First Things First:
The purpose of all unit visits is developmental.
You are visiting people, not “stores.” Conducting unit visits as an “inspector” instead of a Coach stifles team growth, initiative and innovation.
This High Impact Unit Visit Checklist will help you evolve from an “inspect, correct, direct” approach to the more effective “observe, inquire, and develop” process. Visit every unit weekly if possible, have a specific focus, and leave it better than you found it. A MUL’s primary role during visits is to help managers improve, not merely tell them what to do. Bring them up, not down.

Use this template to make every store visit a high-impact one. An expanded, more detailed version of this High-Impact Template is available at MultiUnitleadership.com as an E-book.

PRE-VISIT PLANNING

First: Evaluate & Prepare
Using the appropriate reports and your Quarterly Business Plan, assess the following:

This Unit’s rank among all units
- Detail progress on all Key Result Areas (KRAs)
- Assess 13-month financial & performance trends
- Review last visit report, assigned goals & timetable
- Consider recent marketplace trends and events

Second: Determine the TYPE of Visit
- Announced
- Unannounced
- Daypart / Volume (check all that apply)
  - Morning
  - Lunch
  - Night
  - Transition
  - Peak Volume
  - Slow Volume
  - Weekday
  - Weekend
  - Open
  - Close

Third: Determine the FOCUS of Visit
- Financial (sales, profits, labor, COG, R&M, etc.)
- Morale (turnover, crew engagement, management)
- Leadership (bench strength, direction, energy)
- Systems/Processes (purchasing, receiving, inventory, scheduling, bookkeeping, throughput)
- Safety &Security (use your company checklists)
- Performance Evaluations (up-to-date for all team?)
- Customer-centric (hospitality, shopper scores, etc.)
- Follow-up from previous visit/information gathering
- Training/Recognition (observe, attend or facilitate a manager meeting, recognition ceremony, orientation, in-store training, or pre-shift meeting)
- Major Operation Turnaround (this may require several visits...make sure to analyze root causes first to determine the best course of action)
- My top 3 concerns/GM's top 3 concerns?

Fourth: Determine the TIME FRAME of Visit
- Full Day (best way to comprehensively assess)
- Half-Day (for follow-ups & high-performing units)
- 1-3 hours (looking for answer to a specific question)

DURING THE VISIT

Outside the Unit
Walk it SOLO first from the customer POV.
- Curb appeal
- Signage
- Parking lot
- Building
- Dumpster
- Back door
- Cleanliness
- Lighting
- Landscaping
- Walkways
- Front Door
- Drive-thru (I/A)

Now assess from the MUL Perspective
(Is the team focused on the right things?)
Use your brand checklist of what to look for, paying special attention to systems, standards, people, POS, and any safety issues. Assess both good and bad things. Document with pictures.

Now walk it with the manager on duty, assess their perspective.
(Note what they see, don’t just point out what you saw)

Evaluate Manager Performance as You Walk
1. How well do the managers interact with the team members and customers?
2. Are they solving problems or walking past them? Are they getting the “Big Rocks” in place? Are they spreading energy or taking it away? Note what’s positive and what’s not.
3. Try to get a sense of what they understand and if there are limits to their ability to connect process to performance. Are the teams having fun?

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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 goals during this visit?
• Knowledge transfer/Energy transfer?
• Identify any Big Rock issues needing attention?
• Coach & develop manager(s) during visit?
• See measurable progress on quarterly goals?
• Identify any company standard issues?
• Are the teams growing or standing still?
• Did I lead by example?
• Did I leave it better than I found it?

Set up the Next Visit: Habitual Consistency

Before your next visit, review your last visit report to refresh and re-focus your memory on the key impact issues from the previous visit. It’s all about Habitual Consistency. That which is the same is the MUL’s impact, that which is different is the GM’s impact. Send an email the next day recapping the visit feedback.

Store Location/Unit #:
Visit Date:
Visit Time/Daypart:
Manager on Duty: