

Restaurant Systems - What they are and why it matters

This is the World's Greatest Restaurant Systems Checklist!

We've all seen the "good" operators – you know, the ones that always seem to have a balanced life, a well managed business, and they always seem to know exactly what's going on. Upon further examination, the output of their restaurant is very consistent, professionally served, and they enjoy the fruits of their labor in the form of meaningful profit, happy employees and many regular patrons.



Don't think for a moment that they're the "lucky" ones among us. They are the "focused" ones who understand the need for well designed restaurant systems. Many wise independent owners and almost every restaurant chain have learned the importance of quality systems from top to bottom. In fact, growing from one location to two or more is virtually impossible without duplicating the systems found in the original location.

What exactly are restaurant systems? As consultants, we define them as, "Certain actions completed in an orderly sequence to achieve consistent results and outcomes." Practically speaking, the less dependence a business has on its owner, the better the systems. The net result is an owner who is in control that can actually spend time working on developing the business instead of getting caught up in the day-to-day fire fighting that we commonly see, or worse, an owner that has to work a job function within the restaurant.

Getting these responsibilities assigned and in place effectively requires that as an owner, you help your team prioritize the things that are most important to your operation.

Creating and implementing effective restaurant systems requires focus, time and dedicated effort to insure the processes are all "closed loops" with clear responsibility for accomplishing the tasks.

For some restaurants, it may take a couple of months to pull the above systems together. For others, it may take years. We've had clients that have been open for 40 years or more that are just recently implementing the above systems into their business, so it's never too late to get a great start!

Attracting more patrons to your well-run business is an investment that will pay off. For owners that value their time, their quality of life and the well-being of their business, there's nothing like having a "well-oiled machine" to produce the desired outcomes – consistently.

An owner that has the time to oversee, direct, strategize and guide the business to be the best it can be is the desirable goal for most, so outlined below are the various systems and their components.

Depending on your particular type of business, not all will apply, or perhaps you may even add a few of your own to the somewhat exhaustive lists on the following pages.

If you would like help with getting your restaurant operating properly and profitably, please contact:

Mr. Kevin Moll, President
Restaurant Consulting Services, Inc.
2833 S. Colorado Blvd. Denver, Colorado 80222 USA
Office Main: 720-363-0164 Fax: 303-691-0555
<http://www.restaurantconsultingservices.com>

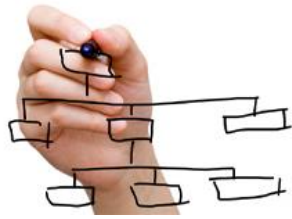
RESTAURANT SYSTEMS CHECKLIST ON THE FOLLOWING PAGES



ADMINISTRATION

This includes:

- Cross-trained management that knows how to perform every job function
- Organized file keeping/records – no paper clutter around the office or business
- Permits and Licenses accounted for, clearly posted as required, expiration dates noted
- Key box kept in office – all issued keys accounted for
- Alarm codes / alarm company contacts current and updated
- All management and employee phone numbers posted in the office
- Inventories sheets, records and blanks for use easily available, with current pricing
- Budgeting system maintained on a weekly and monthly basis to stay on track
- Financial reporting documents including P&L's, balance sheets and general ledger all current and available for monthly review no later than the 10th of each month
- Point of sale usage/programming documents on hand in the office
- Facility management including repair authorizations tracked
- Monthly exterior maintenance schedule posted (snow, lawn)
- Energy management guidelines posted
- Deposit records, checks, and daily reports all kept locked away
- Cash accountability – daily management sign off for each shift for the safe
- Approved vendors and posted contacts/phone numbers on the wall
- Approval/coding of invoices and expenses stamped on each invoice
- Systemized employee schedule creator – schedule to a budget (% of sales)
- Budget and spending log posted to stay on track every day
- Fire/safety procedures posted and practiced, extinguishers all charged with valid dates
- Security procedures posted and maintained (back door, front door, office, safe, parking areas)
- Computer and other hardware backups (Carbonite or other cloud-based auto-backup system)
- Alcohol security, par level, locked premise and daily management of all alcohol
- Regular weekly scheduled management meetings with printed agenda
- Communication system in place with ownership and employees
- Daily management communication log
- China/glass/silverware breakage and controls
- Checklist utilization for all routine functions including FOH, BOH, Management
- Regularly scheduled weekly management meetings and training sessions
- Regularly scheduled employee meetings & service/product training sessions
- Leadership/enforcement of all policies and procedures within the business
- Tracking system for employee advancement posted on office wall
- Any and all brand-specific/required information compliant, posted and current



PERSONNEL AND HUMAN RESOURCES

This includes:

- Current DOE, Wage and State Compliance poster in view for all employees
- Company mission statement clearly posted for all employees to see
- Sexual harassment policy posted, system in place to handle these matters
- Defined steps for employee recruitment
- Employee initial interview policy and process, application forms, GM/owner approval
- Employee selection process – hire for dish, progress through all hourly job functions and this person could ultimately become your future GM. If this is not possible now, fix it so it becomes so
- Interview process, second interview policy
- Compensation and tip policy in force, fair to all employees, state and federal compliant
- Orientation process and handout checklist
- Employee policy manual with verification of receipt
- Uniforms for FOH and BOH – policy, availability/sizing, pricing, cleanliness standards
- Discipline policy consistent and enforced fairly
- Organized employee files with separate I-9 files
- Job descriptions current and available for every position
- Organizational chart posted, with clear-cut and matching job descriptions
- Training methods in place for every position (written, video, cloud-based or other system)
- Training materials available for every position
- Training standards in place to verify education and ability to perform job function
- Regular employee meetings for FOH and BOH taking place and scheduled for the future
- Teamwork emphasis – our performance is dependent on others to perform too
- Quality scheduling system in place (no handwritten schedules) that take the projected budget, overtime, holidays, vacations, work breaks, state laws, no closing then open shifts “closures,” meals and personal time-off requests all into consideration
- All schedules posted in one place
- All schedules posted for a two-week period to allow staff/employees the ability to schedule in advance
- Work shift transfer book or similar system in place so a scheduled employee can easily switch with another qualified person with management approval
- Schedules for BOH, FOH posted on corkboard, management schedule posted in office
- Reasonable shifts/days off for management. GM to work busiest hours
- Management time accountability sheets in use – what happens at every major daily time interval
- Key hourly personnel identified that can get into management training

- Managers are training their replacements
- Managers trained in the concept of “development of both people and profits” equally important
- Crash kit in place in the office in case of power outage
- Medical kit kept in office and inventoried
- Personnel records kept under lock and key
- No “one-on-one’s” in the office at anytime - no less than three people when meeting in the office
- Office door kept locked when not in use. Office never used during peak hours by anyone
- Timekeeping and recording system in place
- Payroll management – who does it, when it’s done, who insures accuracy
- Tracking of server productivity – wall mounted chart to track sales
- Employee performance feedback system and policies, retention and promotion, defined advancement opportunities and defined steps to advancement
- ServSafe, TIPS, other training requirements determined, scheduled, enforced
- Any and all brand specific information/requirements



PRODUCTS/CULINARY/EQUIPMENT

This includes:

- Defined product specifications for every item
- Management approved vendors
- Inventory and ordering sheets/software/apps
- Defined order/delivery days and permitted delivery times/windows
- Product pricing and comparison system
- Recipe book – current, updated, with ingredients, portions, all cook steps, plate presentation
- Prep book – all prep steps including bulk recipes included
- Plate costs determined
- Menu engineering/layout/profitability
- Signature items determined, priced, properly placed on menu
- Plate specifications
- Posted color food pictures on the line
- Product labeling dating and rotation system in place
- Established par levels for every item in inventory including china/glass/silver/bar/culinary
- Bulk buying opportunities taken advantage of
- Quality vendor relationships – better to be a “big fish with one or two, then a small fish with many” – prime vendor agreement in place
- Receiving policies in force

- Delivery invoice check-off/adjustment as items are delivered
- '86 board posted for staff
- "To order" clipboard posted
- Invoice handling/coding for payment and system of immediate payment (if COD)
- Waste controls including: calibrated scales, portion bags and controls, only use clear trash can liners, dumpsters are locked 100% of time, management to check trash frequently, pre-prepped items purchased when practical, space efficiency, bulk cooking, FIFO policy in place
- Prep lists used daily in the mornings – based upon on hand/par/to prep
- Checklist usage in place for all positions – opening, closing, cleaning
- Special items, timely inventories, staff training on product management, sanitation training and certification
- Monthly equipment maintenance checklist
- Yearly equipment maintenance checklist
- Daily repairs clipboard – frequently the Chef or KM will take charge of handling these matters



BAR/ALCOHOL

This includes:

- Drink price categories in a 3 to 6, easy-to-manage tier format. Similar format with house wines and beers
- Knowledge of competition pricing – is yours effective / above or below the market
- Spills and comps tracking
- Wine glass portion pouring – every glass is perfectly the same
- Shot portion training – jigger policy determined/enforced
- Recipe book and special recipes quickly available
- Prep list / par levels on a per-day basis to avoid waste
- Bar cleaning checklist / daily, weekly and monthly
- Product order guides
- Par levels set for all beer/liquor/wine/kegs/Co2/soda
- Receiving guidelines, including 100% supervision of all alcohol until its under lock and key
- Garnishes and juices – top notch quality
- Glassware – modern, stocked, plenty in stock
- Glassware washing – spotless outcome with efficient drying, racking and storage
- Setup and breakdown checklists in use, checked by management
- Ringing of sales accurately, all sales accounted for, no self-checking out with cash, no "zero" rings
- Steps of service established – greeting, napkin, listen, introduction, sale

- No handling of glassware from the top to the middle of the glass. Bottom half only
- Food service at the bar promoted – silver, menus, selling process
- Entertainment – booking to a budget, guest feedback, advance booking, signed contracts on file
- Close eye on entertainment food and beverages. Tracked, run up and accounted for
- Lights dimmed at night to a lower level
- Music type and volume appropriate for the concept and time of day
- Happy hour alcohol and food promotions effective, tracked, promoted
- Regular bartender training scheduled for all staff
- Guests provided with snacks, menus, drinks...a comprehensive guest experience



FRONT OF HOUSE

This includes:

- Steps of service established for all servers/counter personnel to insure a consistent experience
- Loyalty programs in place
- POS training materials, updates and promotional/advertising all programmed in
- Server training program effective, timely, orientated towards developing relationships first, then sales
- Server beverage handling – no drinks handled by the top half of any glass
- Server rotation, sections, turns – smaller sections handled properly will generate as much if not more in tips
- Reservation system effective, allows the gathering of e-mail address info for database
- Dining room overall appearance and cleanliness
- Tabletops – modern centerpieces, S&P
- Checklist usage for all set-up, breakdown and phasing out servers at end of the shift
- Table tents effective in promoting alcohol, appetizers, desserts and upcoming events
- Menus – in good condition, backups available, to-go menus available
- Flowers and decorations – seasonal, fresh, “impressive” in the eyes of the guest
- Children – high chairs, kids menus (with great items on it), crayons
- Large parties – menus, seating, service, promotions, avoidance of backing up the kitchen
- Insuring guest satisfaction – feedback forms, phone calls, letters, Yelp and other social media site reviews responded to
- Holiday planning designated, budgeted for and on time

RESTAURANT MARKETING

MARKETING

This includes:

- Knowledge of your position in the market
- Knowledge of your points of differentiation
- Competition – what are they doing that can/will impact you
- Is your vision for your business consistent with your mission and marketing
- Is a 12-month promotions/planning calendar in place? This drives how every promotion is run including budget, responsibilities, timing, costs, necessary collateral, printing, advertising and more
- Who handles public relations and community involvement and what is our plan
- Social media commentary and communication
- Web site current, compelling, with efficient SEO and page analytics
- Company image/branding and trade dress
- Guest acquisition, guest engagement
- E-mail address acquisition and current/effective database management
- All of these are critical to the “face” of the business, keeping guests informed about the business, and ultimately bringing more guests through the front door. After all, this is the number one responsibility of every business owner

EXTRA ITEMS TO ADDRESS IN YOUR RESTAURANT:

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NOTES: