

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)