

# Order Taking

## *Training Module*

### *Boundaries Coffee Training Series*

## Position Overview

The Order Taker sets the tone for both speed and hospitality. This position is the guest's first impression of Boundaries.

### Key Points:

- When 3+ people clocked in, Order Taker stands outside by menu board
- Wears the Boundaries satchel with handheld POS
- Keeps a friendly, professional presence—should be seen and heard
- With 2 people, Order Taker also handles Expo and Food

## The Greeting Script (Memorize This!)

Step	Action / Script
1	"Welcome to Boundaries!"
2	Hand the mini menu: "Here's a menu to look over."
3	"What can we get started for you today?"
4	Input order into Toast handheld
5	Confirm order (read back to guest)
6	"Are you a rewards member?" → If not, hand promo card for the app
7	If yes, enter phone number for rewards
8	"Go ahead and pull forward to the window for pickup."

## Flow Management

- Always maintain stacking flow: if another car arrives, politely ask first car to pull forward
- Walk forward with them to take the next order—keep the line moving
- Maintain awareness of the window time goal

**Time Goals:** Total visit under 3.5 minutes | Window time ≤ 60 seconds

## Hands-On Practice

Complete all practice tasks under trainer supervision.

Trainee Name: \_\_\_\_\_ Date: \_\_\_\_\_

### Greeting Script Practice

Task	Qty	Trainer Initial	Focus Points
Recite greeting script from memory	3		Word-for-word accuracy
Practice greeting with trainer as guest	5		Eye contact, enthusiasm
Hand menu and deliver opening line	5		Smooth handoff
Practice rewards member question	5		Natural delivery
Practice "pull forward" closing	5		Clear direction

### Live Roleplay Scenarios

Trainer acts as guest. Complete the full greeting interaction.

Scenario	Trainer Initial	Feedback
First-time guest who doesn't know the menu		
Guest asks "What's good here?" – make recommendation		
Guest with dietary restriction (dairy-free, sugar-free)		
Guest who is NOT a rewards member – promote app		
Guest in a hurry – fast but friendly service		

### Trainer Certification

Trainer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Order Taking Quiz

*Minimum passing score: 80% (16/20 correct)*

**1. When does the Order Taker stand outside by the menu board?**

- A) Always, regardless of staffing
- B) When 3 or more people are clocked in
- C) Only during peak hours
- D) When the manager requests it

**2. What equipment does the Order Taker wear/carry?**

- A) Apron and notepad
- B) Boundaries satchel with handheld POS
- C) Headset and tablet
- D) Cash drawer and receipt book

**3. What is the first line of the greeting script?**

- A) "How can I help you?"
- B) "Welcome to Boundaries!"
- C) "What can I get for you?"
- D) "Are you a rewards member?"

**4. What do you do immediately after saying "Welcome to Boundaries"?**

- A) Ask for their order
- B) Hand the mini menu and say "Here's a menu to look over"
- C) Ask if they're a rewards member
- D) Tell them about specials

**5. What is Step 3 of the greeting script?**

- A) "Are you a rewards member?"
- B) "What can we get started for you today?"
- C) Input the order
- D) Confirm the order

**6. After inputting the order, what should you do?**

- A) Process payment immediately
- B) Confirm the order (read back to guest)
- C) Ask about add-ons
- D) Tell them the total

**7. What should you ask about after confirming the order?**

- A) "Would you like anything else?"
- B) "Are you a rewards member?"
- C) "How would you like to pay?"
- D) "What size would you like?"

**8. What do you give non-rewards members?**

- A) A discount code
- B) A promo card for the app
- C) A free drink coupon
- D) Nothing

**9. If someone IS a rewards member, what do you do?**

- A) Skip to payment
- B) Enter their phone number for rewards
- C) Ask for their email
- D) Scan their app

**10. What is the final line of the greeting script?**

- A) "Have a great day!"
- B) "Your total is..."
- C) "Go ahead and pull forward to the window for pickup"
- D) "Thank you for choosing Boundaries"

**11. What is the total visit time goal?**

- A) Under 2 minutes
- B) Under 3.5 minutes
- C) Under 5 minutes
- D) Under 1 minute

**12. What is the maximum window time goal?**

- A) 30 seconds
- B) 60 seconds
- C) 90 seconds
- D) 2 minutes

**13. What does "flow management" mean for Order Takers?**

- A) Keeping drinks organized
- B) Stacking cars and walking forward to keep the line moving
- C) Managing espresso timing
- D) Cleaning between orders

**14. If another car arrives while you're with a guest, what do you do?**

- A) Ignore the new car until finished
- B) Politely ask the first car to pull forward, then walk to the next car
- C) Yell the order to the window
- D) Tell the new car to wait

**15. With 2 people on shift, who handles Order Taking?**

- A) No one takes orders outside
- B) The Order Taker, who also handles Expo and Food
- C) Both people alternate
- D) Only managers

**16. What is the purpose of the Order Taker position?**

- A) To take payment faster
- B) To set the tone for both speed and hospitality
- C) To upsell products
- D) To direct traffic

**17. How should the Order Taker's presence be described?**

- A) Quiet and efficient
- B) Friendly and professional – should be seen and heard
- C) Fast and silent

D) Only speak when spoken to

**18. What step comes AFTER asking about rewards membership?**

- A) Confirm the order
- B) If yes, enter phone number; if no, hand promo card
- C) Process payment
- D) Input the order

**19. How many steps are in the complete greeting script?**

- A) 5
- B) 6
- C) 8
- D) 10

**20. Why is the Order Taker considered the guest's first impression?**

- A) They handle payment
- B) They are the first person the guest interacts with
- C) They make the drinks
- D) They manage the store

## **Answer Key**

*(For Manager/Trainer Use Only)*

- 1. B** – When 3 or more people are clocked in
- 2. B** – Boundaries satchel with handheld POS
- 3. B** – "Welcome to Boundaries!"
- 4. B** – Hand the mini menu and say "Here's a menu to look over"
- 5. B** – "What can we get started for you today?"
- 6. B** – Confirm the order (read back to guest)
- 7. B** – "Are you a rewards member?"
- 8. B** – A promo card for the app
- 9. B** – Enter their phone number for rewards
- 10. C** – "Go ahead and pull forward to the window for pickup"
- 11. B** – Under 3.5 minutes
- 12. B** – 60 seconds
- 13. B** – Stacking cars and walking forward to keep the line moving
- 14. B** – Politely ask the first car to pull forward, then walk to the next car
- 15. B** – The Order Taker, who also handles Expo and Food
- 16. B** – To set the tone for both speed and hospitality
- 17. B** – Friendly and professional – should be seen and heard
- 18. B** – If yes, enter phone number; if no, hand promo card
- 19. C** – 8
- 20. B** – They are the first person the guest interacts with

## **Quiz Results**

**Score:** \_\_\_\_\_ / 20    **Percentage:** \_\_\_\_\_%    **Pass/Fail:** \_\_\_\_\_

*(Minimum 16/20 = 80% to pass)*