

Restaurant & Catering Success Assessment



Let's Figure Out Where You Are On the Road To Success

This is one of those take action things, if you do this you will know where you stand real quick.

The next page is the Restaurant & Catering Success Checklist, the same tool I use when people pay me thousands of dollars to assess their restaurant and consult on how to help them. You and I are going to use this tool to understand where you are today and how to get you where you want to be in the future. This will give you and I a great base to discuss your business in reality not theory plus we can work together to map out what you may or may not want to do.

INSTRUCTIONS:

I want you to go through and mark either Y for Yes, N for No, NA for Not applicable or Circle it if you are not sure what it is so we can talk through it.

This is not designed to be a long process you should know the answer the second you read it. As quick as you can read this you can mark the box of if you are doing it or not. Don't over think it, just blast through it.

ONCE COMPLETED:

Once you have it complete please fax it to me at 1.603.925.3160 (no cover page needed)

Like I mentioned above this will give you and I a great reference point for where you were when we started. It will allow us to map out the quickest way to achieve success and highlight areas of opportunity you may need to focus on or that you may not have considered.

I look forward to helping you achieve true Success and Wealth!

Respectfully yours,

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Example

People

- Y Uniform Standards in Place and being met
- Y Appearance standards being met
- ? Team Member Ranking/Rating Being Conducted
- ? TTT - Being practiced in the Store Hiring

RESTAURANT & CATERING SUCCESS ASSESSMENT

Business Name _____

Contact _____

Date _____

Phone _____

KEY: **Y =Yes** **N =No** **NA =Non Applicable** **Not Sure= Circle it so we can discuss it further**

People

- _____ Uniform Standards in Place and being met
- _____ Appearance standards being met
- _____ Team Member Ranking/Rating Being Conducted
- _____ TTT - Being practiced in the Store (See "The Program")
- Hiring
 - _____ Interview Process being Followed
 - _____ Reference Checks on all Team Members prior to hiring
 - _____ New Hire Packets Fully completed and Processed prior to starting
 - _____ Handbook issued at time of hire
- Training
 - _____ Official Written Training Guide in place
 - _____ Orientation being done
 - _____ Trainers established in store
 - _____ Management approving Team Members Training
 - _____ Training Summary being utilized
- Retention
 - _____ Incentive Programs being utilized
 - _____ Team Member Meetings being conducted
- Productivity
 - _____ Reviews conducted at scheduled intervals (Oct, Apr)
 - _____ Positions Filled by Best Qualified Person

Systems

- Cash Handling
 - _____ Safe Audit (See "The Program")
 - _____ Cashier Audits
 - _____ Cash Drawer Change Outs being followed
 - _____ Over Rings / Paid outs
 - _____ Deposit Accuracy
- Schedule
 - _____ Pre Schedules
 - _____ Post Schedules
- Financial Summary (complete Financial Reporting Center)
 - _____ In place and being utilized fully
- Back to the Basics
 - _____ Open Checklist
 - _____ Closing Checklist
 - _____ Position Chart
 - _____ Prep List
 - _____ Pull Lists
 - _____ Waste Bucket/Sheet
 - _____ Budget Worksheets
 - _____ Proper Ordering
 - _____ Line Check

- To do Grid
 - _____ Checked Daily

- Management
 - _____ Managers Opening Checklist
 - _____ Managers Closing Checklist
 - _____ Catering Blue Book used to coordinate all catering

Quality

- _____ Food Products being prepared to brand Specs
- _____ Hold times being observed
- _____ Meeting All Brand Specifications
- _____ Line Check Completed per Shift and Immediate Corrections Made

Marketing

- _____ All Current Brand Promotions in place and being utilized
- _____ LSM Customized and in effect
- _____ Bag Stuffers being used
- _____ To-Go Menus available
- _____ Catering Menu Available and Promoted
- _____ Frequent Diner offered to every customer
- _____ Manager Actively goes out & Promotes Restaurant
- _____ Upselling done at every opportunity
- _____ Website Up to date and Impactful
- _____ Online Ordering in place and promoted
- _____ Birthday Program in full effect
- _____ Anniversary Program in Full Effect
- _____ Lost Customer Program in effect 30, 60, 90
- _____ Newsletter done monthly
- _____ Email Marketing done at least 2 times a month
- _____ Catering Street Marketing Program in Full Effect with 6 point follow-up
- _____ Pharmaceutical Program in effect
- _____ Conducting Monthly Marketing Meeting planning 3 months out
- _____ RSS Marketing Planner in Full Effect
- _____ Daily Specials being Run (Day & Night)
- _____ Comment Cards Available
- _____ Has EVERYONE in your restaurant seen "Give 'em the Pickle"

Service

- _____ Speed of Service Goals being meet
- _____ TOS- Totally Outrageous Service Program In full effect (See "The Program")
- _____ Sizzle Shops being conducted and discussed with Team Members
- _____ PreMeal Meetings done per shift (Talk Into Position)

Safety & Sanitation

- _____ Overall Unit Cleanliness
- _____ Sanitizer Buckets in use at all stations
- _____ Unit Utilizing a Daily/Weekly/Monthly Cleaning Checklist
- _____ Fire Marshall's Last Visit
- _____ Health Inspection
- _____ Unit Management Food Service Mgmt Certified
- _____ Maintenance Checks being completed and logged
- _____ Maintenance being logged
- _____ Front Counter and Condiments Immaculate
- _____ Equipment Cleaned and Polished
- _____ Safety and Sanitation Audits complete with no deficiencies (See "The Program")
- _____ Water / Ice Machine Changed and Logged
- _____ Wet Floor Signs being used

Financials

- Financials
 - _____ Sales Budget _____
 - _____ Food Cost _____
 - _____ Labor Cost _____
 - _____ Direct Costs _____
 - _____ Profit _____
 - _____ Appropriate Inventory Level being maintained _____
- Accuracy of Projections
 - _____ Sales _____
 - _____ Labor _____

Management

- _____ All necessary paperwork being processed on time and accurate
- Management communication
 - _____ MGMT/Financial Log being utilized 100%
 - _____ With Staff _____
 - _____ With Supervisors and Assistants _____
 - _____ With Director _____
- _____ Unit Punch List being addressed (no lingering items)
- _____ Weekly Plan being written and completed
- _____ Security System in place and being utilized properly
- _____ Voice Mail/Email being Checked and Followed-up on
- _____ Menu Boards Updated and Immaculate
- _____ Brand Assessments Completed and Exceeding Standard
- _____ Manager Utilizing MGMT Closing Checklist and Leaving for Opener
- _____ Opening Manager Reviewing the Closing Checklist and Rating
- _____ Management "Day in the Life" Checklist Completed for all Shifts



When completed Fax to:
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