** Restaurant Checkup**

|  |  |  |  |
| --- | --- | --- | --- |
| First Name |  | Last Name |  |
| Business Name |  | Email Address |  |

SCORING  
Healthy = Meeting standards consistently  
Okay = Haphazard compliance  
Sick = Not occurring in the business  
N/A = Not applicable

\*Check the column that is best describes your business.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **The Basics** | Healthy | Okay | Sick | N/A |
| 1. Your business is making money. |  |  |  |  |
| 2. You are paying your bills on time - especially invoices with discounts. |  |  |  |  |
| 3. Your vendors and suppliers are shipping you with terms. |  |  |  |  |
| 4. You are current with your taxes, permits, and licenses. |  |  |  |  |
| 5. Your business is trending up overall since you opened. |  |  |  |  |
| 6. Your business is trending up compared to last year. (comp #’s) |  |  |  |  |
| 7. You comply with all Health Department Standards. |  |  |  |  |
| 8. You have an effective and consistent customer service plan in place. |  |  |  |  |
| 9. You work beside your employees to help them succeed in their job |  |  |  |  |
| **Finance** | Healthy | Okay | Sick | N/A |
| 1. You reconcile your checking accounts. |  |  |  |  |
| 2. You are producing regular, consistently formatted statements. (income statement, balance sheet, sources and uses of funds) |  |  |  |  |
| 3. You operate with a rolling cash flow 12 - 18 months out. |  |  |  |  |
| 4. Your receivables are current. |  |  |  |  |
| 5. Shrinkage (bad debt, internal and external loss) is less than 2% of gross revenue. |  |  |  |  |
| 6. There is a sales plan in place |  |  |  |  |
| 7. Your lease is competitive. |  |  |  |  |
| 8. Your payroll is an acceptable percentage of sales. |  |  |  |  |
| 9. A basic ratio analysis corresponds favorably to industry benchmarks. |  |  |  |  |
| 10. You monitor and manage your Cost of Goods and Payroll according to business levels. |  |  |  |  |
| **Operations** | Healthy | Okay | Sick | N/A |
| 1. You always keep to your Posted Hours of Operation |  |  |  |  |
| 2. Vendors respond and deliver promptly and consistently and at convenient times. |  |  |  |  |
| 3. You match packing slips with purchase orders with invoices and check quality of goods. |  |  |  |  |
| 4. You have policies for damaged or spoiled supplies received from vendors. |  |  |  |  |
| 5. The process of ordering and delivering product is adequately controlled. |  |  |  |  |
| 6. Your system allows for orderly register “closings” at C.O.B. |  |  |  |  |
| 7. You make bank deposits daily. |  |  |  |  |
| 8. You record weather on your daily business summary report. |  |  |  |  |
| 9. You anticipate business needs and workloads based on weather predictions and/or seasonal variations. |  |  |  |  |
| **Supplies, Food and Produce** | Healthy | Okay | Sick | N/A |
| 1. You store your goods so they can be rotated and used in the order received. |  |  |  |  |
| 2. Portions are clearly defined, measured and controlled. |  |  |  |  |
| 3. All prep work is complete by open of business or prior to peak business hours. |  |  |  |  |
| 4. Prep work is done with attention to consistency and waste control. |  |  |  |  |
| 5. Storage areas are clean, orderly, and kept at proper temperature. |  |  |  |  |
| 6. Foods to be carried over are properly packaged, labeled and dated, and kept at proper temperature. |  |  |  |  |
| 7. Foods are disposed of properly in a timely fashion. |  |  |  |  |
| 8. You are able to anticipate quantities and usage and order so that supply levels are adequate to meet customer demands with a minimum of spoilage. |  |  |  |  |
| **Menus and Presentation** | Healthy | Okay | Sick | N/A |
| 1. Menus are clean, attractive, easy to read, and understandable. |  |  |  |  |
| 2. Lighting is adequate (or even enhancing). |  |  |  |  |
| 3. Display menus/signage are attractive, distinct, easy to read, and clearly priced. |  |  |  |  |
| 4. Cold/hot cases look full, fresh, and “ready for business.” |  |  |  |  |
| 5. Cold/hot cases beverage and dispensers are maintained throughout the day to be ready at peak hours. |  |  |  |  |
| 6. Visible cooking areas are clean, orderly, and constantly maintained. |  |  |  |  |
| 7. These areas enhance the perception of your food. |  |  |  |  |
| 8. Food is attractively and appetizingly presented to the customer. |  |  |  |  |
| **Physical Plant - Front of House** | Healthy | Okay | Sick | N/A |
| 1. The front/entrance of the shop is clean and in good condition. |  |  |  |  |
| 2. Windows are clean. |  |  |  |  |
| 3. All light bulbs are working and interior is well lit. |  |  |  |  |
| 4. Window displays and signage are effective and in order. |  |  |  |  |
| 5. Furnishings and décor are clean and in good condition. |  |  |  |  |
| 6. Tabletops are clean. |  |  |  |  |
| 7. Utensils, napkins, and condiments are clean and readily accessible (whether on the table or at a central station). |  |  |  |  |
| 8. The floor is clean. |  |  |  |  |
| 9. The bathrooms are clean. |  |  |  |  |
| 10. The music is appropriate. |  |  |  |  |
| 11. Refuse containers are periodically emptied and wiped down. |  |  |  |  |
| 12. The shop opens daily "ready for business" regardless of your presence. |  |  |  |  |
| **Physical Plant - Back of the House** | Healthy | Okay | Sick | N/A |
| 13. All equipment works and is safe and in good condition. |  |  |  |  |
| 14. All prep stations are set up correctly and on time at the start of the day. |  |  |  |  |
| 15. All food and beverage prep areas are thoroughly cleaned at C.O.B. |  |  |  |  |
| 16. Floors are clean. |  |  |  |  |
| 17. Storage areas are neat, orderly, and clean. |  |  |  |  |
| 18. Cleaning supplies are properly stored. |  |  |  |  |
| 19. Water temperatures are appropriate. |  |  |  |  |
| 20. Food prep and utensil cleaning equipment is properly maintained. |  |  |  |  |
| 21. All aspects of operations could withstand a health dept. inspection. |  |  |  |  |
| **Personnel** | Healthy | Okay | Sick | N/A |
| 1. Staff is stable and turnover manageable. |  |  |  |  |
| 2. Employees clearly understand performance standards and friendly customer service. |  |  |  |  |
| 3. Operational policy and procedures are clearly stated. |  |  |  |  |
| 4. Employee discounts or purchase program are clearly defined. |  |  |  |  |
| 5. Employees have an understanding of “product knowledge”, “selling techniques”, and “use of downtime.” |  |  |  |  |
| 6. Training is provided. |  |  |  |  |
| 7. Employees are properly groomed and attired. |  |  |  |  |
| 8. The compensation system incentivizes behavior. |  |  |  |  |
| 9. All behavior receives appropriate feedback, redirection, or reinforcement. |  |  |  |  |
| 10. You solicit and listen to employees’ ideas and suggestions. |  |  |  |  |
| 11. You periodically “drop-in" on your day off to see if management is as good as it should be when you are not there. |  |  |  |  |
| **Customer Service** | Healthy | Okay | Sick | N/A |
| 1. You can describe your customer in detail in two or three sentences. |  |  |  |  |
| 2. Merchandising (purchasing, display, signage, pricing) policy (checks, credit card, return, exchange, credit), promotional, marketing, or replacement decisions are made from a customer service perspective. |  |  |  |  |
| 3. Your customers are greeted when they enter your establishment. |  |  |  |  |
| 4. Your employees answer the phone in a prescribed manner. |  |  |  |  |
| 5. Customers are thanked when they spend money with you. |  |  |  |  |
| 6. You have sat or eaten at every table in your establishment. |  |  |  |  |
| 7. You have had your restaurant “secret shopped.” |  |  |  |  |
| 8. You have a "complimentary drink or menu item" budget. |  |  |  |  |
| **Marketing** | **Healthy** | **Okay** | **Sick** | **N/A** |
| 1. You have identified the most effective means of communicating with your customer. (Neighborhood, community, local, regional resources.) |  |  |  |  |
| 2. You capture customer information for mailing or direct contact. |  |  |  |  |
| 3. You contact customers on a regular basis. |  |  |  |  |
| 4. You have a marketing plan and a budget. |  |  |  |  |
| **Competition** | Healthy | Okay | Sick | N/A |
| 1. You patronize the competition. |  |  |  |  |
| 2. You are familiar with competitors’ marketing, menu, pricing, and policy practices. |  |  |  |  |
| 3. You are beating the competition. |  |  |  |  |
| 4. You consider having "loss leaders" that are readily reorderable and might enhance customer loyalty. |  |  |  |  |
| 5. You understand where else a customer might spend the dollars that would be spent in your establishment. (substitute, complementary, or alternative products) |  |  |  |  |
| **Loss Prevention and Safety** | Healthy | Okay | Sick | N/A |
| 1. Shop and register keys are in management’s possession at all times. |  |  |  |  |
| 2. Customer entry chimes (bell) work. |  |  |  |  |
| 3. Stockroom and office doors are closed and secure. |  |  |  |  |
| 4. Rear entrances are locked. |  |  |  |  |
| 5. You conduct regular inventory plus "spot check" inventory on costly goods. |  |  |  |  |
| 6. Emergency numbers are clearly posted in front and rear of shop. |  |  |  |  |
| 7. Fire extinguisher and first aid kit are in good order. |  |  |  |  |
| 8. Exits clear, exit signs and emergency lights are working. |  |  |  |  |
| 9. Bathrooms are monitored by staff. |  |  |  |  |
| **Technology** | Healthy | Okay | Sick | N/A |
| 1. You employ a computerized Point of Sale system that provides effective data and control. |  |  |  |  |
| 2. It integrates to accounting and inventory systems. |  |  |  |  |
| 3. It provides information for adequate and timely reordering. |  |  |  |  |
| 4. It captures customer information. |  |  |  |  |
| 5. You have a Website. |  |  |  |  |
| 6. You have done a “Technology Assessment” to determine appropriate technology applications and cost/benefit for your business. |  |  |  |  |