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Weekly Planning: Big Plans Require Small Steps

by Chris Tripoli

Most everyone has heard the old saying, "If you fail to plan, you are planning to fail." For restaurant owners, planning can sometimes be a tricky proposition. There is the long-term plan, the annual plan, management plan, marketing plan and so on. And after we complete a reasonable plan, our real challenge becomes executing it successfully.

A client of mine, who has been in the restaurant business for 30 years, once told me that the best five-year plan is an annual plan done five years in a row. Although that may sound funny, it is quite true. I would add that the best annual plan is divided into 12 monthly plans, and the best monthly plan is divided into weekly plans with specific assignments. Long-distance runners know that completing a marathon is done one stride at a time. Much like a marathon, carrying out your restaurant's annual plan is done one week at a time.



In this article we take a look at how taking small steps can equal large successes.

Why Bother With Weekly Planning?

Is it enough to create annual sales and profit goals, and then hand them off to your managers? We have found that they alone are not sufficient for a management team to get its arms around, understand, and effectively carry out. That is much like a football coach sending his quarterback onto the field with orders to score but without a playbook. You need to determine the regular, incremental tasks that support the larger goals.

A weekly operating plan should address the components of the sales goal by all appropriate departments:

- ✍ **Restaurant**
- ✍ **Bar**
- ✍ **Banquet (Private Parties)**
- ✍ **To-Go, Delivery Function**
- ✍ **Off-Premise Catering**

A weekly operating plan should also include the controllable cost items that affect unit profitability:

- ✍ **Food Cost**
- ✍ **Bar Cost**
- ✍ **Labor Cost**
- ✍ **Direct Operating Costs (linen, repairs and maintenance, uniforms, utilities)**

Additionally, your weekly operating plan should include marketing projects and tasks the managers are expected to execute. These include:

- ✍ **Advertising and Promotion**
- ✍ **Community Service Projects**

By carrying out a plan that includes categories of responsibility as listed above, managers have a clearer picture of the goal and a specific game plan. They are easier to motivate because they can measure success step by step.

Once You've Set Weekly Goals, Set Daily Goals

I was working with a manager of a steakhouse restaurant on a Wednesday evening shift. He did not remember the previous year's sales goal, customer count total, or exact food cost percentage, but he knew exactly how many customers had been served so far that week, the per-person check average, his sales goal for that shift and what his shift labor cost should be. He was excited by the 8 p.m. reading he took because he saw he was "on plan." He told me about the Friday private party that was confirmed and how those sales would help his restaurant exceed its weekly plan. He further explained how the training cost for two new servers was incorporated into the weekly labor cost goal and that he was on plan to meet that as well. He was "fired up" because he could easily measure his success.

By allowing the managers to break down monthly goals into weekly plans they are better able to execute their shift because they see how particulars affect the success of the weekly plan. The more motivated managers are, the more likely they are to succeed and the more successful they are, the longer they are likely to stay and the more profitable the unit becomes. Everybody wins.

Gary Turner, president of Hospitality Pro Search, a national restaurant executive recruiting firm, told me that managers who excel in weekly planning tend to be more knowledgeable of unit profitability, staff training and retention, and in-house marketing programs. This makes them more valuable to their owners and more marketable within our industry as well.

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-- Gary Turner-President,
Hospitality Pro Search

Some management tasks and weekly assignments are day-specific, so a checklist reminder in the manager's office is a good thing to consider. For this client it was important for managers to adhere to the following reporting and administrative schedule. For example, here's how he parsed out tasks over a given week:

Monday

- ✍ Complete weekend paperwork by noon, invoiced daily checkouts, bank deposits.
- ✍ Prepare liquor, beer and wine orders.
- ✍ Assist kitchen manager with grocery, meat, dairy, frozen, and chemical orders.
- ✍ Prepare weekly assessment and manager meeting agenda for tomorrow's meeting.
- ✍ Confirm private parties for the week.

Tuesday

- ✍ Receiving day. Check invoices to purchase orders.
- ✍ Manager meeting 2:30 p.m. to 4 p.m.

Wednesday

- ✍ Every other Wednesday extend payroll, and phone in by 4 p.m.

Thursday

- ✍ Employee schedules completed, priced out, and posted by 4 p.m.
- ✍ Assist kitchen manager with weekend ordering (grocery, frozen, paper, chemical, meat and dairy).

Friday

- ✍ Complete Monday-Thursday paperwork and send to office by noon, with copies of invoices, daily checkouts, bank deposits.
- ✍ Receiving day; check invoices against purchase orders.

Saturday

- ✍ Manager special project day, repair and maintenance items, review staff in training to see that files are complete.

Sunday

- ✍ Do weekly inventory of prime cost items, food and liquor.

Finally, Support Your Weekly Plan With a Weekly Meeting

Effective weekly management meetings are brief, well-organized, informative and motivational. This is best accomplished by using the weekly planning guide as an agenda and having all managers participate. Within one to two hours each manager should be able to review and comment on sales, food and beverage items, staff and training issues, private parties, in-house marketing plans and repair needs. The key is to have your planning guide complete and for each manager to have his comments prepared before the meeting. At the end of the weekly meeting, managers will have agreed upon the schedule of daily specials, preshift topics for staff, daily sales goals, labor cost goals and other specific issues. Just as a chain is only as strong as its weakest link, your plan is only good if all managers are "on the same page." Review key elements of your plan throughout the week.

With all managers knowing their roles and their expectation each week, you have created a team that is well-informed, well-directed, and able to win the daily battles that lie ahead.

-- [Restaurant Startup & Growth](#)

Form Before Function: A Weekly Planning Guide

Working with a new management team for a 150-seat casual-theme restaurant, we developed a weekly operations assessment form so that they would learn from this "snapshot" of the key items within their restaurant each week. By adding a checklist of management reporting tasks, and a specific day and time for their weekly meeting, we had a procedure developed for them to successfully "manage by the week."

Each restaurant operates a little differently and adjustments may be required, but a good weekly planning guide can be created, using the following template as a starting place.

[Download Weekly Planning Guide](#)

RESTAURANT WEEKLY PLANNING GUIDE
UNIT WEEKLY OPERATIONS ASSESSMENT

Location: _____ General Manager: _____
 Week Ending: _____ Period: _____

(1) SALES
 Wkly. Goal _____ Wkly. Actual _____ P.T.D. Budget _____ P.T.D. Actual _____
 Sales: _____ Sales: _____ Sales: _____ Sales: _____
 Cash Count: _____ Cash Count: _____ Cash Count: _____ Cash Count: _____
 Chk. Avg: _____ Chk. Avg: _____ Chk. Avg: _____ Chk. Avg: _____

(2) SALES COMMENTS
 Restaurant Related: _____
 Bar Related: _____
 Banquet Department: _____

(3) FOOD PRODUCT COMMENTS: _____

(4) CURRENT FOOD COST: _____

(5) RECOMMENDED SPECIALS FOR THE WEEK
 Monday _____
 Tuesday _____
 Wednesday _____
 Thursday _____
 Friday _____
 Saturday _____
 Sunday _____

(6) BAR PRESENCE COMMENTS
 Current Beverage Cost: _____

(7) STAFF REVIEW

Service Staff:	Total Exp.	% Cost
Wait Staff: _____	_____	_____
Bar/Hostess: _____	_____	_____
Bar Staff: _____	_____	_____
Trainers: _____	_____	_____
Other: _____	_____	_____

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