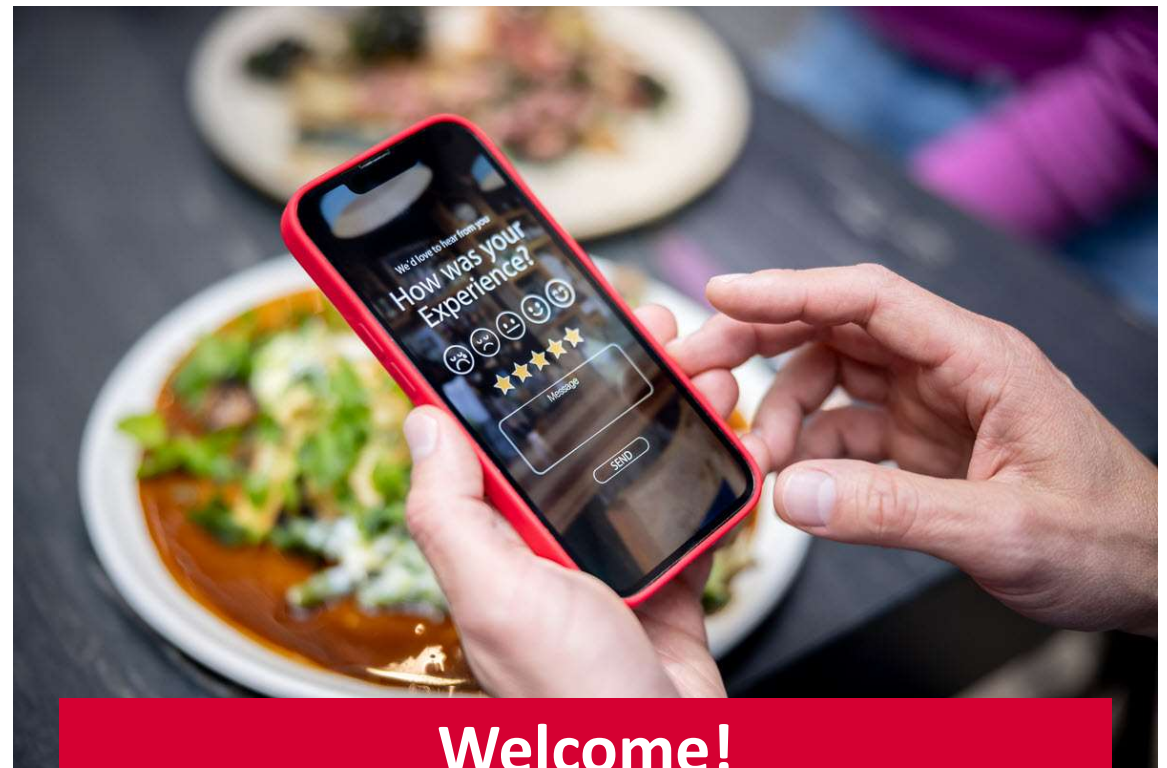


Restaurant Systems Scorecard

**How Will Your
Restaurants Stack Up
in 2023?**

RO Restaurant
owner.com



Welcome!
Today's event will be starting shortly.

Your Hosts



Jim Laube



Chris Tripoli



Joe Erickson

Webinar Format



- Interactive format
- Access to participant comments & questions
- This webinar is being recorded
- Links to resources will be included on the recorded webinar page

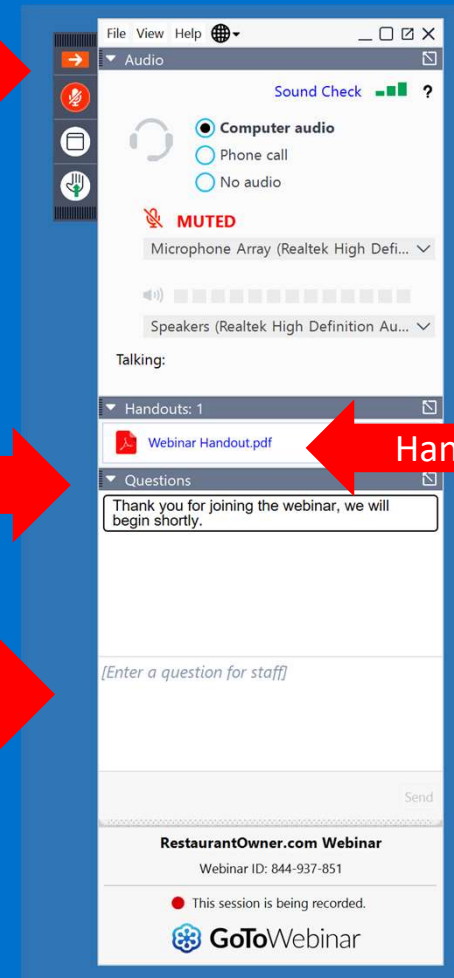
Questions & Comments

Show/Hide Control Panel

Questions Tab

Type your Questions / Comments

Handouts



Restaurant Operations Advisor



Chris Tripoli

Chris Tripoli is a contributor and operations advisor for RestaurantOwner.com. He has over 40 years of service in the hospitality industry as a concept developer, owner-operator and restaurant consultant. Chris has created award winning restaurant concepts, consulted on a wide variety of restaurant projects, and developed food service programs for airports, parks, theaters, arenas, convention centers and medical centers. He also teaches classes in opening restaurants, menu development, and growth strategies at the University of Houston's Small Business Development Center and is a regular contributor to Restaurant Start Up and Growth Magazine and RestaurantOwner.com . Chris hosts the podcast "Corner Booth, candid conversations with today's restaurant entrepreneurs."

Annual Planning

- Review key operating systems (the 3 P's)
 - People
 - Product
 - Procedures
- Prioritize short-term objectives to accomplish
- Establish budgets (week, month, year)
- Execute weekly



Restaurant Operations Assessment

Review Your Systems for These 5 Key Areas

- **Financial Management** - *Everything you do to control and measure your results*
- **Food & Beverage** - *Everything you do to create consistent food and beverages*
- **Service & Hospitality** - *Everything you do to serve and take care of your guests*
- **Leadership & Culture** - *Everything you do to guide your team*
- **Marketing** - *Everything you do to attract new and returning guests*

Question 1 of 5

Financial Management

Everything you do to measure your results Check each of the following statements that are mostly true for your restaurant

- We have budgets and we track sales, guest counts and labor cost daily.
- We calculate prime cost weekly, investigate variances and if necessary, promptly make corrections.
- We conduct a physical inventory and examine inventory turnover whenever food cost is calculated.
- Our financial statement format is based on the Uniform System of Accounts for Restaurants.
- Our monthly (or 4 week) financials are completed no more than 7 days after the end of the period.
- Through our POS, we hold managers accountable for voids, comps and discounts and we have clearly defined cash handling and audit procedures.
- Our weekly labor schedules are based on anticipated sales volume and actual labor is compared to budgeted labor daily.
- We share our P&L (up to at least Controllable Income) with our managers so they can see the financial results of their activities and can better help us manage our profitability.
- We have up to date menu costs for all food and beverage items and maintain a profitable pricing strategy.

www.restaurantowner.com/assessment

Restaurant Business Review

Question 1 of 5

Financial Management

Everything you do to measure your results Check each of the following statements that are mostly true for your restaurant

- We have budgets and we track sales, guest counts and labor cost daily.
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- We share our P&L (up to at least Controllable Income) with our managers so they can see the financial results of their activities and can better help us manage our profitability.
- We have up to date menu costs for all food and beverage items and maintain a profitable pricing strategy.
- We use our POS sales mix report to complete a menu engineering analysis at least twice a year.



Business Review Consultation

Looking for ways to make improvements but don't have the time to create a plan? Let our professional operations advisors review your restaurant's assessment and make recommendations....Learn more>>>

Management

www.restaurantowner.com/assessment

Restaurant Operations Advisor



Chris Tripoli

Chris is offering a complimentary phone review to answer your questions and to help you decide if a full business review is a good fit for your restaurant.

You can email him at chris@christripoli.com

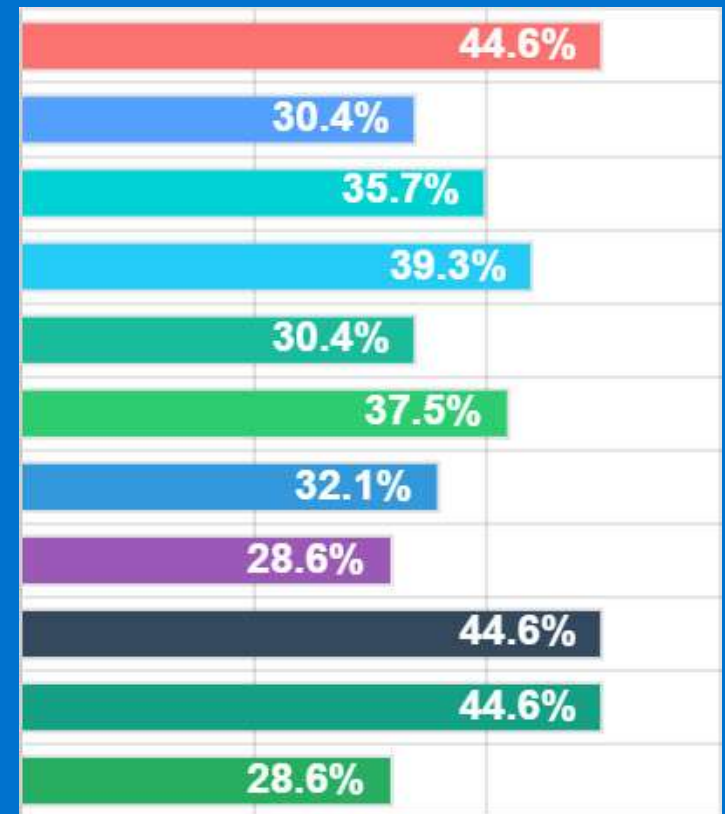
Assessment Results

Key Areas

- Financial Management
- Food & Beverage
- Service & Hospitality
- Leadership & Culture
- Marketing

“We do not do any of these very well”

27.6%
20.7%
24.1%
29.3%
25.9%



Financial Management

- We have budgets and we track sales, guest counts and labor cost daily. **46.6%**
- We calculate prime cost weekly, investigate variances and if necessary, promptly make corrections. **31.0%**
- We conduct a physical inventory and examine inventory turnover whenever food cost is calculated. **37.9%**
- Our financial statement format is based on the Uniform System of Accounts for Restaurants. **41.4%**
- Our monthly (or 4 week) financials are completed no more than 7 days after the end of the period. **32.8%**
- Through our POS, we hold managers accountable for voids, comps and discounts and we have clearly defined cash handling and audit procedures. **37.9%**
- Our weekly labor schedules are based on anticipated sales volume and actual labor is compared to budgeted labor daily. **31.0%**
- We share our P&L (up to at least Controllable Income) with our managers so they can see the financial results of their activities and can better help us manage our profitability. **29.3%**
- We have up to date menu costs for all food and beverage items and maintain a profitable pricing strategy. **46.6%**
- We use our POS sales mix report to complete a menu engineering analysis at least twice a year. **46.6%**

Food & Beverage

- Our staff is held accountable to a photo-based menu and recipe manual. **29.3%**
- Our equipment and systems are clean, current, and well maintained. **69.0%**
- We have effective quality control systems in place focused on the highest level of guest satisfaction. **36.2%**
- Staff is held accountable to our purchasing and receiving policies and procedures. **46.6%**
- Our storerooms, walk-ins and shelves are clean, orderly, and labeled, products are date labeled and rotated. **48.3%**
- We use a standard prep and build-to list, which is reviewed and adjusted based on POS sales mix reports. **29.3%**
- We use strict portion control methods for all food and beverage items. **36.2%**
- We use opening, shift change and closing checklists for each position including all products. **34.5%**
- We have established ticket time benchmarks for every food and beverage item. **34.5%**
- No food or beverage item can be prepared without a POS generated order ticket, we have systems for tracking waste, mistakes and spills. **53.4%**

Service & Hospitality

- Throughout each day our staff follows detailed checklists to ensure our restaurant, inside and out is clean, orderly and in good repair. **32.8%**
- Our dress and appearance policy ensures our staff is uniform and clean. **58.6%**
- Our menu, ordering process, seating, reservations and wait list are clearly understood by all our staff. **62.1%**
- Our service steps and timing for each phase of the guest experience are clearly defined. **37.9%**
- Our trained staff recognizes and responds appropriately and timely to guest needs. **53.4%**
- We have an effective hospitality and customer service program. **32.8%**
- We know mistakes happen, so we have systems to respond immediately, resolve the problem in favor of the guests and we have clearly defined comp/discount/refund policies. **44.8%**
- We have a system to solicit, receive and use guest feedback daily. **41.4%**
- Our service systems are designed to exceed guest expectations. **32.8%**
- We know all the touchpoints of the guest journey and have developed our unique guest experience. **29.3%**

Leadership & Culture

- We have a one sentence mission or vision statement that everyone knows and understands. **27.6%**
- We have created a high-performance culture marked by mutual trust and respect, personal accountability, and a standard of excellence. **32.8%**
- We have weekly manager meetings. **44.8%**
- We communicate to our staff regularly about what's going on in the restaurant. **44.8%**
- We have an organizational chart and written job descriptions for every position. **24.1%**
- We have and use effective employee recruiting and selection systems. **27.6%**
- We have up to date, documented policies and procedures and an employee handbook. **44.8%**
- We have a formal orientation program, written training manuals and training programs for all positions. **31.0%**
- We have an effective compensation and incentive plan that rewards performance and results. **36.2%**
- We take time regularly to plan and think strategically about how we are doing and what we need to change to do better. **34.5%**

Marketing

- We adamantly strive to deliver what our customers want, not what we want to serve. **53.4%**
- We have a clearly defined target market and a specific position in the marketplace. **46.6%**
- We have intimate knowledge of our competitive advantage and clearly communicate this in our marketing. **32.8%**
- We focus on delivering high perceived value not the lowest prices. **62.1%**
- We have a system to identify first time guests and convert them into loyal, returning guests. **25.9%**
- We collect guest contact information and consistently market to them. **36.2%**
- We have an effective guest loyalty and referral program. **25.9%**
- We have an effective presence on social media. **56.9%**
- Our Internet marketing system includes a website that clearly communicates our uniqueness and brand. **48.3%**
- Our menu strategically highlights highly profitable, high quality menu items in a format that can be easily and affordably updated. **37.9%**

Do your restaurant managers work from an annual plan and weekly budget?

Please type you answers into the question box

Download the Weekly Prime Cost Worksheet vs. Budget Template



This form is available in the following formats. You must have a compatible program installed on your computer to use them.



[Click to Download Microsoft Excel format](#)

Blue Fish Grill OPERATING BUDGET - 2022 Year Starting/Ending Dates		01/01/22	12/31/22						
SALES		JAN		FEB		MAR			
Food - Dine In		\$ 85,000	62.9%	\$ 80,000	59.7%	\$ 84,000	59.9%		
Food - Carry Out & Delivery		15,000	11.1%	16,000	11.9%	17,000	12.1%		
Food - Catering		10,000	7.4%	12,000	8.9%	13,000	9.3%		
Total Food Sales		110,000	81.4%	108,000	80.5%	114,000	81.3%		
Merchandise - Other		1,100	.8%	1,100	.8%	1,200	.9%		
Beverage - Liquor		9,000	6.7%	10,000	7.5%	10,000	7.1%		
Beverage - Bottled Beer		6,000	4.4%	6,000	4.5%	6,000	4.3%		
Beverage - Draft Beer		4,000	3.0%	4,000	3.0%	4,000	2.9%		
Beverage - Wine		5,000	3.7%	5,000	3.7%	5,000	3.6%		
Total Beverage Sales		24,000	17.8%	25,000	18.6%	25,000	17.8%		
TOTAL SALES		135,100	100.0%	134,100	100.0%	140,200	100.0%		
COST OF SALES									
Food -		31,350	28.5%	31,320	29.0%	33,060	29.0%		
Total Food Cost		550	50.0%	550	50.0%	600	50.0%		
		2,250	25.0%	2,500	25.0%	2,500	25.0%		
		1,080	18.0%	1,080	18.0%	1,080	18.0%		
		520	13.0%	520	13.0%	520	13.0%		
		2,000	40.0%	2,000	40.0%	2,000	40.0%		
		5,850	24.4%	6,100	24.4%	6,100	24.4%		
		37,750	27.9%	37,970	28.3%	39,760	28.4%		
		10,500	7.8%	10,500	7.8%	10,500	7.5%		
		27,020	20.0%	26,150	19.5%	27,339	19.5%		
		37,520	27.8%	36,650	27.3%	37,839	27.0%		
		8.0%	3,002	2.2%	2,932	2.2%	3,027	2.2%	
		4.7%	1,783	1.3%	1,723	1.3%	1,778	1.3%	
			1,400	1.0%	1,400	1.0%	1,400	1.0%	
			350	.3%	350	.3%	350	.2%	
			200	.1%	200	.1%	200	.1%	
			150	.1%	150	.1%	150	.1%	
			200	.1%	200	.1%	200	.1%	
			500	.4%	500	.4%	500	.4%	
Employee Parties & Activities		7,565	5.6%	7,454	5.6%	7,606	5.4%		
Medical Expenses									
Total Employee Benefits									
TOTAL PAYROLL COST		45,085	33.4%	44,104	32.9%	45,445	32.4%		
PRIME COST		82,835	61.3%	82,074	61.2%	85,205	60.8%		
GROSS MARGIN		52,265	38.7%	52,026	38.8%	54,995	39.2%		

Business Review Consultation

Looking for ways to make improvements but don't have the time to create a plan?

Let our professional operations advisors **review your restaurant's assessment and make recommendations**. You'll get a detailed report and recommendation outlining the steps you can take over the next 30-90 days to help boost your bottom-line, elevate guest consistency, and improve staff retention.

Our "person to person" advisement service includes:

- 60 to 90 minute virtual session to review your restaurant's assessment results, answer questions & provide feedback
- Provide specific recommendations on the systems and best practices that will most benefit your restaurant
- Develop a realistic 30-60 day plan of action for implementation of recommended systems and best practices
- Written summary of session with recommendations and action plan to work from
- 30 day follow up call to review progress, answer questions and discuss next steps.

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Member Price: \$499

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Your guests will be the first to notice.

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Q&A



Questions

Additional questions to
info@restaurantowner.com

Please Give Us Your Feedback

Survey

Customer Satisfaction Survey

1. Please tick a box on each line to indicate how much you rate level of service

	Excellent	Good	Average	Poor	Very Poor
a. Location	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Comfort	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Facilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What can we do to improve service?

Submit

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Just 4 very short questions!

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Thank you for attending!

info@RestaurantOwner.com