

ROBO

Upsell Instructor Toolkit

Train-the-Trainer Guide for Restaurant Leaders

2025



Supporting the 4-Week and 8-Week Upsell Training Programs



Purpose

This toolkit gives managers and trainers the structure, prompts, and facilitation tools to confidently lead upsell training sessions, monitor staff progress, and reinforce consistency on the floor.

It complements both the Quick-Start 4-Week Syllabus and the Full 8-Week Program, consolidating all coaching resources in one place.

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Quick Reference Overview

- The Upsell Training Program helps staff:
- Build confidence in suggesting add-ons naturally
 - Improve timing, phrasing, and tone through repetition
 - Learn to connect upselling with guest experience, not pressure
 - Measure and sustain improvement using attach-rate and feedback data

Managers use this guide to coach, observe, and calibrate. Turning everyday moments into teachable interactions.



Training Flow Snapshot

Phase	Focus Area	Core Activity	Typical Duration	Manager Role
Weeks 1–2	Foundations	Menu knowledge, guest engagement	30–60 mins	Model phrasing, quiz teams
Weeks 3–5	Practice & Coaching	Live role-play and real-shift application	45–75 mins	Observe and debrief
Weeks 6–8	Mastery & Measurement	Objection handling, adaptive communication, advanced scenarios	60–90 mins	Calibrate and coach under pressure

Note: Each week’s focus can be scaled down for quick pre-shift refreshers or expanded for full workshops. Use the right pacing for your operation.



Role Play Scenario Library

This section gives facilitators ready-to-run scenarios to help staff practice upselling, objection handling, and guest engagement in different service settings.

Each scene includes setup, goal, and sample dialogue, followed by short coaching prompts.

Scenarios can be run during pre-shift huddles, workshops, or live-floor refreshers.

How This Toolkit Connects

- For weekly objectives, timing, and pacing: see the 8-Week Training Plan
- For condensed version and on-the-go adaptation: use the 4-Week Quick-Start Syllabus



This toolkit supplements both, providing ready-to-run scenarios, rubrics, and coaching templates.

Table Service Scenarios

Scenario 1 — Starters & Pairings

Setup: Guest seated and reviewing menus.

Goal: Practice suggesting a small add-on or pairing that feels natural.

Sample Script

Server: "Our grilled artichoke starter is light and shareable. Would you like one while I bring your drinks?"

Guest: "Maybe later."

Server: "Sounds good — I'll check back once you've looked over the menu."

Coach Tip:

Watch phrasing for confidence without pressure.
Reinforce calm pauses and tone.



Table Service Scenarios

Scenario 2 — Dessert With Intention

Setup: Guest finishing entrées.

Goal: Practice timing dessert suggestion as part of closing service rhythm.

Sample Script

Server: "Many guests end with our chocolate lava cake. May I tempt you?"

Guest: "No, I'm full."

Server: "How about a small espresso or a mini dessert to take home?"

Coach Tip:

Highlight timing: the server offers before the check is printed, not after.





Counter Service Scenarios

Scenario 1 — Bundle With Energy

Setup: Guest orders a sandwich.

Goal: Introduce simple bundle offers that sound conversational.

Sample Script

Server: “Good choice — that’s one of our most popular sandwiches. Would you like to make it a combo with the house salad or chips today?”

Guest: “Just the sandwich.”

Server: “All right! If you change your mind, No problem. They’re available and fresh until close.”

Coach Tip:

Focus on momentum and brevity. Too many choices can slow the line.



Counter Service Scenarios

Scenario 2 — Highlighting Limited Items

Setup: Guest halfway through order.

Goal: Increase awareness of limited-time or high-margin items.

Sample Script

Server: "By the way, our roasted red pepper soup is only here for the week — want to add a cup?"

Guest: "Not this time."

Server: "Got it. I'll make sure you know when it's back."

Coach Tip:

Encourage energy in voice but keep pacing consistent.

Drive-Thru Scenarios

Scenario 1 — Combo Upgrade

Setup: Guest orders a main item.

Goal: Upsell to combo while keeping order speed smooth.

Sample Script

Server: "Would you like to make that a combo with fries and a drink?"

Guest: "No thanks."

Server: "Sure thing — I'll note just the sandwich for you."

Coach Tip:

Encourage natural tone and quick close, not repeated prompts.

Drive-Thru Scenarios

Scenario 1 — End-of-Line Add-On

Setup: Guest arrives at payment window.

Goal: Suggest one quick, high-margin treat.

Sample Script

Server: "We just pulled a fresh batch of cinnamon twists. Want to add one while you're here?"

Guest: "Tempting, but I'll pass."

Server: "All right — they'll be waiting next time."

Coach Tip:

Smile in voice. Make the offer sound friendly, not scripted.





Objection Handling & Recovery Scenarios

Scenario 1 — Handling Price Sensitivity

Setup: Guest hesitates at add-on price.

Goal: Teach value framing.

Sample Script

Guest: "That's a little expensive."

Server: "It is a bit more, but the portion's large enough to share — that's why most tables order one to split."

Coach Tip:

Practice reframing around guest value, not defending price.

Scenario 2 — Upselling Under Pressure

Setup: Busy period with long ticket times.

Goal: Keep composure while maintaining upsell rhythm.

Sample Script

Server: "While the kitchen finishes your entrées, may I bring a flatbread to share?"

Guest: "No, we'll just wait."

Server: "Perfect. I'll keep an eye on your table and check back shortly."

Coach Tip:

Observe voice tone and posture. Calm presence often drives higher acceptance later.



Coaching & Feedback Rubrics

This section helps managers observe staff performance objectively and deliver consistent, actionable feedback.

Use the rubric during role-plays, live service, or post-shift reviews to measure progress, identify strengths, and set next-step goals.



Universal 5-Metric Evaluation Rubric

Metric	What to Look For	Rating 1–5 Scale
Guest Awareness	Reads guest mood, adapts tone and phrasing appropriately	1 = Misses guest cues 5 = Adjusts naturally and instantly
Timing & Flow	Suggests add-ons at the right service moment without interrupting pace	1 = Poor timing 5 = Smooth integration
Language & Tone	Uses clear, benefit-based language with authentic enthusiasm	1 = Scripted 5 = Conversational and engaging
Confidence & Composure	Maintains positive tone under pressure or rejection	1 = Hesitant 5 = Calm and poised
Conversion & Follow-Through	Secures guest acceptance or reinforces rapport even if declined	1 = Loses moment 5 = Closes with ease or rapport

Manager Note: Use the same rubric each week. Consistent scoring patterns show progress over time more accurately than one-off evaluations.



Sample Completed Rubrics

Example A — Excellent Performance

Metric	Score	Comment
Guest Awareness	5	Instantly recognized when family wanted speed; shortened dialogue appropriately.
Timing & Flow	5	Suggested add-on right after entrée order—smooth, no disruption.
Language & Tone	4	Used natural phrasing; could vary word choice more.
Confidence & Composure	5	Stayed upbeat despite two refusals.
Conversion & Follow-Through	4	Secured dessert add-on later through relaxed tone.

Example B — Developing Performance

Metric	Score	Comment
Guest Awareness	3	Missed visual cue that guest was rushed.
Timing & Flow	2	Interrupted while guest was ordering entrée.
Language & Tone	3	Positive but sounded memorized.
Confidence & Composure	3	Visibly flustered after refusal.
Conversion & Follow-Through	2	Did not attempt alternate suggestion.

Overall: Needs coaching on pacing and recovery after “no.” Practice LAER (Listen, Acknowledge, Explore, Respond) in next session.



Daily Observation Notes Template

This form supports consistent, real-time coaching on upsell techniques and guest engagement. Trainers should use it during active shifts or practice sessions to capture objective observations, identify patterns, and guide focused development.

The goal is to balance accountability with encouragement, helping each team member refine timing, phrasing, and confidence while ensuring every upsell feels natural to the guest experience.

Date:

Trainer:

Employee:

Observation Area	Notes or Examples	Action or Follow-up
Strengths Observed		
Growth Opportunities		
Guest Reaction Highlights		
Next Coaching Focus		

Tip: Keep notes factual (“offered too early in order”) instead of judgmental (“bad timing”). After two to three observation cycles, review progress against the universal rubric for consistency.



Facilitation & Coaching Guides

Purpose

To help managers lead consistent, high-impact training sessions that balance efficiency, reinforcement, and individual coaching.

Each guide can stand alone for quick reference or be used together to structure full weekly sessions.

Running Effective Pre-Shift Huddles

Goal: Align and energize the team before service.



Step	Focus	Duration	Notes
1	Set the focus skill (e.g., dessert timing or tone)	2 min	Keep one clear target
2	Demo or peer example	3 min	Use real phrasing from prior day
3	Quick partner drill	5 min	Two rounds of short dialogue
4	Reinforce metric	2 min	Remind attach-rate or survey goal

Manager Tip: Keep it upbeat and focused on one repeatable behavior, not multiple goals.

Leading Debriefs and Feedback Conversations (LAER Model)

Use **LAER = Listen, Acknowledge, Explore, Respond** to maintain productive, non-defensive feedback loops.

Step	Trainer Example	Common Pitfall
Listen	"Tell me how that guest interaction felt from your side."	Jumping straight to correction
Acknowledge	"You handled the delay calmly—good composure."	Skipping positive reinforcement
Explore	"What might have made the upsell sound more natural?"	Giving answers instead of prompting reflection
Respond	"Let's try that phrasing together once more."	Ending without next-step practice



Tip: End every debrief with one action the employee owns before the next shift.

Coaching Under Pressure

Objective: Equip trainers to maintain composure and build staff confidence during high-volume.

Pressure Cue	Coaching Focus	Example Prompt
Rush periods	Simplify prompts to one offer per order	"One clear add-on is better than three half-heard options."
Multiple refusals	Keep tone steady and reset quickly	"Smile in your voice, move on naturally."
Kitchen delays	Use bridge statements to reassure	"Let's keep guests informed before they ask."

Trainer Reminder: Model calm body language; staff mirror it instantly.

Observation Guidelines

During Training

- Observe two staff per session maximum for quality attention.
- Use the 5-Metric Rubric for structure, not scoring pressure.
- Capture one “highlight moment” to share in pre-shift recognition.

During Live Training

- Watch guest body language as much as staff delivery.
- Note pacing and recovery rather than only conversion rate.
- Share quick feedback within 10 minutes of observation for maximum recall.

After Shift

- Summarize one team win, one coaching theme.
- Update your Observation Notes Template for pattern tracking.



Manager Tip: Recognition drives repetition. Praise visible effort, not just perfect outcomes.





Reference Tools & Printables

Purpose

To give managers fast-access reference materials they can print or display during pre-shift huddles, training sessions, or live-service refreshers.

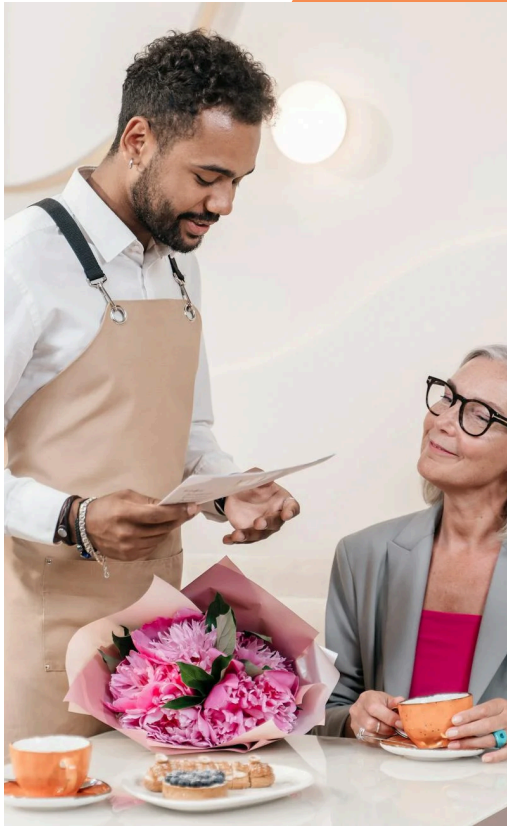
Each tool reinforces consistency, phrasing, and measurable progress throughout the upselling program.



Upselling Language Cheat Sheet

Scenario	Sample Phrasing	Intent / Why It Works
Drink or Starter	"Would you like to start with a small plate while your entrée's prepared?"	Invites early decision without pressure
Combo Upgrade	"You can make that a combo with our seasoned fries and drink—it's a guest favorite."	Anchors value, not price
Dessert Timing	"Our pastry chef just finished a warm berry crisp. Would you like me to bring dessert menus?"	Leverages curiosity and timing
Limited Item	"We only have a few left of today's feature—want me to reserve one for you?"	Creates scarcity and gentle urgency
Take-Home Add-On	"Would you like to take a slice of our cheesecake for later?"	Turns "no" into deferred yes

Trainer Tip: Focus on positive framing and calm pacing. The same words can sound entirely different depending on tone.



Common Objections & Reframes

Guest Objection	Ineffective Response	Better Reframe
"I'm full."	"Okay, no problem."	"Totally understand. Many guests take dessert to go—it travels well."
"Too expensive."	"Yeah, it is a bit pricey."	"It's priced for sharing, and guests say the portion's generous."
"I don't have time."	"All right, I'll close it out."	"We can make it to-go if that helps you stay on schedule."
"I'm watching calories."	"Okay, maybe next time."	"We also have lighter fruit options—would that work?"

Manager Reminder: Track which objections appear most often. Frequent patterns may signal pricing or product perception issues, not just training gaps.

Closing Note

These reference tools are the glue between training and culture. Consistency turns upselling from a scripted exercise into second nature.

When used alongside the 8-Week Program or the 4-Week Quick-Start Syllabus, this Instructor Toolkit provides a complete foundation for measurable, confident upsell performance.

The following page has a progress track you can print and use during weekly staff observations.

Progress Tracker Template

Use Weekly to Record Staff Progress

Week	Focus Area	Observed Strength	Coaching Focus	Attach Rate Change	Manager Signature
1	Mindset & Menu Knowledge		Keep one clear target		
2	Guest Engagement		Use real phrasing from prior day		
3	Techniques & Flow		Two rounds of short dialogue		
4	Live Practice		Remind attach-rate or survey goal		
5	Menu Engineering				
6	Objection Handling				
7	Guest Typing				
8	Table Management				



Manager Tip: Review these trackers at the end of each month to identify top performers for peer-coaching or recognition.



ABOUT US

RoboOp365 is a solutions provider and distributor of kitchen and service robotics.

We deliver Robby, a kitchen automation robot that takes on high-volume cooking tasks.

Our solutions help operators reduce labor strain, improve efficiency, and create more resilient operations.

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