

High Impact Restaurant Visit Checklist

Be a "Coach" not an "Inspector"

The nature of all unit visits is developmental. Conducting unit visits as an "auditor" as opposed to a partner is deadly to sustained unit growth. You are visiting *people*, not "stores."

This High Impact Restaurant Visit Template will help you evolve from an "inspect, correct, direct" approach to the more effective *observe, inquire, and develop* process. Visit every restaurant weekly, have a goal and focus, and help them grow. A MUL's primary role during visits is to help managers think, then improve Mgr skills as customer-centric coaches and leaders.

Use this template to make every visit high-impact. **An expanded, more detailed version of this High-Impact Template is available at www.Sullivision.com as an E-book. Check it out now under our Product Catalog.**

To make every visit a high impact one, focus on these 7 Steps, and have a plan for what to do:

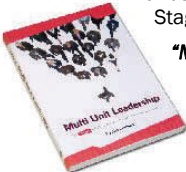
- Before the Visit
- During the Visit
- After the Visit



For best results, use this template in conjunction with Stage 6 in our best-selling book:

"Multi-Unit Leadership: the 7 Stages of Building High-Performing Partnerships and Teams."

To purchase a copy of MUL, or a detailed Store Visit Template E-Book and tons of other effective leadership tools, visit www.sullivision.com.



To get the full version of this High Impact Visit checklist, order the e-book at www.sullivision.com

Pre-Visit Planning

1

Evaluate & Prepare

Using the appropriate reports and your Quarterly Business Plan (see Sullivision.com), assess the following:

- Unit Rank among all Units _____
- Detail Progress on Key Result Areas (KRA's)
- Assess 13-month financial and performance trends
- Review last visit report and assigned goals, timetable
- Consider major marketplace trends & events

Determine the TYPE of Visit

- Announced
- Unannounced

Daypart / Volume (check all that apply)

- breakfast lunch dinner transition
- peak volume slow volume
- weekday weekend open close

Determine the FOCUS of Visit

- 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)
- My Top 3 Biggest Concerns/GMs Top 3.** Write it down.

Determine TIME FRAME of Visit

- Full Day*** (best investment)
- Half Day** (follow-ups & high performers)
- 1-3 Hours** (looking for answer to a specific question)

*Most restaurants cannot alter behavior for more than 4 hours

2

During the Visit

Outside the Unit

Walk it SOLO first from the Guest Perspective (customer touch points)

- | | |
|--------------------------------------|---|
| <input type="checkbox"/> Curb appeal | <input type="checkbox"/> Signage |
| <input type="checkbox"/> Parking lot | <input type="checkbox"/> Building |
| <input type="checkbox"/> Back door | <input type="checkbox"/> Dumpster |
| <input type="checkbox"/> Cleanliness | <input type="checkbox"/> Lighting |
| <input type="checkbox"/> Landscaping | <input type="checkbox"/> Walkways |
| <input type="checkbox"/> Front door | <input type="checkbox"/> Drive-thru (if applicable) |

SOLO from the Multi Unit Leader Perspective (company standards & compliance)

Use your company's checklist of what to look for, paying special attention to systems, standards, people, POS, potential danger, and repair/maintenance/equipment issues.

Now Walk It With GM, from the GM's Perspective (note what they see, don't just point out what you saw)

Evaluate Manager Performance

1. How well do your managers walkabout-and-work the "rooms" (including kitchen, counter, dining area, host areas, drive-thru/car side)? What do they see? What do they miss? How well do they interact with team members & customers?
2. What approach do they use to impact Key Result Areas? Note what's there and what's not there.
3. Try to get a sense of what they understand and if there are limits to their ability to connect process to performance. If problems are evident, do they treat only symptoms?



2

During the Visit (cont'd.)

Inside the Unit

- Spread energy, don't take it away. Greet the entire team. Be a Brand Ambassador.
- Use your company's checklists, assess KRA's.
- **Stay focused on the performance you came to address.** If you see another major area that needs attention, note it and address it later.
- Walk the store first alone, see what's being done, what's being overlooked, and make notes. Now spend time with the manager, note their observations and interactions.

1=perfection 3=further observation 5=immediate action

- Evaluate furniture, glassware, beverage stations, restrooms, equipment, lighting, walk-ins, and storage areas.

Possible underlying cause? _____

- Observe line checks, quality and food safety.

Possible underlying cause? _____

- Observe food handling and hand washing.

Possible underlying cause? _____

- Observe pre-shift meeting. Is there effective and motivational coaching going on? Is it fun?

Possible underlying cause? _____

- Observe bartender (if applicable) for service, selling, recipe knowledge, and efficiency.

Possible underlying cause? _____

- Observe behaviors and efficiency of greeters and hosts. (or Drive-Thru Team if applicable)

Possible underlying cause? _____

- Are fundamentals being properly executed in the kitchen? Dining room/carside/drive-thru?

Possible underlying cause? _____

- Make a note of progress/regress since last visit. Did they resolve last visit's challenges?

Possible underlying cause? _____

- Review manager log book and reports. Look for detailed, relevant and legal notes.

Possible underlying cause? _____

After the Visit

3

Gather Your Thoughts

1. Select a quiet corner of the restaurant, and review your visit before engaging the manager.

- Label and date your visit report.
- Record as much detail as possible.
- Sort bullet points and actionable items keyed to KRA's.

2. Next to each challenge area, 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?

3. Make a "difference list:" what would be different if you were the unit manager?

One-on-One Manager Discussion

Briefly review and recap key points of prior visits.

Your top 3 concerns:

Your manager's top 3 concerns:

- Share and discuss your impressions with your manager. This should be a dialogue, not a monologue. Bring energy, don't take it away.
- Balance discussion between unit performance and personal development.
- Praise progress.** Then identify problem areas and their possible root causes *together*. Don't just "show and tell." Ask questions that uncover mutual understanding and drive development.
- Link all suggestions and direction to KRAs, period goals, and shift execution.
- Agree on an action plan and next steps with a timetable, and leave a written record.

4

Back in Your Office

Continuous Improvement is Key

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

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

Did I achieve my restaurant visit goals?

- Knowledge transfer/Energy transfer
- Goal-setting
- Collaborative development
- Alignment with period goals
- Alignment with company objectives
- 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. Real change is a process, not a project .

Store Location/Unit # _____

Visit Date _____

Visit Time/Daypart _____

Manager on Duty _____