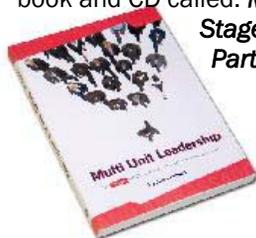


## Targeted Training Tools that Drive Revenue

The purpose of an effective QBP (Quarterly Business Plan) is to create an active roadmap for Multi Unit Leaders that links quarterly goals to daily execution in each of your units. Use this **QBP Quik-Template** to plan and prioritize your next 90 days, and see better results immediately.

You can download a more detailed and comprehensive version of this QBP Planner in our Product catalog at Sullivision.com along with a comprehensive checklist for executing High Impact Restaurant Visits.

Use this template in conjunction with our best-selling book and CD called: **Multi-Unit Leadership: the 7 Stages of Building High- Performing Partnerships and Teams.**



Check out our e-learning course called **Multi U** and free monthly e-newsletter at [www.sullivision.com](http://www.sullivision.com).

## 1

### Previous Quarter Summary

Analyze performance in key areas per unit over the past period.

	\$/%	+/- Vs. Budget	+/- Vs. Prior Year	Trend (+/-)
Total Sales	_____	_____	_____	_____
Cost of Goods	_____	_____	_____	_____
Labor Cost	_____	_____	_____	_____
Operating Costs	_____	_____	_____	_____
Controllable Income	_____	_____	_____	_____

For each unit:

What are the key lessons and best practices that impacted the last quarter? \_\_\_\_\_

\_\_\_\_\_ Share them with your managers.

What did the team accomplish? \_\_\_\_\_

What is still in progress? \_\_\_\_\_

What hasn't been started, but needs to be done? \_\_\_\_\_

## KRA Goals

## 2

Assess and prioritize (1,2,3...) the Key Result Areas you'll work on this quarter in each unit. Use last quarter's results, period trends, GM Input and unit strengths & challenges. \*

	Priority	KRA	Details / Tactics
Team	<input type="checkbox"/>	Staffing	_____
	<input type="checkbox"/>	Training	_____
	<input type="checkbox"/>	Turnover/Tenure	_____
	<input type="checkbox"/>	Development	_____
	<input type="checkbox"/>	Bench Strength	_____
	<input type="checkbox"/>	Diversity	_____
Sales	<input type="checkbox"/>	Service Scores	_____
	<input type="checkbox"/>	Marketing/Events	_____
	<input type="checkbox"/>	Customer Traffic	_____
	<input type="checkbox"/>	Comp Sales	_____
	<input type="checkbox"/>	Salesmanship	_____
	<input type="checkbox"/>	Incentives/Contests	_____
Product	<input type="checkbox"/>	Food Safety	_____
	<input type="checkbox"/>	Food Quality	_____
	<input type="checkbox"/>	Waste	_____
	<input type="checkbox"/>	Line Checks	_____
	<input type="checkbox"/>	Purch./Receiving	_____
	<input type="checkbox"/>	Spec Compliance	_____
Profit	<input type="checkbox"/>	Best Practices	_____
	<input type="checkbox"/>	Profitability	_____
	<input type="checkbox"/>	Labor Costs	_____
	<input type="checkbox"/>	Overtime	_____
	<input type="checkbox"/>	COG	_____
Facility	<input type="checkbox"/>	Supplies	_____
	<input type="checkbox"/>	Cleanliness	_____
	<input type="checkbox"/>	R&M	_____
	<input type="checkbox"/>	Licenses	_____
Process	<input type="checkbox"/>	Inspections	_____
	<input type="checkbox"/>	Systems	_____
	<input type="checkbox"/>	Paperwork/Reports	_____
Marketing	<input type="checkbox"/>	Cash Mgt, Files	_____
	<input type="checkbox"/>	LSM, LTOs, Signage etc	_____

\* See our QBP E-Book @ Sullivision.com for a more detailed quarterly planner.

## 3

### People

At the end of the next 90 days, what do you expect your team to be better at? What are the needs of the team and each individual? For each unit, assess:

- **Leadership** Discuss with each Manager the specific actions he/she will take to achieve the stated KRA goals. What stretch goals should be assigned? To whom? Why?
- **Manager Development** Review and detail each Manager's development needs and career path. Address succession plans, timetables, and necessary resources. Forecast any changes—like promotions, transfers, and departures—in the team over the coming quarter.
- **Training & Knowledge Capital** What knowledge gaps exist in your Manager and Hourly teams that may limit goal achievement, career growth, or executing the quarterly plan? What materials exist (or need to be created) to address those gaps? How is training being executed every day in each unit (new hires, veterans, shift meetings, individual coaching, LTO support, etc.)? How—specifically—will you improve sales & service through crew training this quarter? How will you measure ROI?
- **Recognition** Who is being honored this quarter for performance & achievement? Who is celebrating a hiring anniversary? Which family or spouse should be sent a note or gift to thank them for their support after a busy period? Which units staged contests and who won?

## Marketing

4

**Marketing & Promotions :** What events in the immediate trade area are likely to affect business in the next 90 days? Assess both internal (LTO's, promotions, special events), and external (construction, sporting events, concerts, conventions) events.

Event	Date(s)	Impact / Response
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Local Marketing:

- Develop a Local Store Marketing (LSM) plan with each GM detailing specific strategies & tactics from the business & residential communities within a 3-mile radius of the unit.
- Discuss specific ways to increase traffic in the next 90 days by improving staff retention, service, salesmanship, training and other internal tactics.
- Survey the competition's tactics by visiting their websites and stores, clipping their ads, coupons, and noting signage and promotions.

5

## Facilities / Operations

**Determine the readiness of the facility. Identify equipment or areas that need attention and rate them on a scale:**

### 1="Need to Have"

Poses immediate threat to safety, sanitation, product quality or Guest satisfaction.

### 5="Nice to Have"

Would improve cosmetic appearance of the operation or likely contribute to better productivity.

Item / Issue	Urgency / Priority
_____	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
_____	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
_____	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
_____	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
_____	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>

**Cost Assessment :** Identify priority items above and budget .

Item	Repair	Replace	Estimated Cost
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____

**Throughput Review:** Observe and assess the speed, efficiency and accuracy of the people and processes of each store. Identify bottle-necks or breakdowns in production. Identify causes. Is the team aware of the problem? What is their plan for improvement?

## Profitability / Productivity

6

Are all units making money? Could they be doing better?

### Rank Store Performance:

	Store	Sales	Service	COG	Margin
TOP	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
BOTTOM	_____	_____	_____	_____	_____

What can be learned from the top and communicated to the bottom?

With each GM, set specific revenue & profitability goals, and break them down to daily / shift targets:

- Quarterly Sales Goal: \_\_\_\_\_ Profit Goal: \_\_\_\_\_
- Monthly Sales Goal: \_\_\_\_\_ Tactics/Impact: \_\_\_\_\_
- Weekly Sales Goal: \_\_\_\_\_ Tactics/Impact: \_\_\_\_\_
- Daily Sales Goal: \_\_\_\_\_ Tactics/Impact: \_\_\_\_\_
- Shift Sales Goals (divide by number of shifts and weight according to traffic).
- Detail tactics and impact for each shift.

Review any controllable line-items (cost of goods, labor, supplies, utilities, comps, over/short, etc.) that are over budget or above prior year. Discuss reasons for overages and develop a plan to address.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

7

## Visiting the Unit

Schedule your unit visits based on performance. Which units need your attention the most? Why?

- Call each unit daily, Visit each unit weekly. When you are in a unit, work on that unit. Minimize outside distractions.
- Get a detailed, downloadable **High Impact Restaurant Visit Template** at [Sullivision.com](http://Sullivision.com).
- Bring energy, don't take it away. When planning each visit, determine the focus using the following points:

Store: \_\_\_\_\_

Visit Day/Date: \_\_\_\_\_

Areas of Focus: \_\_\_\_\_

GM Pre-Work: \_\_\_\_\_

### Top 3 Areas of Concern for You/GM:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Quarterly KRA Strengths: \_\_\_\_\_

Quarterly KRA Weaknesses: \_\_\_\_\_

**Multi U**  
e-learning for Multi Unit Leaders

Check out our new **Multi U** e-learning course for MUMs at [www.sullivision.com](http://www.sullivision.com). (Get your free e-newsletter too!)