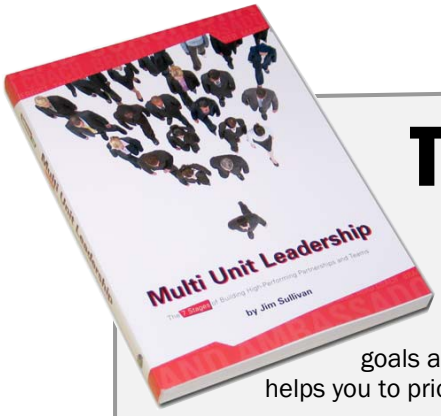


The Quarterly Business Plan

A detailed quarterly business plan (or QBP) is The 90 Day Road Map for a Multi Unit Manager's success. It breaks down annual goals into quarterly, period and shift goals . A QBP enhances and reinforces brand standards, aligns and assigns clear goals across your region, and helps transform strong managers and teams into great ones. It helps you to prioritize time and activities more clearly and work smarter, not harder.

Compiling and executing effective Quarterly Business Plans allows smart MUMs to get *twice* as much done in the time that other MUMs waste while trying to decide *what* to do. An effective QBP (Quarterly Business Plan) creates an active priority roadmap every 90 days linking quarterly goals to daily execution in each restaurant. Use this detailed QBP Template in conjunction with Stage 6 ("Synergist") of our best-selling book, ***"Multi Unit Leadership: The 7 Stages of Building high-Performing Partnerships and Teams"*** to plan and prioritize your next 90 days. Combine the QBP with High-Impact Restaurant Visits and see awesome results immediately.*

The benefits of a QBP:

- Keeps important goals in focus.
- Sets priorities relative to coaching and development needs.
- Helps you prioritize the specific shifts that need your attention.
- Identifies restaurants requiring more visit time.
- Helps you understand what your top performing and bottom performing restaurants have in common.
- Allows for better ROI and more strategic scheduling of time, money and resources.
- Paints a broad picture of the state of the territory and your individual and collective strengths and weaknesses.
- Details the gaps between "performance should be" and "performance is" in each restaurant.
- Insures effective schedule-making that allows the people you report to (and the people who report to you) to use their time more effectively.
- Helps identify high-potential GMs, a key component of bench-strength in the organization.
- Creates more value for your managers by knowing specifically what you're focusing on each quarter.
- Gives insight to continuity (or lack of it) across your market.
- Translates report data into coaching opportunities.
- Allows you to work smarter not harder and clearly aim at financial targets.
- Helps you plan and develop an effective daily, weekly, monthly calendar.

The features of a QBP:

A Quarterly Business Plan should contain the following elements:

- **Previous Quarter Summary**
- **Key Result Areas to focus on**
- **Training and Development opportunities**
- **Marketing Events and Activities**
- **Facilities and Operations status**
- **Profitability and productivity overview**
- **MUM's Schedule for the next 90 days**

Sullivision.com™

Targeted Training Tools that Drive Revenue

Plan your work. Now work your plan.

© 2008

**You can download a comprehensive checklist for executing High Impact Restaurant Visits in e-book format at Sullivision.com*

1 Previous Quarter Summary

Analyze performance in key areas per unit over the past 3 periods, and project relevant trends. Focus on the Key Result Areas they may be struggling with or focusing on. Pay special attention to financial areas. Use the numbers to indicate where there may be underlying internal and external causes of those trends.

		Period to Date	Vs. Budget (+/-)	Vs. Prior Year (+/-)	Trends / Causes
UNIT 1	Sales	$	$	$	
	COG	0%	0%	0%	
	Labor Costs	0%	0%	0%	
	Operating Costs	0%	0%	0%	
	Controllable Income	0%	0%	0%	
UNIT 2	Sales	$	$	$	
	COG	0%	0%	0%	
	Labor Costs	0%	0%	0%	
	Operating Costs	0%	0%	0%	
	Controllable Income	0%	0%	0%	
UNIT 3	Sales	$	$	$	
	COG	0%	0%	0%	
	Labor Costs	0%	0%	0%	
	Operating Costs	0%	0%	0%	
	Controllable Income	0%	0%	0%	
UNIT 4	Sales	$	$	$	
	COG	0%	0%	0%	
	Labor Costs	0%	0%	0%	
	Operating Costs	0%	0%	0%	
	Controllable Income	0%	0%	0%	
UNIT 5	Sales	$	$	$	
	COG	0%	0%	0%	
	Labor Costs	0%	0%	0%	
	Operating Costs	0%	0%	0%	
	Controllable Income	0%	0%	0%	
UNIT 6	Sales	$	$	$	
	COG	0%	0%	0%	
	Labor Costs	0%	0%	0%	
	Operating Costs	0%	0%	0%	
	Controllable Income	0%	0%	0%	

What are the overall sales and margin trends in your area? _____

_____

What are the underlying internal and external causes of those trends? _____

_____

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue
© 2008

1 Previous Quarter Summary

What were the key accomplishments in your area over the past quarter?

- _____
- _____
- _____
- _____
- _____
- _____

What is in progress at each restaurant, and what needs to be done to bring it to a successful conclusion?

- _____ _____
- _____ _____
- _____ _____
- _____ _____
- _____ _____
- _____ _____

What didn't get started, or is stalled, and still needs to get done in each restaurant?

- _____
- _____
- _____
- _____

identify key learnings and best practices from the last quarter. Recognize who or where they came from, and how you'll share it with all your GMs and junior managers. ("Knowledge" isn't power. *Shared* knowledge is.)

_____

_____

_____

_____

_____

_____

_____

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue

© 2008

Key Result Area 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	☐	Staffing	_____
	☐	Training	_____
	☐	Turnover/Tenure	_____
	☐	Development	_____
	☐	Bench Strength	_____
	☐	Diversity	_____
Sales	☐	Service Scores	_____
	☐	Marketing/Events	_____
	☐	Customer Traffic	_____
	☐	Comp Sales	_____
	☐	Menu Merchandising	_____
	☐	Incentives/Contests	_____
Product	☐	Food Safety	_____
	☐	Food Quality	_____
	☐	Waste	_____
	☐	Line Checks	_____
	☐	Purch./Receiving	_____
	☐	Spec Compliance	_____
	☐	Best Practices	_____
Profit	☐	Profitability	_____
	☐	Labor Costs	_____
	☐	Overtime	_____
	☐	COG	_____
	☐	Supplies	_____
Facility	☐	Cleanliness	_____
	☐	R&M	_____
	☐	Licenses	_____
	☐	Inspections	_____
Process	☐	Systems	_____
	☐	Paperwork/Reports	_____
	☐	Cash Mgmt, Files	_____
Marketing	☐	(LSM, LTOs, Signage)	_____

Additional KRA's this Quarter:

☐ _____

☐ _____

☐ _____

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue
© 2008

S.W.O.T. Analysis 2

No two restaurants are alike. Each has its own identity, personality and challenges. List the units you oversee in the left column, then compile a thorough examination of their Strengths and Weaknesses, as well as the Opportunities and Threats facing those markets, managers and units in the next 90 days. Now ask your GM to also do a SWOT analysis for their unit. Show them which reports to use to in order to make a thorough assessment.

Location / Unit #	Strengths	Weaknesses	Opportunities	Threats
1				
2				
3				
4				
5				
6				

Review the GMs S.W.O.T. analysis for each unit and compare to your own. Compare and contrast it with your own to get insight on their awareness, perspective and developmental needs. Now share your S.W.O.T. analysis for each restaurant with its management team.

Ask each GM for input on all KRA's and what they need to do to achieve them. Their input and pre-buy-in is key to team success. What are their top 3 operational challenges? What changes may occur in the marketplace over the next 90 days that could affect operations? What are the competitive challenges? How do you know?

GM TOP 3

UNIT #	UNIT #	UNIT #	UNIT #	UNIT #	UNIT #

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue
© 2008

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 the specific actions each Manager will take to achieve or exceed the stated KRA goals.

Location / Unit #	KRA Actions / Tactics	Resources Needed
1		
2		
3		
4		
5		
6		

- **Manager Development** Review & detail each Manager's development needs and career path. Address succession plans, timetables, & resources necessary to get to the next level. What stretch goals should be assigned? To whom? Why? Forecast any changes—like promotions, transfers, departures—in the team over the coming quarter.

Location / Unit #	Development Needs: Who/Why	MGR / Stretch Goals
1		
2		
3		
4		
5		
6		

Ask yourself: "If this were my only restaurant is this the GM I'd have running it?"

Sullivision.com™
Targeted Training Tools that Drive Revenue
© 2008

3 People

- **Training & Knowledge Gap Analysis** 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? Are Mgrs teaching everyone every shift?

Unit # / MGR	Knowledge Gaps	Materials / Resources
1		
2		
3		
4		
5		
6		

- **Training & Knowledge Capital** How is training being executed every day in each unit (new hires, veterans, pre-shift meetings, individual coaching, LTO support, etc.)? How—*specifically*—will your managers improve performance & profits through crew training this quarter? How will you measure ROI?

Unit # / MGR	Training Expectations	Who / What / Why	Measurement
1			
2			
3			
4			

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue

© 2008

3 People

- **Recognition** Who is being honored this quarter for performance & achievement? Who is celebrating a hiring anniversary, certification or promotion? 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?

Area Hiring Anniversaries/Special Recognition This Quarter

Team Member	Date	Years	Unit #

Location / Unit #	Team / Person Recognized	Reason / Type Recognition
1		
2		
3		
4		
5		
6		

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue

Marketing 4

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

Trade Area Analysis

	Internal Events	Date	External Events	Date
UNIT 1				
UNIT 2				
UNIT 3				
UNIT 4				
UNIT 5				
UNIT 6	$			
	%			
	%			
	%	%		
	%	%		

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue

© 2008

Local Marketing:

Develop a Local Store Marketing (LSM) plan with each GM detailing specific strategies & tactics for building traffic from the business and residential communities within a 3-mile radius of the unit. Make a copy of the front and back sides of the tool below for each unit to use when brainstorming low cost/no cost ways to build business.

Discuss those things that exist or happen outside of your unit that can influence business. Identify opportunities and targeted customers groups, as well as potential threats, such as competitive marketing, .

Local Store Marketing Plan

Store Location / Unit # **Date**

Competitive Survey: What are your area competitors doing in your area over the next 90 days? Survey their tactics by visiting their websites and stores, clipping their ads, and noting signage and promotions.

Competitor Name / Location	Event / Tactic Description	Response?

3 Mile Influence: Develop specific strategies and tactics for building traffic from the business, organization (schools, churches, charities, etc.) and residential communities within 3 miles of your store. Identify their location (office building, sub-division, condo tower, retail area, etc.), then **specify who your potential customers are there** (families, lawyers, secretaries, young single people, factory workers, schools, etc.), and finally **develop a customized, specific plan to reach and attract them.**

Business/Org.

Where are they?	Who are they?	How do we reach / attract them?

Residence

Where are they?	Who are they?	How do we reach / attract them?

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue

Internal Marketing:

Discuss specific ways to build repeat business within the "4-Walls" of the operation over the next 90 days. Include ideas such as conducting internal promotions or influencing staff retention, energizing service and salesmanship, or pre-shift meetings, FOH/BOH training and other internal tactics.

Unit by Unit Internal Marketing Plan

Store Location / Unit #	Date

Driving Repeat Business/Frequency: How will we acquire and maintain customers by improving our competence in these areas?

Service	Selling	Training & Retention
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Use this form to plan, execute and track in-house promotions & events. Don't forget that staff training is job1 of effective promotions!

Promotion / Event:

Purpose / Desired Impact:

Steps / Tactics for Execution	Person Responsible	Estimated Costs	Date Due

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue

© 2008

5 Facilities / Operations

Determine the readiness each facility. Identify equipment and areas that need attention, then rate them on a scale of 1 to 5:

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.

UNIT 1

Item / Issue	Urgency / Priority	Postpone	Repair	Replace	Estimated Cost
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____

UNIT 2

Item / Issue	Urgency / Priority	Postpone	Repair	Replace	Estimated Cost
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____

UNIT 3

Item / Issue	Urgency / Priority	Postpone	Repair	Replace	Estimated Cost
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____

UNIT 4

Item / Issue	Urgency / Priority	Postpone	Repair	Replace	Estimated Cost
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____

UNIT 5

Item / Issue	Urgency / Priority	Postpone	Repair	Replace	Estimated Cost
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____

UNIT 6

Item / Issue	Urgency / Priority	Postpone	Repair	Replace	Estimated Cost
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____
_____	1☐ 2☐ 3☐ 4☐ 5☐	☐	☐	☐	_____

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue

5 Facilities / Operations

Throughput Review: Observe and rate the throughput (the speed, efficiency and accuracy of the people and processes and systems of each store) with 1 indicating severe breakdown, and 5 being ideal. Are there bottlenecks or barriers? What's causing the problems? Is it people, equipment, leadership or process? How do you know that for sure? Is the store's team aware of it? What is their plan for improvement? What are they doing well that should be shared with other units?

UNIT 1

Speed 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Efficiency 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Accuracy 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Plan for Improvement _____
What can be shared? _____

UNIT 2

Speed 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Efficiency 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Accuracy 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Plan for Improvement _____
What can be shared? _____

UNIT 3

Speed 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Efficiency 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Accuracy 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Plan for Improvement _____
What can be shared? _____

UNIT 4

Speed 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Efficiency 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Accuracy 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Plan for Improvement _____
What can be shared? _____

UNIT 5

Speed 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Efficiency 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Accuracy 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Plan for Improvement _____
What can be shared? _____

UNIT 6

Speed 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Efficiency 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Accuracy 1☐ 2☐ 3☐ 4☐ 5☐ Cause of breakdown _____
Plan for Improvement _____
What can be shared? _____

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue

© 2008

Profitability / Productivity 6

Rank all stores. Are all units making money? Could they be doing better? How? Which units are doing the best job with sales & service? Meeting or exceeding KRA goals? How can that expertise be shared with the other stores you oversee? 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 and develop a plan to address.

Rank Store Performance:

SALES

	Store	Measurement	What can be learned / communicated?
TOP			
BOTTOM			

SERVICE

	Store	Measurement	What can be learned / communicated?
TOP			
BOTTOM			

COG

	Store	Measurement	What can be learned / communicated?
TOP			
BOTTOM			

LABOR

	Store	Measurement	What can be learned / communicated?
TOP			
BOTTOM			

SUPPLIES

	Store	Measurement	What can be learned / communicated?
TOP			
BOTTOM			

OPS COST

	Store	Measurement	What can be learned / communicated?
TOP			
BOTTOM			

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue

Profitability / Productivity 6

Set specific revenue and profitability goals for each unit with store managers. Ask each GM to break these quarterly revenue goals into period goals, then assign specific targets *for each shift*. The QBP 's 90-day targets should be broken down into 30-day period goals, and then further delineated to daily shift execution. At your manager meetings be sure to discuss and assign specific shift goals each week tied to the quarterly goals.

		Sales Goal	Profit Goal	Tactics / Impact
UNIT 1	Quarterly	$	$	
	Monthly	0%	0%	
	Weekly	0%	0%	
	Daily	0%	0%	
	Shift	0%	0%	
UNIT 2	Quarterly	$	$	
	Monthly	0%	0%	
	Weekly	0%	0%	
	Daily	0%	0%	
	Shift	0%	0%	
UNIT 3	Quarterly	$	$	
	Monthly	0%	0%	
	Weekly	0%	0%	
	Daily	0%	0%	
	Shift	0%	0%	
UNIT 4	Quarterly	$	$	
	Monthly	0%	0%	
	Weekly	0%	0%	
	Daily	0%	0%	
	Shift	0%	0%	
UNIT 5	Quarterly	$	$	
	Monthly	0%	0%	
	Weekly	0%	0%	
	Daily	0%	0%	
	Shift	0%	0%	
UNIT 6	Quarterly	$	$	
	Monthly	0%	0%	
	Weekly	0%	0%	
	Daily	0%	0%	
	Shift	0%	0%	

By the inch, it's a cinch...by the yard, it's hard!

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue
© 2008

7 Visiting the Unit

Schedule your announced unit visits based on performance. Which units need your attention the most? Why? Begin with the unit that needs the most attention, and work your way down the form. For best results:

- Visit each unit at least once a week.
- When you are in a unit, work only on that unit.
- Minimize outside distractions.
- Bring energy, don't take it away.
- Download our companion detailed **High Impact Restaurant Visit Template** at **Sullivision.com**.
- When planning each visit, determine the focus using the following points:

STORE: _____

Visit Date, Day & Daypart	Visit Focus	GM Concerns / Pre-Work

STORE: _____

Visit Date, Day & Daypart	Visit Focus	GM Concerns / Pre-Work

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue

7 Visiting the Unit

STORE:

Visit Date, Day & Daypart	Visit Focus	GM Concerns / Pre-Work

STORE:

Visit Date, Day & Daypart	Visit Focus	GM Concerns / Pre-Work

STORE:

Visit Date, Day & Daypart	Visit Focus	GM Concerns / Pre-Work

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue

© 2008

7 Visiting the Unit

STORE:

Visit Date, Day & Daypart	Visit Focus	GM Concerns / Pre-Work

STORE:

Visit Date, Day & Daypart	Visit Focus	GM Concerns / Pre-Work

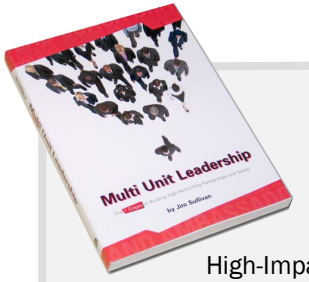
STORE:

Visit Date, Day & Daypart	Visit Focus	GM Concerns / Pre-Work

Get our free monthly e-newsletter of best leadership practices and sales building ideas at Sullivision.com. Have your unit managers sign up too.

Sullivision.com™
Targeted Training Tools that Drive Revenue

© 2008



High Impact Restaurant Visits

A Guide for Multi-Unit Leaders

The nature of all restaurant visits is developmental.

High-Impact Restaurant Visits are a Multi-Unit Leader's (MUL) primary responsibility. They require thoughtful pre-planning, careful execution and thorough de-briefing with the unit GM afterwards to generate sustainable results. KEY: you are visiting *people*, not "stores."

Despite what many MUL's have been taught, unit visits are not about "inspection", "direction", or "correction", they're about coaching, collaboration and development. Acting like an "inspector" instead of a coach stifles people, performance and profits.

High Impact Store Visits involve 7 distinct stages:

1. **Review your Quarterly Business Plan and current progress on goals and objectives. Review your top 3 concerns and the GM's top 3 concerns, noting overlap, if any.**
2. **KRA Analysis: review the unit rank, period trends from last year, Key Result Areas progress and goal vs. actual for each store.**
3. **Determine visit focus and inform the GM of your visit (unless visit is purposefully unannounced).**
4. **Conduct outdoor facilities and systems "walkabout" first without—and then with—the GM or managers.**
5. **Conduct indoor facilities, people and systems "walkabout" first alone then with GM or managers.**
6. **Meet with GM or managers after the visit to review, assess and help coach them to the next developmental level.**
7. **Assess the visit and determine ways to make it more effective next time. Always leave the restaurant better than your found it.**

Call each unit daily, visit every restaurant weekly, have a clear goal and focus, and help the team develop and grow. A MULs goals during visits are to help managers think, improve Manager skills as customer-centric coaches and leaders, and making certain that the team is doing the right things *and the right things right.*

Store Location/Unit # _____
Visit Date _____
Visit Time/Daypart _____
Managers on Duty _____

Sullivision.com™
Targeted Training Tools that Drive Revenue

Pre-Visit Planning **1**

What to do Before the Visit

The key to high impact visits is *preparation*. The written Quarterly Business Plan (QBP), along with daily/weekly financial reports and your daily phone calls to each unit should give you clear insight into which units need your attention first. ***(Download a comprehensive QBP Multi Unit Leader Planner at Sullivision.com)***

Review the written evaluation and the results of your last visit.

What was covered then? _____
_____
_____

What were the managers supposed to be working on in the meantime? _____
_____
_____

Were there any outstanding issues?_____
_____
_____

What has changed in the unit since the last visit?_____
_____
_____

Assess how the unit currently ranks performance-wise in your territory:

Sales _____ QSC _____ Training _____
Retention _____ Marketing _____ Other_____

Overall Unit Rank among all Units _____

Detail Progress in Key Result Areas (i.e. Service, Sales, Mktg, Retention)

Review the top 5 KRA's from your QBP, and assess the unit's progress.

KRA	Results
1._____	_____
2._____	_____
3._____	_____
4._____	_____

Spectacular success is always preceded by unspectacular preparation. Sullivision.com

© 2008

Pre-Visit Planning 1

Assess previous 13-month financial and performance trends.

Compare actual achievement versus goals and past performance for the unit you are visiting. Note key changes and trends and consider underlying causes.

	Period to Date	Vs. Budget (+/-)	Vs. Prior Year (+/-)	Trends / Causes
Sales				
COG				
Labor Costs				
Operating Costs				
Controllable Income				
Turnover				
Shopper Scores				

Consider marketplace trends and events.

What are the external factors that are affecting this unit? How can your team prepare or respond in order to maintain and drive their business?

Infrastructure (parking issues, construction, road closures, etc.) _____

_____

_____

Competitors (new restaurants, competitive promotions or LTO's, etc.) _____

_____

_____

Seasonality (weather, holidays, vacation/tourism school calendars, etc.) _____

_____

_____

Special Events (festivals, sports, parades, movie releases, etc.)_____

_____

_____

Others _____

_____

_____

Determine the TYPE of Visit: ☐ Announced ☐ Unannounced

Many MULs wrestle with whether their unit visits should be "announced" or "unannounced". We recommend that each visit be announced so that the GM or MOD can prepare for your visit—NOT by having a "cleaning party"--but by scheduling time to learn from you with no shift-running responsibilities during your visit.

If you're doing your job correctly, GMs should be happy to see you visit and sorry to see you leave.

Choose a Daypart / Volume (check all that apply)

Prioritize the shifts that will provide the appropriate and maximum input for effective analysis and decision making.

☐ breakfast ☐ lunch ☐ dinner ☐ transition

☐ peak volume ☐ slow volume

☐ weekday ☐ weekend ☐ open ☐ close

Determine TIME FRAME of Visit

☐ **Full Day**

Gives the best picture of what's happening in the store since managers and team members can successfully hide or modify their behaviors for only about three hours at a time. Full day visits make it easier to see what they've accomplished or are challenged by, since this gives you time to observe the arc and flow of each shift or shift transition.

☐ **Half Day**

Normally staged as a follow-up to a recent full-day visit, but can also be effective for high-performing restaurants that need less coaching.

☐ **1-3 Hours**

Most often a waste of time at an under-performing unit if you're looking for a true gauge of performance and underlying causes. These brief visits are normally most effective only if you're looking for an answer to a specific question, or as a follow-up to a previous challenge area you noted.

☐ **Compile a Balanced Scorecard**

Your Goal should be to visit each store at least 4 times per period (month) before making major decisions relative to people and performance issues.

Restaurant visit time is about developing your managers not just checking their work.

Sullivision.com

© 2008

1 Pre-Visit Planning

Determine the FOCUS of Visit

Based on the unit's KRAs, what should the focus of your visit be? Sales? Service? Training? Retention? Cleanliness? Marketing? Stay focused. Don't try to cover everything, or you'll end up covering nothing. Choose the focus area:

- ☐ **Financial** (sales, profits, labor, COG, R&M, etc.)
- ☐ **Morale** (turnover, crew engagement, junior managers)
- ☐ **Leadership** (Bench strength/)
- ☐ **Systems/Processes** (purchasing , receiving, inventory, scheduling, bookkeeping, scheduling, throughput, etc.)
- ☐ **Safety & Security** (use your company checklists)
- ☐ **Marketing** (POP, menus, signage, suggestive selling)
- ☐ **Performance Evaluation** (up to date for all team?)
- ☐ **Customer-centric** (service delivery, shopper scores, flow, table visits, complaints, etc.)
- ☐ **Follow up from Previous Visit/Information Gathering** (what are the key things you're looking for?)
- ☐ **Training / Recognition** (observe, attend or facilitate a manager meeting,, recognition ceremony, orientation, in-store training event or pre-shift meeting)
- ☐ **Major Operation Turnaround** (this requires multiple days…make sure to analyze root causes , systems and processes first)
- ☐ Other _____

1. What—specifically—am I intending to accomplish? _____

_____

2. What does the Manager need from me?_____

_____

3. What should the team be doing differently as a result of my visit? _____

_____

Present the focus of this visit to your GM and how it will differ from previous visits.

Identify pre-work:

What are the GMs top 3 issues/concerns? What are *yours*?

	GM		ME
1.	_____	1.	_____
2.	_____	2.	_____
3.	_____	3.	_____

2 During the Visit

Outside the Unit Walkabout

Walk it SOLO first from the Guest Perspective

1= poses immediate threat to safety, sanitation, product quality or Guest satisfaction.
2= needs some detail work, discuss during one-on-one coaching
3= ideal

1	2	3		Notes
☐	☐	☐	Curb appeal	_____
☐	☐	☐	Signage	_____
☐	☐	☐	Parking lot	_____
☐	☐	☐	Building	_____
☐	☐	☐	Back door	_____
☐	☐	☐	Dumpster	_____
☐	☐	☐	Cleanliness	_____
☐	☐	☐	Lighting	_____
☐	☐	☐	Landscaping	_____
☐	☐	☐	Walkways	_____
☐	☐	☐	Front door	_____
☐	☐	☐	Drive-thru	_____
☐	☐	☐	_____	_____
☐	☐	☐	_____	_____
☐	☐	☐	_____	_____
☐	☐	☐	_____	_____
☐	☐	☐	_____	_____
☐	☐	☐	_____	_____
☐	☐	☐	_____	_____

Curb Appeal

What first impressions are customers likely to form when they park and approach or come through a drive-thru and see what you see? How is the brand being represented?

_____

_____

_____

© 2008

2 During the Visit

Outside the Unit Walkabout

SOLO from the Multi Unit Leader Perspective

Now assess the outside once again, this time through your MUM lens. Evaluate brand standards and compliance issues that the guest may not even notice. *Use your company's checklist of what to look for, paying special attention to systems, standards, people, POS, potential danger, cleanliness, safety and repair/maintenance/equipment issues.*

Make bullet point written notes of all you observe and sense. Note what you want to compliment the managers on. Note what you'll hope the managers will notice that they may have been missing.

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

Ready-for Revenue Outside Walkabout WITH GM

Now walk it again with GM and assess from the GM's Perspective. Note what they see, don't just point out what you saw. Compare and note any differences with your assessment.

☐ _____

☐ _____

☐ _____

Evaluating Operations from Inside the Unit

Review and use your company's checklist as a guideline of what to look for inside the restaurant so that nothing is overlooked, but don't forget that your primary objective is to develop Mgrs, not merely comply to a checklist.

- **Spread energy, don't take it away.** Greet the entire team. Be a Brand Ambassador. See/sense what the guest sees first, then look through the MUL lens.
- Evaluate KRA's based on your Quarterly Business Plan's * assessment.
- **Stay focused on the performance you came to address.** If you see another major area that needs attention, note it and address it later (unless it relates to a safety issue or dangerous situation).
- Walk the unit first alone, carefully observe what's being done well and what's being overlooked in both the FOH and BOH. Make notes. Now walk it several times with the manager, note their observations, actions and interactions.

Walk it SOLO first from the Guest Perspective. Assess facility/team readiness

1= poses immediate threat to safety, sanitation, product quality or Guest satisfaction.
2= needs some detail work, discuss during one-on-one coaching
3= ideal

1	2	3		Notes
☐	☐	☐	Furniture	_____
☐	☐	☐	Glassware	_____
☐	☐	☐	Bev. Stations	_____
☐	☐	☐	Restrooms	_____
☐	☐	☐	Equipment	_____
☐	☐	☐	Lighting	_____
☐	☐	☐	Cleanliness	_____
☐	☐	☐	Walk-Ins	_____
☐	☐	☐	Storage Areas	_____
☐	☐	☐	Line Checks	_____
☐	☐	☐	Food Quality	_____
☐	☐	☐	_____	_____
☐	☐	☐	_____	_____
☐	☐	☐	_____	_____
☐	☐	☐	_____	_____
☐	☐	☐	_____	_____

*Download a comprehensive QBP planner at Sullivision.com

You don't get better in "general." you get better in specific.

Sullivision.com

© 2008

2 During the Visit

Inside the Unit Evaluation

Assess operational issues from the Multi Unit Leader Perspective

Now assess how well the managers and team are getting the job done. Note the quality, efficiency and accuracy of the work, and potential underlying causes of any breakdowns. Rank on scale of 1-5.

1=perfection 3=further observation 5=immediate action

Observe line checks, quality and food safety.
Good/Bad underlying cause? _____

Observe food handling and hand washing.
Good/Bad underlying cause? _____

Observe pre-shift meeting. Is there effective and motivational coaching going on? Is it fun? Are the shift goals crystal-clear to everyone?
Good/Bad underlying cause? _____

Observe bartender (if applicable) for service, selling, recipe knowledge, and efficiency.
Good/Bad underlying cause? _____

Observe behaviors and efficiency of greeters and hosts. (or Drive-Thru Team if applicable)
Good/Bad underlying cause? _____

Are fundamentals being properly executed in the BOH and FOH? How about at the drive-thru, or carside/takeout/to-go areas?
Good/Bad underlying cause? _____

Make a note of progress/regress since last visit. Did they resolve last visit's challenges?
Good/Bad underlying cause? _____

Review manager log book and reports. Look for detailed, relevant and legal notes.
Good/Bad underlying cause? _____

Ready-for-Revenue Inside walkabout WITH GM or MOD

Now walk It with GM and assess from the GM's Perspective. Note what they see, don't just point out what you saw. Compare any differences with your assessment.

Evaluate Manager Performance

How well do your managers walkabout-and-work the "rooms" ?

1=perfection 2=further observation 3=immediate action

1 2 3		Notes
☐☐☐	Kitchen	_____
☐☐☐	Counter / Expo line	_____
☐☐☐	Dining Area	_____
☐☐☐	Bar / Lounge (if app.)	_____
☐☐☐	Host Areas	_____
☐☐☐	Drive-thru/Car Side/To-Go	_____

What do they see? _____

What do they miss? _____

How well do they interact with team members & customers? _____

How do they approach and impact Key Result Areas?

Observe and grade the team (A, B, C, D, F) on relevant KRA's. .

_____	Quality	_____	Cleanliness	_____	Ticket Times
_____	Service	_____	Atmosphere	_____	Kitchen Display Sys.
_____	Hospitality	_____	Speed	_____	Accuracy
_____	Teamwork	_____	Efficiency	_____	Suggestive Selling
_____	Labor	_____	Marketing	_____	Pre-Shift Meetings
_____	Signage	_____	Safety	_____	Staffing Levels
_____	Energy	_____	Table Visits	_____	Bench Strength
_____	FUN	_____	Communication	_____	Drive Thru
_____	Carside/To-Go	_____		_____	

Get a sense of what your Managers understand, how they lead, and if there are limits to their ability to connect process to performance.

_____ Are they able to connect performance issues to process problems?

_____ Are they able to identify and solve critical challenges and their causes?

_____ If problems are evident, do they treat only symptoms?

_____ Do managers take notes as they go?

_____ Do they transfer observations to the log book or personal calendars in detail for follow-up and continuous improvement?

_____ Are managers finding and executing coachable moments with their staff during the shift? Spreading energy and ***having fun?***

© 2008

Gather Your Thoughts/ Draw Conclusions

This is a very important stage of your unit visit. This is where you debrief, recap and coach the GM to know more and grow faster. The key learnings shared at this phase should be fed back into the QBP* for the next 90 days.

1. **Excuse yourself, select a quiet corner of the restaurant, and explain to the manager you'd like a few minutes to record your thoughts and observations of the past few hours.**
2. **Adjust your expectations to reality after concluding the store visit. Identify and rate/rank the gaps between "performance should be" and "performance is" in the store, and address the more critical items first.**
   - ☐ Label and date your visit report.
   - ☐ Record as much detail as possible.
   - ☐ Sort bullet points and actionable items keyed to KRA's.
3. **Next to each challenge area you identify, note:**
   - ☐ Is the problem new or recurring?
   - ☐ Is it a surface problem, or deeper rooted?
   - ☐ What process or system might have failed?
   - ☐ Is it a team or management performance problem?
   - ☐ If it's a manager challenge, is it a result of skill, ignorance or attitude?
4. **Make a "difference list:" What would be different if you were the unit GM?**
   - ☐ When you're done, remember that the list is never finished.
   - ☐ Expect it to be done, but don't expect it to be done your way…the "difference" list is how *you* might approach a problem, but your goal is to help the managers come to a decision, not make it for them.
   - ☐ Understand how your managers might likely approach the problem by asking them about what they saw, what they think they'll do, and why they think that method would produce the result they are seeking.
5. **What do the GM/managers need to be complimented on or recognized for?**
   - ☐ What you reinforce is what you get, what you don't reinforce is what you lose.

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

One-on-One Manager Discussion

Sit down with the GM and share your visit assessment. The conversation and content depends on the focus of visit, what you observed, and what you expect to be accomplished before the next visit.

Stay focused and eliminate distractions. Give the GM your undivided attention.

Briefly review & recap key points of prior visits and highlight progress/regress.

Your top 3 concerns:

- ☐ _____
- ☐ _____
- ☐ _____

Your manager's top 3 concerns:

- ☐ _____
- ☐ _____
- ☐ _____

- ☐ **Share and discuss your impressions with your manager. Review the report together, elaborating on key points.** Skinny the monologue and fatten the dialogue. Bring energy, don't take it away.
- ☐ **Remember that your goal is to develop performance, not direct it.** Ask thoughtful questions that gain mutual understanding of where the root problems lie. Don't just "show and tell." Ask questions that uncover mutual understanding and spur thinking. Some good questions are:
  - What do you think you need to accomplish? Why is that important?
  - What do you think is getting in the way? How do you know?
  - What will success look like? How do we know? What if we didn't do it?
  - What *don't* you know that might be helpful to resolve the problem?
  - What do you need from me to help you?/What do your asst mgrs need?
  - How will this benefit the guest? How will it benefit your career here?
- ☐ **Balance discussion between unit performance and personal development.**
- ☐ **Praise progress.** Then identify problem areas and their possible root causes *together*.
- ☐ **Link all suggestions and direction to KRAs, period goals, and career paths.**
- ☐ **Help them to help themselves.** Self-leadership is first. Offer direction, but encourage your managers to be responsible for their own development.
- ☐ Agree on an action plan and next steps with a timetable, and leave a written record. End with encouragement. Always.

Over-teach. Managers tend to under-learn and over-forget.

Sullivision.com

© 2008

High-Impact Restaurant Visit Coaching Log

Sullivision.com

Outside & Inside Ready-for-Revenue Walkabout

Non-Negotiables	Y/N	Coaching Notes
Are Key Result Areas (KRAs) meeting or exceeding standards?		
Curb appeal, signage, parking lot clean & up to brand standards?		
All Food Safety standards are followed and finished products meet specs		
Walk-in: proper food labeling, rotation. Equipment condition and status, prep work complete		
Manager Log Book filled-in with relevant detail		
Drive Thru or Curbside / To-Go Order Time _____		
Drive Thru or Curbside / To-Go Sales _____		

Customers

Non-Negotiables	Y/N	Coaching Notes
Guests happy? Speed of service appropriate? Bottlenecks observed?		
Marketing strategies and tactics in place and being used?		
100% Table Visits by Managers?		
Safety/Security Policies followed?		
Mgrs and team operating through a Guest-Lens focus?		

Team Members

Non-Negotiables	Y/N	Coaching Notes
Aces in their Places? Most recent hires trained to standards?		
Pre-Shift Meeting conducted with energy, focus and clear goals for both FOH/BOH?		
Staffing & Retention - Team & Management staffing at target levels. Bench strength solid?		
Schedule posted and appropriate to traffic and goals? Training standards followed?		
Are Team Members treated w/respect?Are the FOH/BOH Teams working together?		
Energized Service and Suggestive Selling being used.with every customer? Mgrs coaching performance during Shift?		

Sales & Profits

Non-Negotiables	Y/N	Coaching Notes
YTD Sales aligned to Quarter and Period Goals? Sales/labor properly forecasted?		
Shift goals set at weekly Mgr meeting are assigned and being executed ?		
Server/kitchen contests set to achieve the specific objectives for shift?		
Cash policies, Deposit tracking complete and appropriate to policy?		
Food & Bev prep. and presentation meet/exceed brand standards?		

© 2008

High-Impact Restaurant Visit Coaching Log

Sullivision.com

What Did We See Today & What Does it Mean?

- ☐ Skinny the monologue and fatten the dialogue. Assess "performance is" vs. "performance should be"
- ☐ Are we being good "Brand Ambassadors"?
- ☐ Observe-Inquire-Develop not Inspect-Correct-Direct?
- ☐ Am I acting like a Head Coach rather than an Auditor/ Compliance Cop?
- ☐ Am I leaving the restaurant better than I found it?

NOTES for improvement:_____

_____

What Can We Improve & How do We Do It?

- ☐ Coach: Focus on specific KRA's (goals vs. actual).
- ☐ Have I done a S.W.O.T. Analysis for this unit?
- ☐ Did everyone learn something new today?
- ☐ Am I tough on standards, easy on people?
- ☐ Am I asking questions to gauge and understand their thought process, or am I just telling them what to do?

NOTES for improvement:_____

_____

_____

Why We Had Issues / What Was Great

- ☐ Analyze (symptom vs. underlying problem)
- ☐ Is it a Process, Team, or Management Problem?
- ☐ Determine how shallow or deep the problem is.
- ☐ Ask questions to gauge MOD's understanding
- ☐ Don't forget to compliment progress and praise achievement.

NOTES for improvement:_____

_____

_____

Who / When / How?

- ☐ Communicate Changes: Clarify & Verify that they understood.
- ☐ Agree on core issues and how to solve
- ☐ Agree on timetable for completion
- ☐ What help / resources do they need from me?
- ☐ What did I learn this visit that I didn't know before?.

NOTES for improvement:_____

_____

_____

Letter Grade for Visit

1. Review Coaching and Recognition notes with MOD
2. Follow up on prior visit comments
3. Discuss letter grade assigned to visit
4. Agree to new follow-up actions and timing

MUL Signature _____

MOD Signature _____

© 2008

Back in Tour Office 4

Continuous Improvement is Key

What are 3 things I can do to improve my visits?

1. _____
2. _____
3. _____

What are 3 things I can do to improve my One-on-One conversations with my managers?

1. _____
2. _____
3. _____

Did I achieve my restaurant visit objectives?

- ☐ Knowledge transfer/Energy transfer
- ☐ Goal-setting
- ☐ Collaborative development
- ☐ Alignment with period goals
- ☐ Alignment with company objectives and reinforce brand standards
- ☐ Real improvement (not band-aids)
- ☐ Re-direction to company resources my teams can use to get better?
- ☐ Teach everyone something new?

Next Visit: Check for Consistency

Before your next visit, a review of this last report will refresh and re-focus your memory on the key impact issues from the previous visit. It's all about consistency. That which is the same is the MULs impact, that which is different is the GMs impact. Be patient, and help the team get brilliant at the basics. .

Reality Check on Change 101:

It takes 21-28 days of different behavior to change a personal habit and approximately 120 shifts in a row to change an entire restaurant manager and crew's behavior. It's never a quick fix...so never believe or act like it is. Real change is a process, not a project. It takes time, re-focus, repetition and habitual consistency. That which is the same each time you visit is the MUMs impact. That which is the same is the unit manager's impact. .

RADICAL APPR

Get Smart. Stay Smart.

Sullivision.com™

Targeted Training Tools that Drive Revenue

"Where Leaders Go To Learn"

Visit Sullivision.com to see all of our targeted training tools that drive revenue:

- Live Seminars
- Website
- Free E-Newsletter
- Books
- DVDs
- E-Books
- Posters
- Consulting
- E-learning for MUMs and GMs
- Free Downloads
- Blogs
- Podcasts
- Join the discussion! Share your best ideas or biggest challenges on multi-unit management at our free MUM blogspot at Sullivision.com

Order safely and securely online or call us 24/7 at 920.830.3915

VISA

MARKETING IS A PHILO