATERIALS

1. Sandwich videos (iPad, online)
2. Reference cards (laminated, in Jolt)
3. 1-on-1 (this guide)
4. Station quizzes (iPad, 80% to pass)



## Sandwich and Middle Training

Sandwich and middle training should happen primarily through one-on-one instruction. This is a job for the Team-Leader or Manager/Assistant Manager.

Follow these 5 simple stages. Total training should take between 20 minutes and 45 minutes depending on the task and time of day. Each task should be trained on its own.

**Stage 1:** Before one-on-one training ask employee to **watch relevant videos** and/or read the recipe. This can be done on iPod at slow time or at home (accessible from our website).

**Stage 2: Review station set-up.** Make sure employee understands how everything should look when they start their job.

Focus on cleanliness and orderliness. It is impossible to do clean fast work without a well prepared workspace. Specifically direct them to those out of sight areas that are often missed throughout a busy shift - once you point them out, your employee is much more likely to take notice and care for the area in the future.

**Stage 3: Ask employee to watch you perform the given task.** Talk through important aspects of the job. Use similar descriptions/reference the training videos. **Reference sandwich cards if appropriate.** This is the time to expose your employee to our philosophy surrounding clean food. We aim for our flavors to be simple, clean, and to highlight awesome ingredients. (i.e. Do you know why there are only 4 ingredients in the Heirloom Tomato sandwich? or We used to make our hummus differently, let me tell you why we changed our recipe.)

**\*\*Have employee eat a full sandwich or example of the item you are training. This sample should be free, not charged to the employee.\*\***

**Stage 4: Ask employee to try the task while you watch.** Give helpful feedback/ coaching. Be explicit about what you are looking at to determine whether the employee is doing a good job. Repeat until confident with training.

**Stage 5: Check-in on already trained employee.** This works well after an hour or two at the task, then again after a day or two in the role. Re-train where necessary. Reinforce good habits with positive feedback. Station training is not com-

plete until employee passes the station quiz. Once confident in the trainee on the station, have employee **take the quiz on the iPad.** Passing is over 80% correct. If employee fails, review wrong answers, coach/re-train as necessary. Have employee re-take the quiz.

List of training for this section:

- Chickpea Fritter
- Egg + Eggplant
- BBQ Seitan
- Soy BLT
- Seasonal Sandwiches
- Platters
- Salads
- Wraps/selling the food
- Oven/middle

Remember, training is not complete until you **update the training log.** Go to the employee profile in When I Work to do this.

# Drinks

## ACTIONS

- ❑ Watch station videos (Trainee)
- ❑ Review reference cards (Trainee, Lead Trainer/Manager)
- ❑ One-on-one with trainer (Trainee, Lead Trainer/Manager)
- ❑ Administer quiz (Trainee, Lead Trainer/Manager)
- ❑ Record progress in training log (Manager)

## MATERIALS

1. Station Videos (iPad, online)
2. Reference cards (laminated, in Jolt)
3. One-on-one with trainee (this guide)
4. Drinks quiz (iPad, 80% to pass)



## Drinks Training

Drinks training should happen primarily through one-on-one instruction. This is a job for the Team Leader or Manager/Assistant Manager.

Follow these 5 simple stages. Total training for this station should be 2-2.5 hours. It is best to split the training into two hour sessions.

Stage 1: Before one-on-one training ask employee to **watch relevant videos**. This can be done on iPad at slow time or at home (accessible from our website).

**Stage 2: Review station set-up.** Make sure employee understands how everything should look when they start their job. Focus on cleanliness and orderliness. It is impossible to do clean fast work without a well prepared workspace.

**Stage 3: Ask employee to watch you perform the given task.** Talk through important aspects of the job. Use similar descriptions/reference the training videos. Have employee taste the coffee and an example of each item you are training. This sample should be free, not charged to the employee.

**Stage 4: Ask employee to try the task while you watch.** Give helpful feedback/ coaching. Be explicit about what you are looking at to determine whether the employee is doing a good job. Repeat until confident with training.

**Stage 5: Check-in on already trained employee.** This works well after an hour or two at the task, then again after a day or two in the role. Re-train where necessary. Reinforce good habits with positive feedback. Station training is not complete until employee passes the station quiz. Once confident in the trainee on the station, have employee **take the quiz on the iPad.** Passing is over 80% correct. If employee fails, review wrong answers, coach/re-train as necessary. Have employee re-take the quiz.

**Drinks Part 1 (1 hour):** Station set-up, execution (how-to pour coffee/drinks)

List of training for this section:

- station set-up focus: cleanliness, organization, clean lines, keeping stocked, and what the customers see
- hot coffee
- iced coffee
- hot teas
- cold drinks
- soda
- hot drinks (if applicable)
- soups (if applicable)

**Drinks Part 2 (1 hour):** Customer engagement, tasting, how-to talk to customers about coffee

List of training for this section:

- allow 5 min for trainee to set-up & restock Drinks station according to spec, check in and correct even the smallest details
- ask trainee if they have any questions from part 1 of training
- throughout part 2 remember to watch pouring and portioning, correct and coach when necessary
- talking points:
  - talking to and engaging with customers, a crucial and mandatory part of working the station
  - sampling makes people feel special and involved (proper sampling techniques, dos and donts)
  - sampling increases sales by introducing customers to new things on the menu and involving them more deeply
  - basic qualities of C1 & C2 & IC + how we get them on the menu

- tasting, it should be happening every day so that we can talk honestly about what we like (or don't like) about the individual coffees
- we visit every roaster we serve
- why medium roast?
- single-origin sets us apart

Remember, training is not complete until you **update the training log**. Go to the employee profile in When I Work to do this.

# Breakfast

## ACTIONS

- Watch Breakfast videos (Trainee)
- Review reference cards (Trainee, Lead Trainer/Manager)
- One-on-one with trainer (Trainee, Lead Trainer/Manager)
- Administer quiz (Trainee, Lead Trainer/Manager)
- Record progress in training log (Manager)

## MATERIALS

1. Station Videos (iPad, online)
2. Reference cards (laminated)
3. One-on-one with trainee (1-on-1, this guide)
4. Breakfast quiz (WuFoo, 80% to pass)



## Breakfast Training

Breakfast training should happen primarily through one-on-one instruction. This is a job for the Team Leader or Manager/Assistant Manager. Breakfast training is optional for PE training.

Follow these simple stages. Total training for breakfast station should take approximately 1 hour.

**Stage 1:** Before one-on-one training ask employee to **watch relevant videos**. This can be done on the iPad or at home (accessible from our website).

**Stage 2: Review station set-up.** Make sure employee understands

how everything should look when they start their job. Focus on cleanliness and orderliness. It is impossible to do clean fast work without a well prepared workspace.

**Stage 3: Ask employee to watch you perform the given task.** Talk through important aspects of the job. Use similar descriptions/ reference the training videos. Use reference cards if appropriate. Have employee eat an example of the items you are training. This sample should be free, not charged to the employee.

**Stage 4: Ask employee to try the task while you watch.** Give helpful feedback/ coaching. Be explicit about what you are looking at to determine whether the employee is doing a good job. Repeat until confident with training.

**Stage 5: Check-in on already trained employee.** This works well after an hour or two at the task, then again after a day or two in the role. Re-train where necessary. Reinforce good habits with positive feedback. Station training is not complete until employee passes the station quiz. Once confident in the trainee on the station, have employee **take the quiz on the iPad**. Passing is over 80% correct. If employee fails, review wrong answers, coach/re-train as necessary. Have employee re-take the quiz.

List of Breakfast items for training:

- Breakfast Sandwich
- Seasonal Breakfast Sandwich
- Popover Sandwich

- Yogurt + Granola + Fruit
- Oatmeal or Cheesy Grits
- Baking Popovers & Muffins
- Overnight Oats
- Fruit Salad

Remember, training is not complete until you **update the training log**. Go to the employee profile in When I Work to do this.

# Knife Skills 101

## ACTIONS

- Attend a Knife Skills 101 class (Trainee)
- Record progress in training log (Manager)

## MATERIALS

1. Sign up for Knife Skills 101 (under “Events” on the website)



## Knife Skills 101

Do you remember what it was like to prepare a meal when you didn't have the correct grip on your knife? How about that time you cut your hand after reaching into a sink filled with water only to find a sharp surprise? Knife skills are one of the most important things to be trained on when you're working in a kitchen every day. Once you feel comfortable with a knife, it takes half the time to prepare a meal, food cooks more evenly, and it's safer.

This class is highly suggested for every employee at Clover, although it is optional. It makes us more efficient and provides a life-long skill for anyone who participates. Teaching knife skills might be the best thing we can do for our employees'

health since it will encourage them to cook more fresh food at home. Encourage your staff to make their way through the three different classes - they will become much more valuable to us and can take pride in a new skill!

### **CLASS 1: BASIC CUTS (1 HOUR)**

#### *Knife safety*

Posture  
Securing board  
Blade away  
Preparing for the worst  
Safe transport

#### *Types of knives*

Serrated  
Chef  
Paring  
Steel

#### *Types of cuts*

Claw  
Bridge  
Peel  
Flat hand  
Chef's knife

### **CLASS 1: TEST (Passing: < 12 minutes)**

Onion (1, coarse chop)  
Cocktail tomato (2, slice)  
Cucumber (1, 1/2" dice)  
Garlic (3 segments, medium fine)  
Herbs (1/3 bunch, medium fine)  
Eggplant (stripe, 3/4" slice)  
Tomato (1, 1/2" dice)

Participants will get a paring knife upon completion passing the test! They will also be eligible to sign up for Knife Skills 102.

# Coffee 101

## ACTIONS

- Attend a Coffee 101 class (Trainee)
- Record progress in training log (Manager)

## MATERIALS

1. Sign up for Coffee 101 (under “Events” on the website)



## Coffee 101

Anyone pouring coffee on Drinks station at Clover should take this class. Our main goal is to deepen the understanding and appreciation for coffee across the company. We know that pouring world class coffee is one part technical, and one part love. This class will focus on the love of coffee.

### PART 1: CLOVER & COFFEE (1 HOUR)

- Why do we teach this class?
- Why do we serve coffee at Clover?
- What is special about our coffee program?
- How did we decide to do coffee the way we do it?
- Who are our roasters?
- What is our goal for a Clover employee working Drinks station?

- Coffee tasting (e.g. Pret, Dunkin, Starbucks, 7-11, Boston Coffee Company, etc...)

## **PART 2: COFFEE SCIENCE (1 HOUR)**

- *[PENDING]*

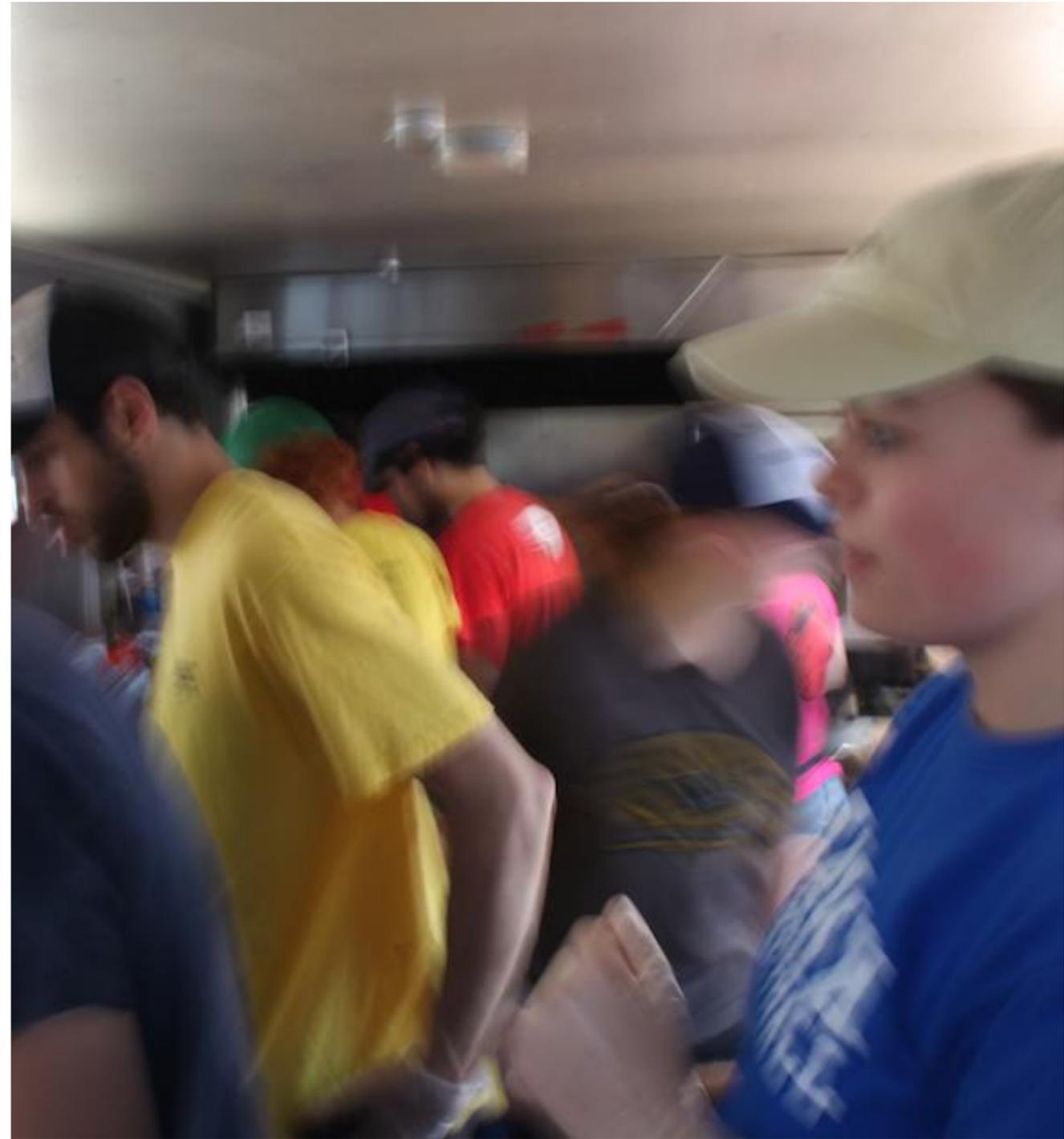
Participants will receive a Melita and a bag of coffee when attending this class!

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# Team Member v. KIT

A new Team Member in the Kitchen has gotten a chance to see what Clover is about, and to work on their Knife Skills.

Now it's time for them to learn more about Clover and have a chance to develop new skills working on the stations.



# Fry

## ACTIONS

- Watch Fry videos (Trainee)
- Review reference cards (Trainee, Lead Trainer/Manager)
- One-on-one with trainer (Trainee, Lead Trainer/Manager)
- Administer station quiz (Trainee, Lead Trainer/Manager)
- Record progress in training log (Manager)

## MATERIALS

1. Station videos (iPad, online)
2. Reference cards (laminated, in Jolt)
3. 1-on-1 (this guide)
4. Station quiz (iPad, 80% to pass)



## Fry Training

Fry training should happen primarily through one-on-one instruction. This is a job for the Team Leader or Manager/Assistant Manager. Fry training is required in order to be a fully trained TM.

Follow these 5 simple stages. Total training for this station should take between 2-2.5 hours. It is best to split the training into two 1 hour sessions.

Stage 1: Before one-on-one training ask employee to **watch relevant videos**. This can be done on iPad at or at home (accessible from our website)

**Stage 2: Review station set-up.** Make sure employee understands how everything should look when they start their job. Focus on cleanliness and orderliness. It is impossible to do clean fast work without a well prepared workspace.

**Stage 3: Ask employee to watch you perform the given task.** Talk through important aspects of the job. Use similar descriptions/ reference the training videos. Have employee taste the fries and other item you are training. This sample should be free, not charged to the employee.

**Stage 4: Ask employee to try the task while you watch.** Give helpful feedback/ coaching. Be explicit about what you are looking at to determine whether the employee is doing a good job. Repeat until confident with training.

**Stage 5: Check-in on already trained employee.** This works well after an hour or two at the task, then again after a day or two in the role. Re-train where necessary. Reinforce good habits with positive feedback. Station training is not complete until employee passes the station quiz. Once confident in the trainee on the station, have employee **take the quiz on the iPad**. Passing is over 80% correct. If employee fails, review wrong answers, coach/re-train as necessary. Have employee re-take the quiz.

**Fry Part 1 (1 hour):** Station set-up, execution (how to fry items)

List of training for this section:

- station set-up focus: cleanliness, organization, proper equipment, keeping stocked, and what the customers see
- CHK
- EGG
- FRY
- SNL (if applicable)
- 3PM (if applicable)

**Fry Part 2 (1 hour):** check-in on execution, fry background and tasting

List of training for this section:

- allow 5 min for trainee to set-up & restock Fry station according to spec, check in and correct even the smallest details
- ask trainee if they have any questions from part 1 of training
- throughout part 2 remember to watch fry item execution (are the fries cooked perfectly, are they using the tongs to turn over the eggplant, fry timer?, cleanliness?), correct and coach when necessary
- working fry at high volume
- talking points:
  - history of fries on the menu: our gateway drug, why this menu item matters
  - engaging with customers and giving out tastes of our fries is a crucial and mandatory part of working the station
  - tasting makes people feel special and involved (proper tasting techniques on fry station, dos and donts)

—tasting increases sales by introducing customers to new things on the menu and involving them more deeply

—what sets our fries apart from others?

—no freezers

—cutting fries from whole potatoes in store

—only fried once

—where we get our potatoes: PEI & Western MA

—why rosemary?

Remember, training is not complete until you **update the training log**. Go to the employee profile in When I Work to do this.

# Breakfast

## ACTIONS

- Watch Breakfast videos (Trainee)
- Review reference cards (Trainee, Lead Trainer/Manager)
- One-on-one with trainer (Trainee, Lead Trainer/Manager)
- Administer quiz (Trainee, Lead Trainer/Manager)
- Record progress in training log (Manager)

## MATERIALS

1. Station Videos (iPad, online)
2. Reference cards (laminated)
3. One-on-one with trainee (1-on-1, this guide)
4. Breakfast quiz (WuFoo, 80% to pass)



## Breakfast Training

Breakfast training should happen primarily through one-on-one instruction. This is a job for the Team Leader or Manager/Assistant Manager. Breakfast training is optional for PE training.

Follow these simple stages. Total training for breakfast station should take approximately 1 hour.

**Stage 1:** Before one-on-one training ask employee to **watch relevant videos**. This can be done on the iPad or at home (accessible from our website).

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how everything should look when they start their job. Focus on cleanliness and orderliness. It is impossible to do clean fast work without a well prepared workspace.

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**Stage 4: Ask employee to try the task while you watch.** Give helpful feedback/ coaching. Be explicit about what you are looking at to determine whether the employee is doing a good job. Repeat until confident with training.

**Stage 5: Check-in on already trained employee.** This works well after an hour or two at the task, then again after a day or two in the role. Re-train where necessary. Reinforce good habits with positive feedback. Station training is not complete until employee passes the station quiz. Once confident in the trainee on the station, have employee **take the quiz on the iPad**. Passing is over 80% correct. If employee fails, review wrong answers, coach/re-train as necessary. Have employee re-take the quiz.

List of Breakfast items for training:

- Breakfast Sandwich
- Seasonal Breakfast Sandwich
- Popover Sandwich

- Yogurt + Granola + Fruit
- Oatmeal or Cheesy Grits
- Baking Popovers & Muffins
- Overnight Oats
- Fruit Salad

Remember, training is not complete until you **update the training log**. Go to the employee profile in When I Work to do this.

# Values

## ACTIONS

- [Read comic book Chapter 2: Values (Trainee, pending)]
- Read website posts tagged “Values” (Trainee)
- Q&A with manager (Trainee, Manager)
- Administer quiz: Values (Trainee, Manager)
- Record progress in training log (Manager)

## MATERIALS

1. [Comic book Chapter 2 (pending)]
2. Q&A with manager (1-on-1, this guide)
3. Quiz: Values (WuFoo, 80% to pass)



## Values

The goal of this segment of training is to introduce Team Members to the values underlying our work at Clover.

Send the Values Letter to the Team Member going through this training and allow them a few days to read the blogposts. Make sure you set up a specific date and time for the Q&A.

When you sit down with your employee for a one-on-one make sure you're familiar with all of the materials on the blog. If you don't know the answer to a question don't BS, just refer it to somebody who does. If you feel uncomfortable with this section of the training reach out to your leadership. We're always happy to talk about this stuff over a drink.

These three values are at the foundation of everything we do at Clover. Once you understand these you will understand why we do what we do:

*Transparency - At Clover we are proud of what we do. It's not always perfect, we make many mistakes. But we work hard, believe in what we do, and feel others should be able to see that work. We don't hide our prep, our ingredients, our mistakes. In a world where people are told the soup at Seven-Eleven is "Fresh, just made" it's just not enough for us to hope people believe us when we tell them our food is great. We'd rather they see us prepping that soup with their own eyes.*

*Equality of Opportunity - Look around, Clover is made up of all types of people, with all types of backgrounds. Brett started as our part-time fill-in resupply truck driver. Mary was 2 months into Clover when she found herself running a truck. Bridget wasn't yet 20 years old when she first stepped up to run a truck. We are comprised of ex-cons, folks who started in the dish-room as well as chefs from Michelin Star restaurants and former bankers. We believe that everybody should be treated with respect regardless of background. We work hard to create opportunities for all types of people regardless of race, sex, sexual preference, background, etc.*

*Everything will be Different Tomorrow - You can make a better Clover. Why? Because every single thing we do could be better. You may contribute to the future of Clover with a new recipe idea for a Lemonade, with a faster way to pour a*

*drink, with a new idea about how to design the drink station, a better way to describe a drink to a new customers, or perhaps a giant mistake/ failure that we can learn from. Everything we are today is the result of somebody in the Clover family, an employee or a customer imagining a better future.*

When you administer the **Values Quiz** passing is anything over 80%. If employee fails the quiz please review/re-train/ etc.

# History

## ACTIONS

- ❑ [Read Comic Book Chapter 3: History (Trainee, pending)]
- ❑ Read website posts tagged “History” (Trainee)
- ❑ Q&A with manager (Trainee, Manager)
- ❑ Administer Quiz: History (Trainee, Manager)
- ❑ Record progress in training log (Manager)

## MATERIALS

1. [Comic Book Chapter 3 (pending)]
2. Q&A (in person, this guide)
3. Bench test (in person, this guide)
4. Quiz: History (WuFoo, 80% to pass)



### History of Clover

We have tagged nearly 200 entries on the blog corresponding to History. This means the history reading is a serious undertaking. Send the History Letter to the Team Member going through this training and give them enough time to read through all of the blog entries. Make clear what you expect him/her to get out of that training. Make sure you set up a specific date and time for the Q&A. This is an opportunity for your Team Member to follow-up on things they thought were interesting in the blog, ask questions, explore anything they found missing.

Ideally this session would be driven by their questions, but in the case that you have a laconic Team Member, you should be prepared to prompt the conversation. Possible questions include:

- What did you think of the History readings?
- Was there anything that was a surprise to you?
- Was there anything you read about that moved you?
- How have your feelings/understanding of Clover changed since you read the History posts?
- Are there stories you would like to hear more about?
- Is there anything you feel was left out of the History?

If you don't know the answers to any of the questions your Team Member asks just say "I don't know" and tell them that you will follow-up. You can then pass your question to Ayr or another senior leader in the company.

When you administer the **History Quiz** passing is anything over 80%. If employee fails the quiz please review/re-train/etc.

# Purpose

## ACTIONS

- ❑ [Comic book Chapter 4: Purpose (Trainee, pending)]
- ❑ Read blog posts tagged “Purpose” (Trainee)
- ❑ Q&A with Manager (Trainee, Manager)
- ❑ Administer Quiz: Purpose (Trainee, Manager)
- ❑ Record progress in training log (Manager)

## MATERIALS

1. [Comic Book Chapter 4 (pending)]
2. Q&A guide (this guide)
3. Quiz: Purpose (WuFoo, 80% to pass)



## Clover's Purpose

Send the Purpose Letter to the Team Member going through this training and 2-3 days to read the posts on the website regarding Clover's Purpose. Make sure you set up a specific date and time for the Q&A. These posts cover 3 core areas of focus:

- (1) Reduce negative impact people have on the environment
- (2) Support and grow local businesses
- (3) Improve the health of our customers and staff

Talk to your Team Member about these goals. Ask why they think Clover cares about these things. Ask what types of things they care about. What do they wish to achieve in their life? What legacy would they like to leave behind?

# Clover Guide

## ACTIONS

- Nominate Clover Guide (Manager)
- Send Clover Guide letter (Manager)
- Go over reference guides (Trainee, SCL/Manager)
- Administer Clover Guide quiz (Trainee, SCL/Manager)
- Practice Clover Guiding 1-on-1 (Trainee, SCL/Manager)
- Schedule Clover Guide Validation (Trainee, Training Manager or Director of Communications)
- Record progress in training log (Manager)

## MATERIALS

1. CG nomination form (iPad)
2. CG letter (Google Drive)
3. CG reference guides (Google Drive)
4. CG quiz (iPad, 80% to pass)
5. CG validation outline (this guide)



## Intro

Remember your first time taking orders? Guiding someone through our way of doing things hasn't always been so natural to you. You've come a long way since then. Now we're going to challenge you to help build the future Clover Guides.

You'll notice we take our customer experience really seriously. You might be wondering why. You already know some of the reasons we're building Clover: to help the environment, create lots of jobs, send a lot of money to hard-working local farmers, educate customers and employees, and create a welcoming space where folks feel remembered and surprised and happy.

What you may not know is that Clover Guides may have the most impact on our ability to achieve these goals.

As a Clover Guide trainer, you'll be a major part of building a business. Your manager is going to lean heavily on you to build regular customers. You're going to demonstrate what's right, so that others can do the same.

## Training Guide and Timeline

PRE-TRAINING (1 week before scheduled training day)

Before you train someone, they must be **nominated and approved**. They must also complete some homework reading some blog posts on the website. This is so folks have a good idea of the importance of their job. This will take them less than 1 hour.

**Send them the Clover Guide letter** which will have links to the website and a separate video. Make sure that your trainee is clear on how to do this, walk them through the process if necessary.

TRAINING (1st day of training, 3 hours total)

Go over **Clover Guide reference materials part 1**.

Have your trainee shadow you taking orders for 1 hour.

Sit back down and go over **Clover Guide reference materials part 2**. When you feel your trainee is ready, have them take the **Clover Guide quiz**.

## APPRENTICESHIP

**1 on 1 training. Schedule this with a GM or a Store Communications Lead in the company.**

The apprenticeship period of Clover Guide training will ensure that they are prepared and confident in handling all sorts of customer interactions. This is a time for the trainer to shadow their trainee for 1-10 busy periods (approx. 2 hours each). Every new Clover Guide is different, some may get it on the first day, some may take a bit longer. Be patient and don't rush this process.

Pull your trainee aside every few customers during the shadowing to offer encouraging observations and constructive ideas.

Observe your new Clover Guide in action. Check their performance on the following dimensions. If they are doing all of these things correctly they pass their validation. Otherwise you should give them further coaching.

-Are they beckoning and approaching customers on their own

without you asking them?

-Are they finding out whether the customer is a first timer or not?

-Are they dealing with tough situations (allergies, first-time customers, long lines) correctly?

-Are they being themselves, not nervous, getting more and more confident?

-Are they making eye contact with customers and making them smile?

-Are they describing items perfectly?

-Are they recommending the correct thing to first time customers?

-Are they asking customers for feedback or to come back and let us know what they think?

-Are they tasting every item every day?

-Are they offering samples, talking about other items, increasing attachment rates?

-Are they telling Clover's stories and secrets?

-Are they not drifting away to do other things or chat with other staff?

-Are they learning things about customers, beginning to recognize people?

When you feel comfortable letting your Clover Guide fly solo, notify the Training Manager to schedule the Clover Guide Validation, which you can look over below.

## CLOVER GUIDE VALIDATION

## On The Job/Hands-On Validation

Observe the Clover Guide for 30 minutes.

1. How many customers?
2. How many times did they determine whether a customer was a first-timer?
3. How many samples did they share?
4. How many stories/Clover secrets did they share?
5. How many times did they ask for feedback from customer?
6. How many times did they make a customer smile?
7. How many times did they learn something about a customer?

Passing Score for "Clover Guide" at Clover: 40%

Passing Score for "Store Communications Lead" at Clover: 54%

## Verbal Q&A/Knowledge Check

### Discussion of Clover

- What's Clover's origin story? Talk me through how/why we started out.
- How many locations does Clover have? (changes)
- What's different about the way we take orders at Clover versus other companies?

- What are the 3 major goals Clover has as a company?

#### Discussion of our food

- How often does our menu change?
- Why does it change?
- What else sets our food apart?

#### Discussion of Clover Guiding

- Talk through the 4 phases of order-taking.
- Why is telling stories so important to us?
- Tell us about a great experience you've had with a customer while taking orders.
- Talk me through how you would deal with a customer with an allergy.
  - Allergy Policy: If a customer has a true allergy (not just a sensitivity or intolerance), the CG or SCL is immediately required to stop the order-taking process, and to hand off the transaction to the GM or person in charge on the shift (AM or TL) and connect them directly with the customer.

# Prep

## ACTIONS

- 1-on-1 prep training (Trainee, Lead Prep/Kitchen Manager)
- Pass Prep quiz (Trainee)
- Pass bench test (Trainee, Lead Prep/Kitchen Manager)
- Record progress in training log (Manager)

## MATERIALS

1. 1-on-1 with trainer (iPad, this guide)
2. Prep quiz (iPad)



## Prep Training

The Prep Role is the food touchstone of a location. This person is tasked with creating great food to our standards, and beginning to spread food knowledge and excitement to other members of the team and to customers. Training for the Prep position is an important and exciting time. This member of our team has been working for us for a while and is ready to step into a role that will determine the quality of food at a given location. This role might also go to an experienced prep cook who loves food and wants to be a part of what Clover is doing. Either way, following the training we have set up for them is crucial to their success and the quality of the food we will be sending out.

Prep training should happen primarily through 1-on-1 instruction with Lead Prep or a Kitchen Manager. Trainee will be introduced to all elements of the prep role and develop their knowledge through hands-on training. The trainee will develop skills by watching a task be performed, gaining background information and history of Clover food, and demonstrating the task for the Lead Prep or Kitchen Manager. The location manager should assist in setting up the 1-on-1 training with a kitchen manager. Total time for this portion of the training will be 2-3 shifts.

Stage 1 of training: Before the 1 on 1 training, the trainee must **watch the relevant prep videos.**

Stage 2: **Review station set-up.** Make sure employee understands how everything should look when they start their job. Focus on cleanliness and orderliness. It is impossible to do clean fast work without a well prepared workspace.

Stage 3: **Ask employee to watch you perform the given task.** Talk through important aspects of the job. Use similar descriptions/ reference the training videos. Have employee taste the fries and other item you are training. This sample should be free, not charged to the employee.

Stage 4: **Ask employee to try the task while you watch.** Give helpful feedback/ coaching. Be explicit about what you are looking at to determine whether

the employee is doing a good job. Repeat until confident with training.

Stage 5: **Check-in on already trained employee.** This should be done by the trainer throughout the training process as well as by the location manager after a day or two in the role. Re-train where necessary. Reinforce good habits with positive feedback. The trainee must **pass the prep quiz and bench test.** The Prep quiz can be found on the location iPad and passing is over 80% correct. If employee fails review wrong answers, coach/re-train as necessary. Have employee re-take the quiz. The bench test is Knife Skills 101 test and should be taken once training is complete.

List of training for this section:

- Sanitation
- Menu Map
- How to read a recipe
- Brothy soup
- Creamy soup
- Eggplant
- Israeli
- BBQ plates
- All drinks (lem, teas, sodas)

Remember, training is not complete until you **update the training log.** Go to the employee profile in When I Work to do this.

## SECTION 8

# ServSafe & Allergen

### ACTIONS

- Pass ServSafe Manager Certification
- Pass Allergen Awareness Certification

### MATERIALS

1. ServSafe/Allergen Resources (this guide)



In order to develop into a leadership position in the kitchen such as Team Leader, Lead Prep, Assistant Manager, or General Manager - you must be ServSafe Manager certified as well as Allergen Awareness certified. Below is a list of resources that we've compiled in the Boston/Cambridge area. Once you complete your training, send them to your Manager.

### **SERV SAFE**

### EXAM ONLY

### CROP CIRCLE KITCHEN

<http://www.cropcirclekitchen.org/servsafe.html>

### BERGER

JP

\$129

Classes Often

Lisa Berger

[lisa@servingsafefood.com](mailto:lisa@servingsafefood.com)

[www.servingsafefood.com](http://www.servingsafefood.com)

### CLASS AND TEST

GREATER BOSTON FOOD BANK

Every Other Month

Kendra Bird

[kbird@gbfb.org](mailto:kbird@gbfb.org)

[http://www.gbfb.org/agency-resources/pdf/2015\\_food\\_safety\\_workshops.pdf](http://www.gbfb.org/agency-resources/pdf/2015_food_safety_workshops.pdf)

FOOD SAFETY CERT (Quincy, Redline)

\$99

Every Tuesday, 10-3pm

<http://www.food-safety-cert.com/offices/quincy>

COSTA

\$129

Charlestown, MA

Mike Scuderi

[scuderim@freshideas.com](mailto:scuderim@freshideas.com)

<http://www.freshideas.com/aboutus/news.html>

MRA

\$100 for MRA members, \$150 for non MRA members

[tzibell@massrestaurantassoc.org](mailto:tzibell@massrestaurantassoc.org)

<http://www.massrestaurantassoc.org/MRA/Education/Sanitati>

[on Training/MRA/Education Training/Sanitation Training  
g.aspx?hkey=774e8147-1b58-436c-87a1-ab55c63bdc38](http://www.massrestaurantassoc.org/MRA/Education/Training/Sanitation/Training.aspx?hkey=774e8147-1b58-436c-87a1-ab55c63bdc38)

### **ALLERGEN AWARENESS:**

The Allergen Awareness online exam

\$10

<http://www.servsafe.com/ss/catalog/productDetail.aspx?ID=1844>

# Team Leader v. REST

Team Leader is the first role at Clover with supervisory responsibilities. Wow. Being in charge of others can be exciting but can also be a bit scary.

Team leaders define our culture, our food quality, our customer interactions. Think about how you can help them gain confidence in their role.



# Leadership + TL Project

## ACTIONS

- ❑ Coaching from Manager (Trainee, Manager)
- ❑ Project and presentation (Trainee, Manager)
- ❑ Record progress in training log (Manager)

## MATERIALS

1. Coaching guide (this guide)
2. Project guidelines (this guide)



## Leadership

Much of the leadership coaching will be done in person. This will happen in an opportunistic way, day to day.

Look for opportunities to use real life situations to further develop your Team Leader. This may include being clear and direct with an hourly employee about what needs to be done next. It may include training a new employee or welcoming an interviewee. Take the time to explain the positive results of doing the task correctly and the opportunity to develop oneself as a leader among staff.

## TL Project and Presentation

### WHAT?

When your new Team Leader is first promoted, it's the perfect time to assign them the TL Project. It's a great first introduction to thinking differently about their role. Right now, your TL may look at you as somebody they don't know too well yet. They may even feel a little distant, or disconnected from the bigger picture of what it means to be a leader at Clover. For many, this will be their first opportunity to lead a team - that's a big step! We'd like to prepare them to step into that place of leadership. A first step towards that is starting to think like a leader. So, for this project we'd like your TL to think about something that will help improve Clover. These projects should be simple and focused - ask your TL to think about something difficult during their day and what possible solutions might work to make it better. This project needs to be well defined and finite.

### WHY?

Effectively leading at Clover means helping make our company better. Since the beginning, we've approached improvement by doing tests that are CHEAP, and then GATHERING RESULTS on the effect of our ideas, then repeating. We'd like to see our TLs practice identifying a problem, structuring a solution, implementing it, gathering feedback, improving their solution, and repeating. The main focus of this project should be the implementation and iteration. We want our TLs to

carry out a project on their own, and see it through from start to finish.

### HOW?

1. First, set a goal presentation date: 2 weeks total is the expectation for selecting, implementing, and presenting.
2. You and your TL decide on a project and it is approved by you (the GM).
  - a. **GOOD PROJECTS:** organizing and labeling paper goods storage, or creating a log to track gas filling of trucks, or finding a better instrument to use for cleaning
  - b. **POOR PROJECTS:** creating a restaurant opening checklist, or writing out a process for cleaning the fryer (I just haven't tried it out just yet!), or painting one of the walls in the restaurant bright green (you know, to bring in some color)
3. Your TL sends a project proposal via email to the Training Manager and await it's approval.
4. Once approved, make sure your TL clearly understands the expectations. This project should not take your TL any longer than 1 hour to complete and implement.
5. Once implemented, your TL should have the project in place for approx. 1 week. During this time they will collect feedback from coworkers and make iterations.

6. After this stage, it's time for your TL to present their project at the manager meeting. The presentation should NOT be the focus of the project. They will have 5 minutes to present their project - we want to hear about their process. What was the problem, what was the solution, how did they implement their project, what kind of feedback did they receive, what changes (if any) did they make? Questions? Your TL can use visual aids (e.g. a picture of their project in the location, write their process up on the whiteboard), but please make sure they keep it simple.

# Opening Team Leader

## ACTIONS

- Trainee observes open (Trainee, Manager)
- Trainee opens with observation (Trainee, Manager)
- Trainee opens solo (Trainee, Manager)
- Record progress in training log (Manager)

## MATERIALS

1. Jolt checklist (iPad)
2. 1-on-1 training guide (this guide)



Team Leaders face a variety of situations, and while they will always have a Manager to call on when needed, it's a benefit to all if they feel confident in their role. As you train a Team Leader you should be looking to coach leadership qualities.

### Training Open

Step 1: Make sure your Team Leader in training knows what to expect. Walk them through the training process, prepare them for the early/late shifts. Encourage them. It's going to be an intense training and the better prepared they are, the better.

Step 2: Meet your Team Leader at the Truck/ Restaurant to have them **shadow you on an open. Give them the Jolt checklist** to follow-along with the work you're doing. It is im-

portant that you follow the stages outlined in the checklist to the letter. Failing to do this risks undermining the rest of the training process. Ask them to have a notebook and take notes as you walk through the procedures.

**Step 3: Meet your Team Leader at the truck/restaurant for a second training shift.** This time you should shadow your Team Leader and provide help as they work to lead the open/close. Refer to the checklist often. Explain the “whys” as well as the “hows.” Repeat until you have confidence the trainee could run the shift without your intervention. This should not be more than 3 days maximum in Step 3.

**Step 4: Meet your Team Leader at the truck/restaurant for a final training shift.** This time you will be “training wheels” ensuring the trainee doesn’t do anything that would risk service or endanger anybody, but otherwise staying out of the way and observing. Share your observations with the trainee and coach where necessary. Repeat until you have confidence the shift would run clean without you present. [Minimum of 2 days in Step 4, maximum of 3 days in Step 4.]

Remember, training is not complete until you **update the training log**. Go to the employee profile in When I Work to do this.

# Closing Team Leader

## ACTIONS

- Trainee observes close (Trainee, Manager)
- Trainee closes with observation (Trainee, Manager)
- Trainee closes solo (Trainee, Manager)
- Record progress in training log (Manager)

## MATERIALS

1. Jolt checklist (iPad)
2. 1-on-1 training guide (this guide)



Team Leaders face a variety of situations, and while they will always have a Manager to call on when needed, it's a benefit to all if they feel confident in their role. As you train a Team Leader you should be looking to coach leadership qualities.

### **Training Close**

**Step 1:** Make sure your Team Leader in training knows what to expect. Walk them through the training process, prepare them for the early/late shifts. Encourage them. It's going to be an intense training and the better prepared they are, the better.

Step 2: Meet your Team Leader at the Truck/Restaurant to have them **shadow you on a close. Give them the checklist** to follow-along with the work you're doing. It is important that you follow the stages outlined in the checklist to the letter. Failing to do this risks undermining the rest of the training process. Ask them to have a notebook and take notes as you walk through the procedures.

Step 3: **Meet your Team Leader at the truck/restaurant for a second training shift.** This time you should shadow your Team Leader and provide help as they work to lead the open/close. Refer to the checklist often. Explain the “whys” as well as the “hows.” Repeat until you have confidence the trainee could run the shift without your intervention. This should not be more than 3 days maximum in Step 3.

Step 4: **Meet your Team Leader at the truck /restaurant for a final training shift.** This time you will be “training wheels” ensuring the trainee doesn't do anything that would risk service or endanger anybody, but otherwise staying out of the way and observing. Share your observations with the trainee and coach where necessary. Repeat until you have confidence the shift would run clean without you present. [Minimum of 2 days in Step 4, maximum of 3 days in Step 4.]

Remember, training is not complete until you **update the training log.** Go to the employee profile in When I Work to

do this.

# Store Communications Lead

## ACTIONS

- Nominate SCL (Manager)
- Send SCL letter (Manager)
- Set up Clover email address (Manager)
- Sign up for SCL bi-weekly meetings (Manager)
- Record progress in training log (Manager)

## MATERIALS

1. SCL nomination form (iPad)
2. SCL letter (Google Drive)
3. Clover email form (Google Form)



The Store Communications Lead is the mayor of their corner. They should spread excitement about Clover through their neighborhood and act as a model for all other Clover Guides to emanate.

A great Store Communications Lead will:

- Create an open, welcoming atmosphere centered around food
- Connect authentically with customers and get to know tons of people
- Have a deep understanding of the Clover brand and mission
- Build a sense of community within their restaurant
- Learn as much as they can about Clover food and share with customers and staff

- Train others as Clover Guides and track their progress
- Collect feedback from customers and staff
- Proficiently tell stories about each of our menu items daily
- Ensure every aspect of the customer experience is wonderful (including clean, frictionless, friendly)
- Contribute to team and location by building sales week after week

If you have someone on your team who has the potential to do accomplish all of the goals above, talk to your Area Manager about getting them into this role. **You'll need to: 1. nominate them via the WuFoo form and 2. ensure that they passed their CG validation with a score above 54%.**

List of training for this role:

- attend bi-weekly meetings
- reach sales goal assigned by GM
- train how to train a CG (trainee must pass validation)
- AM class: Managing Others
- AM class: Developing Hourly Staff
- GM class: Customer Experience class
- GM class: Clover Brand class
- GM class: Driving Sales class

- an SCL class: Twitter, Responding to Customer Feedback, Menu Displays, Managing the Dining Room
- SCL Project

# Lead Prep

## ACTIONS

- 1-on-1 training (Trainee, Kitchen Manager)
- Administer Lead Prep quiz (Trainee)
- Pass Knife Skills 102 (Trainee)

## MATERIALS

1. 1-on-1 training (this guide)
2. Lead Prep quiz (iPad)
3. Sign up for Knife Skills 102 class (under “Events” on the website)



## LEAD PREP

**Part 1: 2-3 days @ KIT.** The Lead Prep trainee will spend time in the commissary kitchen with the Kitchen Manager learning more about our food (i.e. how we make hummus, fal-afel, or even cutting a big bag of onions).

**Part 2: Training on how to train someone on PREP.** This will be done by one of the Kitchen Managers. This part of the training is complete once the Lead Prep has successfully and fully trained someone into the Prep role.

**Part 3: Check-in on already trained employee.** This should be done by the Kitchen Manager throughout the training process as well as by the location Manager. Re-train where necessary. Reinforce good habits with positive feedback.

Part 4: The trainee must **pass the Lead Prep quiz and pass Knife Skills 102**. The Lead PREP quiz can be found on the location iPad and passing is over 80% correct. If employee fails review wrong answers, coach/re-train as necessary. Have employee re-take the quiz. The Knife Skills 102 class needs to be taken, and the trainee must pass the test.

Part 5: Remember, training is not complete until you **update the training log**. Go to the employee profile in When I Work to do this.

# Assistant Manager v. REST

The new Assistant Manager you are working with is the future of Clover.

It may seem that little has changed, your Assistant Manager should already have a lot of experience at Clover, but really everything has changed: running the show when you're not there, office hours, hiring...

Look for opportunities to stretch your manager, but make sure you are there to support their growth. They're taking on a lot in this new role.



# Training Modules + AM Project

## ACTIONS

- Personal Development Homework (Trainee)
- Role Play (Trainee, Manager)
- Office Hours (Trainee, Manager)
- Sourcing & Interviewing (Trainee, Manager)
- Onboard a New Hire (Trainee, Manager)
- Train a Team Member (Trainee, Manager)
- Train a Team Leader (Trainee, Manager)
- AM Project (Trainee)
- Record progress in training log (Manager)

## MATERIALS

1. 1-on-1 (this guide)
2. Personal Dev checklist (WuFoo form)
3. Phone interview guide (Google docs)
4. Working interview guide (Google docs)

## Personal Development Homework

Within the first week in their role as Assistant Manager you should sit down and assign personal development homework. The homework is very simple. Send your Assistant Manager the Personal Development Letter. At the end of every working day your new manager will fill out a WuFoo form with a couple of sentences answering the following questions:

**(1)**What did you do today that worked really well?

**(2)**What challenged you today or led to you feeling failure?

This homework should continue for the first 2 weeks your manager is in their new role. Make sure you set up a specific timeline and due date for this task. The 10 reports should be submitted to the Training Supervisor before your Assistant Manager is considered complete in training (and eligible for a promotion).

## Office Hours Checklist

Stage 1: Schedule for your Assistant Manager to accompany an experienced manager (you) in office hours. Make a point to review the checklist and explain what is being done.

Stage 2: Have your assistant manager complete office hours with an experienced manager (you) watching over their shoulder and helping out where appropriate. Repeat until Assistant Manager is ready to do office hours without support.

## Role Playing Key Moments

You should schedule a 60 minute session to role play with your new assistant manager. Role playing almost always feels odd to the participants, but it can be a very powerful tool. Remember that your assistant manager will only take the training as seriously as you take the training. So use this as an opportunity to show him/her that you care about their development.

Take turns playing the different roles. Encourage your assistant manager to come to you in the future for additional role play as they encounter situations they are unsure of how to handle.

Required Role Playing Scenarios:

### **(a) Employee is late for work -**

1st offense - send home, record in WIW, fill out Incident Report

2nd offense - send home, reduce hours, record in WIW, fill out Incident Report

3rd offense - send home, remove from schedule, record in WIW, fill out Incident Report (both for late and termination)

### **(b) Employee is not in uniform -**

1st offense - send home, record in WIW, fill out Incident Report

2nd offense - send home, reduce hours, record in WIW, fill out Incident Report

3rd offense - send home, remove from schedule, record in WIW, fill out Incident Report (both for late and termination)

**(c) Employee calls out sick for 5th time in 2 weeks, not normal behavior -**

Important to have a discussion, better understand what is going on. Fill out Incident Report, reach out to HR help better handle.

**(d) Employee or Customer gets injured -**

Attend to injury, fill out incident report ALWAYS within 24 hours, if the person needs medical attention send to the hospital. Let them know this is a worker's comp issue, follow Worker's Comp procedures.

(If the employee visits the hospital, call in the injury to our insurance company - instructions found in the incident report.)

**(e) Employee gets angry at work, shouting -**

Pull employee aside, understand the situation. Send home if necessary. Fill out Incident Report.

**(f) Employee says something inappropriate to another employee (race or sex related) -**

Send employee(s) home and contact HR by phone and email IMMEDIATELY. Discuss with impacted employee(s). Fill out incident report within 24 hours.

**(g) Employee continues to make coffee incorrectly after being trained 3 times -**

Discuss, understand what is going on. Try another station? Decide whether or not they may be a good fit.

**(h) Employee moves slowly, no hustle -**

Work with employee. (Ideas: 1:1. Set-up challenges. Pull out timer. Use peer pressure.)

**(i) Notice employee doing a great job talking to a customer -**

Complement, use specifics and thank them for helping us build the company.

**(j) Employee wants more hours -**

Talk about what you are looking for/need to see from them.

Examples: Have they been late? Be on time for \_\_ amount of time. Location is slow? Offer hours on WIW at other locations or within your own - pick up shifts to prove that they want more hours. Bring up catering hours.

**(k) Employee did not receive direct deposit pay -**

Talk to employee to figure out what happened. Ask for evidence (e.g., paystub from iPay/bank statement). Talk to HR to figure out what happened. DO NOT REFER THEM TO HR. Send request for off-cycle checks to Megan and Ayr.

If you encounter a situation in role playing that you do not know how to handle, don't worry. Just say, "That's one I've never encountered/thought about. Let me follow-up with you on that after talking to others to see how they handled that..."

## **Hiring The Next Generation** (Sourcing, Interviewing, Hiring A New Employee)

This section of the class is very hands on. We will cover interviews, hiring TMs, onboarding, training TMs, and training TLs. There will be much for the AMs to do after this class!

### Sourcing Employees:

Use the whiteboard to draw a flow chart of how we source new employees. Discuss tools and expectations.

-If someone taken the time to apply to Clover, we will call them within 24 hours.

-Phone interview role play: 90sec: What are you good at? Why would we be really happy to have you here? What would impress me about you in the first 2 weeks of you working at Clover?

-If an applicant doesn't know much about us, tell them that they should find out a little bit more and reapply if they're interested.

### Interviewing:

-First impressions are important!

-Role play introduction/goodbye for interview (30 sec each).

-Role play asking the team about interviewees (we value their input).

### Hiring/Onboarding:

-Offer Letter: be very clear about expectations of onboarding (when, where, and what to bring).

-Onboarding Packet: where to find it. The AM will do all of this training alongside their GM.

## **Problem Solving** *Assistant Manager Project*

### WHAT?

When your new Assistant Manager is first promoted, it's the perfect time to assign them the AM Project. Don't wait - this is an excellent first assignment to get them thinking differently about the changes happening as they move into their new role! Right now, your AM may feel a little unsure, or separated from what it means to be a Clover Manager. We'd like to prepare them to step into the mindset of managing and what that means. A first step towards that is starting to think like a Manager. So, for this project we'd like your AM to think about something that makes the Manager's job day to day a little difficult or uncomfortable. During this period of their training, they'll likely be doing their Personal Development homework and focusing on their challenges and wins every day. This sort of reflection is where many AM Projects are born. Once they've identified a challenge they want to tackle, they can come up with a solution to make that job easier. These projects should be simple, focused, and well defined.

### WHY?

Just as with the TL Project, the AM Project is about flexing those problem solving skills and helping make our company better. This is a huge part of effectively leading at Clover at all stages. As your AM knows, we approach improvement by doing tests that are CHEAP, and then GATHERING RESULTS

on the effect of our ideas, then repeating. Emphasize this with your AM when assigning the project. We'd like to see our AMs practice identifying a problem, structuring a solution, implementing it, gathering feedback, improving their solution, and repeating. The main focus of this project should be the implementation and iteration. We want our TLs to carry out a project on their own, and see it through from start to finish.

#### HOW?

1. First, set a goal presentation date: 2 weeks total is the expectation for selecting, implementing, and presenting.
2. You and your AM decide on a project and it is approved by you (the GM).
  - a. **GOOD PROJECTS:** developing a system for communicating training amongst the managers at your location, or
  - b. **POOR PROJECTS:** reshooting all training videos
3. Your AM sends a project proposal via email to the Training Manager and await it's approval.
4. Once approved, make sure your AM clearly understands the expectations. This project should not take your AM more than 1-2 hours to complete and implement.
5. Once implemented, your AM should have the project in place for approx. 1 week. During this time they will collect feedback from their fellow management team and make iterations.

6. After this stage, it's time for your AM to present their project at the manager meeting. The presentation should NOT be the focus of the project. They will have 5 minutes to present their project - we want to hear about their process. What was the problem, what was the solution, how did they implement their project, what kind of feedback did they receive, what changes (if any) did they make? Questions? Your AM can use visual aids (e.g. a picture of their project in the location, write their process up on the whiteboard), but please make sure they keep it simple.

# Managing Others Class

## ACTIONS

- Attend Managing Others Class (Trainee)
- Record progress in training log (Manager)

## MATERIALS

1. Class guide (Class Instructor, this guide)



## Managing Others Class (2 hours)

This first class is designed to help new managers learn basic management skills.

As a company we have come far, think about when you first started. There are probably lots of things that seem easier now because we have established new structure and tools. Training a TM or operating the resupply, all run much more smoothly now because of the systems we have in place.

Some of this training will be more personal and reflective than the other stages. This is a really exciting step; it's a time when you get to share your experience and personal connection with Clover. This time can also be a little scary, for some people this is the first time they will hire or fire someone, be responsible to make important decisions in your absence or even understand what a salary role means. Think of this class as a way to welcome the AMs and Kitchen/Bakery Leads to their role, inspire and motivate them and establish all the manager skills needed to run a solid Clover operation.

Open the class by introducing yourself, saying hello, and congratulations to these new AMs and Kitchen/Bakery Leads! Allow everyone to introduce themselves, where they work, and a little something about themselves. This class marks a huge shift in the focus of their training. Before this, training was skills based and mechanical. It will now be focused on bigger, broader, more complex things such as leading others and motivating. This training is class based and includes more one on one coaching. Next, address this guide. Let the AM know that you'll be using it as your guide to teach this and future classes. This reinforces the TTG as a critical tool that we all use on a day to day basis. Encourage them to look forward - cheating is okay here!

Begin talking briefly about what it takes to inspire those who work for you. Focus on what is done to **SHOW** and **TELL** others what matters, what you value, what motivates. Emphasize active role of management. It is not enough to **FEEL**, **BELIEVE**, etc., if managing others you need to find ways to

clearly communicate/demonstrate those values and motivations. Think about what you're showing people by all of the things that you do/actions you take.

Begin by relating why you are here, at Clover. What motivates you? What do you **LOVE** about your job? **WHAT KEEPS YOU HERE?**

Have everyone go around the table and talk about why they are here:

1. Talk about what you found/find attractive about Clover.  
Why have you dedicated yourself to this?
2. Ask each person to talk about why they have dedicated themselves to Clover.
3. What part of what they are sharing have they shared with their staff?

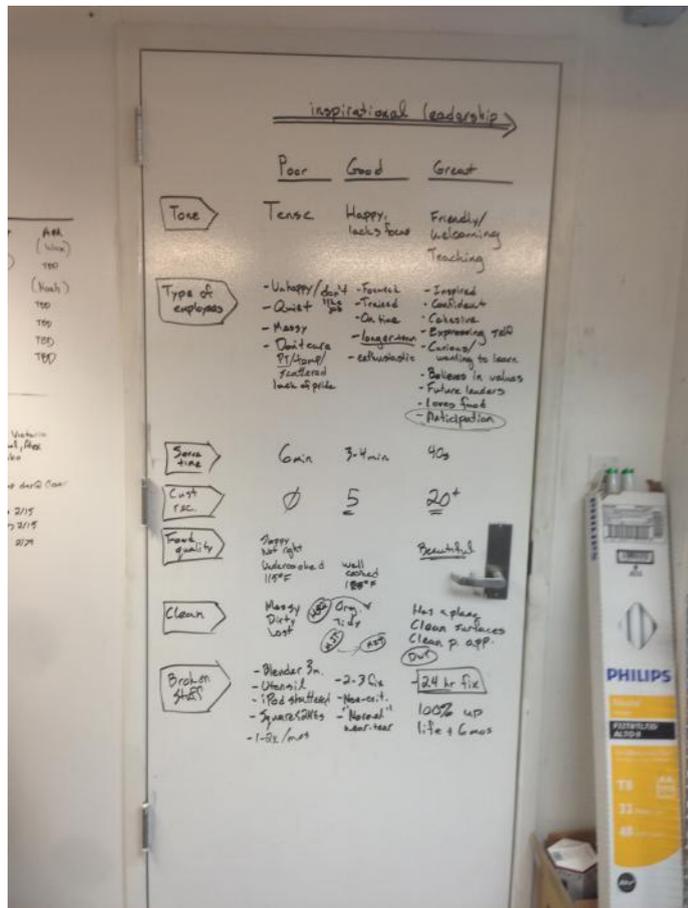
You will likely have an opportunity to make a **distinction here between small talk with staff vs. the impact of sharing more inspiring speech**. A balance of both is what a great leader will do. Examples of things that drive and motivate people: talking about the new coffee, talking about the story of Clover. All of these achieve something that a discussion about the weather or this past weekend's activities will not.

Additionally, use this as an opportunity to talk about the transition from **YOU/THEY (referring to Clover) to US/WE**. As leaders everybody in this class should be "US/WE." This is

a good time for some discussion and self reflection. Saying “they” implies a separation. Elaborate on the idea: if not “we,” it will be difficult to motivate staff and help them feel a part of the larger picture.

## What Does Inspirational Leadership Look Like? (50 Min)

--> **Clean Clover** Draw this chart up for class to see. Ask class to help fill in the chart. Help where necessary. Standards at end of session should look similar to this example. Discuss with the team tangible ways they can tell if they are inspiring their staff through their leadership.



	POOR	GOOD	GREAT
Staff atmosphere	Tense	Happy, lacks focus	Friendly, welcoming, teaching
Type of employee	Unhappy, quiet, messy don't care, lot's of part time, temporary, scattered, lack of pride, negative attitude	Focused, basic training in place, ontime, longer term, enthusiastic	Inspired, confident, cohesive, expressive, curious, wanting to learn, believes in values, future leaders, loves food, anticipates needs
Serve time	6 min	3-4 min	40 s
Customer recommendation	0	5	20+
Food quality	Sloppy, not right, undercooked,	Well cooked	Beautiful
Cleanliness	Messy, dirty, lost	Organized, tidy	Everything has a place, clean surfaces, clean personal appearance

Q: Have you ever seen anybody acting "un-Clover-like?" Who? When? Why?

*Each person in the class should have an answer. Write answers on board (1 for each class attendee).*

*After going through everybody's answers follow up:*

Q: How do you fix this? Go through potential positive solutions for each situation

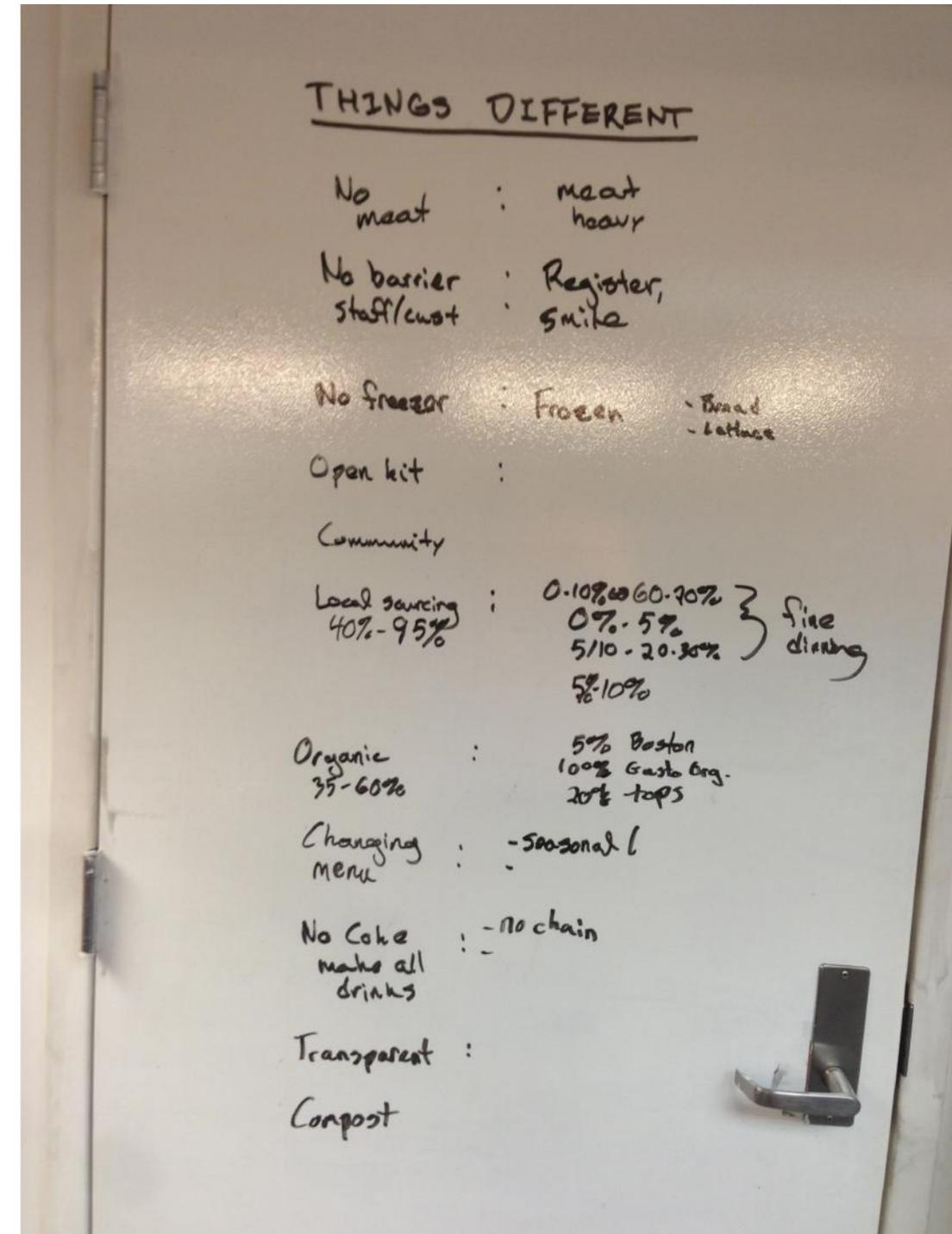
## What's Different About Clover?

As you write the following grid up on the board discuss each item. What about Clover is different? Why? Can the group think of others who do similar things?

(In most cases there are few/none.) When people think somebody does "e.g., Chipotle uses organic" correct appropriately. If you don't know the actual fact, ask an appropriate question: e.g., "I didn't know that about Chipotle. Could you gather some info for the class? I'd love you to find the % of Chipotle ingredients that are organic. Could you share your findings and the source?"). Note that there are many mis-impressions in our industry.

This exercise helps staff understand our challenges, our commitments, and our opportunities. Discuss why these differ-

ences exist. Ask group to think about what challenges they may present. Ask what opportunities arise based on these differences.



## **Homework (due By Part 2: Developing Hourly Staff Class)**

Your leadership as an AM is drastically different now, you are being held to greater expectations and from more people than before your manager, director, employees, customers (both current and future). And you're on a path to even great responsibility. Today we talked in great detail about ways to motivate, inspire and lead your team and business. We have reviewed what it means to be a Clover leader and laid out the expectations we have for you. Your homework is to write a reflection on what you have learned today. Share your thoughts on what you value in your role at Clover and what one thing you have found inspirational in today's talk. How will you apply this to your leadership style? You will be sharing these reflections in our next and final session. Don't be afraid to share new ideas and thoughts with the class.

Q: What surprised you most about this chart?

Q: Do you feel new inspiration from the stuff you have learned from this exercise?

## Developing Hourly Staff Class

### ACTIONS

- Attend Developing Hourly Staff Class (Trainee)
- Record progress in training log (Manager)

### MATERIALS

1. Developing Hourly Staff Class (this guide)



## Developing Hourly Staff Class (2 hours)

This class focuses on the Assistant Manager's role in training hourly staff. This is one of the most critical functions of a location manager. There is no variable that has a higher impact on location performance than quality of your staff.

This portion of the training will be very specific in nature, focusing on activities, exercises, and hands-on learning.

**IMPORTANT:** when planning this class it is essential that you give the manager at the restaurant 3-4 days notice. You will be using their restaurant as a training laboratory for 30 minutes. Don't time this class around peak operations.

Q: What did you take away from last class?

Have each attendee talk about what was most impactful for them in the previous session. What did they learn? What have they done differently over the past week or two because of the class?

## **Hiring The Next Generation (20 Minutes)**

This section of the class is very hands on. We will cover interviews, hiring TMs, onboarding, training TMs, and training TLs. There will be much for the AMs to do after this class!

Sourcing Employees:

Use the whiteboard to draw a flow chart of how we source new employees. Discuss tools and expectations.

-If someone taken the time to apply to Clover, we will call them within 24 hours.

-Phone interview role play: 90sec: What are you good at? Why would we be really happy to have you here? What would impress me about you in the first 2 weeks of you working at Clover?

-If an applicant doesn't know much about us, tell them that they should find out a little bit more and reapply if they're interested.

Interviewing:

-->**Clean Clover**

-First impressions are important!

-Role play introduction/goodbye for interview (30 sec each).

-Role play asking the team about interviewees (we value their input).

Hiring/Onboarding:

-Offer Letter: be very clear about expectations of onboarding (when, where, and what to bring).

-Onboarding Packet: where to find it. The AM will do all of this training alongside their GM.

## **Training Practical (30 Minutes)**

Have AMs pair off in groups of 2 and go down into the location kitchen. Each group trains 1 Team Member or Provisional Employee on a specific item. Use proper training techniques (intro, video/materials, set-up, you show, they show, taste).

Take note of any training shortcomings/issues. If possible use photos to document. E.g., station was not properly set-up before training session. E.g., staff member was not asked to eat sandwich after demo.

Discuss what worked brilliantly and challenges faced.

-How was it? How did the training feel?

-When it's a "re-train" - encourage that employee to be receptive.

## **Using Company Resources (10 Minutes)**

Ask employees where they turn for the following types of questions. Write each question on the board along with the answer.

### **Ayr Muir- CEO**

Appropriate person to talk to about the Values, Vision, Purpose or History about the company...wonder why?

### **Wanda Reindorf- CFO**

Responsible for all things having to do with finance. Great person to talk to about how we put together our budgets, all things accounting, and fundraising.

### **Megan Pileggi- Director of Human Resources**

Resource for helping with issues pertaining to helping staff your unit. If you ever feel uncomfortable at work this is the person you should go to. Manager contact for payroll and iPay questions.

### **Lucia Jazayeri- Director of Communications**

Resource for helping you grow your sales from the customer point of view. Sets up events with farmers, brewers and roasters. Sets the overall tone of Clover.

### **Christopher Anderson - VP of Food**

Responsible for relationships with farmers, brewers and roasters. Oversees kitchen production, the roll out of new food items and host of the Food Development Meetings. Chris was employee number 3 at Clover and can answer lots of questions about food, where it comes from, why and how it moves around the company.

### **Rob Christensen - Area Manager**

Have a question about your location's operations? Opening a new Clover restaurant? Your career path? Rob currently oversees HUB, KND, DTX, FIN, LMA.

### **Michael Minichello - Area Manager**

Michael is the second half of our location operations crack team. If you're a part of one of his restaurant teams, come to him for all operational and development questions. He's currently overseeing: HSQ, BUR, BLV, HFI, WST, TRK6, TRK2.

### **Sara Higelin- Training & Development Manager**

Sara used to run trucks, then she took a break, then she came back. She knows a ton about Clover and loves to work with others on learning more too. She can help you train new employees and help managers become better at training. She also works to coordinate training and update training docs (like this one).

### **Ethan Sherbondy- Systems Engineer**

He loved Clover while he studied at MIT, started making sandwiches and coffees with us when he graduated, and offered to help us out with IT. Now, questions and history about our POS, Order Ahead, and the future of Clover's technology path are under his umbrella.

## **Jenny Salsich - Catering Managing**

Responsible for catering and events at Clover. If you want to grow sales at your location through catering, Jenny is your go to.

## **Vincenzo Pileggi - Director of Food**

He runs our Kitchen and Bakery production, he develops food, he has run our largest operations in the past, and is a star trainer. He can tell you lots of stories about Clover - like Chris he has been around since the beginning.

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# General Manager v. REST

We want Clover managers to be the best managers in the industry. Period.

The training for General Managers is different from the other training modules. It is less focused on skills, more focused on experience and judgement. The success of these materials depends on how they are integrated into the new manager's routine.

Your new manager may be taking on one of the larger challenges of their life. Be there for them. Be excited for them.



# Leading at Clover

## ACTIONS

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- Part 1: Personal Development Class (Trainee)
- Part 2: Developing Assistant Managers Class (Trainee)
- Part 3: Time Management Class (Trainee)
- Record progress in training log (Training Manager)

## MATERIALS

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1. Personal Development Class (this guide)
2. Developing Assistant Manager Class (this guide)
3. Time Management Class (this guide)

# Part 1: Personal Development Class

## ACTIONS

- Myers Briggs personality test (Trainee)
- Part 1: Personal Development Class (Trainee)
- Record progress in training log (Trainer)

## MATERIALS

1. Personal Development Class (this guide)

## Part 1: Personal Development Class (2 hours)

This class is designed to help a new general manager reflect on their strengths and weaknesses. The class should be taken early in the GM's tenure and will provide a framework for on-going development and improvement.

In this part of the training you will be speaking to some of the more general topics that build Clover as a company. You will start with some inspirational topics then branch into teaching your GM's about what their role looks like, how they should think about it and how they should develop other roles beneath them.

### Share Myers Briggs Homework (30 minutes)

Each trainee should have taken the Myers Briggs test online. Take 10 minutes to share results. Use Myers Briggs guide to talk about what each dimension means.

#### **Extrovert vs. Introvert**

How are you socially?

-What is an extrovert? After spending time with people, you feel charged/energized

-What is an introvert? After spending time with people, you feel tired/need to recharge

## **Intuitive vs. Sensing**

How do you process/deal with information?

-What does intuitive mean? Integrate information from different sources --> solution. Impressions, meanings, and patterns of information.

-What is sensing? Step a, b, c ---> solution. Physical reality (5 senses) and what is actual, current, present, real.

## **Feeling vs. Thinking**

How do you make decisions?

As a manager of teams, you have to pay close attention to this. Most potential for conflict. A much more emotional component.

-What does feeling mean? If you ask, “how do you feel about this?” They’ll be engaged. Concerned with values and what is best for each person involved.

-What does thinking mean? If you ask, “what do you think about this?” They’ll be engaged. Analysis, consistency, logic.

## **Judging vs. Perceiving**

How do you approach planning?

-What is judging? Make a list. Planned, orderly, settled, organized way of life.

-What is perceiving? On the fly. Flexible, spontaneous, understand and adapt to life.

Understanding your profile and how others can be different can help us build self-awareness. This type of self-reflection might not be as helpful if you’re great with people, however, for those not as great with people - this can be life changing.

-Give examples of where incompatible types may find conflict. Ask group to share possible resolutions.

-Give examples of where compatible types may find harmony. Ask group for ways to advance or support that compatibility.

## **Qualities and Actions of a Great Manager (30 minutes)**

Each manager should take 5 minutes to write down the name of a manager they found inspirational and describe clearly the **qualities** they believe that person embodied and the **actions** that best describe that manager’s behavior.

Group should share a few of these reflections. A whiteboard can be used to jot down key qualities.

What is a good leader? What does that look like to most people? What are those categories? Transition to talking about qualities and actions Clover would like to develop in managers.

These should be written on a whiteboard. Point out differences in all examples.

Talk about cookie cutter manager vs. reality. We’re not looking for all managers to be the same. We are looking for all managers to be effective.

## **Homework (5 Minutes)**

Homework will be to observe 5 specific actions a senior manager or leader takes that could be described as Characteristic

Actions of a Great Manager. This specific list/recall of events should be shared at the beginning of the next manager training session.

## Inspirational leadership (20 minutes)

The Managers in your class will be, perhaps for the first time in their lives, directly responsible for the actions and welfare of a large group of people.

The manager's team will look to them to answer questions, to fill out the staffing schedule, to fix broken equipment, to train new employees, etc. But more important than any of these specific questions/problems will be the unspoken expectations, the silent role the manager plays in shaping a team. Through your attitude, work ethic, language, body-language, decisions, leaders have the opportunity to model and inspire the folks who work for them.

## Role Modeling

Start by asking the group these questions:

Do you think anybody working for you would like to be you?  
Do you think any of your employees wants your job?

Get some specific names on these questions. Ask each manager to talk about one leader that inspired them. Push for a serious example, this should be somebody who inspired them to do something difficult and meaningful that they would not have without that inspiration.

If you're inspiring people, would love to be like you, you're lifting them up and showing them great things about themselves. Don't fit into this right now? Think about how you might do this really well. Tough crowd? Think about things to turn this around. Elevate the people on your team. This can be negative or positive. Negative role modeling can be very destructive.

Give examples of when this does not take place. For example: Ayr talks about when he cleaned bathrooms at Burger King. The GM inspected his work, told him to do it better. He went back and moved the rag around half-heartedly and didn't do a good job. The Manager looked for a second time and said OK. Ayr spent the rest of that job going to clean the bathrooms without really cleaning them (just waited in there until the right amount of time went by).

## Positivity

Talk about happy environments. Ask managers where they are happy. We have a wonderful opportunity at Clover, to create positivity which is underrated in our industry. More people will want to be around positive people, employees, and customers.

Then share this statement with the group:

We will create a place where people connect through, over, and because of hard work.

This is from one of the earliest business plans for Clover. Do you think this is a good aspiration for Clover? Why do you

think Ayr wrote this? He was inspired by old New England, or “Yankee” values of pride and joy through hard work.

Ask the group:

What have you done in your job in the past that has made your employees happy? What makes you happy at work?

What contributes to unhappy people at work?

What little things do you do that make people who work for you unhappy?

Make lists on the board and discuss examples with the group.

## Homework

Take 5 photographs that capture happy employees. Bring these to the next Manager training class.

## Active Management (20 minutes)

Here we are talking about the difference between a manager who passively participates in what is happening vs. a manager who actively steers what is happening.

Quick reference:

- Riding vs. steering the ship
- Passive: solving shit that comes up
- Active: making sure the shit doesn't come up
- Passive: might not know who is working a station
- Active: knows answers to questions

## Impact Of Active Management On Teams

A successful active manager relies heavily on their team, but is in control and thinking forward, anticipating, reacting, and directing the team.

Do you think employees are more or less happy when they have a manager who lets them do what they want/stays out of their way?

You may be surprised, but most teams function very badly when they are not actively managed. Most employees are much happier when they are clear about expectations, they know what they should be doing, they know how to do it well, and they have the right tools.

Activity: Go out and observe restaurant for 5 minutes

- Examples of active management?
- Examples of passive management?

## Type Of People Hired

What type of people does an active manager hire? Use specific names in the company.

What type of people are hired by passive managers? Use specific names in the company.

## Part 2: Developing Assistant Managers Class

### ACTIONS

- Developing Assistant Managers Class (Trainee)
- Record progress in training log (Trainer)

### MATERIALS

1. Developing Assistant Managers Class (this guide)

## Part 2: Developing Assistant Managers Class (2 hours)

This class is designed to equip a new General Manager to motivate and develop new Assistant Managers. This is one of the most exciting elements of being a GM. Up until this point, they have learned to train up hourly employees, and now GMs will have the opportunity to develop folks into leadership positions. GMs have the opportunity to make serious and lasting change that can improve the lives of their employees. Perhaps the most serious transition for any employee is from hourly to AM.

Training an AM will deal less with technical training, and move into more broad areas of learning and aspects of attitude. This is critical to the success of a GM. Without a strong team, a manager cannot be as effective, and in turn we cannot give our employees the great opportunities available to them.

This portion of your training will be very specific in nature, focusing on activities, exercises, and hands-on learning.

## Qualities And Actions That Will Help Develop A Great Assistant Manager (10 Minutes)

### [MYERS BRIGGS UPDATE]

Each manager should be given the results of their self assessment. Ask managers to think for a moment about qualities they possess that will allow them to develop great leaders. Ask

them to think about aspects of developing others that are a challenge for them.

Discuss as a group. Focus managers on how to leverage strengths they possess and encourage them that the training will cover techniques to help them improve in areas they are challenged.

Remember, there is not just one type of person for this role. There are many great paths to inspirational leadership. Ask the managers to think about the types of people they hire and train up into leadership roles. Example questions: Do I only choose a certain type of person? Am I only attracted to those who manage the same way I do?

## Qualities To Look For In Assistant Managers (10 Minutes)

Review 5 critical qualities we look for in future leaders. Ask each manager to think of one employee they have that embodies these qualities and have them elaborate. What do they love about this employee? What will make a great leader?

- Honest
- Positive
- Mature
- Intelligent
- Loves food

## Motivating Leaders (20 Minutes)

Managers work in restaurant/truck for 15 minutes.

Return and discuss at least 1 specific thing they did to help motivate an employee to want a long-term career with Clover.

Great place to emphasize that lots of small actions (that don't take much time) can really motivate staff.

## Developing Skills (10 Minutes)

Break into pairs and take turns training 1 element of Assistant Manager training for 5 minutes. Discuss as a group techniques that are particularly effective and challenges encountered in the past. Focus on using the tools and support available.

## Part 3: Time Management Class

### ACTIONS

- Time Management Class (Trainee)
- Record progress in training log (Trainer)

### MATERIALS

1. Time Management Class (this guide)

## Part 3: Time Management Class (1.5 hours)

### Efficiency (10 min)

Open the class explaining that we are going to talk about managing time as a practical, pragmatic skill. Ask the class what efficiency means to them. You'll get some different answers. Discuss efficiency as a mathematical term: how much you get out for what you put in. On the other side of the coin - what does it mean to be inefficient? Talk about waste.

There is more than one way to develop efficiency. One way is by developing a skill. Ask the class for some examples of this.

- Example of Developing a Skill:
  - Prep: slowest --> fastest

Another way to develop efficiency is to hone the way you manage your time. Ask the class for some examples of managing towards efficiency.

- Examples of Management:
  - Opening a restaurant
  - Not training right the first time, having to spend a lot more time repeating yourself in the long run

Wrap up the first segment of this class by summarizing the idea of using the same amount of time and same set of skills

to yield a more fruitful result based on management. For the remainder of the class we are going to discuss efficient management and help you to hone those skills.

## Time Management Strategies (40 min)

### PRIORITIZATION

The first strategy we are going to work discuss is prioritization. Start with an exercise. Give the class too many things to get done in a short period of time. Set a timer for 5 minutes once everyone write down the list below.

- 1 Find cheapest price for paper
- 2 Email 3 of your staff
- 3 Call new job applicants
- 4 Check your location's sales for today
- 5 Check your square deposits for today
- 6 Write down everything that you want to get done tomorrow
- 7 Call your manager on duty right now
- 8 Write an email to Dave/Sean
- 9 Get something fixed for your location
- 10 Train an employee

Once the timer goes off, ask everyone to stop working. Who got one task completed? How about 2? How about 3? Find out who got the "most" done. Write this person's strategy up on the board. Ask around for differences in how people prioritized this list. They're likely to be diverse. Is this a familiar situation? Talk about this experience. We all have busy jobs and a ton of important things to do. Most likely, you will always have more to do than you have time for. Expect that this will continue throughout your life. Regardless, it is not our wish that you get burnt out or feel lots of stress about your job.

### MATRIX

Draw a 2x2 matrix up on the board. Consultants use these often and call them two-by-twos. In short, these show the relationship between two variables. This is a great tool for plotting out tasks. The majority of people cannot comprehend relationships between more than two variables at a time, which is why this is so useful.

This exercise is a perfect way to sharpen your mind to consider the relationships between all of the important things that you have to do. Ask the room to give suggestions for tasks to put in each category.

[PHOTO]

(X axis) not urgent <—> urgent

(Y axis) low impact <—> high impact

Give a quick explanation of the different areas of the matrix.

### **Easy**

-High Impact + Urgent = No brainers! These must happen.

-Low Impact + Not Urgent = Never do these.

### **Complicated**

-Low Impact + Urgent = Always there, sometimes hard to distinguish in the moment whether or not it is necessary. Often unnecessary, but we do a lot of this. This drives managerial inefficiency.

-High Impact + Not Urgent = Managerial efficiency is when you start focusing on these tasks.

There will always be a tension between High Impact + Not Urgent and Low Impact + Urgent. Discuss the importance of recognizing when the tasks taking up your time are not having a high impact. What would happen if you took the time to focus less on the small, urgent stuff - and more on the big picture? We want them to get more done, in less time.

### **YOU DON'T WANT TO BE A FIRE FIGHTER**

Do you know anybody like this?

### **SCHEDULING AS WAY TO BALANCE TIME**

- How to approach week
- How to measure time spent against priorities

### **TOOLS AS WAY TO BALANCE TIME**

- Sunrise
- Sunrise scheduler
- Clear and GTD
- Mailbox and other email management apps

### **REST AS WAY TO BE EFFECTIVE**

- Schedule rest/ exercise
- Make sure you sleep!!!!

### **Prototype manager schedule (20 min)**

-Discussion of hours and expectations

# Managing to Superior Financial Performance

## ACTIONS

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- Part 1: Driving Sales Class (Trainee)
- Part 2: Owning Your Cost Structure Class (Trainee)
- Record progress in training log (Training Manager)

## MATERIALS

---

1. Driving Sales Class (this guide)
2. Owning Your Cost Structure Class (this guide)

## Part 1: Driving Sales Class

### ACTIONS

- Driving Sales Class (Trainee)
- Record progress in training log (Training Manager)

### MATERIALS

1. Driving Sales Class (this guide)

## Part 1: Driving Sales Class (1.5 hours)

### Who eats with Clover? (10 min)

Who should eat at Clover? Write answers on the board.

- Everyone.
- Much broader target than other fast casual (e.g. Sweetgreen who wants 28/yr old yoga teachers).

Everyone?

- Why do we say this? We say it every day.
- We think that we have the best tasting food.

What are some reasons people might not eat with us? Write answers on the board.

- Price
- Convenience
- Vegetarian (not for me)
- Won't taste good
- Won't fill me up
- Bad experience
- Don't know us
- Occasion
- Don't want fast food

Talk more deeply about why people may not choose us:

- Lack of understanding/ awareness (e.g., “not for me”, unaware, “need meat,” etc.)
- Operational limitations (e.g., we’re not nearby, don’t have enough time to wait for coffee, we’re too expensive, looking for a fancier meal, etc.)
- Areas we’ve fallen down (e.g., not fast enough, bad experience, locations are dirty)

Who has better sandwich? Better coffee? Better...

Ask these questions and for specific answers.

This is how we think about the food. Why can’t it be better?

We as company should always be thinking that way.

## What are sales? (10 min)

$$\text{Sales} = (\# \text{transactions}) \times (\$/\text{transaction})$$

How do we get sales?

People come in and decided to spend money at Clover.

Who do we want to spend money at Clover?

Everybody!

How do we drive # of transactions up? Discussion about what matters. Push back, what doesn’t matter. Are you sure? Why would you eat somewhere else not Clover? What does that mean?

## Driving Sales Framework (50 min)

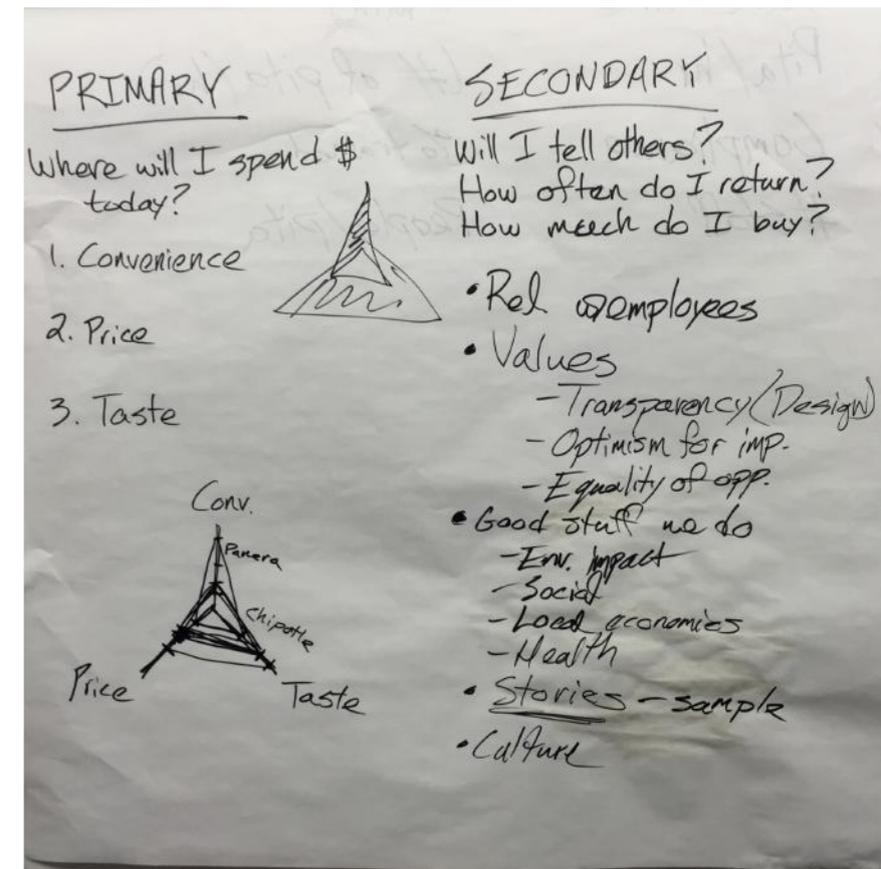
What is our industry? What are we getting into in this market? Introduce primary and secondary purchase drivers.

### PRIMARY SALES DRIVERS

This is the question: Where will I spend my food \$\$ today?

What factors determine people’s food purchases? Write below up on the board.

- Convenience (how long do I have to wait? how much friction is involved in the interaction?)
- Price (value = how much for what I get -compared to other options)
- Taste



Talk about examples of people who care about each dimension. Draw examples using a spider web of competitors and how they compete:

-Enzo: taste is VERY important, go across town, spend more money than he should

-Sara: convenience is VERY important, doesn't taste that great, don't get much for your money

-Alissa: price is VERY important, dollars per calorie, doesn't taste that great, lower convenience

Clover competes on TASTE. Restaurants that win have a good balance on all 3 of these drivers. Clover is: OK on price (just under Chipotle), OK on convenience (aiming for 4 min), SUPERIOR on taste. We can do better on all of these. We need to be self-critical and appreciate how great we are at the same time. This combination will get us to being food that EVERY BODY eats.

Is this all that matters when it comes to creating sales? Discuss?

Primary sales drivers determine # of customers. How do we get customers?

-1st timers

—>recommended (\*\*special: w/ a friend who eats Clover)

—>walking by

-returning

—>how often people coming: 1/mo, 2x/day

—>sales are reflected by how deep we drive these returning customers

(this is where secondary drivers come in)

Example formula:

$$\text{Sales} = (\# \text{ new customers transactions}) \times (\$/ \text{ transaction}) + (\# \text{ of returning customers transactions}) \times (\$/ \text{ transaction})$$
$$\text{Sales} = (\# \text{ customers recommended to eat Clover} + \# \text{ walk-in customers}) \times \$/ \text{ transaction} + (\# \text{ returning customers} \times \# \text{ of times they visit in a sales period}) \times (\text{average } \$/ \text{ transaction})$$

## SECONDARY SALES DRIVERS

These are the questions tied to secondary sales drivers: Will I tell others about Clover? How often do I return? How much do I buy? Write people's ideas up on the board for what drives the answers to these questions.

- Experience —> relationships, etc...

- Stories

- Values —> \$ to farmers, transparent, change, employee opportunity, environment, health (talk about: people do not buy food because it is healthy, it's not where there money is going, that's why we don't talk about Clover being the healthiest food around)

- Culture

Discussion about how secondary sales drivers work.

(A) How many people will I recommend Clover to? —> RECOMMENDATION RATE (# customers recommended to eat at Clover)

(B) How often will I eat at Clover —> FREQUENCY (# of times they visit)

(C) How much do I care about Clover? —> AVERAGE TICKET (average \$/ transaction)

Why focus on secondary drivers at all?

- return
- bring family and friends
- people feel like it's a good choice
- not feeling guilty
- drives sales

Driving customer frequency is A BIG DEAL for sales growth.

## Example restaurant (10 min)

Give an example of a current restaurant that's getting both primary and secondary sales drivers right, and the results.

## Part 2: Owning Your Cost Structure Class

### ACTIONS

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- Owning Your Cost Structure Class (Trainee)
- Record progress in training log (Training Manager)

### MATERIALS

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1. Owning Your Cost Structure Workbook (Excel)

# Managing the Customer Experience

## ACTIONS

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- Part 1: Customer Experience Class (Trainee)
- Part 2: Clover Brand Class (Trainee)
- Record progress in training log (Training Manager)

## MATERIALS

---

1. Customer Experience Class (this guide)
2. Customer Research Project (WuFoo, this guide)
3. Clover Brand Class (this guide)
4. Clover Brand Brief (Google Drive)

## Part 1: Customer Experience Class

### ACTIONS

- Customer Experience Class (Trainee)
- Customer research project (Trainee)
- Record progress in training log (Training Manager)

### MATERIALS

1. Customer Experience Class (this guide)
2. Customer research project (this guide)

## Part 1: Customer Experience Class (30 minutes)

### Communicating Through Stories

Story. When we communicate successfully at Clover it's because we tell stories that are clear, easy to understand, and want to be shared. These stories are honest and express humility, that's part of what makes them interesting.

“Being honest is more important than being clever.”

Talk about how critical honesty is to our communications.

When we fail to connect with customers it's because we're not communicating stories. Impossible to create closeness, community, and intimacy without being honest and vulnerable.

Talk about Julia Child. Julia Child taught French cooking with passion, humor, and elbows deep in real work.

### Small Group Discussion

At a coffee shop or a bar or around a campfire sit down. Start by asking each person to tell a true story that reveals something about who they are as a person. Stories can be very short. They should NOT be fictional. Tell them well (details, etc.)

Example of a story headline: When I was 8 years my leg was almost chopped off and it was one of the best things that ever happened to me. I would tell a 5 minute version of this story.

Ask each Manager to share a story they remember somebody telling them that relates to food in some way.

## Clover Research Project (due By Part 2: Clover Brand Class)

### HOMEWORK #1:

Visit 2 non-Clover food service locations (fast casual), 1 Clover restaurant, and 1 Clover truck. This exercise will total visits to 4 separate locations. Make observations about your environment as you move from place to place. While at each location, fill out this WuFoo checklist:  
<https://cloverfoodlab.wufoo.com/forms/fast-casual-restaurant-exploration/>

### HOMEWORK #2:

Write a blog post centered around a Clover story you have told to a customer that has travelled. You tell stories every day, find evidence from comments on the blog, Twitter, Instagram, Yelp, Square, or by word of mouth - make sure it's something that you can document and confirm. When writing your post, don't worry too much about it being publish-worthy. This ex-

ercise is meant to get you thinking about how far your stories go and to share that with the class.

\*\*When assigning, give an example: I am taking orders at HFI and give Suzy (a customer) a sample of our Strawberry Lemonade. I use this as an opportunity to tell her about the 3 week season we have for strawberries here in MA. Later on that day, I check out HFI's reviews on Yelp and find that Suzy has written a review! She mentions that she didn't know how quick the season was and she will definitely be back for some delicious strawberry lemonade before it's gone. I then use this story I've told - and the evidence I've found - to write up a little blogpost about the experience.

## Part 2: Clover Brand Class

### ACTIONS

- Clover Brand Class (Trainee)
- Record progress in training log (Training Manager)

### MATERIALS

1. Clover Brand Class (this guide)
2. Clover Brand Brief (Google Drive)

## Part 2: Clover Brand Class (1.5 hours)

This should be a class administered by Lucia that reviews the brand. Print, staple, and hand out brand brief for all managers.

### Sharing Homework (15 min)

#### Homework 1:

-Ask what types of things the group noticed people doing badly at other restaurants. Write on board.

-Ask what types of things the group noticed people doing well at other restaurants. Write on board.

How about at Clover restaurants? Discuss why every one thinks we did this assignment. What sorts of things did you learn? How was this helpful or eye-opening?

#### Homework 2:

-Share blogposts from each manager with group.

Talk about the fact that specifics help the stories travel faster (use examples from the blogposts GMs have written).

### Brand Exercise (15 min)

Everyone gets 3 pieces of paper to secretly write down their 3 favorite brands. Write them on whiteboard.

Have everyone try to guess whose favorite brands are which up on the board. Discuss briefly why these brands are appealing or what we associate with them.

Move into a discussion on how we can influence what people think of our brand. Of Clover!

**Brand Brief (30 min)**

# When I Work Class

## ACTIONS

- When I Work Class (Trainee)
- Record progress in training log (Training Manager)

## MATERIALS

1. When I Work Class (this guide)
2. When I Work (website)

## Why WIW?

## What do we use WIW for?

## WIW Basic Overview

### Dashboard

- Company-wide information, notices, and stats

### Scheduler

- Scheduling employees at your location
- Accessing employee details
- Projecting sales and labor
- Tracking sales and labor

### Attendance

- Adjusting and auditing employee timesheets
- Approving timesheets for payroll

### Timeclock

- Clocking in and out for shifts
- Clocking in and out for breaks

### Messaging

- Messaging employees and coworkers

## Requests

- View, send, and approve time-off requests

## Updating Employees, Positions, Locations

- Adding/deleting employees
- Updating employee's personal information
- Updating employee's locations
- Updating employee's payrates
- Tracking employee's training
- Adding/deleting positions
- Adding/deleting restaurant locations

## Contact information, Availability, Account settings

- Log-out
- Updating your contact information
- Viewing your schedule
- Setting your availability
- Updating WIW account settings/preferences

## Key Features

### 1. Creating a balanced schedule

#### 1.1 Scheduling the GM (you)

#### 1.2 Scheduling AMs

#### 1.3 Scheduling TLs, LOTs, Lead PREP

#### 1.4 Scheduling PEs, TMs, PREP, OTs

#### 1.5 Scheduling training support

### 2. Daily Schedule Check-In

#### 2.1 How to check who is scheduled on a computer

#### 2.2 How to check who is scheduled right now on an iPad/iPhone and other mobile devices

### 3. Scheduling Employees

#### 3.1 Setting the schedule

#### 3.2 Checking the schedule

#### 3.3 Publishing the schedule/updating the schedule

#### 3.4 Sending the weekly scheduling email

#### 3.5 Employees acknowledging and confirming their schedules

#### 3.6 Understanding employee's desired hours

#### 3.7 Schedule change requests

#### 3.8 Time-off requests

#### 3.9 No-call/no-shows

### 4. Tracking Employee Training

#### 4.1 Updating employee station training

#### 4.2 Checking employee station training

### 5. Attendance and Payroll

#### 5.1 How employees clock in and out for shifts and breaks

#### 5.2 Updating and auditing timesheets

#### 5.3 Approving payroll

#### 5.4 Accessing employee reports

## 6. Managing Labor Budget

6.1 Projecting future sales

6.2 Scheduling to your labor budget

6.3 Reading daily labor %

## 7. Messaging Employees

7.1 How to send a message to employees

7.2 How to check/audit previous messages

7.3 Other forms of acceptable communications with employees

## 8. Sharing Employees

8.1 When and why to share an employee with another location

8.2 How to share an employee with another location

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# Team Member v. REST

Being promoted to Team Member means you've achieved something special. We think you're doing great things and want to invest in your future.

You will learn more about Clover and have a chance to develop new skills such as Clover Guiding or Prep.



# Provisional Employee v. KIT

Remember your first day at Clover?

Each manager has the opportunity to put their new employees at ease. These first few days are exciting times. This is your first glimpse of your new colleague. Imagine where they may be in 2 years!



# Onboarding

## ACTIONS

- [Distribute Comic Book Chapter 1 (Manager, pending)]
- Review Employee Handbook (Trainee, Manager)
- Review Onboarding Packet (Trainee, Manager)
- Review Safety and Sanitation guide (Trainee, Manager)
- Administer quiz 1: Sanitation (Trainee, Manager)
- Train on When I Work (Trainee, Manager)
- Record progress in training log (Manager)

## MATERIALS

1. [Comic Book: Chapter 1 (pending)]
2. On-boarding packet (printed and online)
3. Sani reference cards: Safety and Sanitation (laminated and online)
4. Quiz 1: Safety and sanitation (wufoo, 100% to pass)

## INTRODUCTION

Onboarding combines some very practical goals with lofty ambitions. We need to make sure each employee will be paid properly. That's very practical. We want every employee to do some amazingly great stuff. That's a lofty ambition.

If you've hired this person there is a reason. So this should be an exciting moment for everybody, the beginning of an adventure. Treat it with respect. Work with them efficiently, but with a sense of enthusiasm.

## COMIC BOOK [pending]

The comic book is meant to be sent home with new employees. This is their first introduction to Clover, training, and our values. Each employee is meant to keep 1 comic book as a gift from Clover.

## EMPLOYEE HANDBOOK

## ONBOARDING PACKET

The on-boarding packet must be reviewed by all employees prior to any paid work. Please walk through the printed on-boarding packet with your new employee. All new employees should understand how to set their availability, how to access the employee handbook online, and have shared all critical employment information with Clover.

**--> Clean Clover (add to handbook in the letter, add language in the safety/sanitation handbook)**

## SAFETY AND SANITATION

Review the Safety and Sanitation reference guide using your physical environment and employees as reference.

This is the first time you're going to introduce Clean Clover to your new hire. When you're discussing the importance of a clean appearance and uniform, it's a great place to tie in our food and the straight forward flavors we're aiming for. Clean floors, fryers, systems, uniforms, and flavors go hand in hand. We want employees learning about the company for the first time to understand these connections and that you can't have one without the other.

When you feel the new employee has adequate exposure to the Safety and Sanitation procedures please have them take the **quiz**. Employees should not work in a kitchen, restaurant, or on a truck until this is complete.

If the employee gets less than a 100% on the quiz review the wrong answers and have them re-take the test.

## WHEN I WORK

### PREFERENCES:

-this should be used to set your UNAVAILABILITY. This should be used to block of parts of the day or entire days that your unavailable. If you don't have it blocked as UNAVAIL-ABLE, there is a chance that you might be scheduled on that day and your required to be there during that time that your

scheduled. This should be used for reoccurring instances for events and travel. This needs to be set 2 weeks in advance. Once the schedule is made, IT IS FIRM unless there is a bona fide emergency.

### REQUEST TIME OFF:

-This is used for one time instances that you need a day or time off. This might be inside your normal work schedule. This needs to be done two weeks in advance.

### BREAKS:

-if you are working over 6 hours IT IS REQUIRED BY LAW THAT YOU TAKE A 30 MIN, un-paied break. You have to report to the manager and they approve if it is a good time to take a break.

### ATTANDANCE:

-If you are scheduled you are expected to be there on time in FULL uniform at the beginning of your shift. The only excep-tion is if there is a bona fide emergency. You are part of a team and the only way a team can function together is if every-one is following the rules. You can only punch in when you are ready to start work. That means, dressed and ready to go.

-You CAN NOT clock in any earlier than 5 minutes before your shift, unless it's authorized by a manager.

#### CONFIRMING THE SCHEULE:

-after the schedule is released, you need to confirm your shifts with-in WIW using the virtual handshake. Once the schedule is made, you are committed to the shift.

#### COMMUNICATION: (SEND A MESSAGE)

-if there is an emergency or need to call out, the only acceptable form is a message through WIW and it has to go to Chris, nobody else. No Phone call or email. The only acceptable way is a WIW message.

#### OPEN SHIFTS:

-these are ways that you pick up extra shifts or pick up a shift that someone called out on. If you see one and you want the shift, just grab it. Once you grab it IT'S A VIRTUAL HAND-SHAKE and your required to be there for that shift, no exceptions, except a bona fide emergency.

# When I Work

## ACTIONS

- Review critical functions one-on-one with Manager during Onboarding (Trainee, Manager)

## MATERIALS

1. 1-on-1 (WIW and this guide)



WIW Training. With the managers computer, make their profile, send invite, and have them set up their preferences, show them how to update their availability, and how to communicate through WIW. This would help everyone understand that the schedule is made a week in advance and they are responsible to update their availability. Also note that once the schedule is published, a weekly email is sent and their are required to respond to confirm their schedule.

### PREFERENCES:

-this should be used to set your UNAVAILABILITY. This should be used to block of parts of the day or entire days that your unavailable. If you don't have it blocked as UNAVAILABLE, there is a chance that you might be scheduled on that

day and you are required to be there during that time that you are scheduled. This should be used for reoccurring instances for events and travel. This needs to be set 2 weeks in advance. Once the schedule is made, IT IS FIRM unless there is a bona fide emergency.

#### REQUEST TIME OFF:

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#### BREAKS:

-if you are working over 6 hours IT IS REQUIRED BY LAW THAT YOU TAKE A 30 MIN, un-paided break. You have to report to the manager and they approve if it is a good time to take a break.

#### ATTENDANCE:

-If you are scheduled you are expected to be there on time in FULL uniform at the beginning of your shift. The only exception is if there is a bona fide emergency. You are part of a team and the only way a team can function together is if every-

one is following the rules. You can only punch in when you are ready to start work. That means, dressed and ready to go.

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#### COMMUNICATION: (SEND A MESSAGE)

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#### OPEN SHIFTS:

-these are ways that you pick up extra shifts or pick up a shift that someone called out on. If you see one and you want the shift, just grab it. Once you grab it IT'S A VIRTUAL HANDSHAKE and you are required to be there for that shift, no exceptions, except a bona fide emergency.

# 6 Stages of Training

## ACTIONS

- Review 6 stages of training
- Review TTG
- Review YouTube training videos

## MATERIALS

1. 1-on-1 (this guide)
2. Training videos (iPad, YouTube)



Every single time your employee is about to do a task, are they asking themselves: have I been trained on all 6 stages of training?

**Stage 1: Video and Recipe**

**Stage 2: Station Set-Up**

**Stage 3: Ask employee to watch you perform the given task and have them taste what amazing tastes like.**

**Stage 4: Ask employee to try the task while you watch and then taste it to see if it's just as amazing.**

**Stage 5: Check-in and coach employee until their skills are up to expectation.**

**Stage 6: Station Quiz**

# Cleaning

## ACTIONS

- Watch cleaning videos (Trainee)
- Review cleaning cards (Trainee, Lead Trainer/AM)
- Review MSDS and proper use of and care for chemicals (Trainee, Lead Trainer/AM)
- Administer cleaning quizzes (Trainee, Lead Trainer/AM) [pending]
- Record progress in training log (Manager)

## MATERIALS

1. Cleaning videos (iPod, YouTube)
2. Cleaning reference cards (iPod)
3. Cleaning quizzes (WuFoo) [pending]



--> **Clean Clover**

Mopping

Bathrooms

Surfaces

Equipment

Shift prep table expectations

# KIT Basics

## ACTIONS

- Watch station videos (Trainee)
- One-on-one with trainer (Trainee, Manager)
- Record progress in training log (Manager)

## MATERIALS

1. 1-on-1 (this guide)
2. KIT Basics videos (iPad, YouTube)



### **Tasting kit**

### **Prep table set-up**

### **Cutting board and third pan colors**

### **Dry and wet measuring cups**

### **Packaging/labeling**

### **Allergens**

### **Knife Skills 101**

Do you remember what it was like to prepare a meal when you didn't have the correct grip on your knife? How about that time you cut your hand after reaching into a sink filled with water only to find a sharp surprise? Knife skills are one of the

most important things to be trained on when you're working in a kitchen every day. Once you feel comfortable with a knife, it takes half the time to prepare a meal, food cooks more evenly, and it's safer.

This class is highly suggested for every employee at Clover, although it is optional. It makes us more efficient and provides a life-long skill for anyone who participates. Teaching knife skills might be the best thing we can do for our employees' health since it will encourage them to cook more fresh food at home. Encourage your staff to make their way through the three different classes - they will become much more valuable to us and can take pride in a new skill!

### **CLASS 1: BASIC CUTS (1 HOUR)**

#### *Knife safety*

Posture  
Securing board  
Blade away  
Preparing for the worst  
Safe transport

#### *Types of knives*

Serrated  
Chef  
Paring  
Steel

#### *Types of cuts*

Claw  
Bridge  
Peel  
Flat hand  
Chef's knife

### **CLASS 1: TEST (Passing: < 12 minutes)**

Onion (1, coarse chop)  
Cocktail tomato (2, slice)  
Cucumber (1, 1/2" dice)  
Garlic (3 segments, medium fine)  
Herbs (1/3 bunch, medium fine)  
Eggplant (stripe, 3/4" slice)  
Tomato (1, 1/2" dice)

Participants will get a paring knife upon completion.

# PE Kitchen Stations

## ACTIONS

- ❑ Watch station videos (Trainee)
- ❑ Review reference cards (Trainee, Manager)
- ❑ One-on-one with trainer (Trainee, Manager)
- ❑ Record progress in training log (Manager)

## MATERIALS

1. Station Videos (iPod, online)
2. Reference cards (laminated)
3. One-on-one with trainee (this guide)



## **KIT Station Training**

Station training should happen primarily through one-on-one instruction. This is a job for the Kitchen Lead or Manager.

Follow these 6 simple stages. Total training should take between 20 minutes and 45 minutes depending on the task. Each station should be trained on its own.

**Stage 1: Video and Recipe.** Before one-on-one training ask employee to watch relevant videos and read the recipe. This can be done on the iPad.

**Stage 2: Station set-up.** Make sure employee understands how everything should look when they start their job. Focus on cleanliness and orderliness. It is impossible to do clean fast work without a well prepared workspace. Specifically direct them to

those out of sight areas that are often missed throughout a busy shift - once you point them out, your employee is much more likely to take notice and care for the area in the future.

**Stage 3: Ask employee to watch you perform the given task and have them taste what amazing tastes like.** Talk through important aspects of the job. Use similar descriptions/reference the training videos. **Use reference cards if appropriate.** This is the time to expose your employee to our philosophy surrounding clean food. We aim for our flavors to be simple, clean, and to highlight awesome ingredients. (i.e. Do you know why there are only 4 ingredients in this salad? *or* We used to make our hummus differently, let me tell you why we changed our recipe.)

**\*\*Have employee taste samples of the item you are training.\*\***

**Stage 4: Ask employee to try the task while you watch and then taste it to see if it's just as amazing.** Give helpful feedback/coaching. Be explicit about what you are looking at to determine whether the employee is doing a good job. Repeat until confident with training.

**Stage 5: Check-in.** Check-in on already trained employee. This works well after an hour or two at the task, then again after a day or two in the role. Re-train where necessary. Reinforce good habits with positive feedback.

**Stage 6:** Station training is not complete until employee passes the station quiz. Once a station has been trained, have employee **take the quiz on the iPad.** Passing is over 80%

correct. If employee fails review wrong answers, coach/ re-train as necessary. Have employee re-take the quiz.

List of training for this section:

- Wash Station
- CL-55 Station
- Plug Station

Remember, training is not complete until you **update the training in WIW.** Go to the employee profile in When I Work and updated both their **“Positions” AND “Log/Notes”** sections.

# Bakery Stations

## ACTIONS

- Watch station videos (Trainee)
- Review reference cards (Trainee, Manager)
- One-on-one with trainer (Trainee, Manager)
- Administer quizzes (Trainee, Manager)
- Record progress in training log (Manager)

## MATERIALS

1. Station Videos (iPod, online)
2. Reference cards (laminated)
3. One-on-one with trainee (1-on-1, this guide)
4. Stations quizzes (WuFoo, 80% to pass)



## BAK Station Training

Station training should happen primarily through one-on-one instruction. This is a job for the Bakery Lead or Manager.

Follow these 6 simple stages. Total training should take between 20 minutes and 45 minutes depending on the task. Each station should be trained on its own.

**Stage 1: Video and Recipe.** Before one-on-one training ask employee to watch relevant videos and read the recipe. This can be done on the iPad.

**Stage 2: Station set-up.** Make sure employee understands how everything should look when they start their job. Focus on cleanliness and orderliness. It is impossible to do clean fast

work without a well prepared workspace. Specifically direct them to those out of sight areas that are often missed throughout a busy shift - once you point them out, your employee is much more likely to take notice and care for the area in the future.

**Stage 3: Ask employee to watch you perform the given task and have them taste what amazing tastes like.** Talk through important aspects of the job. Use similar descriptions/reference the training videos. **Use reference cards if appropriate.** This is the time to expose your employee to our philosophy surrounding clean food. We aim for our flavors to be simple, clean, and to highlight awesome ingredients. (i.e. Do you know why there are only 4 ingredients in this salad? *or* We used to make our hummus differently, let me tell you why we changed our recipe.)

**\*\*Have employee taste samples of the item you are training.\*\***

**Stage 4: Ask employee to try the task while you watch and then taste it to see if it's just as amazing.** Give helpful feedback/coaching. Be explicit about what you are looking at to determine whether the employee is doing a good job. Repeat until confident with training.

**Stage 5: Check-in.** Check-in on already trained employee. This works well after an hour or two at the task, then again after a day or two in the role. Re-train where necessary. Reinforce good habits with positive feedback.

**Stage 6:** Station training is not complete until employee passes the station quiz. Once a station has been trained, have employee **take the quiz on the iPad.** Passing is over 80% correct. If employee fails review wrong answers, coach/ re-train as necessary. Have employee re-take the quiz.

List of training for this section:

- BAG Station
- LOAD Station
- CATCH Station

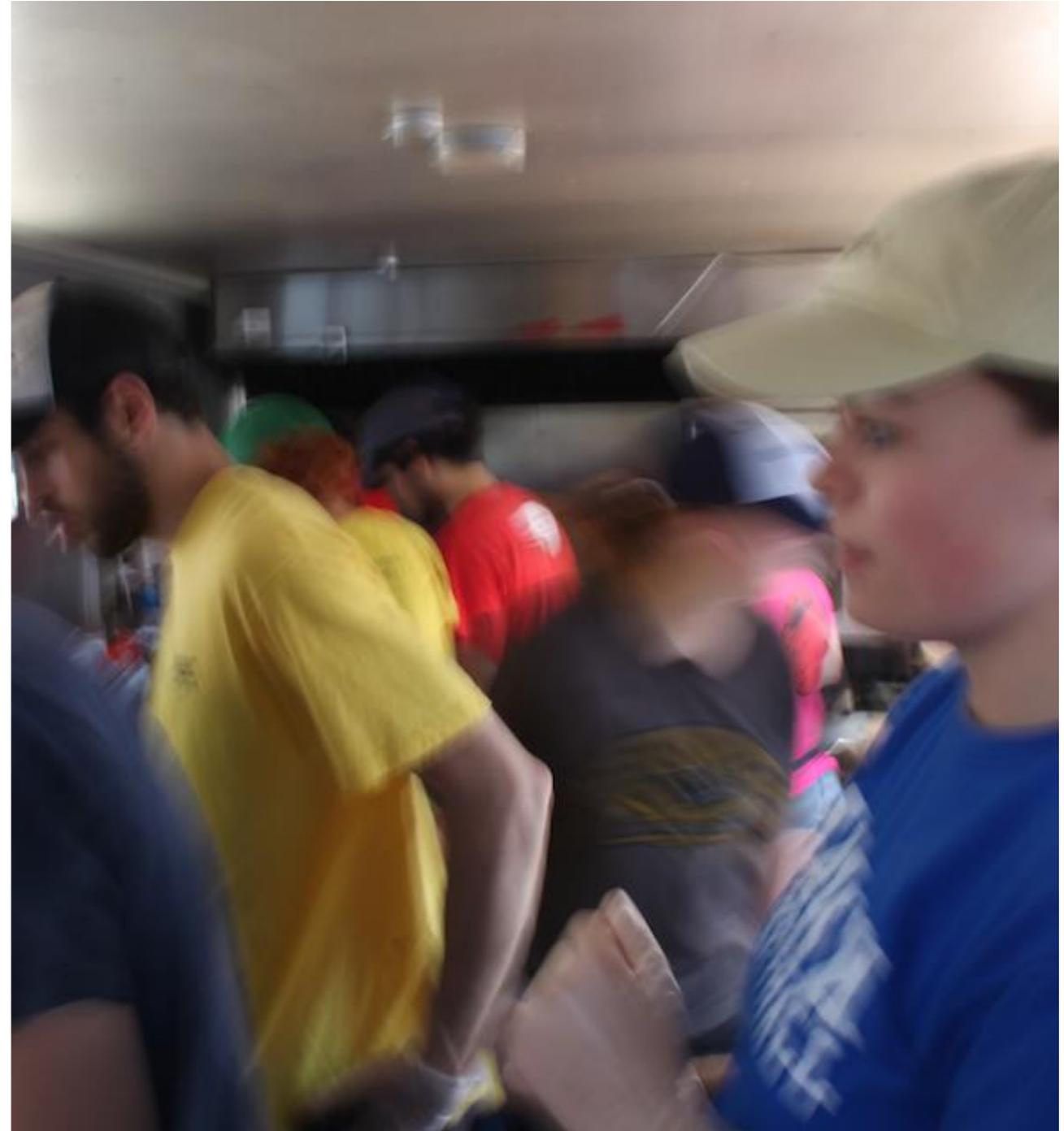
Remember, training is not complete until you **update the training in WIW.** Go to the employee profile in When I Work and updated both their **“Positions” AND “Log/Notes”** sections.

---

# Team Member v. KIT

A new Team Member in the Kitchen has gotten a chance to see what Clover is about, and to work on their Knife Skills.

Now it's time for them to learn more about Clover and have a chance to develop new skills working on the stations.



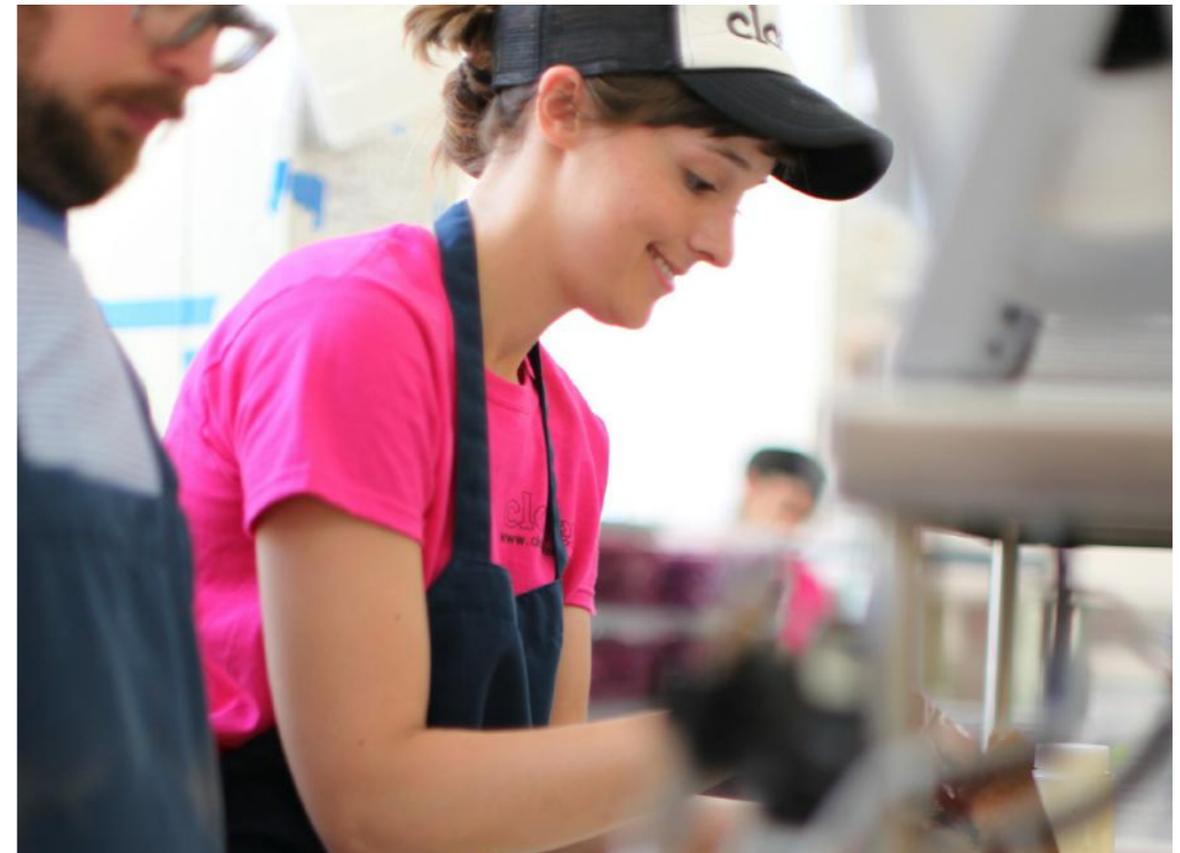
# TM Kitchen Stations

## ACTIONS

- Watch station videos (Trainee)
- Review reference cards (Trainee, Manager)
- One-on-one with trainer (Trainee, Manager)
- Record progress in training log (Manager)

## MATERIALS

1. Station Videos (iPod, online)
2. Reference cards (laminated)
3. One-on-one with trainee (1-on-1, this guide)



## KIT Station Training

Station training should happen primarily through one-on-one instruction. This is a job for the Kitchen Lead or Manager.

Follow these 6 simple stages. Total training should take between 20 minutes and 45 minutes depending on the task. Each station should be trained on its own.

**Stage 1: Video and Recipe.** Before one-on-one training ask employee to watch relevant videos and read the recipe. This can be done on the iPad.

**Stage 2: Station set-up.** Make sure employee understands how everything should look when they start their job. Focus on cleanliness and orderliness. It is impossible to do clean fast

work without a well prepared workspace. Specifically direct them to those out of sight areas that are often missed throughout a busy shift - once you point them out, your employee is much more likely to take notice and care for the area in the future.

**Stage 3: Ask employee to watch you perform the given task and have them taste what amazing tastes like.** Talk through important aspects of the job. Use similar descriptions/reference the training videos. **Use reference cards if appropriate.** This is the time to expose your employee to our philosophy surrounding clean food. We aim for our flavors to be simple, clean, and to highlight awesome ingredients. (i.e. Do you know why there are only 4 ingredients in this salad? *or* We used to make our hummus differently, let me tell you why we changed our recipe.)

**\*\*Have employee taste samples of the item you are training.\*\***

**Stage 4: Ask employee to try the task while you watch and then taste it to see if it's just as amazing.** Give helpful feedback/coaching. Be explicit about what you are looking at to determine whether the employee is doing a good job. Repeat until confident with training.

**Stage 5: Check-in.** Check-in on already trained employee. This works well after an hour or two at the task, then again after a day or two in the role. Re-train where necessary. Reinforce good habits with positive feedback.

**Stage 6:** Station training is not complete until employee passes the station quiz. Once a station has been trained, have employee **take the quiz on the iPad.** Passing is over 80% correct. If employee fails review wrong answers, coach/ re-train as necessary. Have employee re-take the quiz.

List of training for this section:

- Tilt Station
- R23 Station
- Salads
- Pack
- WFM

Remember, training is not complete until you **update the training in WIW.** Go to the employee profile in When I Work and updated both their **“Positions” AND “Log/Notes”** sections.

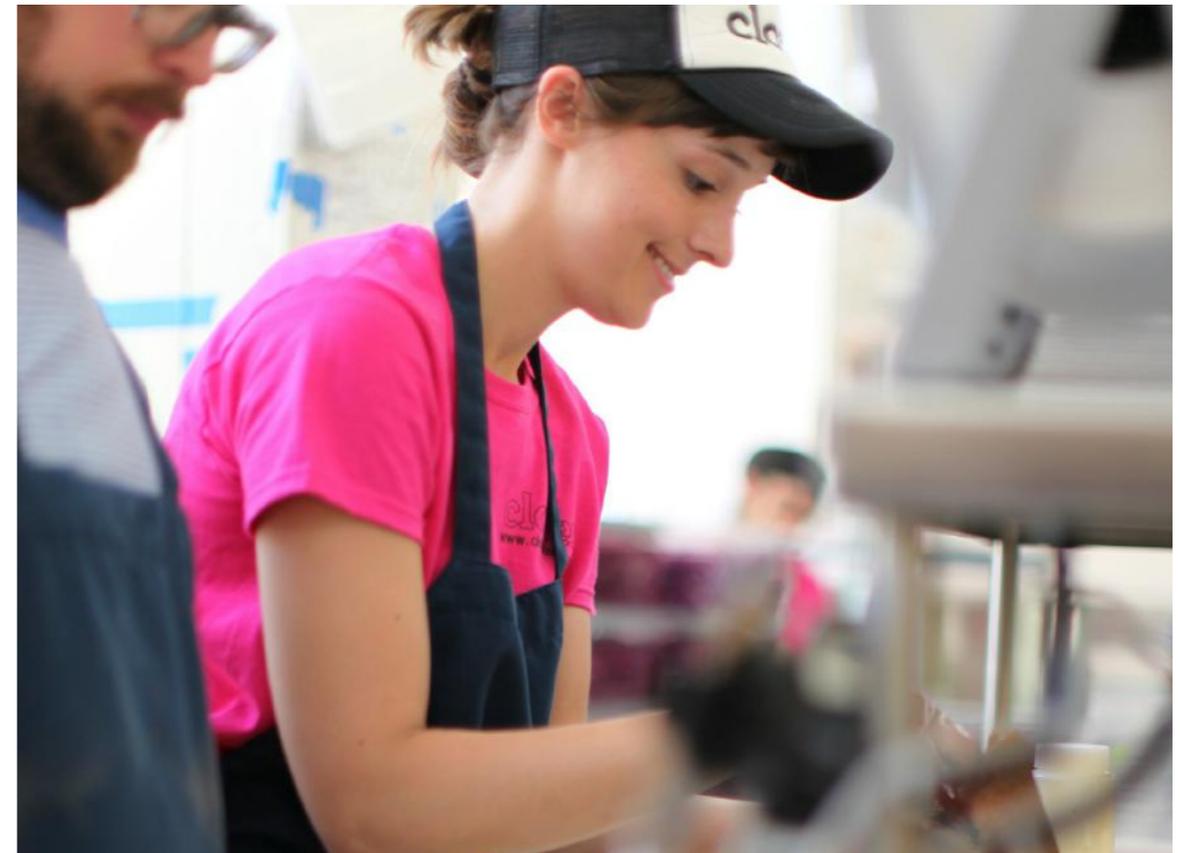
# TM Kitchen Stations

## ACTIONS

- Watch station videos (Trainee)
- Review reference cards (Trainee, Manager)
- One-on-one with trainer (Trainee, Manager)
- Record progress in training log (Manager)

## MATERIALS

1. Station Videos (iPod, online)
2. Reference cards (laminated)
3. One-on-one with trainee (1-on-1, this guide)



## KIT Station Training

Station training should happen primarily through one-on-one instruction. This is a job for the Kitchen Lead or Manager.

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**\*\*Have employee taste samples of the item you are training.\*\***

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**Stage 5: Check-in.** Check-in on already trained employee. This works well after an hour or two at the task, then again after a day or two in the role. Re-train where necessary. Reinforce good habits with positive feedback.

**Stage 6:** Station training is not complete until employee passes the station quiz. Once a station has been trained, have employee **take the quiz on the iPad.** Passing is over 80% correct. If employee fails review wrong answers, coach/ re-train as necessary. Have employee re-take the quiz.

List of training for this section:

- Salads
- R-23
- Tilt Skillet
- Cold Pack
- Chop/Pack

Remember, training is not complete until you **update the training in WIW.** Go to the employee profile in When I Work and updated both their **“Positions” AND “Log/Notes”** sections.

# Values

## ACTIONS

- [Read comic book Chapter 2: Values (Trainee, pending)]
- Read website posts tagged “Values” (Trainee)
- Q&A with manager (Trainee, Manager)
- Administer quiz: Values (Trainee, Manager)
- Record progress in training log (Manager)

## MATERIALS

1. [Comic book Chapter 2 (pending)]
2. Q&A with manager (1-on-1, this guide)
3. Quiz: Values (WuFoo, 80% to pass)



## Values

--> **Clean Clover (go through blogposts, add in CLEAN stories, add questions to quizzes)**

The goal of this segment of training is to introduce Team Members to the values underlying our work at Clover.

Send the Values Letter to the Team Member going through this training and allow them a few days to read the blogposts. Make sure you set up a specific date and time for the Q&A.

When you sit down with your employee for a one-on-one make sure you're familiar with all of the materials on the blog. If you don't know the answer to a question don't BS, just refer it to somebody who does. If you feel uncomfortable with this

section of the training reach out to your leadership. We're always happy to talk about this stuff over a drink.

These three values are at the foundation of everything we do at Clover. Once you understand these you will understand why we do what we do:

*Transparency - At Clover we are proud of what we do. It's not always perfect, we make many mistakes. But we work hard, believe in what we do, and feel others should be able to see that work. We don't hide our prep, our ingredients, our mistakes. In a world where people are told the soup at Seven-Eleven is "Fresh, just made" it's just not enough for us to hope people believe us when we tell them our food is great. We'd rather they see us prepping that soup with their own eyes.*

*Equality of Opportunity - Look around, Clover is made up of all types of people, with all types of backgrounds. Brett started as our part-time fill-in resupply truck driver. Mary was 2 months into Clover when she found herself running a truck. Bridget wasn't yet 20 years old when she first stepped up to run a truck. We are comprised of ex-cons, folks who started in the dish-room as well as chefs from Michelin Star restaurants and former bankers. We believe that everybody should be treated with respect regardless of background. We work hard to create opportunities for all types of people regardless of race, sex, sexual preference, background, etc.*

*Everything will be Different Tomorrow - You can make a better Clover. Why? Because every single thing we do could be*

*better. You may contribute to the future of Clover with a new recipe idea for a Lemonade, with a faster way to pour a drink, with a new idea about how to design the drink station, a better way to describe a drink to a new customers, or perhaps a giant mistake/ failure that we can learn from. Everything we are today is the result of somebody in the Clover family, an employee or a customer imagining a better future.*

When you administer the **Values Quiz** passing is anything over 80%. If employee fails the quiz please review/re-train/ etc.

# History

## ACTIONS

- ❑ [Read Comic Book Chapter 3: History (Trainee, pending)]
- ❑ Read website posts tagged “History” (Trainee)
- ❑ Q&A with manager (Trainee, Manager)
- ❑ Administer Quiz: History (Trainee, Manager)
- ❑ Record progress in training log (Manager)

## MATERIALS

1. [Comic Book Chapter 3 (pending)]
2. Q&A (in person, this guide)
3. Bench test (in person, this guide)
4. Quiz: History (WuFoo, 80% to pass)



## History of Clover

--> **Clean Clover (go through blogposts, add in CLEAN stories, add questions to quizzes)**

We have tagged nearly 200 entries on the blog corresponding to History. This means the history reading is a serious undertaking. Send the History Letter to the Team Member going through this training and give them enough time to read through all of the blog entries. Make clear what you expect him/her to get out of that training. Make sure you set up a specific date and time for the Q&A. This is an opportunity for your Team Member to follow-up on things they thought were interesting in the blog, ask questions, explore anything they found missing.

Ideally this session would be driven by their questions, but in the case that you have a laconic Team Member, you should be prepared to prompt the conversation. Possible questions include:

- What did you think of the History readings?
- Was there anything that was a surprise to you?
- Was there anything you read about that moved you?
- How have your feelings/understanding of Clover changed since you read the History posts?
- Are there stories you would like to hear more about?
- Is there anything you feel was left out of the History?

If you don't know the answers to any of the questions your Team Member asks just say "I don't know" and tell them that you will follow-up. You can then pass your question to Ayr or another senior leader in the company.

When you administer the **History Quiz** passing is anything over 80%. If employee fails the quiz please review/re-train/etc.

# Purpose

## ACTIONS

- [Comic book Chapter 4: Purpose (Trainee, pending)]
- Read blog posts tagged “Purpose” (Trainee)
- Q&A with Manager (Trainee, Manager)
- Administer Quiz: Purpose (Trainee, Manager)
- Record progress in training log (Manager)

## MATERIALS

1. [Comic Book Chapter 4 (pending)]
2. Q&A guide (this guide)
3. Quiz: Purpose (WuFoo, 80% to pass)



### Clover's Purpose

--> **Clean Clover (go through blogposts, add in CLEAN stories, add questions to quizzes)**

Send the Purpose Letter to the Team Member going through this training and 2-3 days to read the posts on the website regarding Clover's Purpose. Make sure you set up a specific date and time for the Q&A. These posts cover 3 core areas of focus:

- (1) Reduce negative impact people have on the environment
- (2) Support and grow local businesses
- (3) Improve the health of our customers and staff

Talk to your Team Member about these goals. Ask why they think Clover cares about these things. Ask what types of things they care about. What do they wish to achieve in their life? What legacy would they like to leave behind?



# ServSafe & Allergen

## ACTIONS

- Pass ServSafe Manager Certification
- Pass Allergen Awareness Certification

## MATERIALS

1. ServSafe/Allergen Resources (this guide)



In order to develop into a leadership position in the kitchen such as Shift Lead or Manager - your TM must be ServSafe Manager certified as well as Allergen Awareness certified. Below is a list of resources that we've compiled in the Boston/Cambridge area. Once they've complete their training, send the certificates to the Training Manager.

### **SERV SAFE**

### EXAM ONLY

### CROP CIRCLE KITCHEN

<http://www.cropcirclekitchen.org/servsafe.html>

### BERGER

JP

\$129  
Classes Often  
Lisa Berger  
[lisa@servingsafefood.com](mailto:lisa@servingsafefood.com)  
[www.servingsafefood.com](http://www.servingsafefood.com)

### CLASS AND TEST

GREATER BOSTON FOOD BANK  
Every Other Month  
Kendra Bird  
[kbird@gbfb.org](mailto:kbird@gbfb.org)  
[http://www.gbfb.org/agency-resources/pdf/2015\\_food\\_safety\\_workshops.pdf](http://www.gbfb.org/agency-resources/pdf/2015_food_safety_workshops.pdf)

FOOD SAFETY CERT (Quincy, Redline)  
\$99  
Every Tuesday, 10-3pm  
<http://www.food-safety-cert.com/offices/quincy>

COSTA  
\$129  
Charlestown, MA  
Mike Scuderi  
[scuderim@freshideas.com](mailto:scuderim@freshideas.com)  
<http://www.freshideas.com/aboutus/news.html>

MRA  
\$100 for MRA members, \$150 for non MRA members  
[tzibell@massrestaurantassoc.org](mailto:tzibell@massrestaurantassoc.org)

[http://www.massrestaurantassoc.org/MRA/Education/Sanitaton\\_Training/MRA/Education\\_Training/Sanitation\\_Training.aspx?hkey=774e8147-1b58-436c-87a1-ab55c63bdc38](http://www.massrestaurantassoc.org/MRA/Education/Sanitaton_Training/MRA/Education_Training/Sanitation_Training.aspx?hkey=774e8147-1b58-436c-87a1-ab55c63bdc38)

### **ALLERGEN AWARENESS:**

The Allergen Awareness online exam  
\$10  
<http://www.servsafe.com/ss/catalog/productDetail.aspx?ID=1844>



# Kitchen/ Bakery Team Leader

Shift Lead is the next step in the Clover Kitchen with supervisory responsibilities. Running a Kitchen shift can be exciting but can also be a bit scary.

Shift Leads define our kitchen culture and our company-wide food quality. Think about how you can help them gain confidence in their role.



# Leadership + TL Project +

## ACTIONS

- ❑ Coaching from manager (Trainee, Manager)
- ❑ Project and presentation (Trainee, Manager)
- ❑ Record progress in training log (Manager)

## MATERIALS

1. Coaching guide (this guide)
2. Project guidelines (this guide)



## Leadership

### --> Clean Clover

Much of the leadership coaching will be done in person. This will happen in an opportunistic way, day to day.

Look for opportunities to use real life situations to further develop your KIT or BAK Lead. This may include being clear and direct with an hourly employee about what needs to be done next. It may include training a new employee or welcoming an interviewee. Take the time to explain the positive results of doing the task correctly and the opportunity to develop oneself as a leader among staff.

## TL Project and Presentation

### WHAT?

When your new Team Leader is first promoted, it's the perfect time to assign them the TL Project. It's a great first introduction to thinking differently about their role. Right now, your TL may look at you as somebody they don't know too well yet. They may even feel a little distant, or disconnected from the bigger picture of what it means to be a leader at Clover. For many, this will be their first opportunity to lead a team - that's a big step! We'd like to prepare them to step into that place of leadership. A first step towards that is starting to think like a leader. So, for this project we'd like your TL to think about something that will help improve Clover. These projects should be simple and focused - ask your TL to think about something difficult during their day and what possible solutions might work to make it better. This project needs to be well defined and finite.

### WHY?

Effectively leading at Clover means helping make our company better. Since the beginning, we've approached improvement by doing tests that are CHEAP, and then GATHERING RESULTS on the effect of our ideas, then repeating. We'd like to see our TLs practice identifying a problem, structuring a solution, implementing it, gathering feedback, improving their solution, and repeating. The main focus of this project should be the implementation and iteration. We want our TLs to

carry out a project on their own, and see it through from start to finish.

### HOW?

1. First, set a goal presentation date: 2 weeks total is the expectation for selecting, implementing, and presenting.
2. You and your TL decide on a project and it is approved by you (the GM).
  - a. **GOOD PROJECTS:** organizing and labeling paper goods storage, or creating a log to track gas filling of trucks, or finding a better instrument to use for cleaning
  - b. **POOR PROJECTS:** creating a restaurant opening checklist, or writing out a process for cleaning the fryer (I just haven't tried it out just yet!), or painting one of the walls in the restaurant bright green (you know, to bring in some color)
3. Your TL sends a project proposal via email to the Training Manager and await it's approval.
4. Once approved, make sure your TL clearly understands the expectations. This project should not take your TL any longer than 1 hour to complete and implement.
5. Once implemented, your TL should have the project in place for approx. 1 week. During this time they will collect feedback from coworkers and make iterations.

6. After this stage, it's time for your TL to present their project at the manager meeting. The presentation should NOT be the focus of the project. They will have 5 minutes to present their project - we want to hear about their process. What was the problem, what was the solution, how did they implement their project, what kind of feedback did they receive, what changes (if any) did they make? Questions? Your TL can use visual aids (e.g. a picture of their project in the location, write their process up on the whiteboard), but please make sure they keep it simple.

# Kitchen Shift Lead

## ACTIONS

- ❑ Trainee observes shift (Trainee, Manager)
- ❑ Trainee leads shift with observation (Trainee, Manager)
- ❑ Trainee leads shift solo (Trainee, Manager)
- ❑ Record progress in training log (Manager)

## MATERIALS

1. Checklists (iPad, WuFoo)
2. One-on-one training guide (this guide)



Kitchen Leads face a variety of situations, and while they will always have a Manager to call on when needed, it's a benefit to all if they feel confident in their role. As you train a Kitchen Lead you should be looking to coach leadership qualities.

### Training Kitchen Lead

*Opener or Closer*

--> **Clean Clover** Step 1: Make sure your Lead in training knows what to expect. Walk them through the training process, prepare them for the early/late shifts. Encourage them. It's going to be an intense training and the better prepared they are, the better.

Step 2: Meet your Lead in the Kitchen to have them **shadow you on a shift**. Give them the **checklist** to follow-along

with the work you're doing. It is important that you follow the stages outlined in the checklist to the letter. Failing to do this risks undermining the rest of the training process. Ask them to have a notebook and take notes as you walk through the procedures.

**Step 3: Meet your Lead in the Kitchen for a second training shift.** This time you should follow your Lead and provide help as they work to lead the shift. Refer to the checklist often. Explain the “whys” as well as the “hows.” Repeat until you have confidence the trainee could run the shift without your intervention. This should not be more than 3 days maximum in Step 3.

**Step 4: Meet your Lead in the Kitchen for a final training shift.** This time you will be “training wheels” ensuring the trainee doesn't do anything that would risk service or endanger anybody, but otherwise staying out of the way and observing. Share your observations with the trainee and coach where necessary. Repeat until you have confidence the shift would run clean without you present. [Minimum of 2 days in Step 4, maximum of 3 days in Step 4.]

# Bakery Shift Lead

## ACTIONS

- ❑ Trainee observes shift (Trainee, Manager)
- ❑ Trainee leads shift with observation (Trainee, Manager)
- ❑ Trainee leads shift solo (Trainee, Manager)
- ❑ Record progress in training log (Manager)

## MATERIALS

1. Checklists (iPad, WuFoo)
2. One-on-one training guide (this guide)



Bakery Leads face a variety of situations, and while they will always have a Manager to call on when needed, it's a benefit to all if they feel confident in their role. As you train a Bakery Lead you should be looking to coach leadership qualities.

### **Training Bakery Lead**

*Opener or Closer*

--> **Clean Clover** Step 1: Make sure your Lead in training knows what to expect. Walk them through the training process, prepare them for the early/late shifts. Encourage them. It's going to be an intense training and the better prepared they are, the better.

Step 2: Meet your Lead in the Bakery to have them **shadow you on a shift**. Give them the **checklist** to follow-along

with the work you're doing. It is important that you follow the stages outlined in the checklist to the letter. Failing to do this risks undermining the rest of the training process. Ask them to have a notebook and take notes as you walk through the procedures.

**Step 3: Meet your Lead in the Bakery for a second training shift.** This time you should follow your Lead and provide help as they work to lead the shift. Refer to the checklist often. Explain the “whys” as well as the “hows.” Repeat until you have confidence the trainee could run the shift without your intervention. This should not be more than 3 days maximum in Step 3.

**Step 4: Meet your Lead in the Bakery for a final training shift.** This time you will be “training wheels” ensuring the trainee doesn't do anything that would risk service or endanger anybody, but otherwise staying out of the way and observing. Share your observations with the trainee and coach where necessary. Repeat until you have confidence the shift would run clean without you present. [Minimum of 2 days in Step 4, maximum of 3 days in Step 4.]

## SECTION 4

# Tasting Class [PENDING]

### ACTIONS

- Attend the Tasting class (Trainee)
- Record progress in training log (Manager)

### MATERIALS

1. Tasting class (sign up on the blog)



--> **Clean Clover**

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# Kitchen/ Bakery Assistant Manager



# Training Modules + AM Project

## ACTIONS

- Personal Development Homework (Trainee)
- Role Play (Trainee, Manager)
- Office Hours (Trainee, Manager)
- Sourcing & Interviewing (Trainee, Manager)
- Onboard a New Hire (Trainee, Manager)
- Train a Team Member (Trainee, Manager)
- Train a Team Leader (Trainee, Manager)
- AM Project (Trainee)
- Record progress in training log (Manager)

## MATERIALS

1. 1-on-1 (this guide)
2. Personal Dev checklist (WuFoo form)
3. Phone interview guide (Google docs)
4. Working interview guide (Google docs)

## Personal Development Homework

Within the first week in their role as Assistant Manager you should sit down and assign personal development homework. The homework is very simple. Send your Assistant Manager the Personal Development Letter. At the end of every working day your new manager will fill out a WuFoo form with a couple of sentences answering the following questions:

**(1)**What did you do today that worked really well?

**(2)**What challenged you today or led to you feeling failure?

This homework should continue for the first 2 weeks your manager is in their new role. Make sure you set up a specific timeline and due date for this task. The 10 reports should be submitted to the Training Supervisor before your Assistant Manager is considered complete in training (and eligible for a promotion).

## Office Hours Checklist

Stage 1: Schedule for your Assistant Manager to accompany an experienced manager (you) in office hours. Make a point to review the checklist and explain what is being done.

Stage 2: Have your assistant manager complete office hours with an experienced manager (you) watching over their shoulder and helping out where appropriate. Repeat until Assistant Manager is ready to do office hours without support.

## Role Playing Key Moments

You should schedule a 60 minute session to role play with your new assistant manager. Role playing almost always feels odd to the participants, but it can be a very powerful tool. Remember that your assistant manager will only take the training as seriously as you take the training. So use this as an opportunity to show him/her that you care about their development.

Take turns playing the different roles. Encourage your assistant manager to come to you in the future for additional role play as they encounter situations they are unsure of how to handle.

Required Role Playing Scenarios:

### **(a) Employee is late for work -**

1st offense - send home, record in WIW, fill out Incident Report

2nd offense - send home, reduce hours, record in WIW, fill out Incident Report

3rd offense - send home, remove from schedule, record in WIW, fill out Incident Report (both for late and termination)

### **(b) Employee is not in uniform -**

1st offense - send home, record in WIW, fill out Incident Report

2nd offense - send home, reduce hours, record in WIW, fill out Incident Report

3rd offense - send home, remove from schedule, record in WIW, fill out Incident Report (both for late and termination)

**(c) Employee calls out sick for 5th time in 2 weeks, not normal behavior -**

Important to have a discussion, better understand what is going on. Fill out Incident Report, reach out to HR help better handle.

**(d) Employee or Customer gets injured -**

Attend to injury, fill out incident report ALWAYS within 24 hours, if the person needs medical attention send to the hospital. Let them know this is a worker's comp issue, follow Worker's Comp procedures.

(If the employee visits the hospital, call in the injury to our insurance company - instructions found in the incident report.)

**(e) Employee gets angry at work, shouting -**

Pull employee aside, understand the situation. Send home if necessary. Fill out Incident Report.

**(f) Employee says something inappropriate to another employee (race or sex related) -**

Send employee(s) home and contact HR by phone and email IMMEDIATELY. Discuss with impacted employee(s). Fill out incident report within 24 hours.

**(g) Employee continues to make coffee incorrectly after being trained 3 times -**

Discuss, understand what is going on. Try another station? Decide whether or not they may be a good fit.

**(h) Employee moves slowly, no hustle -**

Work with employee. (Ideas: 1:1. Set-up challenges. Pull out timer. Use peer pressure.)

**(i) Notice employee doing a great job talking to a customer -**

Complement, use specifics and thank them for helping us build the company.

**(j) Employee wants more hours -**

Talk about what you are looking for/need to see from them.

Examples: Have they been late? Be on time for \_\_ amount of time. Location is slow? Offer hours on WIW at other locations or within your own - pick up shifts to prove that they want more hours. Bring up catering hours.

**(k) Employee did not receive direct deposit pay -**

Talk to employee to figure out what happened. Ask for evidence (e.g., paystub from iPay/bank statement). Talk to HR to figure out what happened. DO NOT REFER THEM TO HR. Send request for off-cycle checks to Megan and Ayr.

If you encounter a situation in role playing that you do not know how to handle, don't worry. Just say, "That's one I've never encountered/thought about. Let me follow-up with you on that after talking to others to see how they handled that..."

## **Hiring The Next Generation** (Sourcing, Interviewing, Hiring A New Employee)

This section of the class is very hands on. We will cover interviews, hiring TMs, onboarding, training TMs, and training TLs. There will be much for the AMs to do after this class!

### Sourcing Employees:

Use the whiteboard to draw a flow chart of how we source new employees. Discuss tools and expectations.

-If someone taken the time to apply to Clover, we will call them within 24 hours.

-Phone interview role play: 90sec: What are you good at? Why would we be really happy to have you here? What would impress me about you in the first 2 weeks of you working at Clover?

-If an applicant doesn't know much about us, tell them that they should find out a little bit more and reapply if they're interested.

### Interviewing:

-First impressions are important!

-Role play introduction/goodbye for interview (30 sec each).

-Role play asking the team about interviewees (we value their input).

### Hiring/Onboarding:

-Offer Letter: be very clear about expectations of onboarding (when, where, and what to bring).

-Onboarding Packet: where to find it. The AM will do all of this training alongside their GM.

## **Problem Solving** *Assistant Manager Project*

### WHAT?

When your new Assistant Manager is first promoted, it's the perfect time to assign them the AM Project. Don't wait - this is an excellent first assignment to get them thinking differently about the changes happening as they move into their new role! Right now, your AM may feel a little unsure, or separated from what it means to be a Clover Manager. We'd like to prepare them to step into the mindset of managing and what that means. A first step towards that is starting to think like a Manager. So, for this project we'd like your AM to think about something that makes the Manager's job day to day a little difficult or uncomfortable. During this period of their training, they'll likely be doing their Personal Development homework and focusing on their challenges and wins every day. This sort of reflection is where many AM Projects are born. Once they've identified a challenge they want to tackle, they can come up with a solution to make that job easier. These projects should be simple, focused, and well defined.

### WHY?

Just as with the TL Project, the AM Project is about flexing those problem solving skills and helping make our company better. This is a huge part of effectively leading at Clover at all stages. As your AM knows, we approach improvement by doing tests that are CHEAP, and then GATHERING RESULTS

on the effect of our ideas, then repeating. Emphasize this with your AM when assigning the project. We'd like to see our AMs practice identifying a problem, structuring a solution, implementing it, gathering feedback, improving their solution, and repeating. The main focus of this project should be the implementation and iteration. We want our TLs to carry out a project on their own, and see it through from start to finish.

#### HOW?

1. First, set a goal presentation date: 2 weeks total is the expectation for selecting, implementing, and presenting.
2. You and your AM decide on a project and it is approved by you (the GM).
  - a. **GOOD PROJECTS:** developing a system for communicating training amongst the managers at your location, or
  - b. **POOR PROJECTS:** reshooting all training videos
3. Your AM sends a project proposal via email to the Training Manager and await it's approval.
4. Once approved, make sure your AM clearly understands the expectations. This project should not take your AM more than 1-2 hours to complete and implement.
5. Once implemented, your AM should have the project in place for approx. 1 week. During this time they will collect feedback from their fellow management team and make iterations.

6. After this stage, it's time for your AM to present their project at the manager meeting. The presentation should NOT be the focus of the project. They will have 5 minutes to present their project - we want to hear about their process. What was the problem, what was the solution, how did they implement their project, what kind of feedback did they receive, what changes (if any) did they make? Questions? Your AM can use visual aids (e.g. a picture of their project in the location, write their process up on the whiteboard), but please make sure they keep it simple.



# Managing Others Class

## ACTIONS

- Attend Managing Others Class (Trainee)
- Record progress in training log (Manager)

## MATERIALS

1. Class guide (Class Instructor, this guide)



## Managing Others Class (2 hours)

This first class is designed to help new managers learn basic management skills.

As a company we have come far, think about when you first started. There are probably lots of things that seem easier now because we have established new structure and tools. Training a TM or operating the resupply, all run much more smoothly now because of the systems we have in place.

Some of this training will be more personal and reflective than the other stages. This is a really exciting step; it's a time when you get to share your experience and personal connection with Clover. This time can also be a little scary, for some people this is the first time they will hire or fire someone, be responsible to make important decisions in your absence or even understand what a salary role means. Think of this class as a way to welcome the AMs and Kitchen/Bakery Leads to their role, inspire and motivate them and establish all the manager skills needed to run a solid Clover operation.

Open the class by introducing yourself, saying hello, and congratulations to these new AMs and Kitchen/Bakery Leads! Allow everyone to introduce themselves, where they work, and a little something about themselves. This class marks a huge shift in the focus of their training. Before this, training was skills based and mechanical. It will now be focused on bigger, broader, more complex things such as leading others and motivating. This training is class based and includes more one on one coaching. Next, address this guide. Let the AM know that you'll be using it as your guide to teach this and future classes. This reinforces the TTG as a critical tool that we all use on a day to day basis. Encourage them to look forward - cheating is okay here!

Begin talking briefly about what it takes to inspire those who work for you. Focus on what is done to **SHOW** and **TELL** others what matters, what you value, what motivates. Emphasize active role of management. It is not enough to **FEEL**, **BELIEVE**, etc., if managing others you need to find ways to

clearly communicate/demonstrate those values and motivations. Think about what you're showing people by all of the things that you do/actions you take.

Begin by relating why you are here, at Clover. What motivates you? What do you **LOVE** about your job? **WHAT KEEPS YOU HERE?**

Have everyone go around the table and talk about why they are here:

1. Talk about what you found/find attractive about Clover. Why have you dedicated yourself to this?
2. Ask each person to talk about why they have dedicated themselves to Clover.
3. What part of what they are sharing have they shared with their staff?

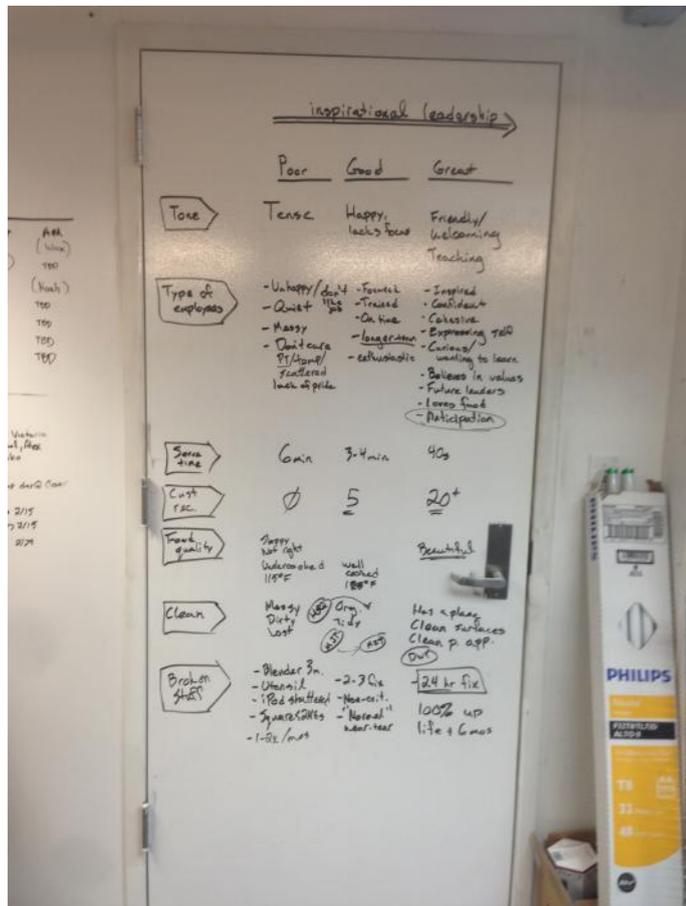
You will likely have an opportunity to make a **distinction here between small talk with staff vs. the impact of sharing more inspiring speech**. A balance of both is what a great leader will do. Examples of things that drive and motivate people: talking about the new coffee, talking about the story of Clover. All of these achieve something that a discussion about the weather or this past weekend's activities will not.

Additionally, use this as an opportunity to talk about the transition from **YOU/THEY (referring to Clover) to US/WE**. As leaders everybody in this class should be "US/WE." This is

a good time for some discussion and self reflection. Saying “they” implies a separation. Elaborate on the idea: if not “we,” it will be difficult to motivate staff and help them feel a part of the larger picture.

## What Does Inspirational Leadership Look Like? (50 Min)

--> **Clean Clover** Draw this chart up for class to see. Ask class to help fill in the chart. Help where necessary. Standards at end of session should look similar to this example. Discuss with the team tangible ways they can tell if they are inspiring their staff through their leadership.



	POOR	GOOD	GREAT
Staff atmosphere	Tense	Happy, lacks focus	Friendly, welcoming, teaching
Type of employee	Unhappy, quiet, messy don't care, lot's of part time, temporary, scattered, lack of pride, negative attitude	Focused, basic training in place, ontime, longer term, enthusiastic	Inspired, confident, cohesive, expressive, curious, wanting to learn, believes in values, future leaders, loves food, anticipates needs
Serve time	6 min	3-4 min	40 s
Customer recommendation	0	5	20+
Food quality	Sloppy, not right, undercooked,	Well cooked	Beautiful
Cleanliness	Messy, dirty, lost	Organized, tidy	Everything has a place, clean surfaces, clean personal appearance

Q: Have you ever seen anybody acting "un-Clover-like?" Who? When? Why?

*Each person in the class should have an answer. Write answers on board (1 for each class attendee).*

*After going through everybody's answers follow up:*

Q: How do you fix this? Go through potential positive solutions for each situation

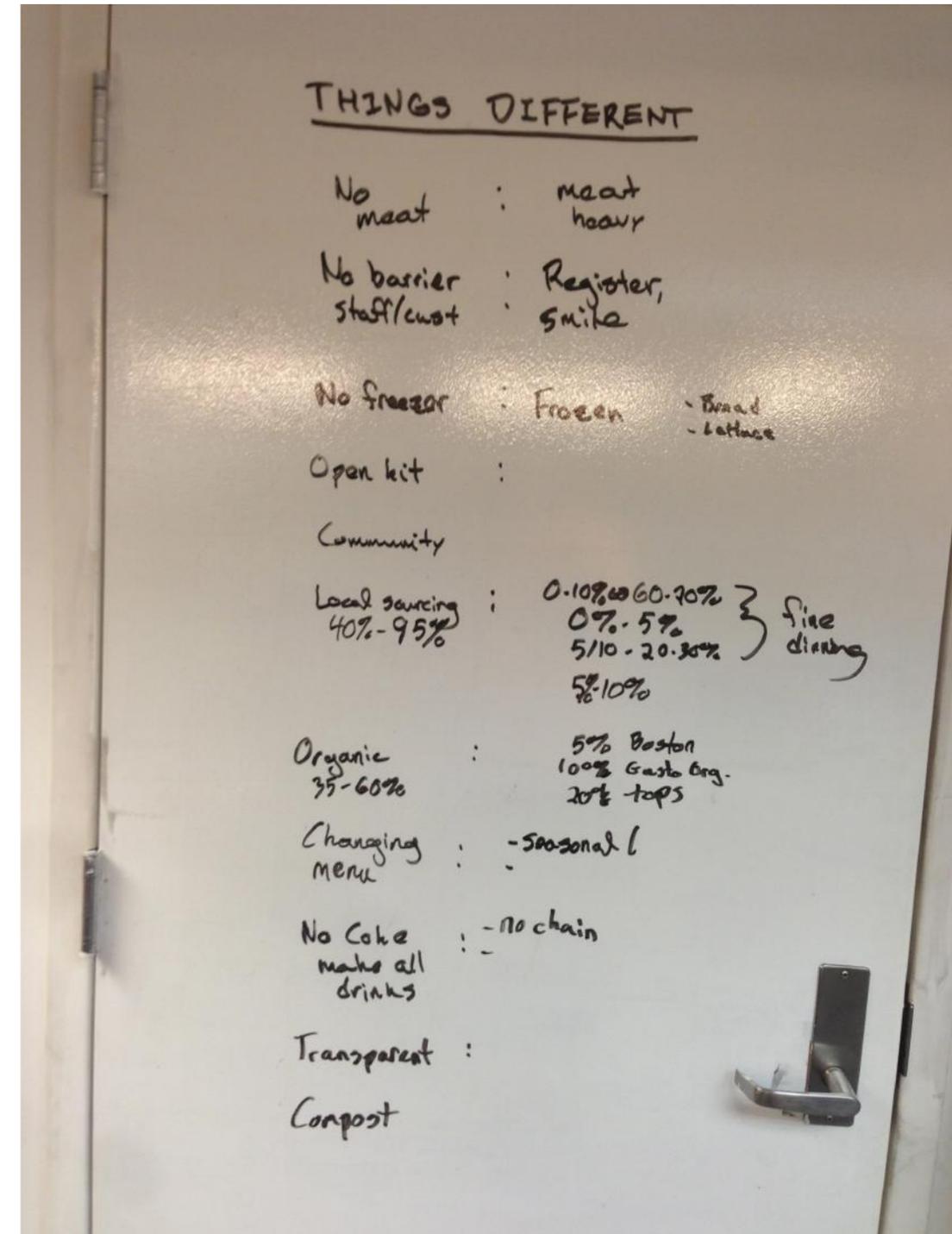
## What's Different About Clover?

As you write the following grid up on the board discuss each item. What about Clover is different? Why? Can the group think of others who do similar things?

(In most cases there are few/none.) When people think somebody does "e.g., Chipotle uses organic" correct appropriately. If you don't know the actual fact, ask an appropriate question: e.g., "I didn't know that about Chipotle. Could you gather some info for the class? I'd love you to find the % of Chipotle ingredients that are organic. Could you share your findings and the source?"). Note that there are many mis-impressions in our industry.

This exercise helps staff understand our challenges, our commitments, and our opportunities. Discuss why these differ-

ences exist. Ask group to think about what challenges they may present. Ask what opportunities arise based on these differences.



## **Homework (due By Part 2: Developing Hourly Staff Class)**

Your leadership as an AM is drastically different now, you are being held to greater expectations and from more people than before your manager, director, employees, customers (both current and future). And you're on a path to even great responsibility. Today we talked in great detail about ways to motivate, inspire and lead your team and business. We have reviewed what it means to be a Clover leader and laid out the expectations we have for you. Your homework is to write a reflection on what you have learned today. Share your thoughts on what you value in your role at Clover and what one thing you have found inspirational in today's talk. How will you apply this to your leadership style? You will be sharing these reflections in our next and final session. Don't be afraid to share new ideas and thoughts with the class.

Q: What surprised you most about this chart?

Q: Do you feel new inspiration from the stuff you have learned from this exercise?



## Developing Hourly Staff Class

### ACTIONS

- Attend Developing Hourly Staff Class (Trainee)
- Record progress in training log (Manager)

### MATERIALS

1. Developing Hourly Staff Class (this guide)



## Developing Hourly Staff Class (2 hours)

This class focuses on the Assistant Manager's role in training hourly staff. This is one of the most critical functions of a location manager. There is no variable that has a higher impact on location performance than quality of your staff.

This portion of the training will be very specific in nature, focusing on activities, exercises, and hands-on learning.

**IMPORTANT:** when planning this class it is essential that you give the manager at the restaurant 3-4 days notice. You will be using their restaurant as a training laboratory for 30 minutes. Don't time this class around peak operations.

Q: What did you take away from last class?

Have each attendee talk about what was most impactful for them in the previous session. What did they learn? What have they done differently over the past week or two because of the class?

## **Hiring The Next Generation (20 Minutes)**

This section of the class is very hands on. We will cover interviews, hiring TMs, onboarding, training TMs, and training TLs. There will be much for the AMs to do after this class!

Sourcing Employees:

Use the whiteboard to draw a flow chart of how we source new employees. Discuss tools and expectations.

-If someone taken the time to apply to Clover, we will call them within 24 hours.

-Phone interview role play: 90sec: What are you good at? Why would we be really happy to have you here? What would impress me about you in the first 2 weeks of you working at Clover?

-If an applicant doesn't know much about us, tell them that they should find out a little bit more and reapply if they're interested.

Interviewing:

-->**Clean Clover**

-First impressions are important!

-Role play introduction/goodbye for interview (30 sec each).

-Role play asking the team about interviewees (we value their input).

Hiring/Onboarding:

-Offer Letter: be very clear about expectations of onboarding (when, where, and what to bring).

-Onboarding Packet: where to find it. The AM will do all of this training alongside their GM.

## **Training Practical (30 Minutes)**

Have AMs pair off in groups of 2 and go down into the location kitchen. Each group trains 1 Team Member or Provisional Employee on a specific item. Use proper training techniques (intro, video/materials, set-up, you show, they show, taste).

Take note of any training shortcomings/issues. If possible use photos to document. E.g., station was not properly set-up before training session. E.g., staff member was not asked to eat sandwich after demo.

Discuss what worked brilliantly and challenges faced.

-How was it? How did the training feel?

-When it's a "re-train" - encourage that employee to be receptive.

## **Using Company Resources (10 Minutes)**

Ask employees where they turn for the following types of questions. Write each question on the board along with the answer.

### **Ayr Muir- CEO**

Appropriate person to talk to about the Values, Vision, Purpose or History about the company...wonder why?

### **Wanda Reindorf- CFO**

Responsible for all restaurant and truck operations. All Area-Managers and General Managers report to Dave.

### **Megan Pileggi- Director of Human Resources**

Resource for helping with issues pertaining to helping staff your unit. If you ever feel uncomfortable at work this is the person you should go to. Manager contact for payroll and iPay questions.

### **Lucia Jazayeri- Director of Communications**

Resource for helping you grow your sales from the customer point of view. Sets up events with farmers, brewers and roasters. Sets the overall tone of Clover.

### **Christopher Anderson - Director of Food**

Responsible for relationships with farmers, brewers and roasters. Oversees kitchen production, the roll out of new food items and host of the Food Development Meetings. Chris is employee number 3 at Clover and can answer lots of questions about food, where it comes from, why and how it moves around the company.

### **Rob Christensen - Area Manager**

### **Michael Minichello - Area Manager**

### **Vincenzo Pileggi - Kitchen Manager**

Responsible for Kendall Square Store, executing training, development and testing of new menu items. He can tell you lots of stories about Clover, like Chris he has been around since the beginning.

### **Sara Higelin- Training Supervisor**

Sara used to run trucks, then she took a break, then she came back. She knows a ton about Clover and loves to work with others on learning more too. She can help you train new employees and help managers become better at training. She also works to coordinate training and update training docs (like this one).

### **Jenny Salsich - Catering Managing**

Responsible for coordinating catering and overseeing events at Clover.

### **Matt Dunn- Accounting Associate**

### **Julia Bremmer- Construction Manager**

### **Ethan Sherbondy- Systems Engineer**



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# Kitchen/ Bakery Manager



# Leading at Clover [PENDING]

## ACTIONS

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- Part 1: Personal Development Class (Trainee)
- Part 2: Developing Assistant Managers Class (Trainee)
- Part 3: Time Management Class (Trainee)
- Record progress in training log (Trainer)

## MATERIALS

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1. Personal Development Class (this guide)

# Part 1: Personal Development Class

## ACTIONS

- Myers Briggs personality test (Trainee)
- Part 1: Personal Development Class (Trainee)
- Record progress in training log (Trainer)

## MATERIALS

1. Personal Development Class (this guide)

## Part 1: Personal Development Class (2 hours)

This class is designed to help a new general manager reflect on their strengths and weaknesses. The class should be taken early in the GM's tenure and will provide a framework for on-going development and improvement.

In this part of the training you will be speaking to some of the more general topics that build Clover as a company. You will start with some inspirational topics then branch into teaching your GM's about what their role looks like, how they should think about it and how they should develop other roles beneath them.

### Share Myers Briggs Homework (30 minutes)

Each trainee should have taken the Myers Briggs test online. Take 10 minutes to share results. Use Myers Briggs guide to talk about what each dimension means.

#### **Extrovert vs. Introvert**

How are you socially?

-What is an extrovert? After spending time with people, you feel charged/energized

-What is an introvert? After spending time with people, you feel tired/need to recharge

## **Intuitive vs. Sensing**

How do you process/deal with information?

-What does intuitive mean? Integrate information from different sources --> solution. Impressions, meanings, and patterns of information.

-What is sensing? Step a, b, c ---> solution. Physical reality (5 senses) and what is actual, current, present, real.

## **Feeling vs. Thinking**

How do you make decisions?

As a manager of teams, you have to pay close attention to this. Most potential for conflict. A much more emotional component.

-What does feeling mean? If you ask, “how do you feel about this?” They’ll be engaged. Concerned with values and what is best for each person involved.

-What does thinking mean? If you ask, “what do you think about this?” They’ll be engaged. Analysis, consistency, logic.

## **Judging vs. Perceiving**

How do you approach planning?

-What is judging? Make a list. Planned, orderly, settled, organized way of life.

-What is perceiving? On the fly. Flexible, spontaneous, understand and adapt to life.

Understanding your profile and how others can be different can help us build self-awareness. This type of self-reflection might not be as helpful if you’re great with people, however, for those not as great with people - this can be life changing.

-Give examples of where incompatible types may find conflict. Ask group to share possible resolutions.

-Give examples of where compatible types may find harmony. Ask group for ways to advance or support that compatibility.

## **Qualities and Actions of a Great Manager (30 minutes)**

Each manager should take 5 minutes to write down the name of a manager they found inspirational and describe clearly the **qualities** they believe that person embodied and the **actions** that best describe that manager’s behavior.

Group should share a few of these reflections. A whiteboard can be used to jot down key qualities.

What is a good leader? What does that look like to most people? What are those categories? Transition to talking about qualities and actions Clover would like to develop in managers.

These should be written on a whiteboard. Point out differences in all examples.

Talk about cookie cutter manager vs. reality. We’re not looking for all managers to be the same. We are looking for all managers to be effective.

## **Homework (5 Minutes)**

Homework will be to observe 5 specific actions a senior manager or leader takes that could be described as Characteristic

Actions of a Great Manager. This specific list/recall of events should be shared at the beginning of the next manager training session.

## Inspirational leadership (20 minutes)

The Managers in your class will be, perhaps for the first time in their lives, directly responsible for the actions and welfare of a large group of people.

The manager's team will look to them to answer questions, to fill out the staffing schedule, to fix broken equipment, to train new employees, etc. But more important than any of these specific questions/problems will be the unspoken expectations, the silent role the manager plays in shaping a team. Through your attitude, work ethic, language, body-language, decisions, leaders have the opportunity to model and inspire the folks who work for them.

## Role Modeling

Start by asking the group these questions:

Do you think anybody working for you would like to be you?  
Do you think any of your employees wants your job?

Get some specific names on these questions. Ask each manager to talk about one leader that inspired them. Push for a serious example, this should be somebody who inspired them to do something difficult and meaningful that they would not have without that inspiration.

If you're inspiring people, would love to be like you, you're lifting them up and showing them great things about themselves. Don't fit into this right now? Think about how you might do this really well. Tough crowd? Think about things to turn this around. Elevate the people on your team. This can be negative or positive. Negative role modeling can be very destructive.

Give examples of when this does not take place. For example: Ayr talks about when he cleaned bathrooms at Burger King. The GM inspected his work, told him to do it better. He went back and moved the rag around half-heartedly and didn't do a good job. The Manager looked for a second time and said OK. Ayr spent the rest of that job going to clean the bathrooms without really cleaning them (just waited in there until the right amount of time went by).

## Positivity

Talk about happy environments. Ask managers where they are happy. We have a wonderful opportunity at Clover, to create positivity which is underrated in our industry. More people will want to be around positive people, employees, and customers.

Then share this statement with the group:

We will create a place where people connect through, over, and because of hard work.

This is from one of the earliest business plans for Clover. Do you think this is a good aspiration for Clover? Why do you

think Ayr wrote this? He was inspired by old New England, or “Yankee” values of pride and joy through hard work.

Ask the group:

What have you done in your job in the past that has made your employees happy? What makes you happy at work?

What contributes to unhappy people at work?

What little things do you do that make people who work for you unhappy?

Make lists on the board and discuss examples with the group.

## Homework

Take 5 photographs that capture happy employees. Bring these to the next Manager training class.

## Active Management (20 minutes)

Here we are talking about the difference between a manager who passively participates in what is happening vs. a manager who actively steers what is happening.

Quick reference:

- Riding vs. steering the ship
- Passive: solving shit that comes up
- Active: making sure the shit doesn't come up
- Passive: might not know who is working a station
- Active: knows answers to questions

## Impact Of Active Management On Teams

A successful active manager relies heavily on their team, but is in control and thinking forward, anticipating, reacting, and directing the team.

Do you think employees are more or less happy when they have a manager who lets them do what they want/stays out of their way?

You may be surprised, but most teams function very badly when they are not actively managed. Most employees are much happier when they are clear about expectations, they know what they should be doing, they know how to do it well, and they have the right tools.

Activity: Go out and observe restaurant for 5 minutes

- Examples of active management?
- Examples of passive management?

## Type Of People Hired

What type of people does an active manager hire? Use specific names in the company.

What type of people are hired by passive managers? Use specific names in the company.

## Part 2: Developing Assistant Managers Class

### ACTIONS

- Developing Assistant Managers Class (Trainee)
- Record progress in training log (Trainer)

### MATERIALS

1. Developing Assistant Managers Class (this guide)

## Part 2: Developing Assistant Managers Class (2 hours)

This class is designed to equip a new General Manager to motivate and develop new Assistant Managers. This is one of the most exciting elements of being a GM. Up until this point, they have learned to train up hourly employees, and now GMs will have the opportunity to develop folks into leadership positions. GMs have the opportunity to make serious and lasting change that can improve the lives of their employees. Perhaps the most serious transition for any employee is from hourly to AM.

Training an AM will deal less with technical training, and move into more broad areas of learning and aspects of attitude. This is critical to the success of a GM. Without a strong team, a manager cannot be as effective, and in turn we cannot give our employees the great opportunities available to them.

This portion of your training will be very specific in nature, focusing on activities, exercises, and hands-on learning.

## Qualities And Actions That Will Help Develop A Great Assistant Manager (10 Minutes)

### [MYERS BRIGGS UPDATE]

Each manager should be given the results of their self assessment. Ask managers to think for a moment about qualities they possess that will allow them to develop great leaders. Ask

them to think about aspects of developing others that are a challenge for them.

Discuss as a group. Focus managers on how to leverage strengths they possess and encourage them that the training will cover techniques to help them improve in areas they are challenged.

Remember, there is not just one type of person for this role. There are many great paths to inspirational leadership. Ask the managers to think about the types of people they hire and train up into leadership roles. Example questions: Do I only choose a certain type of person? Am I only attracted to those who manage the same way I do?

## Qualities To Look For In Assistant Managers (10 Minutes)

Review 5 critical qualities we look for in future leaders. Ask each manager to think of one employee they have that embodies these qualities and have them elaborate. What do they love about this employee? What will make a great leader?

- Honest
- Positive
- Mature
- Intelligent
- Loves food

## Motivating Leaders (20 Minutes)

Managers work in restaurant/truck for 15 minutes.

Return and discuss at least 1 specific thing they did to help motivate an employee to want a long-term career with Clover.

Great place to emphasize that lots of small actions (that don't take much time) can really motivate staff.

## Developing Skills (10 Minutes)

Break into pairs and take turns training 1 element of Assistant Manager training for 5 minutes. Discuss as a group techniques that are particularly effective and challenges encountered in the past. Focus on using the tools and support available.

## Part 3: Time Management Class

### ACTIONS

- Time Management Class (Trainee)
- Record progress in training log (Trainer)

### MATERIALS

1. Time Management Class (this guide)

## Part 3: Time Management Class (1.5 hours)

### Efficiency (10 min)

Open the class explaining that we are going to talk about managing time as a practical, pragmatic skill. Ask the class what efficiency means to them. You'll get some different answers. Discuss efficiency as a mathematical term: how much you get out for what you put in. On the other side of the coin - what does it mean to be inefficient? Talk about waste.

There is more than one way to develop efficiency. One way is by developing a skill. Ask the class for some examples of this.

- Example of Developing a Skill:
  - Prep: slowest --> fastest

Another way to develop efficiency is to hone the way you manage your time. Ask the class for some examples of managing towards efficiency.

- Examples of Management:
  - Opening a restaurant
  - Not training right the first time, having to spend a lot more time repeating yourself in the long run

Wrap up the first segment of this class by summarizing the idea of using the same amount of time and same set of skills

to yield a more fruitful result based on management. For the remainder of the class we are going to discuss efficient management and help you to hone those skills.

## Time Management Strategies (40 min)

### PRIORITIZATION

The first strategy we are going to work discuss is prioritization. Start with an exercise. Give the class too many things to get done in a short period of time. Set a timer for 5 minutes once everyone write down the list below.

- 1 Find cheapest price for paper
- 2 Email 3 of your staff
- 3 Call new job applicants
- 4 Check your location's sales for today
- 5 Check your square deposits for today
- 6 Write down everything that you want to get done tomorrow
- 7 Call your manager on duty right now
- 8 Write an email to Dave/Sean
- 9 Get something fixed for your location
- 10 Train an employee

Once the timer goes off, ask everyone to stop working. Who got one task completed? How about 2? How about 3? Find out who got the “most” done. Write this person's strategy up on the board. Ask around for differences in how people prioritized this list. They're likely to be diverse. Is this a familiar situation? Talk about this experience. We all have busy jobs and a ton of important things to do. Most likely, you will always have more to do than you have time for. Expect that this will continue throughout your life. Regardless, it is not our wish that you get burnt out or feel lots of stress about your job.

### MATRIX

Draw a 2x2 matrix up on the board. Consultants use these often and call them two-by-twos. In short, these show the relationship between two variables. This is a great tool for plotting out tasks. The majority of people cannot comprehend relationships between more than two variables at a time, which is why this is so useful.

This exercise is a perfect way to sharpen your mind to consider the relationships between all of the important things that you have to do. Ask the room to give suggestions for tasks to put in each category.

[PHOTO]

(X axis) not urgent  $\longleftrightarrow$  urgent

(Y axis) low impact  $\longleftrightarrow$  high impact

Give a quick explanation of the different areas of the matrix.

### **Easy**

-High Impact + Urgent = No brainers! These must happen.

-Low Impact + Not Urgent = Never do these.

### **Complicated**

-Low Impact + Urgent = Always there, sometimes hard to distinguish in the moment whether or not it is necessary. Often unnecessary, but we do a lot of this. This drives managerial inefficiency.

-High Impact + Not Urgent = Managerial efficiency is when you start focusing on these tasks.

There will always be a tension between High Impact + Not Urgent and Low Impact + Urgent. Discuss the importance of recognizing when the tasks taking up your time are not having a high impact. What would happen if you took the time to focus less on the small, urgent stuff - and more on the big picture? We want them to get more done, in less time.

### **YOU DON'T WANT TO BE A FIRE FIGHTER**

Do you know anybody like this?

### **SCHEDULING AS WAY TO BALANCE TIME**

- How to approach week
- How to measure time spent against priorities

### **TOOLS AS WAY TO BALANCE TIME**

- Sunrise
- Sunrise scheduler
- Clear and GTD
- Mailbox and other email management apps

### **REST AS WAY TO BE EFFECTIVE**

- Schedule rest/ exercise
- Make sure you sleep!!!!

## **Prototype manager schedule (20 min)**

-Discussion of hours and expectations

# When I Work Class

## ACTIONS

- When I Work Class (Trainee)
- Record progress in training log (Training Manager)

## MATERIALS

1. When I Work Class (this guide)
2. When I Work (website)

## Why WIW?

### What do we use WIW for?

### WIW Basic Overview

#### Dashboard

- Company-wide information, notices, and stats

#### Scheduler

- Scheduling employees at your location
- Accessing employee details
- Projecting sales and labor
- Tracking sales and labor

#### Attendance

- Adjusting and auditing employee timesheets
- Approving timesheets for payroll

#### Timeclock

- Clocking in and out for shifts
- Clocking in and out for breaks

#### Messaging

- Messaging employees and coworkers

## Requests

- View, send, and approve time-off requests

## Updating Employees, Positions, Locations

- Adding/deleting employees
- Updating employee's personal information
- Updating employee's locations
- Updating employee's payrates
- Tracking employee's training
- Adding/deleting positions
- Adding/deleting restaurant locations

## Contact information, Availability, Account settings

- Log-out
- Updating your contact information
- Viewing your schedule
- Setting your availability
- Updating WIW account settings/preferences

## Key Features

### 1. Creating a balanced schedule

#### 1.1 Scheduling the GM (you)

#### 1.2 Scheduling AMs

#### 1.3 Scheduling TLs, LOTs, Lead PREP

#### 1.4 Scheduling PEs, TMs, PREP, OTs

#### 1.5 Scheduling training support

### 2. Daily Schedule Check-In

#### 2.1 How to check who is scheduled on a computer

#### 2.2 How to check who is scheduled right now on an iPad/iPhone and other mobile devices

### 3. Scheduling Employees

#### 3.1 Setting the schedule

#### 3.2 Checking the schedule

#### 3.3 Publishing the schedule/updating the schedule

#### 3.4 Sending the weekly scheduling email

#### 3.5 Employees acknowledging and confirming their schedules

#### 3.6 Understanding employee's desired hours

#### 3.7 Schedule change requests

#### 3.8 Time-off requests

#### 3.9 No-call/no-shows

### 4. Tracking Employee Training

#### 4.1 Updating employee station training

#### 4.2 Checking employee station training

### 5. Attendance and Payroll

#### 5.1 How employees clock in and out for shifts and breaks

#### 5.2 Updating and auditing timesheets

#### 5.3 Approving payroll

#### 5.4 Accessing employee reports

## 6. Managing Labor Budget

6.1 Projecting future sales

6.2 Scheduling to your labor budget

6.3 Reading daily labor %

## 7. Messaging Employees

7.1 How to send a message to employees

7.2 How to check/audit previous messages

7.3 Other forms of acceptable communications with employees

## 8. Sharing Employees

8.1 When and why to share an employee with another location

8.2 How to share an employee with another location