THE GRAVITY RESTAURANT LEADERSHIP SYSTEM

Food Cost, Waste & Inventory Control

Forms Companion Pack

Print-focused collection of inventory, ordering, waste, portion, prep, storage, review, training, and accountability tools.

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305 ORIGINAL RESOURCE PAGES

Extracted from Food Cost, Waste & Inventory Control Workbook

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How to Use This Companion Pack

This pack separates the reusable forms, worksheets, checklists, exercises, and control tools from the current source book so managers can print the operating pages without reprinting the full book. Read the source book for instruction, examples, context, and current use guidance.

Included resource groups

- Inventory, variance, ordering, and receiving controls
- Waste, spoilage, remake, and portion tools
- Prep, production, storage, FIFO, and labeling tools
- Manager reviews, training, action plans, and follow-up logs

Control note

Use only the tools that solve a real operating need. Assign an owner, train the standard, preserve required records, and return to ThomasMonroeBooks.com for current approved releases. This pack does not replace legal, safety, employment, accounting, or regulatory guidance.

PART 1

FOOD COST CONTROL FOUNDATIONS

WHY FOOD COST GETS OUT OF CONTROL

Food cost usually gets out of control because small daily habits are not being tracked.
Most restaurants do not lose control of food cost from one single mistake.
They lose control because the same small mistakes happen again and again.
A manager orders too much product because the walk-in was not counted.
A cook uses a bigger portion than the recipe allows.
A prep employee makes a full batch when a half batch was enough.
A case of product gets pushed behind newer product and expires.
A server rings in the wrong item and the kitchen remakes food.
A bartender or cook gives away product without documentation.
A food item is returned by a guest but never logged.
A manager sees waste but does not ask why it happened.
A product is low, so someone places an emergency order at a higher cost.
A supplier invoice changes, but no one checks the price.
A restaurant cannot fix food cost only by telling employees to “waste less.”
Waste less is not a system.
Order better is not a system.
Watch portions is not a system.
A system gives managers a way to see what is happening.
Food cost problems usually come from one or more of these areas:
Poor inventory counts
Weak ordering habits
No par levels
No waste log
No portion standards
Poor recipe training
Overproduction
Expired product
Poor storage rotation
Unclear receiving process
No manager follow-up
No employee accountability
The first step is not blame.
The first step is visibility.
Managers need to know where the loss is coming from before they can correct it.
A restaurant may believe its biggest problem is high supplier pricing, but the real problem may be overproduction.
Another restaurant may believe its biggest problem is waste, but the real problem may be incorrect ordering.
Another restaurant may believe employees are careless, but the real problem may be that portion tools were never assigned or recipe standards were never trained.
Food cost control starts when the restaurant stops guessing.
The manager’s job is to identify the leak, document the pattern, train the correction, and follow up until the standard improves.

Food Cost Problem Review

Date: _____
Manager Name: _____
Restaurant / Location: _____
Department: _____
Use this worksheet to identify where food cost may currently be getting out of control.

What food items seem to be wasted most often?

What items are most often overproduced?

What items does the restaurant run out of too often?

What products are most often found expired, spoiled, or unusable?

What high-cost ingredients need tighter portion control?

What items are ordered too heavily?

What items are ordered too late or too lightly?

What storage area creates the most inventory problems?

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar storage
□ Prep area
□ Cook line
□ Server station
□ Other: _____

Notes:

What food cost problem does management correct repeatedly?

What is the first food cost issue that should be reviewed?

Why this issue matters:

Person Responsible: _____
Target Completion Date: _____
Manager Signature: _____

THE DIFFERENCE BETWEEN SALES, COST, WASTE, AND PROFIT

Food cost control becomes easier when managers understand the difference between sales, cost, waste, and profit.
These words are often used together, but they do not mean the same thing.
Sales are the dollars the restaurant brings in from guests.
Cost is the money spent to buy the food, ingredients, supplies, and products needed to produce those sales.
Waste is product the restaurant paid for but did not turn into profitable sales.
Profit is what remains after costs are controlled and the restaurant protects enough margin to stay healthy.
A restaurant can have strong sales and still lose profit if food cost is uncontrolled.
High sales do not automatically mean strong performance.
A busy restaurant can still waste too much product, over-order, over-prep, over-portion, miss invoice changes, throw away expired food, remake too many items, or give away food without tracking it.
That is why managers must look beyond sales.

Sales answer one question:

How much money did guests spend?

Food cost answers a different question:

How much did it cost the restaurant to produce those sales?

Waste answers another question:

How much product did the restaurant pay for but fail to use correctly?

Profit answers the most important question:

After the restaurant served guests and paid its costs, what was actually protected?
A manager who only watches sales may miss the bigger problem.
For example, a restaurant may sell a large number of steaks on a weekend.
That sounds good.
But if cooks over-portion sides, trim product poorly, remake plates, throw away unused prep, and fail to track waste, the profit from those steak sales may be much lower than expected.
Another restaurant may have average sales but excellent portion control, tight prep, accurate ordering, low waste, and strong inventory review.
That restaurant may protect better profit than a busier restaurant with weaker systems.
Food cost control is not about being cheap.
It is about making sure paid product is used correctly.
Guests should still receive good portions, quality food, and a strong experience.

The goal is not to take value away from the guest.
The goal is to stop losing money through avoidable mistakes.
A manager should review food cost decisions with this mindset:
Did we buy the right amount?
Did we receive what we paid for?
Did we store it correctly?
Did we rotate it correctly?
Did we prep the right amount?
Did we portion it correctly?
Did we sell it before it spoiled?
Did we track what was wasted?
Did we learn from the waste?
Did we follow up with the team?
Food cost control is not one number.
It is the result of many daily decisions.
When managers understand the difference between sales, cost, waste, and profit, they can make better decisions before the damage grows.

Sales, Cost, Waste, and Profit Review

Date: _____
Manager Name: _____
Restaurant / Location: _____

Review Period:

□ Daily
□ Weekly
□ Monthly
□ Other: _____

Use this worksheet to help managers understand what is happening behind the food cost numbers.

What were the strongest sales items during this review period?

Did strong sales create any product shortages?
□ Yes
□ No
□ Not sure
If yes, what ran low or ran out?

Did strong sales create any overproduction or waste?
□ Yes
□ No
□ Not sure
If yes, what was wasted?

What high-cost products were used during this period?

Were any high-cost products over-portioned, over-prepped, wasted, spoiled, or remade?
□ Yes
□ No
□ Not sure

Notes:

What product was purchased but not used efficiently?

What product was thrown away, remade, spoiled, or returned?

What product sold well and should be watched closely next week?

What product did not sell as expected?

What should the manager adjust next week?
□ Order less
□ Order more
□ Adjust prep levels
□ Review portion control
□ Review recipe execution
□ Review storage and rotation
□ Review waste log
□ Review menu item performance
□ Train employees
□ Other: _____

Manager Notes:

Action Needed:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

WHAT MANAGERS MUST TRACK EVERY WEEK

Food cost control works best when managers track the same important areas every week.
A restaurant cannot depend on memory.
A manager may believe waste was low, but the waste log may show repeated spoilage.
A manager may believe ordering was accurate, but the walk-in may show too much backup product.
A manager may believe portion control is strong, but a high-cost ingredient may be disappearing faster than sales can explain.
Tracking gives managers facts.
Facts make better decisions possible.
A restaurant does not need to make food cost tracking complicated.
But it does need to be consistent.

The most important weekly tracking areas are:

Inventory counts
Weekly high-dollar and high-risk counts
Monthly full inventory
Food purchases
Supplier invoices
Transfers in and out
Product price changes
Waste
Spoilage
Remakes and comps
Prep and production records
Par levels
Overproduction
Underproduction
Portion control
High-cost ingredients
Inventory variance
Storage organization
Labeling and dating
Manager follow-up
Each area tells part of the story.
Inventory counts show what is actually in the building.
Food purchases show what the restaurant bought.
Supplier invoices show what the restaurant paid.
Product price changes show where cost may be increasing.
Waste logs show what was lost.
Spoilage logs show what was not used in time.
Remake logs show where mistakes may be happening.
Prep reviews show whether the restaurant is making too much or too little.
Portion audits show whether recipes are being followed.
Storage checks show whether product is being protected.
Manager follow-up shows whether problems are being corrected or ignored.
The weekly review does not have to be perfect at first.
It has to begin.

A manager should start by choosing the areas that are causing the most money loss.
If waste is high, start with daily waste logs.
If product keeps expiring, start with storage, labeling, and rotation.
If food cost is high but waste looks low, review portion control and invoice prices.
If the restaurant keeps running out of product, review par levels and ordering.
If too much product is being prepped, review sales patterns and production planning.
The goal is to create a weekly rhythm.
When managers review the same things every week, patterns become easier to see.
A pattern is more useful than a single mistake.
One wasted pan of product may be a one-time problem.
The same product wasted three weeks in a row is a system problem.
One emergency order may be unavoidable.
Emergency orders every week show weak planning.
One over-portioned plate may be a training issue.
Over-portioning every shift shows a lack of recipe control.
Weekly tracking helps managers stop reacting and start managing.

Weekly Food Cost Tracking Checklist

Week Of: _____
Manager Name: _____
Restaurant / Location: _____
Use this checklist once per week to review the most important food cost control areas.

Inventory Review

□ Weekly inventory count completed.
□ Count sheets were reviewed for missing items.
□ High-cost items were counted carefully.
□ Walk-in cooler was reviewed.
□ Walk-in freezer was reviewed.
□ Dry storage was reviewed.
□ Bar storage was reviewed if applicable.
□ Prep area backup product was reviewed.
□ Cook line backup product was reviewed.

Notes:

Ordering Review

□ Orders were based on inventory counts.
□ Par levels were reviewed before ordering.
□ Sales forecast was reviewed before ordering.
□ Events, holidays, weather, and reservations were considered.
□ Emergency orders were reviewed.
□ Over-ordering risks were reviewed.
□ Shortage risks were reviewed.

Notes:

Receiving and Invoice Review

□ Deliveries were checked against invoices.
□ Product quantities were verified.
□ Product quality was checked.

□ Incorrect items were reported.
□ Missing items were reported.
□ Damaged items were reported.
□ Price changes were reviewed.
□ Invoice totals were reviewed.

Notes:

Waste Review
□ Daily waste logs were reviewed.
□ Spoiled product was reviewed.
□ Expired product was reviewed.
□ Prep waste was reviewed.
□ Cook line waste was reviewed.
□ Returned food was reviewed.
□ Remakes were reviewed.
□ Waste patterns were identified.

Notes:

Prep and Production Review
□ Prep levels were reviewed.
□ Overproduction was reviewed.
□ Underproduction was reviewed.
□ Products that ran out were reviewed.
□ Products that sat too long were reviewed.
□ Prep list accuracy was reviewed.
□ Prep communication issues were reviewed.

Notes:

Portion Control Review
□ High-cost ingredients were reviewed.
□ Portion tools were available.
□ Recipe standards were reviewed.
□ Over-portioning concerns were reviewed.
□ Under-portioning concerns were reviewed.
□ Employees needing portion retraining were identified.

Notes:

Manager Follow-Up

What is the biggest food cost issue this week?

What caused the issue?

□ Ordering problem
□ Prep problem
□ Portion problem
□ Waste problem
□ Storage problem
□ Labeling problem
□ Rotation problem
□ Receiving problem
□ Recipe problem
□ Training problem
□ Manager follow-up problem
□ Other: _____

What action will be taken?

Who is responsible?

When will the follow-up happen?

Manager Signature: _____
General Manager / Owner Signature if Required: _____

CORE FOOD COST AND VARIANCE CALCULATIONS

Managers do not need complicated accounting language to use these calculations. They do need consistent counts, the same units of measure, complete receiving records, and honest supporting logs.

Food Used

Beginning Inventory + Purchases + Transfers In - Transfers Out - Ending Inventory = Food Used

Food-Cost Percentage

Food Used ÷ Food Sales × 100 = Food-Cost Percentage

Unexplained Inventory Variance

Product Available - Product Accounted For = Unexplained Variance

A variance is a signal that something needs to be checked. It is not proof of theft, misconduct, or intentional wrongdoing.

The manager should compare the number with sales and recipe usage, receiving, waste, production, transfers, remakes, comps, samples, storage, portions, and count accuracy before reaching a conclusion. Record the resulting variance here only after completing the item-level reconciliation in Part 2.

Core Calculation Worksheet

Calculation Input	Amount / Notes
Beginning inventory	
Purchases and accepted receipts	
Transfers in	
Transfers out	
Ending inventory	
Calculated food used	
Food sales	
Calculated food-cost percentage	
Unexplained variance from item-level reconciliation	

Manager review completed by: _____ **Date:** _____

HOW SMALL MISTAKES BECOME BIG FOOD COST PROBLEMS

Most food cost problems begin small.
That is what makes them dangerous.
A small mistake may not seem worth correcting in the moment.
A cook uses a little too much cheese.
A server forgets to ring in an extra sauce.
A prep cook makes one extra pan of product.
A manager accepts a delivery without checking the invoice.
A container goes unlabeled in the walk-in.
A case gets placed in front of older product.
An employee throws away food without recording it.
A bartender over-pours slightly.
A manager notices but decides to deal with it later.
One small mistake may not damage the restaurant.
Repeated small mistakes can become a major cost problem.
Food cost is often lost through repetition.
A few ounces over-portioned every plate becomes pounds of product lost by the end of the week.
One untracked remake becomes a pattern of kitchen mistakes that no one studies.
One unlabeled container becomes a habit that leads to expired product.
One missed invoice check becomes weeks of unnoticed price increases.
One manager skipping waste review teaches the team that waste does not matter.
Small mistakes become big problems when they are ignored, repeated, normalized, or left undocumented.
Managers must pay attention to small problems because small problems are easier to correct early.
It is easier to correct portion control during training than to explain why food cost is high at the end of the month.
It is easier to fix labeling habits today than to throw away spoiled product next week.
It is easier to review ordering before the delivery arrives than to store too much product in an already crowded walk-in.
It is easier to log waste during the shift than to guess at the end of the week.
Food cost control depends on daily discipline.
Managers should not treat every small mistake like a crisis.
But managers should treat repeated mistakes like a system warning.
A repeated mistake means one of four things is happening:
The employee was not trained clearly.
The standard is not written down.
The manager is not following up.
The system is too weak to catch the problem.
Correcting small mistakes does not have to be harsh.
It should be clear.

A manager can say:

“This portion needs to match the recipe.”
“This product has to be labeled before it goes into the walk-in.”
“This waste needs to be written down.”
“This item cannot be ordered until we check what we already have.”
“This product needs to be rotated behind the older case.”
“This remake needs to be logged so we can see the pattern.”
The goal is not to blame employees.
The goal is to protect the restaurant.
When managers correct small food cost problems early, they prevent bigger problems later.

Small Food Cost Mistake Tracker

Date: _____
Manager Name: _____
Department: _____

Shift:

□ Opening
□ Lunch
□ Dinner
□ Closing
□ Other: _____
Use this page to document small food cost issues before they become repeated problems.

Issue Observed:
□ Over-portioning
□ Under-portioning
□ Product not labeled
□ Product not dated
□ Poor rotation
□ Product wasted
□ Product spoiled
□ Product over-prepped
□ Product under-prepped
□ Recipe not followed
□ Wrong item made
□ Food remade
□ Product ordered incorrectly
□ Delivery not checked
□ Invoice concern
□ Storage issue
□ Other: _____

Product / Item Involved:

What happened?

Was product wasted?
□ Yes
□ No
□ Not sure

Estimated amount wasted:

Possible cause:
□ Employee was not trained
□ Employee forgot standard
□ Recipe unclear
□ Portion tool missing
□ Labeling supplies missing
□ Storage area disorganized
□ Manager did not verify
□ Rush pressure
□ Communication issue
□ Ordering issue
□ Other: _____

Immediate correction made:

Employee coached?
□ Yes
□ No
□ Not applicable
Follow-up needed?
□ Yes
□ No

Follow-up action:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

FOOD COST CONTROL WITHOUT HURTING GUEST EXPERIENCE

Food cost control should never be used as an excuse to damage the guest experience.
A restaurant can control cost and still serve quality food.
The goal is not to make plates look smaller, reduce quality, disappoint guests, or make employees afraid to serve properly.
The goal is to serve the correct product, in the correct portion, using the correct recipe, with the correct standard, every time.
Food cost control becomes harmful when managers confuse control with cutting corners.
Cutting corners may lower cost for a short time, but it can damage trust.
Guests notice when portions shrink without explanation.
Guests notice when quality drops.
Guests notice when recipes become inconsistent.
Guests notice when a favorite item looks different every visit.
Guests notice when a plate feels careless.
The right way to control food cost is to remove waste, not value.
A manager should protect value by controlling the parts of the process that should never have been loose in the first place.

Examples include:

Using the recipe instead of guessing
Using the correct scoop, ladle, scale, or portion cup
Prepping based on realistic sales needs
Rotating product so older product is used first
Checking deliveries before accepting them
Recording waste when it happens
Training employees on high-cost ingredients
Reviewing remakes and returned food
Keeping storage areas organized
Adjusting par levels based on real usage
Following up when products are repeatedly wasted
None of those actions hurt the guest.
They protect the restaurant while still protecting the guest.
Good food cost control should make the guest experience more consistent.
If recipes are followed, guests receive the same item each visit.
If portions are correct, guests receive fair value and the restaurant protects margin.
If prep is planned well, the restaurant is less likely to run out of important items.
If product is rotated correctly, quality improves.
If waste is tracked, managers can fix problems before they affect guests.
Food cost control should be explained to employees carefully.
Employees should understand that the goal is not to be cheap.
The goal is to be consistent, responsible, and professional.
A cook should know that portion control protects both food cost and guest trust.
A prep cook should know that overproduction creates waste and underproduction creates service problems.
A server should know that ringing in orders accurately protects the guest, the kitchen, and the restaurant.

A manager should know that cutting labor, reducing prep, or lowering portions without a plan can create bigger problems.
The best restaurants control food cost while still making guests feel taken care of.
That is the balance.
Protect the guest.
Protect the standard.
Protect the profit.

Guest Experience Food Cost Review

Date: _____
Manager Name: _____
Restaurant / Location: _____
Use this worksheet before making any food cost adjustment that could affect the guest.

What food cost issue are we trying to correct?

What item, recipe, station, or process is involved?

Could this change affect guest experience?
□ Yes
□ No
□ Not sure
If yes, how?

Could this change affect portion size?
□ Yes
□ No
□ Not sure

Notes:

Could this change affect food quality?
□ Yes
□ No
□ Not sure

Notes:

Could this change affect ticket times or service speed?
□ Yes
□ No
□ Not sure

Notes:

Could this change cause the restaurant to run out of product?
□ Yes
□ No
□ Not sure

Notes:

What should be controlled instead of reducing guest value?
□ Waste
□ Overproduction
□ Portion inconsistency
□ Recipe mistakes
□ Poor storage
□ Poor rotation
□ Over-ordering
□ Invoice errors
□ Remakes
□ Training gaps
□ Manager follow-up
□ Other: _____

What employee training is needed before this change is made?

How will the manager confirm that guest experience is protected?

Manager Decision:
□ Change approved
□ Change not approved
□ More review needed
□ Test for one week first
□ Train team before change

Manager Notes:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

Part 1 Review: Food Cost Control Foundation Checkpoint

Date: _____
Manager Name: _____
Restaurant / Location: _____
Department: _____
Use this page before moving into inventory setup.

Do managers understand why food cost gets out of control?
□ Yes
□ No
□ Needs review

Notes:

Do managers understand the difference between sales, cost, waste, and profit?
□ Yes
□ No
□ Needs review

Notes:

Does the restaurant currently track food cost issues every week?
□ Yes
□ No
□ Sometimes

Notes:

Does the restaurant track small food cost mistakes before they repeat?
□ Yes
□ No
□ Sometimes

Notes:

Does the restaurant protect guest experience while controlling food cost?
□ Yes
□ No
□ Needs improvement

Notes:

What is the biggest food cost control weakness right now?

What product, station, or process needs immediate review?

What weekly tracking habit should begin first?

□ Inventory count
□ Waste log
□ Prep review
□ Portion audit
□ Receiving check
□ Invoice review
□ Storage audit
□ Labeling audit
□ Par level review
□ Manager food cost meeting
□ Other: _____

Who will own the first food cost control improvement?

What is the deadline for the first improvement?

Manager Action Plan:

Follow-Up Date: _____
Manager Signature: _____

PART 2

INVENTORY SYSTEM SETUP

Purpose of This Section

Food cost control starts with knowing what is already in the building.
A manager cannot order accurately without inventory awareness.
A manager cannot identify waste without knowing what product was available.
A manager cannot control prep without understanding current stock.
A manager cannot protect food cost if storage areas are disorganized, counts are inconsistent, or products are measured differently from week to week.
Inventory is not just a count.
Inventory is a control system.

A strong inventory system helps the restaurant know:

What product is on hand
Where product is stored
How product is counted
What unit of measure is used
What product is moving quickly
What product is moving slowly
What product is being wasted
What product should be ordered
What product should not be ordered
What product may expire soon
What product needs manager follow-up
Many restaurants struggle with inventory because the process is not organized before the count begins.
Managers count items in different orders.
Products are stored in multiple places.
Units of measure are inconsistent.
One manager counts cases.
Another counts individual units, often called eaches.
Another estimates.
Some products are counted from memory.
Some products are skipped.
Some storage areas are messy.
Some products are unlabeled.
Some backup product is forgotten.
The result is inventory that looks complete but is not accurate.
Inaccurate inventory creates bad ordering.
Bad ordering creates waste, shortages, overstocking, emergency orders, and poor food cost control.
This section helps managers set up the inventory system before trying to use it.
Start by organizing storage areas.
Then build product categories.
Then decide the correct unit of measure.
Then create a count sheet that matches the restaurant's real storage flow.
Inventory should be counted the same way every time.
Same storage order.
Same product names.
Same units of measure.
Same manager review.
Same follow-up process.
Consistency creates accuracy.
Accuracy creates better ordering.
Better ordering protects food cost.

INVENTORY AREA SETUP CHECKLIST

Inventory starts in the storage areas.
If storage areas are disorganized, the count will be difficult and inaccurate.
A manager should not have to search the entire building to find product.
Products should have a clear home.
Dry goods should be organized.
Walk-in product should be grouped logically.

Freezer product should be rotated and visible.
Bar product should be separated by type.
Prep product should be labeled.
Backup product should not be hidden.
A messy storage area creates several problems.
Managers miss product during inventory.
Employees open new product while old product sits behind it.
Items expire because they are not visible.
Ordering becomes inaccurate.
Employees waste time looking for supplies.
Deliveries become harder to put away correctly.
Food safety risks increase.
Cleaning becomes harder.
Inventory accuracy starts with storage discipline.
Before a restaurant can count well, it must organize well.

A strong inventory area should be:

Clean
Labeled
Grouped by category
Easy to count
Easy to rotate
Easy to inspect
Free of expired product
Free of damaged product
Free of unnecessary clutter
Organized the same way each week
The goal is not perfection.
The goal is repeatability.
A manager should be able to walk into the storage area and know where each product belongs.
A new employee should be able to learn the organization system.
A delivery should be put away in a way that supports counting, rotation, and food safety.
When inventory areas are organized, managers make better decisions.
When inventory areas are messy, managers guess.
Guessing costs money.

Inventory Area Setup Checklist

Date: _____
Manager Name: _____
Restaurant / Location: _____

Storage Area Reviewed:

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar storage
□ Prep area
□ Cook line backup
□ Chemical storage
□ Paper goods storage
□ Other: _____

General Organization

□ Area is clean.
□ Area is easy to walk through safely.
□ Products are grouped by category.
□ Products have a clear storage location.
□ Labels are visible where needed.
□ Old product is not hidden behind new product.
□ Damaged product has been removed or reported.
□ Expired product has been removed or logged.
□ Open product is covered or sealed properly.
□ Product is stored off the floor according to restaurant standards.

□ Heavy items are stored safely.
□ Food and chemicals are separated properly.
□ Raw and ready-to-eat products are separated properly if applicable.
□ Storage area is ready for accurate counting.

Inventory Accuracy

□ Products are easy to identify.
□ Products are not spread across too many locations.
□ Backup product is visible.
□ Partial cases are easy to count.
□ Open containers are labeled.
□ Unit of measure is clear.
□ Items that are hard to count have been identified.
□ Slow-moving items have been identified.
□ High-cost items have been identified.
□ Items close to expiration have been identified.

Problems Found:

Products That Need Better Storage Location:

Products That Need Labels:

Expired, Damaged, or Questionable Product Found:

Corrective Action Needed:

□ Reorganize area
□ Add shelf labels
□ Remove expired product
□ Record waste
□ Retrain employees on storage
□ Review FIFO
□ Review receiving process
□ Create product map
□ Adjust inventory count sheet
□ Other: _____

Person Responsible: _____
Deadline: _____
Manager Signature: _____

STORAGE AREA MAP

A restaurant cannot count inventory accurately if managers and employees do not know where product belongs.
A storage area map helps the team create order.
It does not need to be fancy.
It needs to be clear.
A storage map shows where product categories should be kept so inventory can be counted, deliveries can be put away correctly, product can be rotated, and employees can find what they need during the shift.
Without a storage map, product often moves around based on convenience.
Dry goods may be placed wherever there is space.
Frozen product may be stacked in front of older cases.
Bar product may be mixed with kitchen product.
Prep product may be stored in several places.
Sauces, dressings, proteins, produce, paper goods, chemicals, and backup supplies may end up in the wrong areas.
When that happens, inventory becomes harder to count.
Ordering becomes less accurate.
Waste becomes harder to see.
Employees open new product before using old product.
Managers order items that are already in the building.
Storage problems create food cost problems.
A storage area map helps prevent that.
Each major storage area should have a simple layout.

The map should show:

What belongs in the area
What does not belong in the area
Where high-cost products are stored
Where open product should go
Where backup product should go
Where damaged product should be reported
Where product should be staged after delivery
Where chemicals should never be stored
Where food safety risks may exist
A storage area map also helps with training.
New employees can learn where items belong.
Prep cooks can find product faster.
Cooks can restock more consistently.
Managers can inspect storage areas more easily.
Inventory counts become more repeatable.
A manager should review the storage map whenever the menu changes, storage layout changes, supplier packaging changes, or inventory problems keep repeating.
The map should match the real restaurant.
If the walk-in has five shelves, the map should reflect those shelves.
If dry storage has zones, the map should show those zones.
If product is stored in multiple locations, the map should identify each location.
The purpose is not to make storage complicated.
The purpose is to make storage visible, organized, and easier to control.

Storage Area Map Worksheet

Date: _____
Manager Name: _____
Restaurant / Location: _____

Storage Area Being Mapped:

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar storage
□ Prep area

□ Cook line backup
□ Paper goods storage
□ Chemical storage
□ Other: _____

Storage Area Description:

Main Product Categories Stored in This Area:

Storage Zone Plan

Zone / Shelf / Area 1:

Products Stored Here:

Notes:

Zone / Shelf / Area 2:

Products Stored Here:

Notes:

Zone / Shelf / Area 3:

Products Stored Here:

Notes:

Zone / Shelf / Area 4:

Products Stored Here:

Notes:

Zone / Shelf / Area 5:

Products Stored Here:

Notes:

Zone / Shelf / Area 6:

Products Stored Here:

Notes:

High-Cost Products Stored in This Area:

Products That Must Be Counted Carefully:

Products That Are Often Misplaced:

Products That Should Not Be Stored in This Area:

Food Safety or Storage Concerns:

□ Raw product storage concern
□ Ready-to-eat product storage concern
□ Chemical separation concern

□ Product stored too low
□ Product stored uncovered
□ Product stored unlabeled
□ Product stored undated
□ Product hard to rotate
□ Product hard to count
□ Product blocking access
□ Other: _____

Notes:

Storage Map Action Plan

What needs to be moved?

What needs a better label?

What needs manager follow-up?

Person Responsible: _____
Deadline: _____
Manager Signature: _____

PRODUCT CATEGORY LIST

Inventory is easier to manage when products are grouped into clear categories.
A product category list helps the restaurant organize inventory, count sheets, ordering guides, storage areas, waste logs, and food cost reviews.
Without categories, inventory can become a long, confusing list.
Managers may forget items.
Products may be counted in different places.
Invoices may be harder to compare.
Waste may be harder to track.
Ordering may become disorganized.
A product category system gives the restaurant structure.

Common restaurant inventory categories include:

Proteins
Seafood
Produce
Dairy
Dry goods

Frozen items
Prepared sauces
Dressings
Desserts
Bread products
Spices and seasonings
Bar products
Beverages
Paper goods
Cleaning supplies
Chemicals
Smallwares
Retail or merchandise items if applicable
Each restaurant should build categories that match its own operation.
A steakhouse may need detailed categories for beef cuts.
A pizza restaurant may need separate categories for dough, cheese, sauce, toppings, boxes, and pizza supplies.
A bar and grill may need separate categories for liquor, beer, wine, mixers, garnishes, glassware, and bar paper.
A full-service restaurant may need categories by storage area, station, or supplier.

The category list should help managers answer practical questions:

What products do we count every week?
Where are they stored?
Who uses them?
Which supplier provides them?
What unit of measure should be used?
Which items are high-cost?
Which items spoil quickly?
Which items are wasted often?
Which items need tighter manager review?
The more organized the category list, the easier it becomes to build inventory sheets and order guides.
Managers should avoid making categories too vague.
For example, “food” is not a helpful category.
“Proteins” is better.
“Beef,” “chicken,” “pork,” and “seafood” may be even better if the restaurant carries many items.
The best category system is detailed enough to support accurate counting but simple enough for managers to use consistently.
A category list should be reviewed whenever new menu items are added, suppliers change, products are discontinued, or inventory sheets become confusing.
Organized categories create organized counts.
Organized counts create better ordering.
Better ordering protects food cost.

Product Category List Worksheet

Date: _____
Manager Name: _____
Restaurant / Location: _____
Use this worksheet to build the restaurant’s main inventory categories.

Main Inventory Categories

□ Proteins
□ Seafood
□ Produce
□ Dairy
□ Dry goods
□ Frozen foods
□ Bread products
□ Desserts
□ Sauces
□ Dressings
□ Spices and seasonings
□ Bar liquor
□ Beer
□ Wine

□ Bar mixers
□ Non-alcoholic beverages
□ Coffee / tea
□ Paper goods
□ To-go supplies
□ Cleaning supplies
□ Chemicals
□ Smallwares
□ Other: _____

Custom Category List

Category 1:

Category Name: _____

Products Included:

Storage Area:

Supplier:

High-Cost Category?
□ Yes
□ No
Needs Weekly Manager Review?
□ Yes
□ No

Category 2:

Category Name: _____

Products Included:

Storage Area:

Supplier:

High-Cost Category?
□ Yes
□ No
Needs Weekly Manager Review?
□ Yes
□ No

Category 3:
Category Name: _____

Products Included:

Storage Area:

Supplier:

High-Cost Category?
□ Yes
□ No
Needs Weekly Manager Review?
□ Yes
□ No

Category 4:
Category Name: _____

Products Included:

Storage Area:

Supplier:

High-Cost Category?
☐ Yes
☐ No
Needs Weekly Manager Review?
☐ Yes
☐ No

Category 5:
Category Name: _____

Products Included:

Storage Area:

Supplier:

High-Cost Category?
☐ Yes
☐ No
Needs Weekly Manager Review?
☐ Yes
☐ No

Category 6:
Category Name: _____

Products Included:

Storage Area:

Supplier:

High-Cost Category?
□ Yes
□ No
Needs Weekly Manager Review?
□ Yes
□ No

Category 7:
Category Name: _____

Products Included:

Storage Area:

Supplier:

High-Cost Category?
□ Yes
□ No
Needs Weekly Manager Review?
□ Yes
□ No

Category 8:
Category Name: _____

Products Included:

Storage Area:

Supplier:

High-Cost Category?
□ Yes
□ No
Needs Weekly Manager Review?
□ Yes
□ No

Category Review Questions

Which category has the highest cost risk?

Which category creates the most waste?

Which category is hardest to count accurately?

Which category is most often over-ordered?

Which category is most often under-ordered?

Which category needs better storage organization?

Which category needs a better order guide?

Manager Notes:

Manager Signature: _____

UNIT OF MEASURE SETUP PAGE

Inventory accuracy depends on using the correct unit of measure.
A unit of measure explains how a product is counted.
If one manager counts a product by the case, another counts it by the pound, and another counts it by each item, the inventory will not be consistent.
Inconsistent units create inaccurate counts.
Inaccurate counts create bad ordering decisions.
Bad ordering decisions create waste, shortages, emergency orders, overstocking, and food cost confusion.
A restaurant must decide how each product should be counted.

Common units of measure include:

Case
Bag
Box
Pound
Ounce
Gallon
Quart
Pint
Cup
Each
Bottle
Can
Container
Sleeve
Rack
Dozen
Pan
Tray
Portion
Batch

The correct unit depends on how the restaurant buys, stores, uses, and tracks the product.
For example, a case of chicken may be purchased by the case but used by the pound.
A sauce may be made by the batch but stored by the quart.
A dessert may be purchased by the case but sold by the slice.
A bottle of liquor may be purchased by the bottle but tracked by bottle count or partial bottle estimate.
A box of gloves may be counted by the box.
A sleeve of cups may be counted by the sleeve.
Managers should choose the unit that creates the most useful count.
The unit should be easy to understand.
It should be repeatable.
It should match the inventory sheet.
It should match ordering needs when possible.
It should be clear enough that a different manager could count the same product and get a similar result.

Some items may need two measurements:

Purchase unit
Inventory count unit

For example:

Purchased by case, counted by each package.
Purchased by case, counted by pound.
Purchased by bottle, counted by bottle.
Purchased by box, counted by sleeve.
The restaurant should document this before inventory begins.
If the unit is unclear, managers may estimate.
Estimating creates weak numbers.
Weak numbers create weak decisions.
A strong unit of measure system helps managers count inventory the same way every week.

Unit of Measure Setup Worksheet

Date: _____
Manager Name: _____
Restaurant / Location: _____
Product Category: _____
Use this page to decide how each product should be counted during inventory.

Product 1:

Product Name: _____
Supplier: _____
Storage Area: _____

Purchase Unit:

□ Case
□ Bag
□ Box
□ Pound
□ Bottle
□ Can
□ Container
□ Each
□ Other: _____

Inventory Count Unit:

□ Case
□ Partial case
□ Bag
□ Box
□ Pound
□ Ounce
□ Gallon
□ Quart
□ Pint
□ Cup
□ Bottle
□ Can
□ Container
□ Each
□ Sleeve
□ Dozen
□ Other: _____
How should partial product be counted?

High-Cost Item?
□ Yes
□ No
Manager Review Needed Weekly?

□ Yes
□ No

Product 2:

Product Name: _____
Supplier: _____
Storage Area: _____

Purchase Unit:

□ Case
□ Bag
□ Box
□ Pound
□ Bottle
□ Can
□ Container
□ Each
□ Other: _____

Inventory Count Unit:

□ Case
□ Partial case
□ Bag
□ Box
□ Pound
□ Ounce
□ Gallon
□ Quart
□ Pint
□ Cup
□ Bottle
□ Can
□ Container
□ Each
□ Sleeve
□ Dozen
□ Other: _____
How should partial product be counted?

High-Cost Item?
□ Yes
□ No
Manager Review Needed Weekly?
□ Yes
□ No

Product 3:

Product Name: _____
Supplier: _____
Storage Area: _____

Purchase Unit:

□ Case
□ Bag
□ Box
□ Pound
□ Bottle
□ Can

□ Container
□ Each
□ Other: _____

Inventory Count Unit:

□ Case
□ Partial case
□ Bag
□ Box
□ Pound
□ Ounce
□ Gallon
□ Quart
□ Pint
□ Cup
□ Bottle
□ Can
□ Container
□ Each
□ Sleeve
□ Dozen
□ Other: _____

How should partial product be counted?

High-Cost Item?
□ Yes
□ No

Manager Review Needed Weekly?
□ Yes
□ No

Product 4:

Product Name: _____
Supplier: _____
Storage Area: _____

Purchase Unit:

□ Case
□ Bag
□ Box
□ Pound
□ Bottle
□ Can
□ Container
□ Each
□ Other: _____

Inventory Count Unit:

□ Case
□ Partial case
□ Bag
□ Box
□ Pound
□ Ounce
□ Gallon
□ Quart
□ Pint
□ Cup

□ Bottle
□ Can
□ Container
□ Each
□ Sleeve
□ Dozen
□ Other: _____
How should partial product be counted?

High-Cost Item?
□ Yes
□ No
Manager Review Needed Weekly?
□ Yes
□ No

Unit of Measure Review

Which products are hardest to count?

Which products are being counted differently by different managers?

Which products need clearer unit instructions?

Which products should be counted more carefully because of cost?

What change should be made to the inventory count sheet?

Manager Signature: _____

INVENTORY COUNT SHEET

The inventory count sheet is one of the most important food cost control tools in the restaurant.
It tells managers what product is in the building.
It supports ordering decisions.
It helps identify overstocking.
It helps identify shortages.
It helps managers compare usage to sales.
It helps reveal waste, spoilage, and portion control problems.
But an inventory count sheet only works if it is organized and used consistently.
A weak count sheet creates confusion.
A strong count sheet creates clarity.

A good inventory count sheet should include:

Product name
Product category
Storage area
Unit of measure
Beginning count
Ending count
Amount ordered
Amount received
Waste or spoilage notes
Manager initials
Follow-up notes
Not every restaurant needs every column at first.
But every restaurant needs a count sheet that can be used the same way every week.
The count sheet should follow the storage flow.
That means the order of the sheet should match the way the manager walks through the restaurant.
If the manager starts in dry storage, dry storage should be first.
If the manager counts the walk-in next, the walk-in should come next.
If bar storage is counted separately, it should have its own section.
This helps prevent missed items.
Managers should avoid building a count sheet that jumps from category to category without matching the real building.
A good count sheet should also separate high-cost items.
High-cost products should receive extra attention because small mistakes can create larger cost problems.
A manager should count high-cost proteins, seafood, specialty products, alcohol, and expensive ingredients carefully.
Inventory counts should not be rushed.
A rushed count often becomes a guessed count.
A guessed count is not inventory control.
Managers should count at the same time each week when possible.
The count should happen before major ordering decisions.
The count should be reviewed before the order is placed.

The final question should always be:

Does this count make sense based on sales, prep, waste, and product movement?
If the answer is no, the manager should investigate before ordering.

Inventory Count Sheet

Week Of: _____
Inventory Date: _____
Manager Counting: _____
Second Count / Verification if Needed: _____
Restaurant / Location: _____

Storage Area:

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar storage
□ Prep area
□ Cook line backup

□ Paper goods
□ Other: _____

Product Count Table

Product Name: _____
Category: _____
Storage Location: _____
Unit of Measure: _____
Beginning Count: _____
Ending Count: _____
Amount Ordered: _____
Amount Received: _____

Waste / Spoilage Notes:

Manager Initials: _____
Product Name: _____
Category: _____
Storage Location: _____
Unit of Measure: _____
Beginning Count: _____
Ending Count: _____
Amount Ordered: _____
Amount Received: _____

Waste / Spoilage Notes:

Manager Initials: _____
Product Name: _____
Category: _____
Storage Location: _____
Unit of Measure: _____
Beginning Count: _____
Ending Count: _____
Amount Ordered: _____
Amount Received: _____

Waste / Spoilage Notes:

Manager Initials: _____
Product Name: _____
Category: _____
Storage Location: _____
Unit of Measure: _____
Beginning Count: _____
Ending Count: _____
Amount Ordered: _____
Amount Received: _____

Waste / Spoilage Notes:

Manager Initials: _____
Product Name: _____
Category: _____
Storage Location: _____
Unit of Measure: _____
Beginning Count: _____
Ending Count: _____
Amount Ordered: _____
Amount Received: _____

Waste / Spoilage Notes:

Manager Initials: _____
Product Name: _____
Category: _____
Storage Location: _____
Unit of Measure: _____
Beginning Count: _____
Ending Count: _____
Amount Ordered: _____
Amount Received: _____

Waste / Spoilage Notes:

Manager Initials: _____

Count Review

Were any items missing from the count sheet?

□ Yes
□ No

If yes, list them:

Were any items difficult to count?

□ Yes
□ No

If yes, list them:

Were any items found in the wrong storage area?
□ Yes
□ No

If yes, list them:

Were any items expired, spoiled, damaged, or questionable?
□ Yes
□ No

If yes, list them and record waste:

Were any high-cost items lower than expected?
□ Yes
□ No
□ Not sure

Notes:

Were any items higher than expected?
□ Yes
□ No
□ Not sure

Notes:

What ordering changes should be made based on this count?

What storage changes should be made based on this count?

What employee training is needed based on this count?

Manager Notes:

Inventory Count Completed By: _____
Date Completed: _____
Manager Signature: _____

OPENING INVENTORY SETUP

Opening inventory creates the starting point for the restaurant's food cost control system.
Before managers can track progress, they need a beginning count.
The opening inventory count shows what is in the building at the start of the tracking period.
Without an opening inventory, managers may not know whether food cost improved, worsened, or stayed the same.
Opening inventory is especially important when a restaurant is starting a new food cost system, switching managers, changing suppliers, updating menus, creating new par levels, or trying to solve ongoing waste problems.
The opening count should be careful.
It should not be guessed.
It should not be rushed.
It should not be done from memory.
A manager should count each storage area and document the products clearly.
If possible, high-cost products should be verified by a second manager.

Opening inventory should answer these questions:

What product is currently in the building?
Where is it stored?
How much is available?
What unit of measure is being used?
What product is expired or questionable?
What product is overstocked?
What product is low?
What product needs to be ordered soon?
What product needs to be used first?
What product needs manager follow-up?
Opening inventory also helps managers clean up the system before weekly tracking begins.
If old product is found, it should be reviewed.
If product is unlabeled, it should be corrected.
If product is stored in the wrong area, it should be moved.
If the count sheet is missing items, it should be updated.
If the unit of measure is unclear, it should be fixed.
The opening count is not just a number.

It is a reset.
It gives the restaurant a chance to begin the food cost system with better organization, better visibility, and better control.

Opening Inventory Setup Checklist

Opening Inventory Date: _____
Manager Name: _____
Restaurant / Location: _____

Reason for Opening Inventory:

□ New food cost system
□ New inventory process
□ New manager
□ New menu
□ New supplier setup
□ Monthly reset
□ Quarterly reset
□ Food cost problem review
□ Waste reduction project
□ Other: _____

Before Counting

□ Storage areas were cleaned.
□ Expired product was removed or logged.
□ Damaged product was removed or reported.
□ Unlabeled product was reviewed.
□ Product categories were reviewed.
□ Unit of measure instructions were reviewed.
□ Count sheets were prepared.
□ High-cost items were identified.
□ Second manager verification was assigned if needed.

Storage Areas Counted

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar storage
□ Prep area
□ Cook line backup
□ Paper goods
□ Cleaning supplies
□ Chemical storage
□ Other: _____

Opening Inventory Concerns

What products were overstocked?

What products were low?

What products were expired, spoiled, damaged, or questionable?

What products were unlabeled or undated?

What products were stored in the wrong area?

What products were difficult to count?

What products need better unit of measure instructions?

What products need immediate manager follow-up?

Opening Inventory Manager Review

Inventory system ready to begin?
□ Yes
□ No
□ Needs correction first

Corrections needed before weekly tracking begins:

Person Responsible: _____
Deadline: _____
Opening Inventory Completed By: _____
Second Verification if Required: _____
Manager Signature: _____

WEEKLY INVENTORY ROUTINE

Inventory works best when it becomes a routine.
A restaurant should not count inventory only when food cost looks bad.
By the time food cost looks bad, the problem may already have been happening for weeks.
A weekly inventory routine gives managers a regular way to review product levels, ordering needs, storage problems, waste concerns, and food cost risks.
The routine should be simple enough to repeat.
It should happen on the same day when possible.
It should use the same count sheets.
It should follow the same storage path.
It should use the same unit of measure.
It should include manager review before the order is placed.
A weekly inventory routine helps managers stop guessing.
Instead of asking, “Do we need more product?” the manager can look at the count.
Instead of asking, “Why did we run out?” the manager can review par levels, sales, prep, and ordering.
Instead of asking, “Why is food cost high?” the manager can compare inventory, purchasing, waste, and portion control.
Inventory should not be treated as a paperwork task.
It should be treated as a decision-making tool.

A strong weekly inventory routine should include:

Preparing the count sheets
Cleaning and organizing storage areas
Counting each storage area
Reviewing high-cost items
Checking labels and dates
Identifying expired or questionable product
Reviewing waste concerns
Comparing counts to par levels
Reviewing upcoming sales needs
Reviewing upcoming events or holidays
Reviewing order needs
Assigning follow-up actions
The count should be completed before major ordering decisions are made.
Ordering before counting is one of the fastest ways to create overstocking.
A manager who orders from memory may miss product that is already in the building.
A manager who orders without checking par levels may order too much or too little.
A manager who orders without reviewing waste may keep buying product that the restaurant is not using correctly.
Weekly inventory should create better questions.
Why are we carrying this much product?
Why did this item move so fast?
Why did this item not move?
Why did this product expire?
Why did we run out?
Why did we need an emergency order?
Why did this count not match expected usage?
Why was this product in the wrong storage area?
Those questions help managers improve the system.
The goal is not just to count.
The goal is to learn from the count.

Weekly Inventory Routine Checklist

Week Of: _____
Inventory Date: _____
Manager Responsible: _____
Restaurant / Location: _____
Inventory Start Time: _____
Inventory End Time: _____

Before Inventory

□ Count sheets are printed or ready.
□ Product categories are reviewed.
□ Units of measure are reviewed.
□ Storage areas are accessible.

□ Deliveries have been put away if applicable.
□ Products are grouped correctly.
□ High-cost items are identified.
□ Waste logs are available for review.
□ Par levels are available for review.
□ Upcoming sales events are reviewed.
□ Manager responsible for ordering is available for review.

Storage Areas Counted

□ Walk-in cooler counted.
□ Walk-in freezer counted.
□ Dry storage counted.
□ Bar storage counted if applicable.
□ Prep area backup counted.
□ Cook line backup counted.
□ Paper goods counted.
□ To-go supplies counted.
□ Cleaning supplies counted if applicable.
□ Other areas counted: _____

High-Cost Item Review

□ High-cost proteins counted carefully.
□ Seafood counted carefully if applicable.
□ Cheese and dairy counted carefully if applicable.
□ Specialty ingredients counted carefully.
□ Alcohol counted carefully if applicable.
□ Items with repeated waste were reviewed.
□ Items with repeated shortages were reviewed.
□ Items with recent price changes were reviewed.

Labeling and Rotation Review

□ Open product is labeled.
□ Open product is dated.
□ FIFO is being followed.
□ Older product is accessible.
□ Expired product was removed or logged.
□ Questionable product was reported.
□ Product was not hidden behind newer product.
□ Storage areas were organized enough for accurate counting.

Count Accuracy Review

□ No major products were skipped.
□ Partial cases were counted consistently.
□ Open containers were estimated according to standard.
□ Units of measure were followed.
□ Count sheet was updated for missing products.
□ Unclear products were flagged for review.
□ Second count was completed for high-risk items if needed.

Inventory Findings

What items are lower than expected?

What items are higher than expected?

What items may be overstocked?

What items may need to be ordered immediately?

What items should not be ordered this week?

What items need to be used first?

What items need waste, spoilage, or quality follow-up?

Manager Review

Inventory reviewed before ordering?
□ Yes
□ No

Ordering changes needed?
□ Yes
□ No

If yes, explain:

Follow-up actions assigned?
□ Yes
□ No

Action Needed:

Person Responsible: _____
Deadline: _____
Manager Signature: _____

INVENTORY ACCURACY REVIEW

Inventory is only useful if it is accurate.
An inaccurate inventory count can create more problems than no count at all because managers may trust bad information.
If the count says there is enough product, the manager may not order more.
If the count says product is low when it is actually overstocked, the manager may order too much.
If the unit of measure is wrong, food cost reports may become confusing.
If storage areas are skipped, managers may believe product is missing when it is simply stored somewhere else.
Inventory accuracy depends on discipline.
Managers should not guess.
Managers should not count from memory.
Managers should not rush through storage areas.
Managers should not change units of measure without updating the count sheet.
Managers should not ignore products that are hard to count.
The inventory accuracy review helps managers find weak spots in the count process.

Common inventory accuracy problems include:

Products stored in multiple places
Products counted with different units
Partial cases estimated differently
Open containers not measured consistently
Items missing from the count sheet
Items counted twice
Items skipped
Products stored in the wrong area
Expired product included in usable inventory
Damaged product not removed
Waste not recorded
Deliveries counted before invoices are checked
Manager does not review unusual counts
Accuracy improves when the restaurant creates clear counting rules.

For example:

Count all unopened cases as full cases.
Count partial cases by the agreed unit.
Count open bottles according to the restaurant’s bottle-count method.
Do not count expired product as usable inventory.
Do not count damaged product as usable inventory.
Record questionable product for manager review.
Update the count sheet when a new product is added.
Remove discontinued products from the count sheet.
Count high-cost items twice if needed.
A manager should review inventory accuracy after each count.
The review does not need to be long.

It should answer one simple question:

Can we trust this count?
If the answer is no, the manager should fix the system before using the count to make ordering decisions.
Accurate inventory creates accurate ordering.
Accurate ordering protects food cost.

Inventory Accuracy Review Form

Inventory Date: _____
Manager Reviewing: _____
Restaurant / Location: _____
Count Completed By: _____
Second Count Completed By if Applicable: _____

Inventory Accuracy Questions

Were all storage areas counted?

□ Yes
□ No
□ Not sure

If no or not sure, explain:

Were products counted using the correct unit of measure?

□ Yes
□ No
□ Some items need review

Products needing unit review:

Were any items missing from the count sheet?

□ Yes
□ No

If yes, list them:

Were any items counted twice?

□ Yes
□ No
□ Not sure

If yes or not sure, explain:

Were any items skipped?

□ Yes
□ No
□ Not sure

If yes or not sure, explain:

Were partial cases or open containers counted consistently?
□ Yes
□ No
□ Needs improvement

Notes:

Were expired, spoiled, damaged, or questionable products removed from usable inventory?
□ Yes
□ No
□ Not applicable

Notes:

Were high-cost items verified carefully?
□ Yes
□ No
□ Not applicable

High-cost items needing review:

Did any count seem unusually high or low?
□ Yes
□ No

If yes, list item and possible reason:

Can management trust this inventory count for ordering decisions?
□ Yes
□ No
□ Needs correction first
Why or why not?

Accuracy Problem Found:

□ Storage issue
□ Unit of measure issue
□ Count sheet issue
□ Training issue
□ Product location issue
□ Waste not recorded
□ Expired product included
□ Product counted twice
□ Product skipped
□ Manager review issue
□ Other: _____

Corrective Action Needed:

Person Responsible: _____
Deadline: _____
Manager Signature: _____

INVENTORY VARIANCE, RECORD ACCURACY, AND UNEXPLAINED PRODUCT LOSS

Inventory is not only a count of what remains. When it is compared with ordering, receiving, transfers, waste, production, portions, sales, remakes, and other approved uses, it becomes an early-warning system.

The numbers give the manager a reason to check. They do not give the manager permission to accuse.

Why This Review Matters

A shortage may come from a counting mistake, a delivery or invoice error, unrecorded waste, production that was not written down, a transfer to another location that was never recorded, a remake or comp that was missed, poor portion control, spoilage, misplaced product, recipe inconsistency, or possible theft. The first responsibility is to find the most supportable explanation.

The same process also reveals when waste and production records are incomplete, inaccurate, or not being used at all. If the physical count shows more product was used than the records explain, the manager knows where to begin checking and retraining.

Required Counting Rhythm

Weekly: Count designated high-dollar, high-volume, short-shelf-life, and repeatedly missing products. The list should be based on actual restaurant risk, not only price.

Monthly: Complete a full inventory of every storage area at least once each month, using the same item order and units of measure each time. Recount unusual results before using them to make a decision.

Additional Counts: Recount any item with an unusual shortage, repeated variance, storage concern, receiving issue, or major price change.

Product-Flow Reconciliation

Product Available = Beginning Inventory + Purchases or Receipts + Transfers In

Product Accounted For = Ending Inventory + Transfers Out + Expected Recipe Usage + Recorded Waste + Approved Adjustments

Unexplained Variance = Product Available - Product Accounted For

Expected recipe usage should be calculated from POS sales counts and standardized recipes. Approved adjustments may include documented remakes, comps, samples, employee meals, or yield and production adjustments that are not already included in expected recipe usage, recorded waste, or ending inventory. Never count the same product movement twice. Always compare using the same unit of measure. A case, pound, each, pan, bottle, ounce, or portion cannot be mixed without conversion.

Fair Investigation Sequence

1. Recount the product and verify every storage location.
2. Check invoices, credits, receiving records, and units of measure.
3. Check transfers in and out, including loans to another restaurant or department.
4. Compare waste, spoilage, remake, comp, and returned-food records.
5. Compare production sheets, prep yields, batch records, and sales or recipe usage.
6. Review portion standards, recipe compliance, and unrecorded employee or manager use.
7. Correct missing records, retrain the process, and count again.
8. Escalate only when a repeated pattern remains unexplained after ordinary causes have been checked.

Repeated Patterns Matter

One variance may be a mistake. Repeated variance on the same item, shift, storage area, or record process is evidence that the system needs deeper review. Pattern tracking helps the manager separate an isolated error from an ongoing control failure.

WEEKLY HIGH-DOLLAR AND HIGH-RISK ITEM COUNT

Week ending: _____ **Counted by:** _____ **Verified by:** _____

Use this sheet for the products most capable of creating rapid loss through price, volume, waste, short shelf life, uncontrolled portions, or repeated shortages.

Item	Unit	Begin	Receipts	Transfers +/-	Use / Waste / Adj.	End	Variance / Note

Were all unusual counts recounted? ☐ **Yes** ☐ **No** **Were supporting records reviewed?** ☐ **Yes** ☐ **No**

Immediate actions / items to monitor:

_____

_

_____

_

MONTHLY FULL INVENTORY VERIFICATION

Inventory date: _____ **Manager:** _____ **Second verifier:** _____

□ Every cooler, freezer, dry-storage area, bar area, prep area, line location, office stock area, and approved off-site storage area was counted.
□ Count sheets followed the physical storage order.
□ Units of measure matched the inventory system.
□ Partial cases, open containers, bottles, and prepared products were counted by an established method.
□ Expired, spoiled, damaged, or unusable product was removed from usable inventory and recorded correctly.
□ Products stored in more than one location were not skipped or counted twice.
□ Deliveries, credits, returns, and transfers near the count cutoff were handled consistently.
□ High-risk variances were recounted before the inventory was finalized.
□ Monthly inventory was compared with purchasing, sales, waste, production, transfers, and prior trends.
□ Unexplained variances were assigned for follow-up.

Area / Category	Inventory Value	Concern or Follow-Up

Total inventory value: _____ **Previous month:** _____ **Change:** _____

UNEXPLAINED VARIANCE INVESTIGATION

Item: _____ **Unit:** _____ **Date found:** _____ **Variance:** _____

Where the concern appeared: ☐ Weekly high-risk count ☐ Monthly inventory ☐ Waste review ☐ Production review ☐ Other: _____

Possible Causes to Check

☐ Count error or wrong unit of measure
☐ Product stored in another location
☐ Invoice, delivery, credit, or receiving error
☐ Transfer in or out not recorded
☐ Waste, spoilage, or trim not recorded accurately
☐ Production or prep quantity missing or inaccurate
☐ Remake, return, comp, sample, or employee meal not recorded
☐ Recipe or portion standard not followed
☐ Product quality or shelf-life problem
☐ POS, sales mix, or recipe mapping problem
☐ Unauthorized use or possible theft
☐ Other: _____

Evidence Reviewed

☐ Recount ☐ Storage inspection ☐ Invoices / credits ☐ Receiving records ☐ Transfer records
☐ Waste / spoilage ☐ Production / prep ☐ Sales / recipes ☐ Portions ☐ Comps / remakes ☐ Interviews / observations

Most supportable explanation:

_____
_
_____
_
_____
_

Corrective action: ☐ Fix record ☐ Recount ☐ Retrain ☐ Adjust par/order ☐ Correct production ☐ Correct waste logging ☐ Correct transfer process ☐ Increase monitoring ☐ Escalate for formal review

Person responsible: _____ **Deadline:** _____ **Follow-up count:** _____

REPEAT VARIANCE PATTERN TRACKER

Use this tracker to identify whether the same item, area, shift, or record problem continues over time.

Date	Item	Variance	Likely Cause	Area / Shift	Action	Follow-Up	Resolved?

Pattern found? □ No □ Possible □ Confirmed operating pattern requiring correction □ Requires formal leadership review

Pattern summary and evidence:

_____

_

_____

_

VARIANCE FOLLOW-UP AND MANAGER DECISION

The purpose of this page is to document what the facts support after the records and physical product have been reviewed.

Finding

□ Count or unit-of-measure error
□ Receiving, invoice, or supplier issue
□ Transfer documentation failure
□ Waste records incomplete or inaccurate
□ Production records incomplete or inaccurate
□ Recipe or portion-control issue
□ Storage, labeling, rotation, or spoilage issue
□ Training or manager follow-up failure
□ Unexplained pattern remains
□ Sufficient evidence exists for a separate personnel or security review
□ Other: _____

Decision and reason:

_____
_
_____
_
_____
_

Next count / review date: _____ **Responsible manager:** _____
GM / Owner review if required: _____ **Date:** _____

Part 2 Review: Inventory System Setup Checkpoint

Date: _____
Manager Name: _____
Restaurant / Location: _____
Department: _____
Use this page before moving into ordering control.

Are all major storage areas organized well enough for accurate inventory?
☐ Yes
☐ No
☐ Some areas need work

Notes:

Has each major storage area been mapped?
☐ Yes
☐ No
☐ Some areas

Notes:

Has the restaurant created clear product categories?
☐ Yes
☐ No
☐ Needs review

Notes:

Has the restaurant decided the correct unit of measure for important products?
☐ Yes
☐ No
☐ Some products

Notes:

Is the inventory count sheet ready to use weekly?
☐ Yes
☐ No
☐ Needs revision

Notes:

Has opening inventory been completed?
□ Yes
□ No
□ Scheduled
Date completed or scheduled: _____
Has a weekly inventory routine been assigned?
□ Yes
□ No
Manager responsible: _____
Are high-cost items being counted carefully?
□ Yes
□ No
□ Needs improvement

High-cost items needing extra attention:

What is the biggest inventory weakness right now?

What correction should happen before the next order is placed?

Variance-Control Readiness

Has the restaurant assigned a weekly count list for high-dollar and high-risk products?
□ Yes
□ No
□ List still needs to be built

Notes:

Has a complete monthly inventory date, count method, and second-review process been assigned?
□ Yes
□ No
□ Partially assigned

Notes:

Are inventory differences compared with ordering, receiving, transfers, waste, production, sales, portions, remakes, and comps?

□ Yes
□ No
□ Some records are missing

Notes:

Can the manager recognize when waste or production records are incomplete, inaccurate, or not being used?

□ Yes
□ No
□ More training is needed

Notes:

Are repeated unexplained variances documented and followed through before a personnel conclusion is made?

□ Yes
□ No
□ A formal follow-up process is still needed

Notes:

Inventory System Status:

□ Ready for weekly use
□ Usable but needs improvement
□ Not ready yet
□ Needs manager retraining
□ Needs storage reorganization first

Action Plan:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

PART 3

ORDERING CONTROL

Purpose of This Section

Ordering is one of the most important food cost control responsibilities in a restaurant.
A strong order protects the restaurant.
A weak order creates problems before the product even arrives.
Ordering too much can create overstocking, spoilage, waste, crowded storage areas, poor rotation, and unnecessary spending.
Ordering too little can create shortages, emergency orders, menu outages, guest disappointment, prep problems, and manager stress.
Ordering the wrong product can create recipe problems, quality problems, invoice problems, and product confusion.
Ordering without checking inventory is guessing.
Ordering without reviewing par levels is risky.
Ordering without reviewing sales patterns can create waste or shortages.
Ordering without checking upcoming events, reservations, holidays, weather, or specials can leave the restaurant unprepared.
Ordering should not depend only on habit.
A manager should not order something simply because “we always order it.”

A manager should ask:

How much do we have?
How much do we normally use?
How much do we expect to sell?
What is already prepped?
What is close to expiration?
What is on special?
What is coming up this week?
What did we waste last week?
What did we run out of last week?
What product price changed?
What supplier issue should we expect?
Ordering control is not about under-ordering.
It is about ordering with facts.
The best restaurant orders are built from inventory counts, sales expectations, par levels, prep needs, storage limits, waste review, and manager judgment.
A manager should also understand that ordering affects more than food cost.
It affects kitchen flow.
It affects prep planning.
It affects employee stress.
It affects guest experience.
It affects storage cleanliness.
It affects cash flow.
It affects waste.
When ordering is controlled, the restaurant runs smoother.
When ordering is careless, the restaurant pays for it all week.

ORDERING RESPONSIBILITY CHECKLIST

Ordering should have clear ownership.
If everyone is responsible, no one is fully responsible.
A restaurant should know who builds the order, who reviews it, who approves it, who places it, who receives it, and who follows up on problems.
Many ordering problems happen because responsibility is unclear.
One manager assumes another manager checked inventory.
A kitchen lead adds product without reviewing par levels.
A manager places an order without checking the walk-in.
A delivery arrives, but no one verifies it.
An invoice changes, but no one reviews it.
A shortage happens, but no one documents why.
A product is over-ordered, but no one takes responsibility.
Clear ordering responsibility prevents confusion.

The restaurant should decide:

Who counts inventory?
Who builds the order?
Who reviews par levels?
Who checks sales forecast?
Who approves high-cost items?
Who places the supplier order?
Who receives the delivery?
Who checks the invoice?
Who reports missing or damaged product?
Who updates the order guide?
Who follows up when ordering mistakes happen?
Ordering responsibility may be shared, but accountability should not be vague.
A kitchen manager may build the food order.
A general manager may approve it.
A prep lead may communicate production needs.
A bar manager may place the beverage order.
A receiver may check the delivery.
But the process must be clear.
Managers should also decide what requires approval.
High-cost proteins may need manager review.
Specialty products may need approval.
Emergency orders may need owner or GM approval.
Large orders before holidays may need review.
Products that are repeatedly wasted should not be ordered without discussion.
Products that are slow-moving should be reviewed before reordering.
Ordering control starts when the restaurant knows who owns each step.

Ordering Responsibility Checklist

Date: _____
Restaurant / Location: _____
General Manager: _____

Ordering Period Reviewed:

□ Daily
□ Weekly
□ Monthly
□ Other: _____

Ordering Roles

Inventory Count Responsible Person:

Backup Person:

Food Order Builder:

Backup Person:

Bar Order Builder if Applicable:

Backup Person:

Paper / To-Go Supply Order Builder:

Backup Person:

Cleaning / Chemical Order Builder:

Backup Person:

Final Order Reviewer:

Backup Person:

Final Order Approver:

Backup Person:

Person Who Places Supplier Order:

Backup Person:

Delivery Receiver:

Backup Person:

Invoice Reviewer:

Backup Person:

Ordering Process Standards

□ Inventory must be checked before ordering.
□ Par levels must be reviewed before ordering.
□ Sales forecast must be reviewed before ordering.
□ Upcoming events must be reviewed before ordering.
□ Waste patterns must be reviewed before ordering.
□ Products close to expiration must be reviewed before ordering.
□ High-cost items require manager review.
□ Emergency orders require manager approval.
□ Slow-moving items require review before reordering.
□ Repeatedly wasted items require review before reordering.
□ Substitutions require manager approval.
□ Invoice changes must be reviewed.
□ Delivery problems must be documented.

Approval Rules

High-cost products requiring approval:

Products that should not be ordered without review:

Suppliers that require manager review:

Emergency order approval process:

Ordering Accountability Review

Who owns final responsibility for weekly food orders?

Who owns final responsibility for bar orders?

Who owns final responsibility for paper and to-go supplies?

Who reviews ordering mistakes?

Who follows up with suppliers?

Who updates order guides and par levels?

Manager Notes:

Ordering Responsibility Approved By:
Manager Signature: _____
Date: _____

SALES FORECAST AND ORDERING PLANNER

A good order should be connected to expected sales.
Managers should not order only based on what was used last week.
They should also consider what is likely to happen this week.
Sales forecasting does not have to be perfect.
It needs to be thoughtful.
A restaurant should look at patterns that affect product usage.

Important forecasting factors include:

Last week's sales
Same week last year if available
Day-of-week patterns
Reservations
Large parties
Catering or events
Holidays
Weather
Local events
Menu specials
Promotions
Seasonal items
Staffing levels
Product availability
Supplier delivery schedule
For example, a rainy week may reduce patio sales.
A holiday weekend may increase sales.
A large reservation may increase steak, seafood, dessert, or wine usage.
A new special may increase demand for a specific ingredient.
A local event may increase late-night sales.
A short-staffed kitchen may reduce what the restaurant can realistically execute.
A supplier delivery delay may require ordering more before the next delivery.
Ordering should match the restaurant's expected need.
Without a forecast, managers often order from habit.
Habit ordering may work during average weeks.
It may fail during unusual weeks.
A manager should review the upcoming week before placing the order.
The question is not just, "What are we low on?"

The better question is:

"What will we need based on what is coming?"
A forecast helps managers avoid both shortages and over-ordering.
It also helps prep planning.
If the restaurant expects a high-volume weekend, prep levels should be adjusted.
If the restaurant expects a slower week, prep should be controlled to avoid waste.
Sales forecasting is not about predicting perfectly.
It is about preparing better.

Sales Forecast and Ordering Planner

Week Of: _____
Manager Name: _____
Restaurant / Location: _____
Order Date: _____
Supplier: _____

Sales Forecast Review

Last Week's Sales: $_____
Expected Sales This Week: $_____

Expected Sales Change:

□ Higher than last week
□ Lower than last week
□ About the same
□ Not sure

Reason for Expected Change:

□ Reservations
□ Large parties
□ Catering
□ Holiday
□ Local event
□ Weather
□ Menu special
□ Promotion
□ Seasonal change
□ Staffing concern
□ Supplier concern
□ Other: _____

Notes:

Day-by-Day Forecast

Monday Expected Sales: $_____

Notes:

Tuesday Expected Sales: $_____

Notes:

Wednesday Expected Sales: $_____

Notes:

Thursday Expected Sales: $_____

Notes:

Friday Expected Sales: $_____

Notes:

Saturday Expected Sales: $_____

Notes:

Sunday Expected Sales: $_____

Notes:

High-Impact Events This Week

Large parties / reservations:

Specials / promotions:

Weather or local events:

Menu items expected to sell more than usual:

Menu items expected to sell less than usual:

Ordering Adjustments Needed

Products to order more carefully:

Products to reduce this week:

Products to increase this week:

Products to avoid overstocking:

Products at risk of running out:

Manager Decision

Order should be:

□ Normal
□ Increased
□ Reduced
□ Adjusted by category
□ Reviewed by GM / owner before placing

Reason:

Order Reviewed By: _____
Order Approved By: _____
Manager Signature: _____

PAR LEVEL BUILDER

Par levels help managers decide how much product the restaurant should normally keep on hand.
A par level is the target amount of product needed to operate without overstocking or running out.
Without par levels, managers often order based on habit, fear, memory, or guesswork.
That creates problems.
If par levels are too high, the restaurant may carry too much product.
Too much product can lead to spoilage, crowded storage areas, poor rotation, unnecessary spending, and higher waste.
If par levels are too low, the restaurant may run out of product.
Running out can lead to emergency orders, menu outages, guest disappointment, rushed prep, manager stress, and poor service.
A strong par level should be based on real usage.

Managers should consider:

Average weekly sales
Average product usage
Delivery schedule
Shelf life
Storage space
Menu popularity
Seasonal demand
Special events
Waste patterns
Prep time
Supplier reliability
Backup needs
Par levels should not be permanent.
They should be reviewed and adjusted when the restaurant changes.

A par level may need to change when:

Sales increase
Sales decrease
A menu item becomes more popular
A menu item slows down
A supplier changes pack size
A product has repeated spoilage
A product runs out repeatedly
A holiday or event is coming
Weather changes sales patterns
A new menu item is added
A product is discontinued
Par levels are especially important for high-cost items.
A restaurant should not carry too much expensive product unless sales support it.
High-cost products should be reviewed carefully before ordering.
Examples include steaks, seafood, specialty cheese, premium produce, specialty desserts, liquor, wine, and any ingredient with a short shelf life.

A par level should help the manager answer:

How much should we have before ordering?
How much do we need to get through the next delivery period?
How much is too much?
How much is too little?
What amount protects both guest experience and food cost?
The best par levels are practical.
They are not random numbers.
They are based on actual restaurant needs.

Par Level Builder Worksheet

Date: _____
Manager Name: _____
Restaurant / Location: _____
Product Category: _____
Supplier: _____

Product Information

Product Name: _____

Storage Area:

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar storage
□ Prep area
□ Cook line backup
□ Other: _____

Unit of Measure: _____
Purchase Unit: _____
Shelf Life: _____

Delivery Days:

□ Monday
□ Tuesday
□ Wednesday
□ Thursday
□ Friday
□ Saturday
□ Sunday

Current Par Level if Any: _____
Recommended New Par Level: _____

Usage Review

Average Weekly Usage: _____
Highest Weekly Usage: _____
Lowest Weekly Usage: _____
Average Daily Usage: _____
Peak Day Usage: _____
Slow Day Usage: _____

Sales and Menu Review

Menu item or items using this product:

Is this product used in multiple recipes?
□ Yes
□ No

If yes, list recipes or stations:

Is this a high-selling item?

□ Yes
□ No
□ Seasonal
□ Not sure
Is this a high-cost item?
□ Yes
□ No
Is this product easy to replace if we run out?
□ Yes
□ No
□ Supplier dependent

Waste and Shortage Review

Has this product been wasted recently?
□ Yes
□ No
□ Not sure

Waste notes:

Has this product spoiled or expired recently?
□ Yes
□ No
□ Not sure

Spoilage notes:

Has this product run out recently?
□ Yes
□ No
□ Not sure

Shortage notes:

Par Level Decision

Par level should be:

□ Increased
□ Decreased
□ Kept the same
□ Reviewed again after one week
□ Reviewed again after one month

Reason for par decision:

Manager Follow-Up Needed:

□ Yes
□ No

Follow-Up Action:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

ORDER GUIDE TEMPLATE

An order guide helps managers place orders consistently.
It lists the products the restaurant normally buys, the supplier, the storage area, the unit of measure, the par level, and the amount that should be ordered.
A strong order guide reduces missed items, duplicate ordering, over-ordering, and confusion.
Without an order guide, managers may depend on memory.
Memory is not a reliable ordering system.
A manager may forget a product.
A manager may order an old product that is no longer used.
A manager may order too much because the par level is unclear.
A manager may miss a supplier change.
A manager may forget that a product is already stored in another area.
An order guide should match the restaurant's actual menu and storage system.
It should be updated when products change.
If a new menu item is added, the order guide should be updated.
If a product is discontinued, the order guide should be updated.
If a supplier changes pack size, the order guide should be updated.
If a par level changes, the order guide should be updated.
If a product is repeatedly wasted, the order guide should be reviewed.
If a product repeatedly runs out, the order guide should be reviewed.
The order guide should not be treated as an automatic order.
It is a guide.
Managers still need to check inventory, sales forecast, waste, prep needs, and upcoming events before ordering.
The order guide helps organize the order.
The manager's judgment helps adjust the order.

A good order guide should include:

Product name
Category
Supplier
Pack size
Unit of measure
Storage area
Par level
Current count
Suggested order
Final order amount
Manager initials
Notes
The final order should be reviewed before it is placed.
Managers should pay special attention to high-cost products, slow-moving products, short-shelf-life products, and items that have been wasted recently.
The order guide should make ordering more accurate, not automatic.

The goal is controlled ordering.

Order Guide Template

Order Date: _____
Manager Ordering: _____
Restaurant / Location: _____
Supplier: _____
Delivery Date: _____

Order Type:

□ Food
□ Bar
□ Paper goods
□ Cleaning supplies
□ Chemicals
□ Smallwares
□ Other: _____

Order Guide Item 1

Product Name: _____
Category: _____
Pack Size: _____
Storage Area: _____
Unit of Measure: _____
Par Level: _____
Current Count: _____
Suggested Order: _____
Final Order Amount: _____
High-Cost Item?
□ Yes
□ No

Manager Notes:

Order Guide Item 2

Product Name: _____
Category: _____
Pack Size: _____
Storage Area: _____
Unit of Measure: _____
Par Level: _____
Current Count: _____
Suggested Order: _____
Final Order Amount: _____
High-Cost Item?
□ Yes
□ No

Manager Notes:

Order Guide Item 3

Product Name: _____
Category: _____
Pack Size: _____
Storage Area: _____
Unit of Measure: _____
Par Level: _____
Current Count: _____
Suggested Order: _____
Final Order Amount: _____
High-Cost Item?
□ Yes
□ No

Manager Notes:

Order Guide Item 4

Product Name: _____
Category: _____
Pack Size: _____
Storage Area: _____
Unit of Measure: _____
Par Level: _____
Current Count: _____
Suggested Order: _____
Final Order Amount: _____
High-Cost Item?
□ Yes
□ No

Manager Notes:

Order Guide Item 5

Product Name: _____
Category: _____
Pack Size: _____
Storage Area: _____
Unit of Measure: _____
Par Level: _____
Current Count: _____
Suggested Order: _____
Final Order Amount: _____
High-Cost Item?
□ Yes
□ No

Manager Notes:

Order Review Before Placing

□ Inventory count was reviewed.
□ Par levels were reviewed.
□ Sales forecast was reviewed.
□ Waste log was reviewed.
□ Products close to expiration were reviewed.
□ Upcoming events were reviewed.
□ Storage space was considered.
□ High-cost items were reviewed carefully.
□ Slow-moving products were reviewed.
□ Repeatedly wasted items were reviewed.
□ Emergency order history was reviewed.
□ Final order was approved before placing.

Products Removed From Order:

Products Added to Order:

Products Reduced From Normal Order:

Products Increased From Normal Order:

Reason for Order Adjustment:

Order Placed By: _____
Order Reviewed By: _____
Order Approved By: _____
Manager Signature: _____

SUPPLIER ORDER REVIEW

Supplier orders should be reviewed before and after they are placed.
A supplier order is not just a list of products.
It is a spending decision.

Every order affects food cost, storage space, prep planning, cash flow, and manager accountability.
A restaurant may use one supplier or several suppliers.
Common suppliers may include food vendors, produce companies, meat suppliers, seafood suppliers, bakery vendors, dairy suppliers, bar suppliers, paper goods vendors, chemical companies, and local specialty suppliers.
Each supplier should be reviewed for accuracy, pricing, quality, delivery timing, product availability, and issue follow-up.

Managers should know:

Which supplier provides each product
What delivery days are available
What cutoff times apply
What minimum order rules exist
What product substitutions are allowed
What products require special ordering
What items have changing prices
What items often arrive damaged or short
What items need extra quality checks
Who to contact when there is a problem
Supplier problems can create food cost problems.
A price increase may go unnoticed.
A substitution may affect recipe cost.
A lower-quality product may create more trim waste.
A late delivery may force emergency ordering.
A missing item may cause menu outages.
A damaged case may be accepted and paid for.
An invoice error may never be corrected.
A manager should not assume the supplier order is correct just because it arrived.
The order should be checked.
The invoice should be reviewed.
The product should be inspected.
Shortages should be documented.
Damaged product should be reported.
Price changes should be flagged.
Substitutions should be approved.
Supplier review protects the restaurant from paying for mistakes that should have been caught.
The stronger the supplier review, the stronger the ordering system becomes.

Supplier Order Review Form

Order Date: _____
Delivery Date: _____
Supplier Name: _____
Manager Reviewing: _____
Restaurant / Location: _____

Supplier Information

Sales Representative / Contact: _____
Phone / Email: _____
Order Cutoff Time: _____
Delivery Days: _____
Minimum Order Requirement: _____

Special Ordering Rules:

Order Review Before Placing

□ Inventory count reviewed.
□ Par levels reviewed.
□ Sales forecast reviewed.
□ Storage space reviewed.

□ Waste patterns reviewed.
□ Products close to expiration reviewed.
□ Specials and events reviewed.
□ High-cost products reviewed.
□ Slow-moving products reviewed.
□ Order guide reviewed.
□ Final order approved.

Products Requiring Special Attention

High-cost products:

Products with recent price changes:

Products with quality concerns:

Products with substitution risk:

Products that should not be over-ordered:

Products at risk of running out:

After Delivery Review
□ Delivery arrived on expected date.
□ Delivery arrived at expected time.
□ All ordered items were checked.

□ Missing items were identified.
□ Substitutions were identified.
□ Damaged product was identified.
□ Product quality was inspected.
□ Shorted items were reported.
□ Invoice was checked.
□ Price changes were reviewed.
□ Credits were requested if needed.
□ Manager follow-up was assigned.

Supplier Issues Found

□ Missing product
□ Wrong product
□ Damaged product
□ Poor quality product
□ Late delivery
□ Incorrect price
□ Incorrect quantity
□ Unauthorized substitution
□ Invoice error
□ Credit needed
□ Other: _____

Explain issue:

Action Taken:

Supplier Contacted?
□ Yes
□ No
□ Not needed

Contact Person: _____
Date Contacted: _____

Credit Requested?
□ Yes
□ No
□ Not needed

Credit Amount if Known: $_____

Manager Follow-Up

What needs to be watched next order?

Should supplier performance be reviewed with GM or owner?
□ Yes
□ No

Reason:

Manager Signature: _____

OVER-ORDERING RISK TRACKER

Over-ordering is one of the easiest ways to lose food cost control.
It often happens with good intentions.
A manager does not want to run out.
A cook asks for extra backup.
A prep lead wants to be safe.
A holiday is coming.
A supplier has a deal.
A manager remembers a busy week and orders heavily again.
The problem is that extra product does not always turn into extra sales.
Extra product can turn into waste.

Over-ordering creates several risks:

Spoilage
Expired product
Crowded walk-ins
Poor rotation
Hidden product
Cash tied up in inventory
More difficult counting
More product opened unnecessarily
More waste when sales are lower than expected
More manager confusion
Over-ordering can also hide other problems.
If managers always order extra, they may not notice poor prep planning.
If there is always too much product, employees may not treat product carefully.
If storage is crowded, FIFO becomes harder.
If product is hidden behind too much backup, waste increases.
The goal is not to order too little.
The goal is to order the right amount.
Managers should watch for over-ordering risks before placing an order.

Common warning signs include:

Current count is already above par
Product did not sell as expected last week
Product has short shelf life
Product was wasted recently
Product is already prepped in large amounts
Storage area is crowded
Product is used in only one menu item
Product is slow-moving
Product price is high
Product is being ordered because of habit
Product is being ordered because someone is nervous
Product has been expiring before use
When these warning signs appear, the manager should pause.

The manager should ask:

Do we really need this product?
Can we use what we already have first?
Should we reduce the order?
Should we adjust prep instead?
Should we wait until the next delivery?
Should this product be reviewed by the GM or owner before ordering?

Over-ordering is preventable when managers review before they buy.

Over-Ordering Risk Tracker

Order Date: _____
Manager Name: _____
Supplier: _____
Restaurant / Location: _____
Product Being Reviewed: _____
Category: _____
Storage Area: _____
Unit of Measure: _____
Current Count: _____
Par Level: _____
Suggested Order: _____
Final Order Decision: _____

Over-Ordering Risk Review

Is current count already at or above par?
□ Yes
□ No
□ Not sure

Notes:

Did this product sell slower than expected last week?
□ Yes
□ No
□ Not sure

Notes:

Was this product wasted, spoiled, or discarded recently?
□ Yes
□ No
□ Not sure

Notes:

Is this product already prepped in large amounts?
□ Yes
□ No
□ Not applicable

Notes:

Does this product have a short shelf life?
□ Yes
□ No
□ Not sure

Shelf life notes:

Is storage space already crowded?
□ Yes
□ No

Notes:

Is this product used in only one or two menu items?
□ Yes
□ No
□ Not sure

Menu item notes:

Is this a high-cost item?
□ Yes
□ No

Cost concern:

Is this product being ordered mostly out of habit?
□ Yes
□ No
□ Not sure

Notes:

Could the restaurant wait until the next delivery?
□ Yes
□ No
□ Not sure

Reason:

Manager Decision
□ Order normal amount
□ Reduce order
□ Do not order this time
□ Use existing product first
□ Review with GM / owner
□ Adjust par level

□ Watch waste this week
□ Other: _____

Reason for decision:

Follow-Up Needed:
□ Yes
□ No

Follow-Up Action:

Manager Signature: _____

EMERGENCY ORDER LOG

Emergency orders should be tracked.
An emergency order may be necessary sometimes.
A delivery may be short.
Sales may be much higher than expected.
A cooler may fail.
A product may be damaged.
A large party may be added.
A supplier may make an error.
A manager may need product quickly to protect service.
But emergency orders should not become normal.
Repeated emergency orders usually point to a problem in the system.
The problem may be weak inventory.
It may be poor par levels.
It may be bad ordering.
It may be overuse.
It may be waste.
It may be poor prep planning.
It may be a supplier issue.
It may be poor communication between shifts.
Emergency orders often cost more.
They may require extra delivery fees.
They may come from a more expensive supplier.
They may require a manager to leave the building.
They may interrupt the shift.
They may create inconsistent product quality.
They may hide planning problems that need to be fixed.
A restaurant should record every emergency order.

The log should show:
Date
Product needed
Reason for emergency order
Who approved it
Where product was purchased
Cost
Whether the issue could have been prevented
What follow-up is needed

The most important question is:

Why did we need this emergency order?
If the answer is “unexpected sales,” that may be understandable.
If the answer is “we did not count correctly,” the inventory process needs review.
If the answer is “we forgot to order it,” the ordering process needs review.
If the answer is “we wasted too much,” the waste process needs review.
If the answer is “prep used too much,” the prep process needs review.
An emergency order is not only a purchase.
It is a warning sign.
Managers should study the pattern.

Emergency Order Log

Date: _____
Time: _____
Manager Requesting Order: _____
Manager Approving Order: _____
Restaurant / Location: _____

Emergency Order Details

Product Needed: _____
Category: _____
Amount Needed: _____
Supplier / Store Used: _____
Estimated Cost: $_____
Delivery Fee or Extra Cost if Any: $_____

Reason Product Was Needed:

□ Product was not ordered
□ Product was under-ordered
□ Sales were higher than expected
□ Large party or event added
□ Product was wasted
□ Product spoiled
□ Product damaged
□ Delivery was short
□ Supplier mistake
□ Prep overused product
□ Recipe or portion issue
□ Storage issue
□ Cooler or freezer issue
□ Other: _____

Explain what happened:

Could this have been prevented?
□ Yes
□ No
□ Not sure
If yes, how?

Impact on Operation

Did the restaurant run out before product arrived?
□ Yes
□ No

Guest impact:

□ No guest impact
□ Menu item unavailable
□ Longer ticket times
□ Substitution needed
□ Guest complaint
□ Other: _____

Manager impact:

□ No major issue
□ Manager had to leave building
□ Extra delivery arranged
□ Shift was disrupted
□ Staff had to change prep plan
□ Other: _____

Follow-Up Review

What system needs review?
□ Inventory count
□ Par level
□ Ordering process
□ Prep planning
□ Waste tracking
□ Portion control
□ Supplier performance
□ Storage organization
□ Manager communication
□ Other: _____

Corrective Action Needed:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

RECEIVING AND INVOICE CHECK

Ordering control does not end when the order is placed.
The delivery must be checked.
Receiving is the point where the restaurant confirms that it received what it ordered, in the correct quantity, at the correct quality, and at the expected price.
A weak receiving process can cost the restaurant money.
Product may be missing.
Product may be damaged.
Product may be poor quality.
Product may arrive at the wrong temperature.
Product may be substituted without approval.
Product may be billed incorrectly.
A case may be charged but not delivered.
A price may increase without manager review.
A product may be accepted even though it should have been refused.
Receiving should not be rushed.
A delivery should be checked before product is put away whenever possible.

The manager or assigned receiver should review:

Product name
Quantity delivered
Condition
Temperature if required
Expiration or use-by date when applicable
Pack size
Substitutions
Invoice price
Credits needed
Missing items
Damaged items
Quality concerns
Invoices should also be reviewed.
The invoice is not just paperwork.
It shows what the restaurant is being charged.
Managers should watch for price changes, wrong quantities, unexpected substitutions, delivery fees, fuel charges, credits, and missing adjustments.
Receiving errors should be documented quickly.
If the supplier made a mistake, the restaurant should request correction or credit according to supplier process.
If the restaurant made the ordering mistake, the manager should review the ordering system.
Receiving is a food cost control step.
A restaurant should not pay for product it did not receive.
A restaurant should not accept product it cannot use.
A restaurant should not ignore invoice changes.
Strong receiving protects cost, quality, and accountability.

Receiving and Invoice Check Form

Delivery Date: _____
Delivery Time: _____
Supplier: _____
Invoice Number: _____
Receiver Name: _____
Manager Name: _____
Restaurant / Location: _____

Delivery Check

□ Delivery arrived on expected date.
□ Delivery arrived within expected time range.
□ Invoice was provided.
□ Product was checked before being put away.
□ Quantities were checked.
□ Product quality was inspected.
□ Damaged product was identified.
□ Missing product was identified.
□ Substitutions were identified.
□ Temperature-sensitive product was checked if required.
□ Expiration or use-by dates were reviewed if needed.
□ Product was stored correctly after receiving.

Invoice Check

□ Invoice totals reviewed.
□ Product prices reviewed.
□ Quantity billed matches quantity received.
□ Credits were applied if expected.
□ Delivery fees or extra charges reviewed.
□ Price changes were flagged.
□ Substitutions were reviewed.
□ Missing items were noted.
□ Damaged items were noted.
□ Invoice was submitted according to restaurant process.

Product Issue Review

Product Issue 1:

Product Name: _____

Issue Type:

□ Missing
□ Damaged
□ Poor quality
□ Wrong item
□ Wrong quantity
□ Wrong price
□ Unauthorized substitution
□ Temperature concern
□ Expired / short date
□ Other: _____

Details:

Action Taken:

□ Accepted
□ Refused
□ Credit requested
□ Replacement requested
□ Manager review needed
□ Supplier contacted
□ Other: _____

Product Issue 2:

Product Name: _____

Issue Type:

□ Missing
□ Damaged
□ Poor quality
□ Wrong item
□ Wrong quantity
□ Wrong price
□ Unauthorized substitution
□ Temperature concern
□ Expired / short date
□ Other: _____

Details:

Action Taken:

□ Accepted
□ Refused
□ Credit requested
□ Replacement requested
□ Manager review needed

□ Supplier contacted
□ Other: _____

Price Change Review

Products with price changes:

Price changes that need manager review:

Supplier Follow-Up Needed?
□ Yes
□ No

If yes, explain:

Supplier Contacted By: _____
Date Contacted: _____
Credit / Correction Expected: _____

Receiving Accuracy Review

Was the delivery accurate?
□ Yes
□ No
□ Mostly

Notes:

Was the product quality acceptable?
□ Yes
□ No
□ Mostly

Notes:

Was the invoice accurate?

□ Yes
□ No
□ Needs review

Notes:

Did anything from this delivery create a food cost risk?
□ Yes
□ No

If yes, explain:

What follow-up is needed before the next order?

Receiver Signature: _____
Manager Signature: _____

Part 3 Review: Ordering Control Checkpoint

Date: _____
Manager Name: _____
Restaurant / Location: _____
Department: _____
Use this page before moving into waste tracking and reduction.

Does the restaurant have clear ordering responsibility?

☐ Yes
☐ No
☐ Needs clarification

Notes:

Are orders based on inventory counts?

☐ Yes
☐ No
☐ Sometimes

Notes:

Are sales forecasts reviewed before ordering?

☐ Yes
☐ No
☐ Sometimes

Notes:

Are par levels being used?

☐ Yes
☐ No
☐ Some products

Notes:

Is the order guide accurate and up to date?

☐ Yes
☐ No
☐ Needs revision

Notes:

Are supplier orders reviewed for accuracy, quality, and price?
□ Yes
□ No
□ Sometimes

Notes:

Are over-ordering risks reviewed before orders are placed?
□ Yes
□ No
□ Sometimes

Notes:

Are emergency orders being logged?
□ Yes
□ No
□ Not currently

Notes:

Are deliveries and invoices checked before product is fully accepted?
□ Yes
□ No
□ Sometimes

Notes:

What is the biggest ordering control weakness right now?

Ordering System Status:
□ Strong and consistent
□ Working but needs improvement
□ Inconsistent
□ Not controlled enough
□ Needs manager retraining

First Ordering Improvement Needed:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

PART 4

WASTE TRACKING AND REDUCTION

Purpose of This Section

Waste is one of the clearest signs of food cost loss.
When product is thrown away, spoiled, remade, over-prepped, burned, dropped, mislabeled, expired, returned, or portioned incorrectly, the restaurant has already paid for it.
If that loss is not tracked, the restaurant may keep repeating the same mistake.
Waste does not improve when managers ignore it.
Waste improves when managers see it, record it, review it, train against it, and follow up.
Many restaurants throw away product without writing it down.
That creates a blind spot.
The manager may know that waste happens, but not how much, how often, where it happens, who is involved, or what product is most affected.

A waste system helps the restaurant answer:

What was wasted?
How much was wasted?
Why was it wasted?
Where did it happen?
Who reported it?
Was it preventable?
What action should be taken?
Is this a repeated problem?
Waste is not always caused by carelessness.
Waste can come from poor ordering, poor prep planning, poor labeling, weak rotation, unclear recipes, over-portioning, equipment problems, guest complaints, training gaps, or management decisions.
That is why waste tracking should not be used only to blame employees.
It should be used to improve the system.

Managers should track several types of waste:

Prep waste
Cook line waste
Spoilage
Expired product
Dropped product
Burned product
Wrong item made
Returned food
Remakes
Overproduction
Trim waste
Bar waste
Product damaged during receiving
Product damaged during storage
A strong waste system helps managers focus.
If the same product appears on the waste log repeatedly, that product needs review.
If the same station creates waste repeatedly, that station needs training or process correction.
If the same manager keeps approving overproduction, manager accountability is needed.
If product expires often, ordering and rotation need review.
If remakes are frequent, recipes, order entry, kitchen accuracy, or guest communication may need review.
Waste is information.
The restaurant should use that information to make better decisions.

WHY WASTE MUST BE TRACKED

Waste must be tracked because untracked waste becomes invisible.
Invisible waste cannot be corrected.
A restaurant may believe waste is low because no one is talking about it.
But if food is being thrown away without documentation, managers may not see the real cost.
Employees may throw away product during prep.
Cooks may remake food without writing it down.
Servers may return food to the kitchen without documentation.

Managers may approve comps without connecting them to kitchen waste.
Expired product may be discarded before inventory.
Burned product may go straight to the trash.
Dropped product may never be reported.
All of that waste matters.
The restaurant paid for that product.
When waste is tracked, managers can begin to see patterns.
The pattern matters more than a single mistake.
One mistake may be normal.
Repeated mistakes show a system problem.

For example:

If lettuce is wasted every week, ordering or prep may be too high.
If steaks are repeatedly overcooked, training or cooking standards need review.
If sauces expire, batch sizes may be too large.
If fries are thrown away after every rush, production timing may need review.
If desserts are slow-moving, ordering or menu placement may need review.
If the same item is remade often, order accuracy or recipe execution may be weak.
Waste tracking also teaches employees that product matters.
When employees know waste must be written down, they become more aware.
They may ask before making extra prep.
They may portion more carefully.
They may label product correctly.
They may rotate older product first.
They may tell a manager when something is close to expiration.
They may take fewer shortcuts.
A waste log is not meant to shame employees.
It is meant to create awareness.
Awareness creates accountability.
Accountability reduces loss.
Managers should keep waste tracking simple enough to use during real shifts.
If the waste log is too complicated, employees will not use it.
A good waste log should capture the most important details quickly:
Date
Product
Amount
Reason
Station
Employee or manager initials
Corrective action
The goal is not perfect paperwork.
The goal is better visibility.
Waste that is written down can be reviewed.
Waste that is reviewed can be reduced.

Waste Awareness Review

Date: _____
Manager Name: _____
Restaurant / Location: _____
Department: _____
Use this worksheet to review how waste is currently handled in the restaurant.

Does the restaurant currently track food waste?

□ Yes
□ No
□ Sometimes

Notes:

Where is waste most likely to happen?

□ Prep area
□ Cook line
□ Dish area
□ Bar
□ Server station
□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Receiving
□ Other: _____

Notes:

What product is most often wasted?

What type of waste happens most often?

□ Overproduction
□ Spoilage
□ Expired product
□ Wrong item made
□ Burned product
□ Dropped product
□ Returned food
□ Remake
□ Trim waste
□ Bar waste
□ Other: _____

Is waste usually reported to a manager?

□ Yes
□ No
□ Sometimes

Notes:

Is waste usually written down?

□ Yes
□ No
□ Sometimes

Notes:

Do employees understand why waste matters?
□ Yes
□ No
□ Some do

Notes:

What waste problem should be tracked first?

What station needs waste awareness training?

What manager follow-up is needed?

Action Plan:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

DAILY WASTE LOG

Waste should be recorded when it happens.
If employees wait until the end of the day, details may be forgotten.
If managers wait until the end of the week, the waste may disappear from memory completely.
A daily waste log gives the restaurant a simple place to record product loss during each shift.
The log should be easy to find.
Employees should know where it is.
Managers should explain when it must be used.
Waste should be recorded for more than obvious trash.

The restaurant should record product that is:

Thrown away
Dropped
Burned
Overcooked
Prepared incorrectly
Made by mistake
Returned by a guest
Remade for a guest
Expired
Spoiled
Mislabeled
Held too long
Over-prepped
Damaged during delivery
Damaged during storage
Not usable for food safety reasons
A daily waste log helps managers see what is happening during real operations.
It also helps prevent arguments later.
Instead of guessing why food cost is high, managers can review actual waste notes.
Instead of blaming the whole kitchen, managers can identify the exact station, product, or process that needs correction.
Instead of assuming one employee caused the problem, managers can look at the pattern.
Daily waste tracking should not be complicated.

A simple log should capture:

Date
Shift
Product
Amount
Reason
Station
Employee or manager reporting
Immediate action
Follow-up needed
Managers should review the waste log at the end of each shift when possible.
If the waste is small and isolated, the manager may only need to note it.
If the waste is repeated or expensive, the manager should take action.
A manager may need to retrain an employee, adjust prep levels, review ordering, check storage, update labels, repair equipment, or correct recipe execution.
The waste log should not be used only after something goes wrong.
It should become part of the restaurant's food cost routine.
When waste is recorded daily, managers can review it weekly.
When managers review it weekly, patterns become clear.
When patterns become clear, action becomes easier.

Daily Waste Log

Date: _____
Manager on Duty: _____
Restaurant / Location: _____

Shift:

□ Opening
□ Lunch
□ Dinner
□ Closing
□ Other: _____

Waste Entry 1

Time: _____
Product / Item Wasted: _____

Station / Area:

□ Prep
□ Cook line

□ Dish
□ Bar
□ Server station
□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Receiving
□ Other: _____

Amount Wasted: _____

Estimated Cost if Known: $_____

Reason for Waste:

□ Over-prepped
□ Spoiled
□ Expired
□ Dropped
□ Burned
□ Overcooked
□ Wrong item made
□ Guest return
□ Remake
□ Trim waste
□ Poor quality
□ Damaged product
□ Held too long
□ Labeling issue
□ Storage issue
□ Other: _____

What happened?

Reported By: _____

Manager Initials: _____

Follow-Up Needed?

□ Yes
□ No

Follow-Up Action:

Waste Entry 2

Time: _____

Product / Item Wasted: _____

Station / Area:

□ Prep
□ Cook line
□ Dish
□ Bar
□ Server station
□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Receiving
□ Other: _____

Amount Wasted: _____
Estimated Cost if Known: $_____

Reason for Waste:

□ Over-prepped
□ Spoiled
□ Expired
□ Dropped
□ Burned
□ Overcooked
□ Wrong item made
□ Guest return
□ Remake
□ Trim waste
□ Poor quality
□ Damaged product
□ Held too long
□ Labeling issue
□ Storage issue
□ Other: _____
What happened?

Reported By: _____
Manager Initials: _____
Follow-Up Needed?
□ Yes
□ No

Follow-Up Action:

Waste Entry 3

Time: _____
Product / Item Wasted: _____

Station / Area:

□ Prep
□ Cook line
□ Dish
□ Bar
□ Server station
□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Receiving
□ Other: _____
Amount Wasted: _____
Estimated Cost if Known: $_____

Reason for Waste:

□ Over-prepped
□ Spoiled
□ Expired
□ Dropped
□ Burned

□ Overcooked
□ Wrong item made
□ Guest return
□ Remake
□ Trim waste
□ Poor quality
□ Damaged product
□ Held too long
□ Labeling issue
□ Storage issue
□ Other: _____
What happened?

Reported By: _____
Manager Initials: _____
Follow-Up Needed?
□ Yes
□ No

Follow-Up Action:

End-of-Day Waste Review

Was any high-cost product wasted today?
□ Yes
□ No
If yes, what product?

Was any waste preventable?
□ Yes
□ No
□ Not sure

If yes, explain:

Did the same waste problem happen more than once?
□ Yes
□ No

If yes, explain:

Does any employee, station, or manager need follow-up?
□ Yes
□ No

Follow-up needed:

What should be adjusted tomorrow?
□ Prep amount
□ Order amount
□ Portion control
□ Storage
□ Labeling
□ Rotation
□ Recipe training
□ Station training
□ Manager verification
□ Other: _____

Manager Notes:

Manager Signature: _____

FOOD WASTE CATEGORY TRACKER

Tracking waste by category helps managers see where the biggest problems are happening.
A daily waste log shows individual incidents.
A category tracker shows patterns.
For example, the daily log may show several separate waste entries:
Lettuce spoiled
Tomatoes over-prepped
Sauce expired
Chicken overcooked
Fries held too long
Dessert returned
Bread thrown away
Each entry matters.
But when managers group waste by category, they can see the bigger picture.
Maybe produce waste is the main issue.
Maybe proteins are creating the most cost risk.
Maybe prepared sauces are being made in batches that are too large.
Maybe bread products are being ordered too heavily.
Maybe bar garnish waste is higher than expected.
Maybe desserts are slow-moving.
Waste categories help managers focus attention where it matters most.
A restaurant should not treat all waste equally.
Some waste is low cost but frequent.
Some waste is high cost but occasional.
Some waste is preventable.
Some waste is connected to guest experience.
Some waste comes from ordering.

Some waste comes from prep.
Some waste comes from poor storage.
Some waste comes from training.
A category tracker helps managers compare waste across areas.

Common food waste categories include:

Proteins
Seafood
Produce
Dairy
Sauces and dressings
Dry goods
Bread products
Desserts
Frozen products
Prepared items
Bar fruit and garnish
Beverages
Paper or to-go supplies if applicable
The manager should review which categories appear most often.
If one category repeats every week, that category needs deeper review.

For example:

Repeated produce waste may mean poor ordering, poor storage, or weak prep planning.
Repeated protein waste may mean overproduction, cooking mistakes, or portion control issues.
Repeated sauce waste may mean batch sizes are too large.
Repeated dessert waste may mean slow sales or poor par levels.
Repeated bar garnish waste may mean prep amounts are too high.
The goal is to move from “we waste too much” to “this category is where the waste is coming from.”
Specific problems are easier to fix than general complaints.

Food Waste Category Tracker

Week Of: _____
Manager Name: _____
Restaurant / Location: _____

Category 1

Category:

□ Proteins
□ Seafood
□ Produce
□ Dairy
□ Sauces / dressings
□ Dry goods
□ Bread products
□ Desserts
□ Frozen products
□ Prepared items
□ Bar fruit / garnish
□ Beverages
□ Other: _____

Products Wasted in This Category:

Total Amount Wasted if Known: _____
Estimated Cost if Known: $_____

Main Reason for Waste:

□ Over-ordering
□ Over-prepping
□ Spoilage
□ Expired product
□ Poor rotation
□ Poor storage
□ Wrong recipe
□ Portion issue
□ Cooking mistake
□ Guest return
□ Remake
□ Slow sales
□ Other: _____

Manager Notes:

Follow-Up Needed?
□ Yes
□ No

Follow-Up Action:

Category 2

Category:

□ Proteins
□ Seafood
□ Produce
□ Dairy
□ Sauces / dressings
□ Dry goods
□ Bread products
□ Desserts
□ Frozen products
□ Prepared items
□ Bar fruit / garnish
□ Beverages
□ Other: _____

Products Wasted in This Category:

Total Amount Wasted if Known: _____
Estimated Cost if Known: $_____

Main Reason for Waste:

□ Over-ordering
□ Over-prepping
□ Spoilage
□ Expired product
□ Poor rotation
□ Poor storage
□ Wrong recipe
□ Portion issue
□ Cooking mistake
□ Guest return
□ Remake
□ Slow sales
□ Other: _____

Manager Notes:

Follow-Up Needed?
□ Yes
□ No

Follow-Up Action:

Category 3

Category:

□ Proteins
□ Seafood
□ Produce
□ Dairy
□ Sauces / dressings
□ Dry goods
□ Bread products
□ Desserts
□ Frozen products
□ Prepared items
□ Bar fruit / garnish
□ Beverages
□ Other: _____

Products Wasted in This Category:

Total Amount Wasted if Known: _____
Estimated Cost if Known: $_____

Main Reason for Waste:

□ Over-ordering
□ Over-prepping
□ Spoilage
□ Expired product
□ Poor rotation
□ Poor storage
□ Wrong recipe
□ Portion issue
□ Cooking mistake
□ Guest return
□ Remake
□ Slow sales
□ Other: _____

Manager Notes:

Follow-Up Needed?
□ Yes
□ No

Follow-Up Action:

Weekly Category Review

Which category had the most waste?

Which category had the highest cost risk?

Which category had repeated waste from last week?

Which category needs manager follow-up first?

What action should be taken?
□ Reduce order
□ Adjust par level
□ Adjust prep amount
□ Review storage
□ Review FIFO
□ Review labeling
□ Review recipe
□ Review portion control
□ Train employee
□ Coach manager
□ Contact supplier
□ Other: _____

Action Plan:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

PREP WASTE REVIEW

Prep waste happens before the guest ever orders.
That is why it must be controlled early.
Prep waste can come from overproduction, poor forecasting, wrong batch size, poor knife skills, incorrect recipes, expired product, trim loss, labeling mistakes, storage problems, or unclear par levels.
A prep employee may work hard and still create waste if the prep plan is wrong.
That is why managers must review prep waste as a system issue, not only an employee issue.

Common prep waste problems include:

Making too much product
Making product too early
Making the wrong product
Using the wrong recipe
Cutting product incorrectly
Trimming too much usable product
Mixing old and new product
Failing to label or date product
Using product out of rotation
Opening backup product too soon
Not checking what is already prepped
Not communicating low or excess product
Prep waste can be expensive because it often involves labor and product.
The restaurant pays for the product.
The restaurant pays the employee to prep it.
Then the restaurant loses both if the product is not used correctly.
Prep waste also affects storage.
Too much prep can crowd the walk-in, hide older product, make rotation harder, and increase spoilage risk.
Too little prep can cause rush problems, delays, menu outages, and emergency production during service.
The goal is not simply to prep less.
The goal is to prep smarter.
Managers should compare prep to actual sales and usage.
If a product is consistently leftover at the end of the day, the prep amount may be too high.
If a product runs out during peak times, the prep amount may be too low.
If a product expires before use, batch size or par level may need adjustment.

If trim waste is high, knife skills or product quality may need review.
If recipes are inconsistent, prep training may need review.
Prep waste review should happen regularly because prep decisions affect the whole restaurant.
Strong prep control protects food cost, ticket times, quality, and service.

Prep Waste Review Form

Date: _____
Manager Name: _____
Prep Employee / Prep Lead: _____
Restaurant / Location: _____

Shift / Prep Period:

□ Morning prep
□ Afternoon prep
□ Dinner prep
□ Closing prep
□ Other: _____
Prep Item Reviewed: _____

Product Category:

□ Protein
□ Seafood
□ Produce
□ Dairy
□ Sauce / dressing
□ Dessert
□ Bread product
□ Frozen item
□ Prepared item
□ Other: _____
Amount Prepped: _____
Amount Used: _____
Amount Leftover: _____
Amount Wasted: _____
Estimated Cost if Known: $_____

Reason for Prep Waste

□ Over-prepped
□ Wrong batch size
□ Sales lower than expected
□ Product expired
□ Product spoiled
□ Product not labeled
□ Product not dated
□ Product made incorrectly
□ Recipe not followed
□ Trim waste too high
□ Product quality issue
□ Poor storage
□ Poor rotation
□ Communication issue
□ Other: _____
What happened?

Could this waste have been prevented?

□ Yes
□ No
□ Not sure
If yes, how?

Prep Planning Review

Was the prep amount based on sales forecast?
□ Yes
□ No
□ Not sure

Was the prep amount based on par level?
□ Yes
□ No
□ Not sure

Did the employee check existing product before prepping?
□ Yes
□ No
□ Not sure

Was older product used first?
□ Yes
□ No
□ Not sure

Was product labeled and dated correctly?
□ Yes
□ No
□ Not applicable

Was the recipe followed correctly?
□ Yes
□ No
□ Not sure

Was product stored correctly after prep?
□ Yes
□ No
□ Not sure

Manager Decision

□ Reduce prep amount
□ Increase prep amount
□ Adjust batch size
□ Review par level
□ Review recipe
□ Review knife skills
□ Review labeling
□ Review storage
□ Review sales forecast
□ Retrain employee
□ Monitor for one week
□ Other: _____

Corrective Action:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

COOK LINE WASTE REVIEW

Cook line waste happens during service.
It often happens under pressure.
A cook may burn food, overcook protein, make the wrong item, miss a modifier, drop product, use the wrong portion, hold product too long, or prepare food that never gets sold.
Cook line waste can be caused by employee mistakes, unclear recipes, poor communication, ticket confusion, weak expo control, poor prep setup, bad equipment, rushing, or manager decisions.
Cook line waste should be reviewed carefully because it directly affects food cost and guest experience.
When food is wasted on the line, the restaurant may lose more than the product.
It may also lose time, labor, guest trust, and ticket flow.

For example:

A steak cooked to the wrong temperature may need to be remade.
A wrong modifier may delay a table.
A burned item may slow the kitchen.
A missing side may create guest frustration.
A dropped plate may require a full replacement.
A line cook using too much product may increase cost every shift.
A product held too long may become unusable.
Cook line waste often reveals training gaps.
The employee may not understand the recipe.
The ticket may be hard to read.
The station may be poorly set up.
The cook may not know the correct portion tool.
The expo may not be checking plates before they leave.
The manager may not be watching repeated mistakes.
Managers should review cook line waste by product, station, shift, and cause.
The goal is not to punish every mistake.
The goal is to identify patterns and correct them.
One burned item may be a normal mistake.
The same burned item several times in one week needs review.
One wrong modifier may be a communication issue.
Repeated modifier mistakes need POS, server, ticket, or kitchen review.
Cook line waste is a sign that a process needs attention.
Managers should use the waste review to protect both food cost and service quality.

Cook Line Waste Review Form

Date: _____
Manager Name: _____
Cook / Station: _____
Restaurant / Location: _____

Shift:

□ Lunch
□ Dinner
□ Late night
□ Event
□ Other: _____

Waste Item: _____

Station:

□ Grill
□ Fry
□ Sauté
□ Salad
□ Expo
□ Pizza
□ Pantry
□ Dessert

□ Bar food
□ Other: _____

Amount Wasted: _____

Estimated Cost if Known: $_____

Ticket / Table Number if Applicable: _____

Reason for Cook Line Waste

□ Burned
□ Overcooked
□ Undercooked
□ Wrong item made
□ Wrong modifier
□ Wrong portion
□ Dropped product
□ Dropped plate
□ Held too long
□ Duplicate item made
□ Ticket confusion
□ Guest return
□ Remake
□ Product quality issue
□ Equipment issue
□ Other: _____

What happened?

Was guest experience affected?
□ Yes
□ No
□ Not sure

If yes, explain:

Was a remake required?
□ Yes
□ No

Was a comp, void, or discount involved?
□ Yes
□ No
□ Manager decision

Details:

Cause Review

Possible cause:

□ Recipe not followed
□ Portion tool not used
□ Ticket was misread

□ Modifier was unclear
□ Server entry issue
□ Cook training issue
□ Expo missed issue
□ Station setup issue
□ Rush pressure
□ Equipment problem
□ Communication breakdown
□ Manager follow-up issue
□ Other: _____

Corrective Action Taken During Shift:

Follow-Up Needed

□ Recipe retraining
□ Portion retraining
□ Ticket reading retraining
□ POS modifier review
□ Expo review
□ Station setup review
□ Equipment repair
□ Manager observation
□ Employee coaching
□ Other: _____

Person Responsible: _____
Follow-Up Date: _____
Cook Initials if Applicable: _____
Manager Signature: _____

SPOILAGE AND EXPIRED PRODUCT LOG

Spoilage and expired product are signs that the restaurant paid for product it did not use in time.
Some spoilage may happen occasionally.
But repeated spoilage usually means the system needs review.
Product may spoil because of over-ordering, weak sales forecasting, poor rotation, wrong prep levels, poor storage, unlabeled containers, missed dates, low menu movement, equipment problems, or lack of manager inspection.
Expired product is especially important because it affects food cost, food safety, health inspection readiness, and guest trust.
Managers should never ignore expired or questionable product.
If product is expired, spoiled, damaged, unsafe, or questionable, it should be handled according to restaurant policy and food safety standards.
It should also be documented.

The spoilage and expired product log helps managers answer:

What product spoiled?
How much was lost?
Where was it stored?
Why did it happen?
Was it ordered too heavily?
Was it prepped too heavily?
Was it labeled correctly?
Was it rotated correctly?
Was the cooler or freezer working properly?
Was the product slow-moving?
Was the manager checking dates?
What should change?
Spoilage is often connected to ordering and prep.
If a product expires regularly, the restaurant may be buying too much.

If a prepared sauce spoils regularly, the batch size may be too large.
If produce spoils regularly, storage or ordering may need review.
If protein spoils, the cost risk may be serious.
If bar garnish spoils, prep levels may need adjustment.
If product expires because it was hidden, storage organization and FIFO need review.
Spoilage should not be treated as normal.
Every spoiled product should teach the restaurant something.
Managers should review the spoilage log before ordering.
If a product was thrown away this week, the manager should think carefully before ordering the same amount again.
A restaurant should not keep buying product that it is not using correctly.

Spoilage and Expired Product Log

Date Found: _____
Manager Name: _____
Restaurant / Location: _____

Storage Area:

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar storage
□ Prep area
□ Cook line
□ Other: _____

Product Name: _____

Product Category:

□ Protein
□ Seafood
□ Produce
□ Dairy
□ Sauce / dressing
□ Dry goods
□ Bread product
□ Dessert
□ Frozen item
□ Prepared item
□ Bar item
□ Other: _____

Amount Discarded: _____
Estimated Cost if Known: $_____
Date Prepared if Known: _____
Use-By / Expiration Date: _____
Employee Who Found Product: _____

Problem Type

□ Expired
□ Spoiled
□ Mold
□ Off smell
□ Wrong texture
□ Damaged package
□ Freezer burn
□ Temperature concern
□ Unlabeled product
□ Undated product
□ Questionable product
□ Other: _____

What happened?

Possible Cause

□ Over-ordered
□ Over-prepped
□ Product slow-moving
□ Poor rotation
□ Poor storage
□ Product hidden
□ Not labeled
□ Not dated
□ Cooler / freezer issue
□ Delivery quality issue
□ Prep batch too large
□ Manager did not inspect
□ Other: _____

Was product logged as waste?
□ Yes
□ No

Was manager notified immediately?
□ Yes
□ No

Was product removed from usable inventory?
□ Yes
□ No

Corrective Action Needed

□ Adjust order amount
□ Adjust par level
□ Adjust prep batch size
□ Review FIFO
□ Review labeling
□ Review storage area
□ Review manager inspection routine
□ Check equipment temperature
□ Contact supplier
□ Train employee
□ Other: _____

Action Plan:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

RETURNED FOOD AND REMAKE TRACKER

Returned food and remakes should be tracked because they can quietly damage food cost.
A returned plate is not only a guest service issue.
It is also a product loss issue.
A remake is not only a kitchen correction.
It is also a food cost event.
When food is returned, remade, discounted, voided, or comped, the restaurant should understand why.
Sometimes the restaurant made a mistake.
Sometimes the guest changed their mind.

Sometimes the server entered the wrong item.
Sometimes the kitchen missed a modifier.
Sometimes the food was cooked incorrectly.
Sometimes the plate took too long.
Sometimes the item did not match the guest's expectation.
Sometimes the food was correct, but the guest was unhappy.
The reason matters.
If managers do not track returned food and remakes, they may miss repeated problems.

For example:

A steak temperature may be missed several times in one week.
A salad may be made without a modifier repeatedly.
A server may enter orders incorrectly.
A kitchen station may be rushing and missing details.
A menu description may be confusing guests.
An item may be commonly returned because expectations are unclear.
A recipe may not be consistent.
A product quality issue may be creating complaints.
Returned food and remakes connect food cost, service, training, and guest experience.
That is why they should be reviewed by managers.
The goal is not to blame employees automatically.
The goal is to find the cause.
If the cause is server order entry, retrain POS use and order confirmation.
If the cause is kitchen execution, retrain recipe and ticket reading.
If the cause is guest expectation, review menu wording or server communication.
If the cause is product quality, review supplier, storage, prep, or cooking method.
If the cause is ticket time, review kitchen flow or staffing.
If the cause is repeated by the same person, coach and follow up.
If the cause is repeated by the same station, review the station system.
Returned food and remakes should be handled quickly with the guest.
But after the guest is taken care of, the manager should document what happened.
A problem that is documented can be corrected.
A problem that is ignored usually repeats.

Returned Food and Remake Tracker

Date: _____
Time: _____
Manager Name: _____
Restaurant / Location: _____

Shift:

□ Lunch
□ Dinner
□ Late night
□ Event
□ Other: _____

Guest / Table Information

Table Number: _____
Check Number: _____
Server Name: _____
Cook / Station if Applicable: _____

Item Information

Item Returned or Remade:

Product Category:

□ Protein
□ Seafood

□ Produce
□ Dairy
□ Sauce / dressing
□ Side item
□ Dessert
□ Beverage
□ Bar item
□ Full entree
□ Other: _____
Was the item returned?
□ Yes
□ No
Was the item remade?
□ Yes
□ No
Was a comp, void, refund, or discount involved?
□ Comp
□ Void
□ Refund
□ Discount
□ No
□ Manager decision pending
Estimated Food Cost Lost if Known: $_____

Reason for Return or Remake

□ Wrong item made
□ Wrong item entered
□ Wrong modifier
□ Missing modifier
□ Wrong temperature
□ Overcooked
□ Undercooked
□ Cold food
□ Long wait
□ Missing side
□ Missing sauce
□ Poor quality
□ Guest did not like item
□ Allergy concern
□ Menu confusion
□ Server communication issue
□ Kitchen execution issue
□ Product quality issue
□ Other: _____
What happened?

Cause Review

Main cause appears to be:

□ Server order-taking issue
□ POS entry issue
□ Kitchen ticket reading issue
□ Recipe execution issue
□ Cooking temperature issue
□ Expo issue
□ Product quality issue
□ Prep issue

□ Menu description issue
□ Guest expectation issue
□ Manager communication issue
□ Not sure yet
□ Other: _____
Was this preventable?
□ Yes
□ No
□ Not sure
If yes, how?

Guest Recovery
How was the guest taken care of?

Did manager speak with guest?
□ Yes
□ No
□ Not needed
Guest left satisfied?
□ Yes
□ No
□ Not sure

Follow-Up Needed
□ Server retraining
□ POS retraining
□ Kitchen retraining
□ Recipe review
□ Portion review
□ Expo review
□ Menu communication review
□ Product quality review
□ Supplier review
□ Manager observation
□ Employee coaching
□ No follow-up needed
□ Other: _____

Follow-Up Action:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

WASTE PATTERN REVIEW
A waste pattern review helps managers move from daily notes to real correction.

Daily waste logs are useful.
But the real value comes when managers study the pattern.
One waste entry tells what happened once.
A pattern tells what keeps happening.
Food cost improves when managers stop treating every waste event as isolated.
If the same product is wasted repeatedly, that product needs review.
If the same station wastes product repeatedly, that station needs training or process correction.
If the same manager keeps missing follow-up, manager accountability is needed.
If the same supplier sends poor product, supplier review is needed.
If the same prep item expires, batch size or par level may be wrong.
If the same menu item is remade often, recipe, order entry, or guest communication may need review.
A waste pattern review should happen weekly.

The manager should gather:

Daily waste logs
Prep waste reviews
Cook line waste reviews
Spoilage logs
Returned food and remake trackers
Inventory notes
Ordering notes
Receiving issues
Manager observations

Then the manager should ask:

What product appears most often?
What category appears most often?
What station appears most often?
What reason appears most often?
What waste was preventable?
What waste was connected to training?
What waste was connected to ordering?
What waste was connected to prep?
What waste was connected to storage?
What waste was connected to manager follow-up?
The review should end with action.
A waste pattern review without action is only paperwork.
Managers should assign a person, deadline, and follow-up date.
The action may be simple.
Reduce prep by one batch.
Change a par level.
Retrain a cook on portion tools.
Move product to a better storage location.
Add a label reminder.
Review FIFO with the team.
Watch a station during rush.
Update a recipe card.
Talk to a supplier.
Change the order guide.
The key is follow-through.
Waste reduction does not happen because a manager notices waste.
Waste reduction happens when the manager corrects the cause.

Weekly Waste Pattern Review

Week Of: _____
Manager Name: _____
Restaurant / Location: _____
Review Date: _____

Waste Records Reviewed

□ Daily waste logs
□ Food waste category tracker
□ Prep waste review

□ Cook line waste review
□ Spoilage and expired product log
□ Returned food and remake tracker
□ Inventory notes
□ Ordering notes
□ Receiving issues
□ Manager observations
□ Other: _____

Pattern Review

What product was wasted most often this week?

What product created the highest estimated cost loss?

What category had the most waste?
□ Proteins
□ Seafood
□ Produce
□ Dairy
□ Sauces / dressings
□ Dry goods
□ Bread products
□ Desserts
□ Frozen products
□ Prepared items
□ Bar fruit / garnish
□ Beverages
□ Other: _____

What station had the most waste?
□ Prep
□ Cook line
□ Grill
□ Fry
□ Salad
□ Expo
□ Bar
□ Dish
□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Receiving
□ Other: _____

What was the most common reason for waste?
□ Over-ordering
□ Over-prepping
□ Spoilage
□ Expired product
□ Poor rotation
□ Poor storage
□ Wrong recipe
□ Portion issue

□ Cooking mistake
□ Guest return
□ Remake
□ Slow sales
□ Supplier issue
□ Manager follow-up issue
□ Other: _____

Was the waste mostly preventable?

□ Yes
□ No
□ Some was
□ Not sure

Explain:

Was waste connected to ordering?

□ Yes
□ No
□ Not sure

Notes:

Was waste connected to prep planning?

□ Yes
□ No
□ Not sure

Notes:

Was waste connected to portion control?

□ Yes
□ No
□ Not sure

Notes:

Was waste connected to storage, labeling, or rotation?

□ Yes
□ No
□ Not sure

Notes:

Was waste connected to employee training?

□ Yes
□ No
□ Not sure

Notes:

Was waste connected to manager follow-up?
□ Yes
□ No
□ Not sure

Notes:

Waste Reduction Decision

The biggest waste issue this week was:

The most likely cause was:

Corrective action needed:
□ Reduce order amount
□ Increase order accuracy
□ Adjust par level
□ Adjust prep amount
□ Adjust batch size
□ Review recipe
□ Review portion control
□ Review storage
□ Review labeling
□ Review FIFO
□ Review receiving
□ Train employee
□ Coach manager
□ Contact supplier
□ Watch station during rush
□ Other: _____

Action Plan:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

Part 4 Review: Waste Tracking and Reduction Checkpoint

Date: _____
Manager Name: _____
Restaurant / Location: _____
Department: _____
Use this page before moving into portion control.

Does the restaurant track waste daily?

□ Yes
□ No
□ Sometimes

Notes:

Do employees understand when waste must be recorded?

□ Yes
□ No
□ Some do

Notes:

Are managers reviewing waste at the end of the shift?

□ Yes
□ No
□ Sometimes

Notes:

Are waste categories being reviewed weekly?

□ Yes
□ No
□ Not yet

Notes:

Is prep waste being reviewed?

□ Yes
□ No
□ Sometimes

Notes:

Is cook line waste being reviewed?
□ Yes
□ No
□ Sometimes

Notes:

Are spoiled and expired products being logged?
□ Yes
□ No
□ Sometimes

Notes:

Are returned food and remakes being tracked?
□ Yes
□ No
□ Sometimes

Notes:

What product or category creates the most waste right now?

What is the biggest waste pattern that needs correction?

Waste Tracking System Status:
□ Strong and consistent
□ Working but needs improvement

□ Inconsistent
□ Not being used enough
□ Needs employee retraining
□ Needs manager follow-up

First Waste Reduction Action:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

Portion Control Profit Review

Date: _____
Manager Name: _____
Restaurant / Location: _____
Department / Station: _____

Product or Menu Item Reviewed:

Portion Standard

Recipe Portion: _____

Portion Tool Required:

□ Scale
□ Scoop
□ Ladle
□ Spoodle
□ Measuring cup
□ Portion cup
□ Knife cut guide
□ Bottle pour tool
□ Counted pieces
□ Other: _____
High-Cost Ingredient?
□ Yes
□ No

Menu Item Uses This Product In:

Portion Risk Review

Are employees currently using the correct portion?
□ Yes
□ No
□ Sometimes
□ Not sure

Notes:

Are employees using the correct portion tool?
□ Yes
□ No
□ Sometimes
□ Tool not available

Notes:

Is over-portioning happening?
□ Yes
□ No
□ Sometimes
□ Not sure

Examples:

Is under-portioning happening?
□ Yes
□ No
□ Sometimes
□ Not sure

Examples:

Could portion mistakes be affecting food cost?
□ Yes
□ No
□ Not sure

Explain:

Could portion inconsistency be affecting guest experience?
□ Yes
□ No
□ Not sure

Explain:

Manager Decision
□ Portion standard is strong
□ Portion standard needs retraining
□ Portion tool is missing
□ Recipe needs clarification
□ Plate guide needed
□ Manager audit needed

□ Employee coaching needed
□ Other: _____

Action Plan:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

PORTION TOOL CHECKLIST

Portion control is difficult without the right tools.
Employees should not be expected to guess portions during a busy shift.
A restaurant that wants consistent portions must provide the tools needed to measure those portions correctly.
Portion tools protect the recipe, the employee, the guest, and the restaurant.
Without portion tools, employees often rely on habit, memory, speed, or visual judgment.
That creates inconsistency.
One cook may use a heavier scoop.
Another cook may use a smaller scoop.
One bartender may pour carefully.
Another may over-pour.
One prep employee may fill containers accurately.
Another may guess.
One server may portion sauces correctly.
Another may give away extra without realizing the cost.
Portion tools make the standard easier to follow.

Common portion tools include:

Scales
Scoops
Ladles
Spoodles
Measuring cups
Measuring spoons
Portion cups
Cut guides
Bottle pourers
Jiggers
Tongs
Preset containers
Recipe cards
Plate diagrams
Prep yield sheets
The tool should match the product.
A scale may be best for proteins, cheese, dough, seafood, or high-cost ingredients.
A ladle may be best for soups, sauces, gravies, dressings, or batters.
A scoop may be best for sides, salads, desserts, rice, mashed potatoes, or prepared mixtures.
A portion cup may be best for sauces, dressings, condiments, toppings, and sides.
A jigger or measured pour tool may be needed for alcohol control.
A cut guide may be needed for desserts, proteins, breads, or garnishes.
A portion tool is only useful if employees use it.
Managers should check that tools are available, clean, labeled if needed, stored in the correct station, and used during real service.
If the correct tool is missing, employees will guess.
If the tool is dirty, employees may skip it.
If the tool is stored far away, employees may not use it during a rush.
If multiple similar tools are available, employees may use the wrong one.
If a recipe says “one scoop” but does not identify the scoop size, the standard is incomplete.

A strong portion tool system should answer:

What tool is required?
Where is the tool stored?
What size is the tool?
What product uses the tool?
Who checks that the tool is available?
What happens if the tool is missing?
How often is the tool inspected?
Portion tools should be part of station setup.
If a station cannot open without the correct product, it should not open without the correct portion tools.
Managers should treat portion tools as part of the food cost control system.

Portion Tool Checklist

Date: _____
Manager Name: _____
Restaurant / Location: _____

Station / Area Reviewed:

☐ Grill
☐ Fry
☐ Sauté
☐ Salad
☐ Pizza
☐ Prep
☐ Bar
☐ Dessert
☐ Server station
☐ Expo
☐ Other: _____

Portion Tools Available

☐ Scale
☐ Scoops
☐ Ladles
☐ Spoodles
☐ Measuring cups
☐ Measuring spoons
☐ Portion cups
☐ Jiggers
☐ Bottle pourers
☐ Tongs
☐ Cut guides
☐ Recipe cards
☐ Plate guides
☐ Prep yield sheets
☐ Other: _____

Tool Review

Tool 1:

Tool Name / Size: _____

Product Used For:

Correct Storage Location:

Available at Station?
□ Yes
□ No
Clean and Ready?
□ Yes
□ No
Employees Using Correctly?
□ Yes
□ No
□ Sometimes
□ Not observed

Follow-Up Needed:

Tool 2:
Tool Name / Size: _____

Product Used For:

Correct Storage Location:

Available at Station?
□ Yes
□ No
Clean and Ready?
□ Yes
□ No
Employees Using Correctly?
□ Yes
□ No
□ Sometimes
□ Not observed

Follow-Up Needed:

Tool 3:
Tool Name / Size: _____

Product Used For:

Correct Storage Location:

Available at Station?
□ Yes
□ No
Clean and Ready?
□ Yes
□ No
Employees Using Correctly?
□ Yes
□ No
□ Sometimes
□ Not observed

Follow-Up Needed:

Tool 4:
Tool Name / Size: _____

Product Used For:

Correct Storage Location:

Available at Station?
□ Yes
□ No
Clean and Ready?
□ Yes
□ No
Employees Using Correctly?
□ Yes
□ No
□ Sometimes
□ Not observed

Follow-Up Needed:

Missing or Incorrect Tools
What portion tools are missing?

What tools are damaged, dirty, unlabeled, or unclear?

What products are employees currently portioning by guess?

What high-cost products need better portion tools?

Manager Decision

□ Portion tools are ready
□ Portion tools need replacement
□ Portion tools need labeling
□ Portion tools need better storage location
□ Employees need retraining
□ Recipe cards need tool sizes added
□ Manager audit needed
□ Other: _____

Action Plan:

Person Responsible: _____
Deadline: _____
Manager Signature: _____

RECIPE PORTION STANDARD PAGE

A recipe portion standard explains exactly how much product should be used for a menu item, prep item, side item, sauce, drink, dessert, or station task.
Without a recipe portion standard, employees may guess.
Guessing creates inconsistent food cost and inconsistent guest experience.
A recipe should not only list ingredients.
It should also explain the amount, tool, method, yield, and finished standard.

For example, a recipe should not say:

Add cheese.

It should say:

Add _____ ounces of cheese using the assigned scale or portion cup.

A recipe should not say:

Use sauce.

It should say:
Use _____ ounces of sauce using the _____ ladle.

A recipe should not say:
Serve fries.

It should say:
Serve _____ ounces of fries using the assigned basket, scoop, or portion standard.
Clear portion standards help employees perform the task correctly.
They also help managers coach employees fairly.
A manager cannot correct an employee clearly if the standard is vague.

A strong recipe portion standard should include:
Menu item name
Ingredient list
Exact portion amount
Unit of measure
Required portion tool
Prep yield
Serving size
Plate or container standard
Garnish standard
Common mistakes
High-cost ingredients
Allergen or food safety concerns
Manager verification steps
Recipe portion standards should be especially clear for items that affect food cost.
High-cost proteins, seafood, cheese, specialty toppings, alcohol, sauces, dressings, desserts, premium sides, and limited-time specials should never be left to guesswork.
Managers should also watch items that are frequently modified by guests.
If a menu item is often changed, employees need to know how modifications affect portioning, cost, and guest expectation.
Recipe portion standards should be reviewed during training.
The trainer should explain the recipe.
The trainer should demonstrate the portion.
The employee should practice the portion.
The manager or trainer should observe the employee during real service.
The employee should not be signed off until they can repeat the portion correctly.
A written recipe standard protects the restaurant from silent food cost loss.
It also protects employees from unclear expectations.

Recipe Portion Standard Page
Recipe / Menu Item Name: _____
Date Created or Reviewed: _____
Manager Name: _____
Restaurant / Location: _____

Station:
□ Grill
□ Fry
□ Sauté
□ Salad
□ Pizza
□ Prep
□ Bar
□ Dessert
□ Expo
□ Other: _____

Recipe Purpose

This recipe is used for:
□ Menu item
□ Side item

□ Sauce
□ Dressing
□ Prep batch
□ Dessert
□ Beverage
□ Bar item
□ Garnish
□ Other: _____

Ingredient and Portion Standards

Ingredient 1: _____
Portion Amount: _____
Unit of Measure: _____
Portion Tool Required: _____
High-Cost Ingredient?
□ Yes
□ No

Ingredient 2: _____
Portion Amount: _____
Unit of Measure: _____
Portion Tool Required: _____
High-Cost Ingredient?
□ Yes
□ No

Ingredient 3: _____
Portion Amount: _____
Unit of Measure: _____
Portion Tool Required: _____
High-Cost Ingredient?
□ Yes
□ No

Ingredient 4: _____
Portion Amount: _____
Unit of Measure: _____
Portion Tool Required: _____
High-Cost Ingredient?
□ Yes
□ No

Ingredient 5: _____
Portion Amount: _____
Unit of Measure: _____
Portion Tool Required: _____
High-Cost Ingredient?
□ Yes
□ No

Finished Product Standard

Expected finished portion:

Plate / bowl / container used:

Garnish or finishing standard:

Expected recipe yield if applicable:

Common Portion Mistakes
□ Too much protein
□ Too little protein
□ Too much cheese
□ Too much sauce
□ Too much dressing
□ Too much garnish
□ Wrong side portion
□ Wrong scoop size
□ Wrong ladle size
□ Wrong cut size
□ Wrong container
□ Recipe steps skipped
□ Item not weighed
□ Item not measured
□ Other: _____

Common mistakes to watch:

Training Standard
□ Recipe was explained.
□ Portion tools were shown.
□ Employee watched demonstration.
□ Employee practiced portion.
□ Employee corrected mistakes.
□ Employee repeated portion correctly.
□ Employee performed recipe during real shift conditions.
□ Manager or trainer verified performance.

Employee Portion Sign-Off
Employee Name: _____
Trainer Name: _____
Date Trained: _____

Employee can portion this recipe correctly:
□ Yes
□ No
□ Needs more practice

Follow-Up Needed:

Employee Signature: _____
Trainer Signature: _____
Manager Signature: _____

HIGH-COST INGREDIENT CONTROL SHEET

High-cost ingredients need tighter control than low-cost ingredients.
Every product matters, but expensive products can damage food cost faster when they are wasted, over-portioned, over-ordered, stolen, spoiled, used incorrectly, or left untracked.

High-cost ingredients may include:

Steaks
Seafood
Chicken
Pork
Ribs
Specialty meats
Cheese
Premium toppings
Desserts
Specialty sauces
Nuts
Fresh herbs
Premium produce
Liquor
Wine
Craft beer
Specialty bar ingredients
Seasonal ingredients
Limited-time special ingredients

A high-cost ingredient should be easy to identify, easy to count, and easy to review.
Managers should know where it is stored, how it is portioned, how it is used, how much is ordered, how much is wasted, and who is responsible for controlling it.
High-cost ingredient control does not mean employees cannot use the product.
It means employees must use it correctly.
A restaurant loses money when high-cost ingredients are treated casually.

For example:

A cook gives extra steak trim away as a snack.
A prep employee overuses cheese.
A bartender over-pours liquor.
A server gives extra sauce or topping without ringing it in.
A manager orders too much seafood before a slow week.
A specialty dessert expires because sales were lower than expected.
A premium topping is used on the wrong item.
A product is stored poorly and spoils.
A high-cost control sheet helps the manager focus on the ingredients that create the greatest risk.
Managers should review high-cost ingredients weekly.
They should compare inventory, sales, waste, prep, portion control, and ordering.
If a high-cost item is disappearing faster than sales explain, the manager should investigate.

Possible causes include:

Over-portioning
Unrecorded waste
Incorrect recipe execution
Employee meals or giveaways
Theft
Wrong menu item build
Prep error
Storage loss
Spoilage

Receiving shortage
Inventory count error
POS entry issue
A high-cost ingredient should never be ignored because it is “close enough.”
Small errors with expensive products become large losses.

High-Cost Ingredient Control Sheet

Date: _____
Manager Name: _____
Restaurant / Location: _____

Review Period:

□ Daily
□ Weekly
□ Monthly
□ Other: _____
Ingredient Name: _____

Product Category:

□ Protein
□ Seafood
□ Dairy
□ Cheese
□ Produce
□ Sauce
□ Topping
□ Dessert
□ Alcohol
□ Beverage
□ Specialty product
□ Other: _____
Supplier: _____
Storage Area: _____
Unit of Measure: _____
Purchase Unit: _____
Current Cost if Known: $_____

Usage Information

Menu items using this ingredient:

Recipe portion standard:

Portion tool required:

□ Scale
□ Scoop
□ Ladle
□ Portion cup
□ Measuring cup
□ Jigger
□ Bottle pourer

□ Counted pieces
□ Cut guide
□ Other: _____

Inventory and Ordering Review

Beginning Count: _____
Ending Count: _____
Amount Ordered: _____
Amount Received: _____
Amount Used if Known: _____
Expected Usage Based on Sales: _____
Actual Usage Concern?
□ Yes
□ No
□ Not sure

Waste and Loss Review

Was this product wasted during the review period?
□ Yes
□ No
□ Not sure

Waste amount if known:

Was this product spoiled or expired?
□ Yes
□ No
□ Not sure

Notes:

Was this product remade, returned, or discarded?
□ Yes
□ No
□ Not sure

Notes:

Was this product possibly over-portioned?
□ Yes
□ No
□ Not sure

Notes:

Was this product possibly used without being rung in or documented?
□ Yes
□ No
□ Not sure

Notes:

Control Review
□ Product is stored correctly.
□ Product is counted accurately.
□ Product is labeled if needed.
□ Product is rotated correctly.
□ Portion standard is clear.
□ Portion tool is available.
□ Employees are trained on correct use.
□ Waste is being logged.
□ Remakes are being tracked.
□ Manager is reviewing usage weekly.
□ Ordering amount is appropriate.
□ Par level is appropriate.

Manager Concern

Biggest concern with this ingredient:
□ Over-ordering
□ Over-portioning
□ Waste
□ Spoilage
□ Storage
□ Recipe inconsistency
□ Poor training
□ Untracked use
□ Incorrect inventory count
□ Receiving issue
□ POS issue
□ No major concern
□ Other: _____

Action Needed:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

OVER-PORTIONING REVIEW
Over-portioning happens when employees use more product than the recipe allows.
It may look like good service.
It may feel generous.
It may even make a guest happy in the moment.
But over-portioning creates long-term problems for the restaurant.
It raises food cost.
It makes recipe costing inaccurate.
It makes inventory usage harder to understand.
It creates inconsistent guest expectations.
It teaches employees that the written standard does not matter.
It can make the correct portion look wrong later.
Over-portioning is often unintentional.
Employees may not know the correct portion.
The portion tool may be missing.

The recipe may be unclear.
The employee may be rushing.
The employee may believe larger portions prevent complaints.
The employee may copy another employee who portions incorrectly.
The manager may not be watching.
The station may not have a visual plate guide.

Over-portioning can happen in many areas:

Proteins
Seafood
Cheese
Pasta
Fries
Sides
Sauces
Dressings
Desserts
Toppings
Garnishes
Alcohol
Bar mixers
To-go condiments
The most dangerous over-portioning happens with high-cost products or high-volume items.
A high-cost item loses money quickly.
A high-volume item loses money repeatedly.
A product that is both high-cost and high-volume requires serious manager attention.
Managers should correct over-portioning quickly and professionally.
The correction should focus on the standard.

A manager can say:

“This portion needs to match the recipe.”
“Use the scale every time.”
“This scoop is the required tool.”
“This ingredient is high cost, so we have to control it carefully.”
“The guest should get the correct portion every visit.”
“Consistency is the standard.”
The goal is not to embarrass employees.
The goal is to train accuracy.
Managers should document repeated over-portioning and follow up with retraining.
If the same employee continues over-portioning after training, the issue becomes accountability.
If the whole station is over-portioning, the issue is likely training, tools, recipe clarity, or manager follow-up.
Over-portioning should never be ignored because it is “only a little extra.”
A little extra becomes a lot when it happens all week.

Over-Portioning Review Form

Date: _____
Manager Name: _____
Restaurant / Location: _____

Station:

□ Grill
□ Fry
□ Sauté
□ Salad
□ Pizza
□ Prep
□ Bar
□ Dessert
□ Server station
□ Expo
□ Other: _____

Product or Menu Item Reviewed:

Correct Portion Standard:

Actual Portion Observed:

Portion Tool Required:
□ Scale
□ Scoop
□ Ladle
□ Spoodle
□ Measuring cup
□ Portion cup
□ Jigger
□ Bottle pourer
□ Counted pieces
□ Cut guide
□ Other: _____
Was the correct portion tool available?
□ Yes
□ No
□ Not sure
Was the employee using the correct tool?
□ Yes
□ No
□ Sometimes

Over-Portioning Risk

Product type:
□ High-cost item
□ High-volume item
□ Both high-cost and high-volume
□ Standard item
□ Not sure
How often has this issue been observed?
□ First time
□ More than once
□ Repeated issue
□ Happens often
□ Not sure

Possible Cause
□ Employee did not know standard
□ Employee forgot standard

□ Recipe unclear
□ Portion tool missing
□ Portion tool ignored
□ Plate guide missing
□ Trainer taught wrong portion
□ Rush pressure
□ Employee trying to be generous
□ Manager not verifying
□ Station habit
□ Other: _____
What happened?

Correction Given

□ Standard explained
□ Correct tool shown
□ Employee demonstrated correct portion
□ Recipe reviewed
□ Plate guide reviewed
□ Trainer notified
□ Manager observation assigned
□ Retraining assigned
□ Other: _____

Employee Response / Notes:

Follow-Up Needed?
□ Yes
□ No

Follow-Up Action:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

UNDER-PORTIONING GUEST IMPACT REVIEW

Under-portioning happens when employees give the guest less product than the recipe standard requires.
Under-portioning may seem like it protects food cost, but it can hurt the restaurant in other ways.
A guest may feel the plate looks weak.
A guest may feel the value is not fair.
A guest may complain.
A guest may not return.
A server may lose trust with the kitchen.
A manager may need to comp, remake, discount, or apologize.
The restaurant may save a small amount of product and lose a much larger amount in guest satisfaction.

Food cost control should never mean shorting the guest.
The correct portion is the standard.
Not more.
Not less.
Correct.
Under-portioning can happen for several reasons.
An employee may not know the portion standard.
A portion tool may be missing.
A cook may be trying to stretch product because the station is low.
A prep employee may have produced too little.
A manager may have ordered too little.
A cook may be rushing.
A server may request extra after seeing a weak plate.
A guest may compare the plate to a previous visit.
Under-portioning can be just as damaging as over-portioning because it creates inconsistency.
If a guest receives a strong portion one visit and a weak portion the next visit, the guest may lose confidence in the restaurant.
Consistency is part of value.
A restaurant should protect food cost by reducing waste, improving ordering, controlling prep, following recipes, and using correct portion tools.
It should not protect food cost by serving less than the standard.
Managers should review under-portioning carefully.

They should ask:

Was the recipe standard clear?
Was the correct portion tool available?
Was the employee trained?
Was the product low?
Was the station trying to stretch product?
Was the guest complaint connected to plate value?
Was the plate presentation affected?
Was the menu item built correctly?
Did the manager verify the issue?
If under-portioning is happening because product is low, the manager should review ordering and prep planning.
If under-portioning is happening because employees are guessing, the manager should retrain portion standards.
If under-portioning is happening because the recipe standard is unclear, the manager should update the recipe.
If under-portioning is happening because employees are trying to reduce food cost the wrong way, the manager should explain that correct portions protect both guest trust and profit.
The goal is a consistent plate every time.

Under-Portioning Guest Impact Review Form

Date: _____
Manager Name: _____
Restaurant / Location: _____

Station:

□ Grill
□ Fry
□ Sauté
□ Salad
□ Pizza
□ Prep
□ Bar
□ Dessert
□ Server station
□ Expo
□ Other: _____

Product or Menu Item Reviewed:

Correct Portion Standard:

Actual Portion Observed:

Was guest experience affected?
□ Yes
□ No
□ Not sure

If yes, explain:

Was there a guest complaint?
□ Yes
□ No

Complaint details:

Was a remake, comp, void, refund, or discount needed?
□ Remake
□ Comp
□ Void
□ Refund
□ Discount
□ No
□ Not sure

Details:

Portion Tool Required:
□ Scale
□ Scoop
□ Ladle

□ Spoodle
□ Measuring cup
□ Portion cup
□ Jigger
□ Bottle pourer
□ Counted pieces
□ Cut guide
□ Other: _____
Was the correct portion tool available?
□ Yes
□ No
□ Not sure
Was the employee using the correct tool?
□ Yes
□ No
□ Sometimes
□ Not observed

Possible Cause

□ Employee did not know standard
□ Employee forgot standard
□ Recipe unclear
□ Portion tool missing
□ Product was running low
□ Prep amount was too low
□ Order amount was too low
□ Employee tried to stretch product
□ Plate guide missing
□ Trainer taught wrong portion
□ Rush pressure
□ Manager did not verify
□ Other: _____
What happened?

Correction Given

□ Standard explained
□ Correct tool shown
□ Recipe reviewed
□ Plate guide reviewed
□ Prep level reviewed
□ Ordering reviewed
□ Employee demonstrated correct portion
□ Manager observation assigned
□ Retraining assigned
□ Other: _____
Follow-Up Needed?
□ Yes
□ No

Follow-Up Action:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

PORTION TRAINING SIGN-OFF

Portion control must be trained before it can be enforced.
A manager should not hold an employee accountable for a portion standard that was never explained, demonstrated, practiced, and verified.
A portion training sign-off gives the restaurant documentation that the employee was trained on the correct standard.
It also helps the employee understand that portion control matters.
Training should include more than telling the employee the portion.
The trainer should explain why the portion matters.
The trainer should show the correct tool.
The trainer should demonstrate the portion.
The employee should practice the portion.
The trainer should correct mistakes.
The employee should repeat the portion correctly.
The manager or trainer should observe the portion during real shift conditions.
Only then should the employee be signed off.
Portion training should focus especially on high-cost items, high-volume items, and items that are frequently made incorrectly.

Examples include:

Steaks
Seafood
Chicken
Cheese
Pizza toppings
Pasta portions
Fries
Sauces
Dressings
Desserts
Bar pours
Premium sides
Salad toppings
To-go sauces
Specialty ingredients
A portion training sign-off protects the employee and the restaurant.
It helps the employee know exactly what is expected.
It helps the manager coach fairly.
It helps the restaurant prove that the standard was trained.
It also helps identify who needs retraining when portion problems repeat.
Managers should not treat sign-off as a formality.
A signature should mean the employee can perform the portion correctly.
If the employee is not ready, the manager should write down what needs more practice and schedule follow-up.
Training is not complete until the employee can do the task correctly during real restaurant conditions.
Portion control should be reviewed again if the recipe changes, the tool changes, the menu item changes, the employee transfers stations, or portion mistakes begin repeating.
A strong portion training system reduces guessing.
Less guessing means better consistency.

Portion Training Sign-Off Form

Employee Name: _____
Position: _____
Station: _____
Trainer Name: _____
Manager Name: _____
Training Date: _____
Restaurant / Location: _____

Product or Menu Item Trained:

Portion Standard Trained:

Portion Tool Required:

□ Scale
□ Scoop
□ Ladle
□ Spoodle
□ Measuring cup
□ Portion cup
□ Jigger
□ Bottle pourer
□ Counted pieces
□ Cut guide
□ Plate guide
□ Recipe card
□ Other: _____

Training Steps Completed

□ Portion standard was explained.
□ Reason for portion control was explained.
□ Recipe or menu item was reviewed.
□ Correct portion tool was shown.
□ Trainer demonstrated the portion.
□ Employee practiced the portion.
□ Employee received correction if needed.
□ Employee repeated the portion correctly.
□ Employee performed the portion during real shift conditions.
□ High-cost ingredients were explained if applicable.
□ Guest consistency was explained.
□ Food cost impact was explained.
□ Manager or trainer verified performance.

Employee Performance Review

Accuracy:

□ Not acceptable
□ Needs practice
□ Acceptable
□ Strong

Tool use:
□ Not acceptable
□ Needs practice
□ Acceptable
□ Strong

Consistency:
□ Not consistent
□ Improving
□ Consistent
□ Very consistent

Speed during service:
□ Too slow
□ Needs improvement
□ Acceptable
□ Strong

Training Decision
□ Introduced only
□ Practiced with support
□ Needs more practice
□ Ready for portion sign-off
□ Retraining required
What did the employee do well?

What still needs improvement?

Follow-Up Required?
□ Yes
□ No

Follow-Up Action:

Follow-Up Date: _____

Employee Acknowledgment
I understand the portion standard for this product or menu item. I understand that correct portioning protects guest consistency, food cost, recipe standards, and restaurant accountability.
Employee Signature: _____
Trainer Signature: _____
Manager Signature: _____

PORTION AUDIT FORM
A portion audit helps managers verify that employees are following portion standards during real restaurant conditions.
Training is important.
Sign-off is important.
But managers still need to observe the standard during service.

A portion can look correct during training and drift during busy shifts.
Employees may start guessing.
Tools may go missing.
Recipes may be ignored.
High-cost ingredients may be used too heavily.
Portions may change depending on who is working.
A portion audit gives managers a way to check the standard before food cost problems grow.
A portion audit should be simple and practical.
The manager should choose a product, menu item, station, or employee to observe.
The manager should compare the actual portion to the written standard.
The manager should confirm that the correct portion tool is being used.
The manager should document whether the portion is accurate, too heavy, too light, inconsistent, or unclear.
The manager should correct mistakes immediately when needed.

Portion audits are especially useful for:

High-cost ingredients
High-volume menu items
New employees
Employees with repeated portion issues
Stations with high waste
Menu items with inconsistent presentation
Bar pours
Dessert portions
Sauces and dressings
Pizza or salad toppings
Protein portions
A portion audit should not be used only when food cost is bad.
It should be part of the manager's routine.
When employees know portion standards are reviewed regularly, they are more likely to follow them.
The tone matters.
Managers should present portion audits as standard protection, not punishment.

A manager can say:

"We are checking portions today to protect consistency."
"We need every plate to match the recipe."
"This tool must be used every time."
"This portion is too heavy and needs correction."
"This portion is too light and could affect guest value."
"Let's reset the standard now."
The best portion audits lead to immediate improvement.
If the issue is small, coach in the moment.
If the issue repeats, document retraining.
If the standard is unclear, fix the recipe.
If tools are missing, replace them.
If the station is repeatedly off-standard, assign manager follow-up.
Portion audits protect profit without lowering quality.
They help the restaurant serve the right portion every time.

Portion Audit Form

Audit Date: _____
Manager Completing Audit: _____
Restaurant / Location: _____

Shift:

□ Opening
□ Lunch
□ Dinner
□ Closing
□ Event
□ Other: _____

Station Audited:

□ Grill
□ Fry

□ Sauté
□ Salad
□ Pizza
□ Prep
□ Bar
□ Dessert
□ Server station
□ Expo
□ Other: _____

Employee Observed: _____

Product or Menu Item Audited:

Written Portion Standard:

Actual Portion Observed:

Portion Tool Required:

□ Scale
□ Scoop
□ Ladle
□ Spoodle
□ Measuring cup
□ Portion cup
□ Jigger
□ Bottle pourer
□ Counted pieces
□ Cut guide
□ Plate guide
□ Recipe card
□ Other: _____

Was the correct tool available?
□ Yes
□ No
□ Not sure

Was the correct tool used?
□ Yes
□ No
□ Sometimes
□ Not observed

Audit Result

□ Portion was correct
□ Portion was too heavy

□ Portion was too light
□ Portion was inconsistent
□ Portion standard was unclear
□ Portion tool was missing
□ Employee needs retraining
□ Recipe needs review
□ Manager follow-up needed

Food Cost Risk

□ Low
□ Medium
□ High
□ Not sure

Guest Experience Risk

□ Low
□ Medium
□ High
□ Not sure

Correction Given During Audit?

□ Yes
□ No
□ Not needed

Correction Notes:

Employee Response / Questions:

Follow-Up Needed

□ No follow-up needed
□ Employee coaching
□ Portion retraining
□ Recipe update
□ Tool replacement
□ Tool labeling
□ Plate guide needed
□ Manager re-audit
□ Station review
□ Other: _____

Follow-Up Action:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

Part 5 Review: Portion Control System Checkpoint

Date: _____
Manager Name: _____
Restaurant / Location: _____
Department / Station: _____

Use this page before moving into prep planning and production control.

Are portion standards clearly written for major menu items?

□ Yes
□ No
□ Some items

Notes:

Are portion tools available at each station?

□ Yes
□ No
□ Some stations

Notes:

Are high-cost ingredients being portioned carefully?

□ Yes
□ No
□ Sometimes

Notes:

Are employees trained on portion standards before sign-off?

□ Yes
□ No
□ Sometimes

Notes:

Are managers auditing portions during real shifts?

□ Yes
□ No
□ Sometimes

Notes:

Is over-portioning happening?
□ Yes
□ No
□ Not sure

Products or stations involved:

Is under-portioning happening?
□ Yes
□ No
□ Not sure

Products or stations involved:

What product creates the biggest portion control risk?

What station needs portion control follow-up first?

What portion tool, recipe card, or plate guide needs to be added?

Portion Control System Status:
□ Strong and consistent
□ Working but needs improvement
□ Inconsistent
□ Not controlled enough
□ Needs employee retraining
□ Needs manager audits

First Portion Control Improvement:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

PART 6

PREP PLANNING AND PRODUCTION CONTROL

Purpose of This Section

Prep planning affects food cost before the shift begins.
When prep is planned well, the restaurant has enough product to serve guests without creating unnecessary waste.
When prep is planned poorly, the restaurant either runs out or throws product away.
Both problems hurt the business.
Under-prepping creates stress during service.
The kitchen may fall behind.
Employees may rush.
Ticket times may increase.
Guests may wait longer.
Menu items may become unavailable.
Managers may need emergency prep during peak hours.
Over-prepping creates waste.
Product may expire.
Storage may become crowded.
Older product may get hidden.
Employees may use newer product before older product.
Managers may order less accurately because too much prepared product is sitting in the walk-in.
Prep planning should be based on facts.
A prep list should not be created only from habit.

Managers and prep leads should consider:

Current inventory
Current prepared product
Sales forecast
Par levels
Upcoming reservations
Events
Weather
Holidays
Product shelf life
Waste patterns
Previous shortages
Previous overproduction
Staffing levels
Station needs
Menu specials
Prep planning is not just a kitchen task.
It is a manager control system.

A strong prep plan helps the restaurant know:

What needs to be prepped
How much should be prepped
Who is responsible
When it should be completed
What product should be used first
What batch size should be made
What should not be prepped yet
What should be watched during the shift
What needs manager approval
Prep production should be tracked because it connects directly to waste.
If a product is made but not sold, the manager should know why.
If a product runs out, the manager should know why.
If a product is prepped every day but often thrown away, the par level or batch size may need adjustment.
If a product is always low, prep planning may need adjustment.
Prep planning protects the shift.
Production control protects the profit.
The purpose of this section is to help managers build a clear prep system that supports both service and food cost control.

PREP LIST BUILDER

A prep list should tell the team what needs to be prepared before service.
It should also help prevent overproduction.
A weak prep list is vague.

It may say:

Prep sauces.
Cut vegetables.
Make backups.
Stock the line.
That does not give employees enough direction.
A strong prep list is specific.

It tells employees:

What product to prep
How much to prep
What batch size to make
What recipe to use
What product to use first
What station needs the product
What time it is needed
Who is responsible
Who verifies completion
A prep list should be built from current need, not guesswork.
Before creating the prep list, managers or prep leads should review:
What is already prepped
What product is close to expiration
What sold yesterday
What is expected to sell today
What products were wasted recently
What ran out recently
What menu specials are active
What reservations or events are coming
What staffing level is available
What storage space is available
The prep list should help employees avoid two common mistakes:
Making product that is already available.
Making more product than the restaurant can use before it expires.
The prep list should also protect food safety.
Employees should know which products must be labeled, dated, cooled, covered, stored, rotated, or used first.
If a prep item has a short shelf life, the prep amount should be controlled carefully.
If a prep item is high cost, the prep amount should be reviewed by a manager.
If a prep item is used slowly, the batch size should be smaller.
If a prep item is used quickly, the par level should be realistic.
Managers should review prep lists regularly.
A prep list that never changes may not match the restaurant's real sales.
Prep should adjust with volume, season, menu mix, events, and waste patterns.
A strong prep list is not just a task list.
It is a food cost control tool.

Prep List Builder Worksheet

Date: _____
Manager Name: _____
Prep Lead / Employee: _____
Restaurant / Location: _____

Prep Period:

□ Morning prep
□ Afternoon prep
□ Dinner prep
□ Closing prep
□ Event prep
□ Other: _____

Prep Planning Review

Expected Sales Today: $_____

Expected Volume:

☐ Slow
☐ Normal
☐ Busy
☐ Very busy
☐ Not sure

Forecast Factors:

☐ Reservations
☐ Large party
☐ Event
☐ Holiday
☐ Weather
☐ Special menu item
☐ Promotion
☐ Catering
☐ Staffing concern
☐ Supplier issue
☐ Other: _____

Notes:

Current Prepared Product Reviewed?
☐ Yes
☐ No

Products already prepped:

Products that need to be used first:

Products close to expiration:

Prep List Item 1

Item to Prep: _____
Station / Use: _____
Recipe or SOP Name: _____
Current Amount on Hand: _____
Amount Needed: _____
Amount to Prep: _____

Batch Size:

□ Full batch
□ Half batch
□ Quarter batch
□ Custom: _____

Priority:

□ High
□ Medium
□ Low

Assigned To: _____
Needed By: _____
Manager Approval Needed?
□ Yes
□ No
Completion Initials: _____

Prep List Item 2

Item to Prep: _____
Station / Use: _____
Recipe or SOP Name: _____
Current Amount on Hand: _____
Amount Needed: _____
Amount to Prep: _____

Batch Size:

□ Full batch
□ Half batch
□ Quarter batch
□ Custom: _____

Priority:

□ High
□ Medium
□ Low

Assigned To: _____
Needed By: _____
Manager Approval Needed?
□ Yes
□ No
Completion Initials: _____

Prep List Item 3

Item to Prep: _____
Station / Use: _____
Recipe or SOP Name: _____
Current Amount on Hand: _____
Amount Needed: _____
Amount to Prep: _____

Batch Size:

□ Full batch
□ Half batch
□ Quarter batch
□ Custom: _____

Priority:
□ High
□ Medium
□ Low
Assigned To: _____
Needed By: _____
Manager Approval Needed?
□ Yes
□ No
Completion Initials: _____

Prep List Item 4

Item to Prep: _____
Station / Use: _____
Recipe or SOP Name: _____
Current Amount on Hand: _____
Amount Needed: _____
Amount to Prep: _____

Batch Size:
□ Full batch
□ Half batch
□ Quarter batch
□ Custom: _____

Priority:
□ High
□ Medium
□ Low
Assigned To: _____
Needed By: _____
Manager Approval Needed?
□ Yes
□ No
Completion Initials: _____

Prep Items Not to Make Yet

Products that should not be prepped until later:

Reason:
□ Enough already on hand
□ Sales forecast is low
□ Product has short shelf life
□ Waiting on delivery
□ Needs manager approval
□ Storage space limited
□ Previous waste concern
□ Other: _____

Manager Review

□ Prep list reviewed before work began.
□ Current prepped product was checked.
□ Products close to expiration were reviewed.
□ Par levels were considered.
□ Sales forecast was considered.
□ Waste patterns were considered.

□ High-cost prep items were reviewed.
□ Short-shelf-life items were controlled.
□ Prep responsibilities were assigned.
□ Completion will be verified.

Manager Notes:

Prep List Approved By: _____
Manager Signature: _____

DAILY PREP PLAN

A daily prep plan turns the prep list into a shift plan.
The prep list shows what needs to be made.
The daily prep plan helps managers decide when it should be made, who should make it, what should be made first, and what must be verified before service.
Prep planning should happen before the restaurant is under pressure.
During a rush, it is harder to make good decisions.
Employees may prep too much because they are nervous.
Employees may prep too little because they are rushed.
Employees may skip labels, dates, cooling steps, recipe standards, or storage steps.
Managers may miss problems because service has already started.
A daily prep plan helps prevent that.

A strong daily prep plan should include:

Expected sales
Expected guest volume
Reservations or events
Products already prepped
Products close to expiration
Products that need to be used first
Products that should not be prepped yet
Prep priorities
Assigned employees
Completion deadlines
Manager verification
Follow-up notes
The plan should also separate high-priority prep from low-priority prep.
Not every prep item has the same urgency.
Some items must be ready before service begins.
Some items can wait until later.
Some items should only be made if sales volume increases.
Some items should be held until a manager approves them.
This matters because unnecessary prep creates waste.
The daily prep plan should also protect products with short shelf life.
If an item spoils quickly, managers should avoid making too much at once.
If an item is expensive, managers should review the amount before production begins.
If an item was wasted yesterday, managers should adjust the plan today.
A daily prep plan should not be created once and ignored.
Managers should check progress during the day.
If sales are higher than expected, prep may need to increase.
If sales are lower than expected, prep may need to slow down.
If a product is running low, the manager should decide whether to prep more or adjust ordering.
If a product is sitting unused, the manager should reduce production or push usage before expiration.
Good prep planning is active.
It changes based on the shift.
The goal is to have enough product ready without creating avoidable waste.

Daily Prep Plan

Date: _____
Manager Name: _____
Prep Lead / Employee: _____
Restaurant / Location: _____

Shift / Prep Period:

□ Morning prep
□ Lunch prep
□ Dinner prep
□ Event prep
□ Closing prep
□ Other: _____

Daily Forecast

Expected Sales Today: $_____

Expected Volume:

□ Slow
□ Normal
□ Busy
□ Very busy
□ Not sure

Forecast Notes:

Reservations / Large Parties / Events:

Weather / Local Event / Holiday Concerns:

Products to Use First

Product 1: _____

Reason:

□ Close to expiration
□ Already open
□ Older product
□ Previous overproduction
□ Needs rotation
□ Other: _____

Product 2: _____

Reason:

□ Close to expiration
□ Already open
□ Older product

□ Previous overproduction
□ Needs rotation
□ Other: _____
Product 3: _____

Reason:
□ Close to expiration
□ Already open
□ Older product
□ Previous overproduction
□ Needs rotation
□ Other: _____

Daily Prep Priorities

Priority 1:
Item: _____
Amount to Prep: _____
Assigned To: _____
Needed By: _____
Manager Verification Required?
□ Yes
□ No
Completion Initials: _____

Priority 2:
Item: _____
Amount to Prep: _____
Assigned To: _____
Needed By: _____
Manager Verification Required?
□ Yes
□ No
Completion Initials: _____

Priority 3:
Item: _____
Amount to Prep: _____
Assigned To: _____
Needed By: _____
Manager Verification Required?
□ Yes
□ No
Completion Initials: _____

Priority 4:
Item: _____
Amount to Prep: _____
Assigned To: _____
Needed By: _____
Manager Verification Required?
□ Yes
□ No
Completion Initials: _____

Prep Items to Delay

Do not prep these items until manager approval:

Reason: _____

Reason: _____

Reason: _____

Mid-Shift Prep Review

Time Reviewed: _____

Manager Reviewing: _____

Are prep levels still correct?

□ Yes
□ No
□ Not sure

If no, what changed?

□ Sales higher than expected
□ Sales lower than expected
□ Product moving faster than expected
□ Product moving slower than expected
□ Large party added
□ Staff shortage
□ Product quality issue
□ Station running low
□ Too much product prepped
□ Other: _____

Adjustment Needed:

□ Prep more
□ Stop prepping item
□ Reduce batch size
□ Use older product first
□ Move product to priority use
□ Manager approval before more prep
□ Other: _____

Notes:

End-of-Day Prep Review

What prep items were completed correctly?

What prep items were overproduced?

What prep items ran out?

What prep items should be adjusted tomorrow?

Manager Notes:

Manager Signature: _____

PREP PAR LEVEL REVIEW

Prep par levels help managers decide how much prepared product should normally be available.
A prep par is different from an inventory par.
Inventory par focuses on raw product or purchased product.
Prep par focuses on finished or partially prepared product.
For example, a restaurant may have inventory pars for cases of lettuce, tomatoes, cheese, sauce ingredients, chicken, or dough.
The prep par may be the number of pans, containers, portions, bags, bottles, or batches that should be ready for service.
Prep par levels are important because they help managers balance readiness and waste.
If prep par levels are too high, product may expire before use.
If prep par levels are too low, the restaurant may run out during service.
Prep par levels should be based on real sales and usage.
A manager should not set prep pars only by habit.

The restaurant should review:

Average daily usage
Peak day usage
Slow day usage
Shelf life
Batch size
Storage space
Prep time
Sales forecast
Waste history
Shortage history
Menu popularity
Station needs
Prep par levels should change when business changes.
A Friday night prep par may be different from a Tuesday lunch prep par.
A summer patio season prep par may be different from a slow winter prep par.
A holiday weekend prep par may need temporary adjustment.
A special menu item may need its own prep par.
A product with frequent waste should have its prep par reviewed.
A product that runs out often should also have its prep par reviewed.

The goal is not to keep the walk-in full of prepared product.
The goal is to keep the restaurant ready with the right amount of product.

A good prep par tells employees:

How much should be ready before service.
How much backup should exist.
When to make more.
When to stop.
When to ask a manager.
Prep pars should be written clearly.
If the prep par says “enough,” the standard is weak.
If the prep par says “two full pans,” “one half batch,” “six quart containers,” or “twenty-four portions,” the standard is clearer.
Prep par levels should be reviewed weekly until they are accurate.
If waste is high, reduce or adjust.
If shortages repeat, increase or adjust.
If sales change, review again.
Prep par levels are not perfect numbers.
They are working targets that help managers control production.

Prep Par Level Review Form

Date: _____
Manager Name: _____
Prep Lead / Employee: _____
Restaurant / Location: _____
Prep Item Reviewed: _____
Station / Use: _____
Recipe or SOP Name: _____

Product Category:

□ Protein
□ Seafood
□ Produce
□ Sauce / dressing
□ Dairy
□ Dessert
□ Bread product
□ Bar item
□ Prepared item
□ Other: _____

Current Prep Par Level: _____
Current Batch Size: _____
Shelf Life: _____
Storage Area: _____

Unit of Measure:

□ Pan
□ Quart
□ Pint
□ Portion
□ Bag
□ Bottle
□ Container
□ Batch
□ Each
□ Other: _____

Usage Review

Average Daily Usage: _____
Peak Day Usage: _____
Slow Day Usage: _____
Average Weekly Usage: _____
Highest Weekly Usage: _____
Lowest Weekly Usage: _____

Waste and Shortage Review

Was this item wasted recently?
□ Yes
□ No
□ Not sure

Waste notes:

Did this item expire or spoil recently?
□ Yes
□ No
□ Not sure

Spoilage notes:

Did this item run out recently?
□ Yes
□ No
□ Not sure

Shortage notes:

Was this item overproduced recently?
□ Yes
□ No
□ Not sure

Notes:

Was this item underproduced recently?
□ Yes
□ No
□ Not sure

Notes:

Prep Par Decision

Prep par should be:
□ Increased
□ Decreased
□ Kept the same
□ Changed by day of week
□ Changed by sales volume
□ Changed for events only
□ Reviewed again after one week
□ Reviewed again after one month

Recommended New Prep Par:
Slow Day: _____
Normal Day: _____
Busy Day: _____
Event / Holiday: _____

Reason for Change:

Manager Follow-Up Needed:
□ Yes
□ No

Follow-Up Action:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

PRODUCTION AND USAGE TRACKER

A production and usage tracker helps managers compare what was made to what was actually used.
This is one of the best ways to find overproduction, underproduction, waste, and prep planning mistakes.
A restaurant may believe its prep levels are correct, but the usage tracker may show something different.
If the restaurant makes four pans of a product and only uses one, the prep level may be too high.
If the restaurant makes two pans and runs out every Friday, the prep level may be too low.
If the restaurant makes product daily but throws away leftovers twice a week, the batch size may be wrong.
If the restaurant makes product in the morning and runs out by dinner, production timing may need to change.
Production tracking helps managers make better decisions because it connects prep to actual use.

It answers:
What did we make?
How much did we make?
When did we make it?

Who made it?
How much did we use?
How much was left?
How much was wasted?
Did we run out?
Did we make too much?
Did we make too little?
Should the prep level change?
This tracker is especially useful for items that create repeated waste or shortages.
Examples include sauces, dressings, soups, sides, desserts, sliced produce, proteins, dough, marinades, bar garnishes, and prepared toppings.
Managers should not track every product forever.
Start with the items causing the biggest problems.
Track them long enough to see the pattern.
Then adjust the par level, batch size, ordering, storage, or training.
Production and usage tracking helps turn opinions into facts.
Instead of saying “we always make too much,” the manager can show the amount made and amount left.
Instead of saying “we keep running out,” the manager can show which days and volumes caused the shortage.
Facts help the team improve.
A strong production system reduces waste and protects service.

Production and Usage Tracker

Date: _____
Manager Name: _____
Prep Lead / Employee: _____
Restaurant / Location: _____

Review Period:

□ Daily
□ Weekly
□ Event
□ Other: _____
Product / Prep Item: _____
Station / Use: _____
Recipe or SOP Name: _____

Unit of Measure:

□ Pan
□ Quart
□ Pint
□ Portion
□ Bag
□ Bottle
□ Container
□ Batch
□ Each
□ Other: _____

Production Entry 1

Time Produced: _____
Amount Produced: _____
Produced By: _____
Manager Approval Required?
□ Yes
□ No
Manager Initials: _____
Amount Used During Shift / Day: _____
Amount Left Over: _____
Amount Wasted: _____

Reason for Waste if Any:

□ Overproduction
□ Spoilage

□ Expired
□ Poor quality
□ Wrong recipe
□ Held too long
□ Not labeled
□ Not used
□ Other: _____
Did product run out?
□ Yes
□ No
If yes, time product ran out: _____

Production Entry 2

Time Produced: _____
Amount Produced: _____
Produced By: _____
Manager Approval Required?
□ Yes
□ No
Manager Initials: _____
Amount Used During Shift / Day: _____
Amount Left Over: _____
Amount Wasted: _____

Reason for Waste if Any:

□ Overproduction
□ Spoilage
□ Expired
□ Poor quality
□ Wrong recipe
□ Held too long
□ Not labeled
□ Not used
□ Other: _____
Did product run out?
□ Yes
□ No
If yes, time product ran out: _____

Production Review

Was the correct amount produced?
□ Yes
□ No
□ Not sure

Explain:

Was product overproduced?
□ Yes
□ No
□ Not sure

Amount overproduced:

Was product underproduced?
□ Yes
□ No
□ Not sure

Amount short:

Was any product wasted?
□ Yes
□ No

Waste notes:

Was the batch size correct?
□ Yes
□ No
□ Needs review

Notes:

Should the prep par level change?
□ Yes
□ No
□ Not sure

Recommended change:

Should production timing change?
□ Yes
□ No
□ Not sure

Recommended timing:

Manager Decision
□ Keep current production level
□ Reduce amount produced
□ Increase amount produced

□ Change batch size
□ Change production time
□ Review recipe
□ Review sales forecast
□ Review par level
□ Retrain employee
□ Monitor for one more week
□ Other: _____

Action Plan:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

OVERPRODUCTION REVIEW

Overproduction happens when the restaurant makes more product than it can use.
It is one of the most common causes of food waste.
Overproduction can happen in prep, on the cook line, in the bar, during buffet or event service, with sauces, sides, desserts, proteins, produce, soups, garnishes, or any prepared item.
Overproduction often happens because employees want to be prepared.
That intention is understandable.
But preparation without control creates waste.
A restaurant should be ready for service, not overloaded with product.

Overproduction can be caused by:

Prep pars set too high
Sales forecast too high
Batch size too large
Manager not checking existing product
Employee making product from habit
Fear of running out
Poor communication between shifts
Not using older product first
Product made too early
Slow sales
Menu changes
Weather changes
Large party cancellation
Supplier packaging size
Lack of manager approval
Overproduction creates several problems.
Product may expire before it is used.
Storage areas become crowded.
FIFO becomes harder.
Employees may open new product instead of using older product.
Managers may undercount or overcount inventory.
Food cost increases.
Labor is wasted because employees spent time making product the restaurant did not need.
Overproduction should be reviewed without automatically blaming the prep employee.
The employee may have followed the prep list.
The prep list may have been wrong.
The manager may have failed to check product on hand.
The par level may be outdated.
The batch size may not match current sales.
The forecast may have been wrong.
The purpose of an overproduction review is to find the cause and correct it.

Managers should ask:

Was the product already available?
Was the prep amount based on real need?
Was the sales forecast accurate?
Was the batch size too large?
Was the par level too high?
Did the employee ask before making extra?
Did the manager verify the prep plan?
Did the product have a short shelf life?
Could the product have been used in another way?
What should change next time?
Overproduction is preventable when managers review before product is made.

Overproduction Review Form

Date: _____
Manager Name: _____
Prep Lead / Employee: _____
Restaurant / Location: _____
Product Overproduced: _____
Station / Use: _____

Product Category:

□ Protein
□ Seafood
□ Produce
□ Sauce / dressing
□ Dairy
□ Soup
□ Side item
□ Dessert
□ Bread product
□ Bar garnish
□ Prepared item
□ Other: _____

Amount Produced: _____
Amount Used: _____
Amount Left Over: _____
Amount Wasted: _____
Estimated Cost if Known: $_____
Shelf Life: _____

Overproduction Cause Review

Was existing product checked before more was made?
□ Yes
□ No
□ Not sure

Notes:

Was the prep amount listed on the prep plan?
□ Yes
□ No
□ Not sure

Notes:

Was the prep par level too high?
□ Yes
□ No
□ Not sure

Notes:

Was the batch size too large?
□ Yes
□ No
□ Not sure

Notes:

Were sales lower than expected?
□ Yes
□ No
□ Not sure

Notes:

Was product made out of habit?
□ Yes
□ No
□ Not sure

Notes:

Did a manager approve the production amount?
□ Yes
□ No
□ Not required

Notes:

Was product close to expiration before use?
□ Yes
□ No
□ Not sure

Notes:

Primary Cause

□ Prep par too high
□ Batch size too large
□ Sales forecast wrong
□ Employee did not check product on hand
□ Manager did not verify
□ Product made too early
□ Slow sales
□ Event cancelled
□ Communication issue
□ Recipe yield too large
□ Ordering too heavy
□ Other: _____

Corrective Action

□ Reduce prep par
□ Reduce batch size
□ Require manager approval
□ Review sales forecast
□ Review prep list process
□ Use smaller containers
□ Train employee
□ Review FIFO
□ Adjust ordering
□ Monitor product for one week
□ Other: _____

Action Plan:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

UNDERPRODUCTION REVIEW

Underproduction happens when the restaurant does not make enough prepared product to support the shift.
Underproduction can damage guest experience, ticket times, employee confidence, and manager control.
When the restaurant runs out of prepared product during service, employees may have to rush.
Rushed prep can lead to mistakes.
Cooks may fall behind.
Servers may wait longer for food.
Guests may experience slower service.
Managers may need to make decisions under pressure.
Menu items may become unavailable.
Underproduction is not always caused by laziness or poor employee effort.
It may come from a weak prep plan.
It may come from low par levels.
It may come from inaccurate sales forecasting.
It may come from poor communication between shifts.
It may come from ordering too little product.
It may come from product being wasted before service.
It may come from a larger-than-expected rush.
It may come from a special, promotion, holiday, or large party.
It may come from the prep employee not understanding priority.
The manager’s job is to find the cause.
Underproduction should be reviewed because running out of product can create hidden costs.
The restaurant may lose sales if an item is unavailable.

The kitchen may spend extra labor catching up.
Managers may approve substitutions.
Guest trust may weaken.
Employees may become frustrated.
A server may have to explain to a guest that an item is not available.
A cook may have to stop regular production to prep something that should have been ready.
A manager may have to adjust the menu during service.
Underproduction should not automatically lead to making too much product next time.
That is how restaurants swing from shortages to waste.
Instead, managers should review the pattern.
Was this a one-time rush?
Was the prep par too low?
Was the product already low before prep began?
Was the prep list incomplete?
Was the employee assigned enough time?
Was there enough raw product available?
Did the manager check the prep list before service?
Was the item selling more than normal?
Was the item connected to a special, event, or holiday?
Was the product wasted earlier in the day?
Was production delayed?
The correct answer may be to increase prep.
It may also be to adjust timing, improve communication, change par levels by day, review ordering, or assign manager verification.
The goal is not to overcorrect.
The goal is to prepare accurately.

Underproduction Review Form

Date: _____
Manager Name: _____
Prep Lead / Employee: _____
Restaurant / Location: _____

Shift:

□ Lunch
□ Dinner
□ Event
□ Closing
□ Other: _____
Product Underproduced: _____
Station / Use: _____

Product Category:

□ Protein
□ Seafood
□ Produce
□ Sauce / dressing
□ Dairy
□ Soup
□ Side item
□ Dessert
□ Bread product
□ Bar garnish
□ Prepared item
□ Other: _____
Amount Prepared: _____
Amount Needed: _____
Amount Short: _____
Time Product Ran Low: _____
Time Product Ran Out if Applicable: _____

Guest or Service Impact

Did the item run out completely?

□ Yes
□ No
□ Almost
Was a menu item unavailable?
□ Yes
□ No
Was ticket time affected?
□ Yes
□ No
□ Not sure
Was guest experience affected?
□ Yes
□ No
□ Not sure

Explain impact:

Cause Review

Was the prep plan completed before service?
□ Yes
□ No
□ Partially

Notes:

Was the prep par level too low?
□ Yes
□ No
□ Not sure

Notes:

Was sales volume higher than expected?
□ Yes
□ No
□ Not sure

Notes:

Was there enough raw product available to prep more?
□ Yes
□ No
□ Not sure

Notes:

Did the employee understand the priority?
☐ Yes
☐ No
☐ Not sure

Notes:

Was the prep item assigned to someone clearly?
☐ Yes
☐ No
☐ Not sure

Notes:

Did manager verify prep readiness before service?
☐ Yes
☐ No
☐ Not sure

Notes:

Was product wasted before or during service?
☐ Yes
☐ No
☐ Not sure

Notes:

Primary Cause
☐ Prep par too low
☐ Sales forecast too low
☐ Product ordered too lightly
☐ Employee did not complete prep
☐ Prep priority unclear
☐ Manager did not verify
☐ Product wasted earlier
☐ Large party or event
☐ Special sold more than expected
☐ Poor communication
☐ Not enough prep time
☐ Raw product unavailable
☐ Other: _____

Corrective Action

□ Increase prep par
□ Adjust prep par by day of week
□ Adjust prep par for events
□ Increase order amount
□ Improve sales forecast
□ Assign prep earlier
□ Require manager verification
□ Improve shift communication
□ Train employee
□ Monitor product for one week
□ Other: _____

Action Plan:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

PREP COMMUNICATION LOG

Prep communication affects the entire restaurant.
The prep team, cook line, managers, servers, bar, and dish area all depend on accurate communication.
When prep communication is weak, problems spread quickly.
A product may be low, but no one tells the manager.
A prep item may be finished, but the cook line does not know where it is stored.
A product may be close to expiration, but no one identifies it as use-first.
A prep employee may need more product, but the order has already been placed.
A cook may assume backup product exists when it does not.
A manager may think prep is complete when several items are unfinished.
A closing manager may not tell the opening manager what needs attention.
Prep communication is not just talking.
It is a system.

A strong prep communication system tells the team:

What was completed
What was not completed
What is running low
What product must be used first
What product should not be prepped again
What product has quality concerns
What product needs ordering
What product needs manager approval
What product needs follow-up tomorrow
What station needs support
Prep communication should happen before service, during service, and after service.
Before service, managers should confirm readiness.
During service, employees should communicate shortages, waste, quality issues, and production needs.
After service, managers should review what was overproduced, what ran out, and what should change tomorrow.
The prep communication log helps managers prevent repeated mistakes.
If the same issue appears often, the restaurant can fix the system.

For example:

If the line keeps running out of sauce, prep par may be too low.
If the prep team keeps making product already available, storage visibility may be weak.
If product is repeatedly close to expiration, ordering or batch size may need review.
If managers are surprised by shortages, communication between shifts may be weak.
If cooks do not know what needs to be used first, labeling and handoff need improvement.
Good prep communication reduces waste and protects service.

A restaurant should not depend on memory alone.
Important prep information should be written down.

Prep Communication Log

Date: _____
Manager Name: _____
Prep Lead / Employee: _____
Restaurant / Location: _____

Shift:

☐ Opening
☐ Lunch
☐ Dinner
☐ Closing
☐ Shift handoff
☐ Other: _____

Prep Status Summary

Items Completed:

Items Not Completed:

Reason Items Were Not Completed:

☐ Not enough product
☐ Not enough time
☐ Employee reassigned
☐ Equipment issue
☐ Manager changed priority
☐ Waiting on delivery
☐ Recipe unclear
☐ Not needed based on sales
☐ Other: _____

Notes:

Products Running Low

Product 1: _____
Amount Remaining: _____

Action Needed:

☐ Prep more
☐ Order more
☐ Watch during shift
☐ Use substitute if approved

□ Manager approval needed
□ Other: _____

Product 2: _____

Amount Remaining: _____

Action Needed:

□ Prep more
□ Order more
□ Watch during shift
□ Use substitute if approved
□ Manager approval needed
□ Other: _____

Products to Use First

Product 1: _____

Reason:

□ Older product
□ Close to expiration
□ Already open
□ Previous overproduction
□ Quality concern
□ Other: _____

Product 2: _____

Reason:

□ Older product
□ Close to expiration
□ Already open
□ Previous overproduction
□ Quality concern
□ Other: _____

Products Not to Prep Again Yet

Product 1: _____

Reason:

□ Enough on hand
□ Slow sales
□ Short shelf life
□ Manager review needed
□ Waste concern
□ Other: _____

Product 2: _____

Reason:

□ Enough on hand
□ Slow sales
□ Short shelf life
□ Manager review needed
□ Waste concern
□ Other: _____

Quality or Storage Concerns

Product concern:

Action needed:

Ordering Concerns from Prep

Products that may need ordering:

Products that should not be ordered heavily:

Shift Handoff Notes

What does the next manager or prep employee need to know?

What should be checked first tomorrow?

Follow-Up Needed

□ Prep par review
□ Ordering review
□ Waste review
□ Storage review
□ Labeling review
□ Recipe review
□ Employee training
□ Manager verification
□ Other: _____

Action Plan:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

PREP COMPLETION SIGN-OFF

Prep completion should be verified.
A prep list is only useful if managers confirm that the right items were completed, in the right amount, using the right recipe, with the correct labels, dates, storage, and food safety standards.
Without sign-off, managers may assume prep is ready when it is not.
The cook line may discover problems during service.
A product may be missing.
A batch may be too small.
A batch may be too large.
A sauce may be made incorrectly.
A product may be unlabeled.
A container may be stored in the wrong area.
A high-cost item may be over-prepped.
A product may be close to expiration and not identified.
Prep completion sign-off creates accountability.
It shows who completed the prep.
It shows who verified it.
It gives managers a place to document concerns.
It also protects the employee because expectations are clearer.
Prep sign-off should not be used only as a checklist.
It should be an inspection.

The manager or prep lead should review:

Was the item completed?
Was the correct amount made?
Was the correct recipe followed?
Was the correct portion standard used?
Was the product labeled?
Was the product dated?
Was the product stored properly?
Was FIFO followed?
Was waste recorded?
Were shortages communicated?
Were quality problems reported?
Does the item support the next shift?
If the answer is no, the manager should correct the issue before service begins whenever possible.
Prep completion sign-off is especially important for high-cost items, short-shelf-life items, items used during rush periods, and products that have had repeated waste or shortage problems.
A strong prep completion system helps managers avoid surprises.
The restaurant should know what is ready before the shift begins.

Prep Completion Sign-Off Form

Date: _____
Manager Name: _____
Prep Lead / Employee: _____
Restaurant / Location: _____

Prep Period:

□ Morning prep
□ Afternoon prep
□ Dinner prep
□ Closing prep
□ Event prep
□ Other: _____

Prep Item 1

Item Prepared: _____
Recipe or SOP Used: _____
Amount Required: _____
Amount Completed: _____
Completed By: _____
Completion Time: _____
Manager Verified?
□ Yes
□ No
Label and Date Correct?
□ Yes
□ No
□ Not applicable
Stored Correctly?
□ Yes
□ No

Follow-Up Needed:

Prep Item 2

Item Prepared: _____
Recipe or SOP Used: _____
Amount Required: _____
Amount Completed: _____
Completed By: _____
Completion Time: _____
Manager Verified?
□ Yes
□ No
Label and Date Correct?
□ Yes
□ No
□ Not applicable
Stored Correctly?
□ Yes
□ No

Follow-Up Needed:

Prep Item 3

Item Prepared: _____
Recipe or SOP Used: _____
Amount Required: _____
Amount Completed: _____
Completed By: _____
Completion Time: _____
Manager Verified?
□ Yes
□ No
Label and Date Correct?

□ Yes
□ No
□ Not applicable
Stored Correctly?
□ Yes
□ No

Follow-Up Needed:

Prep Item 4

Item Prepared: _____
Recipe or SOP Used: _____
Amount Required: _____
Amount Completed: _____
Completed By: _____
Completion Time: _____
Manager Verified?
□ Yes
□ No
Label and Date Correct?
□ Yes
□ No
□ Not applicable
Stored Correctly?
□ Yes
□ No

Follow-Up Needed:

Final Prep Readiness Review

□ Required prep was completed.
□ High-priority prep was completed first.
□ High-cost prep items were reviewed.
□ Short-shelf-life items were controlled.
□ Older product was used first.
□ Labels were checked.
□ Dates were checked.
□ Storage was checked.
□ Waste was recorded.
□ Shortages were communicated.
□ Products not completed were communicated.
□ Next-shift notes were written.

Items Still Not Ready:

Reason Not Ready:

□ Product unavailable
□ Not enough time
□ Employee reassigned

□ Waiting on delivery
□ Equipment issue
□ Manager changed priority
□ Not needed based on sales
□ Other: _____

Action Needed Before Service:

Action Needed for Next Shift:

Prep Completion Decision

□ Prep is ready for service
□ Prep is mostly ready with minor follow-up
□ Prep is not ready
□ Manager review required before service
□ Next shift must complete remaining items

Prep Employee Signature: _____
Prep Lead Signature if Applicable: _____
Manager Signature: _____

Part 6 Review: Prep Planning and Production Control Checkpoint

Date: _____
Manager Name: _____
Restaurant / Location: _____
Department / Station: _____

Use this page before moving into storage, rotation, and labeling.

Is the prep list specific enough for employees to follow?

□ Yes
□ No
□ Needs improvement

Notes:

Is there a daily prep plan before production begins?

□ Yes
□ No
□ Sometimes

Notes:

Are prep par levels written clearly?

□ Yes
□ No
□ Some items

Notes:

Are production amounts being compared to actual usage?

□ Yes
□ No
□ Sometimes

Notes:

Is overproduction being reviewed?

□ Yes
□ No
□ Sometimes

Notes:

Is underproduction being reviewed?
□ Yes
□ No
□ Sometimes

Notes:

Is prep communication strong between shifts?
□ Yes
□ No
□ Needs improvement

Notes:

Is prep completion verified before service?
□ Yes
□ No
□ Sometimes

Notes:

What prep item creates the most waste right now?

What prep item runs out too often?

What prep par level needs review first?

What prep communication problem needs correction?

Prep Planning System Status:

□ Strong and consistent
□ Working but needs improvement
□ Inconsistent
□ Not controlled enough
□ Needs employee retraining
□ Needs manager verification

First Prep Planning Improvement:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

PART 7

STORAGE, ROTATION, AND LABELING

Purpose of This Section

Storage, rotation, and labeling protect food cost before product is ever cooked or served.
A restaurant can order the right product, prep the right amount, and train correct portions, but still lose money if product is stored poorly.
Poor storage creates waste.
Poor rotation creates expired product.
Poor labeling creates confusion.
Poor dating creates food safety risk.
Poor organization creates inaccurate inventory.
Poor visibility creates over-ordering.
Poor follow-up creates repeated loss.
Storage is not just where product sits.
Storage is part of the food cost control system.
A strong storage system helps employees know where product belongs, what should be used first, what is ready for service, what should not be used, what needs manager review, and what must be reordered.
A weak storage system forces employees to guess.
They may open new product before older product.
They may miss product during inventory.
They may leave product uncovered.
They may put raw product in the wrong place.
They may forget when something was prepped.
They may throw away product that could have been used earlier.
They may serve product that should have been reviewed by a manager.
This section helps managers review the most important storage control areas:
Storage standards
Walk-in cooler organization
Walk-in freezer organization
Dry storage organization
FIFO rotation
Labeling and dating
Product quality
Storage problem correction
The goal is simple.
Every product should have a place.
Every open product should have a clear label when needed.
Every prepared product should have a date.
Older product should be used first.
Questionable product should be reviewed.
Expired product should not be counted as usable inventory.
Managers should inspect storage areas regularly.
Employees should be trained on storage expectations.
Food cost control depends on product being protected after it enters the building.
Strong storage protects quality, safety, inventory accuracy, and profit.

STORAGE AREA STANDARDS

Storage standards explain how product should be organized, protected, labeled, rotated, and inspected.
Without storage standards, each employee may put product away differently.
That creates confusion.
One employee may place new product in front of old product.
Another may leave open product uncovered.
Another may put prep in the wrong location.
Another may store product without a label.
Another may place heavy items unsafely.
Another may store food too close to chemicals.
Storage standards should be simple, visible, and enforced.

The restaurant should decide:

Where each product category belongs
How product should be labeled

How product should be dated
How FIFO should be followed
Where raw product belongs
Where ready-to-eat product belongs
Where chemicals belong
Where damaged product should go
Where product waiting for manager review should be placed
How open product should be covered or sealed
How deliveries should be put away
How storage areas should be cleaned
Who checks the area

Strong storage standards help prevent several food cost problems:

Over-ordering
Expired product
Spoilage
Hidden inventory
Duplicate product opening
Untracked waste
Poor product quality
Inventory count mistakes
Unsafe food handling
Health inspection problems
Managers should inspect storage areas often.
The inspection should not only look for cleanliness.
It should also look for food cost risk.
A clean walk-in can still have poor rotation.
A neat dry storage area can still have products counted in the wrong unit.
A freezer can look full but contain slow-moving product that should not be reordered.
A bar storage area can look stocked but hide over-ordering or poor bottle control.
Storage standards should be trained during onboarding, position training, prep training, and manager training.
Employees should know that putting product away correctly is part of controlling food cost.
A product is not fully received until it is stored correctly.
A prep item is not complete until it is labeled, dated, and stored correctly.
A manager is not finished reviewing inventory until storage concerns are addressed.
Storage discipline protects the restaurant every day.

Storage Area Standards Checklist

Date: _____
Manager Name: _____
Restaurant / Location: _____

Storage Area Reviewed:

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar storage
□ Prep area
□ Cook line backup
□ Paper goods
□ Chemical storage
□ Other: _____

General Storage Standards

□ Product has a clear storage location.
□ Product categories are grouped logically.
□ Older product is stored in front of or above newer product when appropriate.
□ New product is placed behind older product when appropriate.
□ Open product is covered or sealed properly.
□ Prepared product is labeled.
□ Prepared product is dated.
□ Product is stored off the floor according to restaurant standard.
□ Product is not blocking walkways or access.

□ Heavy product is stored safely.
□ Damaged product is separated or reported.
□ Expired product is removed or logged.
□ Questionable product is reported to a manager.
□ Chemicals are separated from food.
□ Raw and ready-to-eat products are separated properly if applicable.
□ Storage area is clean enough for safe operation.
□ Storage area is organized enough for accurate inventory.

Food Cost Control Review

□ Product is easy to count.
□ High-cost product is easy to identify.
□ Slow-moving product is visible.
□ Products close to expiration are visible.
□ Backup product is not hidden.
□ Duplicate open containers are minimized.
□ Product is not being overstocked.
□ Product is not stored in multiple unnecessary locations.
□ Product that needs to be used first is identified.
□ Waste or spoilage concerns are documented.

Problems Found

Storage issue observed:

Product involved:

Food cost risk:

□ Low
□ Medium
□ High
□ Not sure

Corrective Action Needed

□ Reorganize area
□ Add labels
□ Add date stickers
□ Review FIFO
□ Move product
□ Discard and log waste
□ Review ordering
□ Review prep level
□ Train employee
□ Assign manager inspection
□ Other: _____

Action Plan:

Person Responsible: _____
Deadline: _____
Manager Signature: _____

WALK-IN COOLER ORGANIZATION CHECKLIST

The walk-in cooler is one of the most important storage areas in the restaurant.
It holds products that are often expensive, perishable, and used daily.
If the walk-in is disorganized, food cost problems can happen quickly.
Product can expire.
Product can get hidden.
Employees may open new cases before using older product.
Prepared food may be stored without labels or dates.
Raw product may be stored incorrectly.
Managers may miss product during inventory.
Prep employees may make more product even though backup already exists.
The walk-in cooler should be organized in a way that supports food safety, inventory accuracy, prep control, and daily production.
A good walk-in system should make it easy to answer these questions:
Where does each product belong?
What product should be used first?
What product is close to expiration?
What product is already open?
What product is backup?
What product is ready for service?
What product needs manager review?
What product should not be ordered again yet?
Walk-in cooler organization should not depend on one person's memory.
The system should be clear enough that any trained manager, cook, prep employee, or receiver can understand it.
Products should be grouped logically.

Examples include:

Raw proteins
Seafood
Prepared proteins
Produce
Dairy
Sauces
Dressings
Prepared sides
Desserts
Backup line product
Use-first product
Employee meal product if applicable
The restaurant should also decide where newly received product goes.
New product should not be placed in front of older product unless the older product has already been reviewed and moved for use.
FIFO should be easy to follow.
Older product should be visible.
Prepared product should be labeled and dated.
Open product should be covered and stored correctly.
High-cost products should be easy for managers to inspect.
A walk-in cooler that looks full is not always a good thing.
Too much product can be a warning sign.
Crowding makes it harder to rotate, count, clean, and control waste.
Managers should inspect the walk-in regularly, not only before inspections.
The walk-in cooler should help the restaurant protect product, not hide problems.

Walk-In Cooler Organization Checklist

Date: _____
Manager Name: _____
Restaurant / Location: _____

Shift:

□ Opening
□ Lunch
□ Dinner
□ Closing
□ Weekly review
□ Other: _____

General Walk-In Condition

□ Walk-in is clean.
□ Walk-in is organized.
□ Walkways are clear.
□ Product is stored off the floor according to restaurant standard.
□ Shelves are not overloaded.
□ Product categories are grouped logically.
□ Product is easy to see.
□ Product is easy to count.
□ Product is easy to rotate.
□ No unnecessary clutter is present.
□ No damaged containers are left unreported.
□ No questionable product is left without manager review.

Labeling and Dating

□ Prepared product is labeled.
□ Prepared product is dated.
□ Open product is labeled if needed.
□ Open product is dated if needed.
□ Use-first product is clearly marked.
□ Unlabeled product was corrected or reported.
□ Undated product was corrected or reported.
□ Expired product was removed and logged.
□ Questionable product was reviewed by a manager.

FIFO and Rotation

□ Older product is placed in front of newer product when appropriate.
□ New product is placed behind older product when appropriate.
□ Open product is used before opening new product.
□ Product close to expiration is identified.
□ Product with the shortest shelf life is reviewed.
□ Duplicate open containers are minimized.
□ Employees know what should be used first.
□ Rotation problems were corrected during the review.

Food Cost Control

□ High-cost products are easy to locate.
□ High-cost products are counted or checked carefully.
□ Products with repeated waste are easy to review.
□ Products with repeated shortages are easy to review.
□ Overstocked products are identified.
□ Slow-moving products are identified.
□ Product that should not be reordered yet is identified.
□ Product that needs immediate use is identified.
□ Product that needs prep adjustment is identified.

Food Safety and Storage

□ Raw products are stored according to restaurant food safety standards.
□ Ready-to-eat products are protected.
□ Product is covered or sealed properly.
□ Product is not stored in unsafe containers.

□ Product is not leaking.
□ Product is not cross-contaminating other items.
□ Cooler temperature concern was not observed.
□ Any temperature concern was reported immediately.
□ Chemicals are not stored with food.

Problems Found

Product found unlabeled:

Product found undated:

Product close to expiration:

Product overstocked:

Product that needs to be used first:

Product that should not be ordered again yet:

Storage or rotation problem:

Corrective Action Needed

□ Reorganize shelves
□ Add labels
□ Add dates
□ Mark use-first product
□ Remove expired product
□ Record waste
□ Review FIFO with employees
□ Review ordering
□ Review prep par
□ Move product to correct area
□ Manager recheck required
□ Other: _____

Action Plan:

Person Responsible: _____
Deadline: _____
Manager Signature: _____

WALK-IN FREEZER ORGANIZATION CHECKLIST

The walk-in freezer can hide food cost problems because frozen product is often stored for longer periods.
A freezer may look full, but that does not mean it is controlled.
Frozen product can still be wasted.
Product can become freezer burned.
Product can be buried behind newer cases.
Product can be forgotten.
Product can be over-ordered.
Product can be counted incorrectly.
Product can be damaged by poor storage.
Product can be stored in the wrong area.
A disorganized freezer creates confusion.
Managers may believe product is missing when it is hidden.
Employees may open a new case while older product sits unused.
A product may stay frozen too long and lose quality.
A slow-moving product may take up space for months.
A delivery may be put away without rotation.
Inventory counts may be wrong because product is stacked poorly.
Freezer organization should help managers control usage and ordering.
Frozen product should still follow a system.
Products should be grouped by category.
Cases should be labeled when needed.
Older product should be used first.
High-cost frozen items should be easy to inspect.
Slow-moving items should be reviewed before reordering.
Frozen products should not become a place where over-ordering is hidden.
The freezer should also be easy to count.
If items are stacked in a way that makes counting impossible, inventory accuracy suffers.
A manager should not have to dig through unsafe stacks of product to estimate what is on hand.
Freezer organization matters for safety too.
Heavy boxes should be stored securely.
Walkways should remain clear.
Product should not block fans, doors, or access.

Damaged packaging should be reported.
Product with freezer burn or quality issues should be reviewed.
The freezer should protect product quality, not create loss.
Managers should inspect the freezer regularly and review slow-moving items.
A full freezer may mean the restaurant is prepared.
It may also mean the restaurant is over-ordering.
The checklist helps managers know the difference.

Walk-In Freezer Organization Checklist

Date: _____
Manager Name: _____
Restaurant / Location: _____

Shift:

□ Opening
□ Lunch
□ Dinner
□ Closing
□ Weekly review
□ Other: _____

General Freezer Condition

□ Freezer is organized.
□ Walkways are clear.
□ Product is stored safely.
□ Heavy items are stacked safely.
□ Product is stored off the floor according to restaurant standard.
□ Product categories are grouped logically.
□ Product is easy to identify.
□ Product is easy to count.
□ Product is easy to rotate.
□ No unnecessary clutter is present.
□ Door access is clear.
□ Fan or airflow areas are not blocked if applicable.
□ No damaged product is left unreported.

FIFO and Rotation

□ Older product is used before newer product.
□ New deliveries are placed behind older product when appropriate.
□ Open cases are used before new cases.
□ Slow-moving product is identified.
□ Product with older dates is visible.
□ Product is not buried behind newer product.
□ Rotation problems were corrected.

Product Quality

□ Packaging is intact.
□ No major freezer burn concerns observed.
□ No product appears thawed and refrozen.
□ No damaged cases are left without review.
□ No questionable product is left without manager review.
□ Product quality concerns are documented.
□ Supplier issues are documented if applicable.

Food Cost Control

□ High-cost frozen products are easy to locate.
□ High-cost frozen products are counted carefully.
□ Slow-moving products are reviewed before reordering.
□ Overstocked products are identified.
□ Products with repeated waste are identified.
□ Products that should be used first are identified.
□ Products that should not be reordered yet are identified.
□ Freezer inventory supports the order decision.

Problems Found

Slow-moving product:

Overstocked product:

Product with quality concern:

Product with damaged packaging:

Product that needs to be used first:

Product that should not be ordered again yet:

Storage or safety concern:

Corrective Action Needed

□ Reorganize freezer
□ Move older product forward
□ Mark use-first product

□ Review slow-moving product
□ Reduce order amount
□ Record damaged or unusable product
□ Contact supplier
□ Review inventory count sheet
□ Review par level
□ Train employees on freezer rotation
□ Manager recheck required
□ Other: _____

Action Plan:

Person Responsible: _____
Deadline: _____
Manager Signature: _____

DRY STORAGE ORGANIZATION CHECKLIST

Dry storage can create food cost problems when it is ignored.
Because dry goods often last longer than cooler products, managers may pay less attention to them.
That can be a mistake.
Dry storage usually contains important products such as canned goods, flour, sugar, oil, spices, pasta, rice, sauces, paper goods, to-go supplies, cleaning supplies, and backup inventory.
These items may not always spoil quickly, but they still cost money.

Dry storage problems can include:

Over-ordering
Expired product
Damaged packaging
Pest risk
Product hidden behind newer cases
Duplicate open containers
Incorrect storage location
Poor rotation
Inventory count mistakes
Overuse of paper goods
Untracked to-go supply usage
Chemical and food separation concerns
Slow-moving products taking up space
Dry storage should be organized by category.
Products should have a clear home.
Heavy items should be stored safely.
Open products should be sealed.
Food should be separated from chemicals.
Paper goods should be counted and controlled.
High-use products should be easy to access.
Slow-moving products should be reviewed.
Products with expiration dates should be rotated.
Dry storage should not become a dumping area for extra deliveries.
If product is placed wherever there is space, the inventory system becomes weaker.
Managers may order items that are already in the building.
Employees may open new cases while partial cases sit unused.
Products may expire unnoticed.
Paper goods may disappear faster than expected.
To-go supplies may be overused.
Dry storage organization also affects speed.
Employees should be able to find what they need without searching.
Receivers should be able to put deliveries away correctly.
Managers should be able to count inventory quickly and accurately.

A strong dry storage area is clean, organized, labeled, rotated, and easy to count.
Dry storage is not just storage.
It is part of the restaurant's cost control system.

Dry Storage Organization Checklist

Date: _____
Manager Name: _____
Restaurant / Location: _____

Shift:

□ Opening
□ Lunch
□ Dinner
□ Closing
□ Weekly review
□ Other: _____

General Dry Storage Condition

□ Dry storage is clean.
□ Dry storage is organized.
□ Walkways are clear.
□ Product is stored off the floor according to restaurant standard.
□ Heavy items are stored safely.
□ Product categories are grouped logically.
□ Product is easy to identify.
□ Product is easy to count.
□ Product is easy to rotate.
□ No unnecessary clutter is present.
□ Open product is sealed properly.
□ Damaged packaging is reported.
□ Pest concern was not observed.
□ Any pest concern was reported immediately.

Food and Chemical Separation

□ Food is separated from chemicals.
□ Cleaning supplies are stored in the correct area.
□ Chemicals are labeled properly.
□ Chemicals are not stored above food or food-contact items.
□ Paper goods are protected from contamination.
□ To-go supplies are stored cleanly.

FIFO and Date Review

□ Older product is used first.
□ New product is placed behind older product when appropriate.
□ Expiration dates are checked.
□ Product close to expiration is identified.
□ Product past expiration is removed or reviewed.
□ Duplicate open containers are minimized.
□ Slow-moving products are identified.
□ Products that should not be reordered yet are identified.

Food Cost and Supply Control

□ High-cost dry goods are reviewed.
□ Oil usage is reviewed if applicable.
□ Spices and seasonings are organized.
□ Paper goods are counted.
□ To-go supplies are counted.
□ Products with repeated overuse are reviewed.
□ Products with repeated shortages are reviewed.
□ Overstocked items are identified.
□ Supplier pack-size issues are identified.
□ Order guide needs are identified.

Problems Found

Overstocked dry goods:

Expired or close-to-expiration products:

Damaged product or packaging:

Product stored in wrong area:

Duplicate open products:

Paper or to-go supply concern:

Chemical separation concern:

Corrective Action Needed

□ Reorganize dry storage
□ Add shelf labels
□ Seal open product

□ Remove expired product
□ Record waste
□ Review FIFO
□ Review ordering
□ Reduce order amount
□ Update order guide
□ Train employees on dry storage
□ Review paper goods usage
□ Review chemical storage
□ Manager recheck required
□ Other: _____

Action Plan:

Person Responsible: _____
Deadline: _____
Manager Signature: _____

FIFO ROTATION CHECKLIST

FIFO stands for First In, First Out.
It means older product should be used before newer product.
FIFO is one of the simplest and most important food cost control habits in a restaurant.
When FIFO is ignored, product can expire while newer product is used first.
That creates waste.
It also creates food safety and quality problems.

FIFO should apply to many areas of the restaurant:

Walk-in cooler
Walk-in freezer
Dry storage
Prep area
Cook line backup
Bar storage
Sauces
Dressings
Produce
Proteins
Dairy
Desserts
Bread products
Prepared items
To-go supplies if applicable
FIFO is not only a storage rule.
It is a daily behavior.
Employees must rotate product when deliveries arrive.
Prep employees must use older product first.
Cooks must open older product before new product.
Managers must check that older product is visible.
Receivers must put away deliveries correctly.
Closing employees must leave product organized for the next shift.
FIFO fails when employees are rushed, storage is crowded, labels are missing, dates are unclear, or managers do not inspect.
A product can be labeled and still not rotated.
A product can be dated and still be hidden.
A product can be in the building and still be wasted because no one saw it.
Managers should teach employees that FIFO protects food cost and guest quality.
Using older product first does not mean using bad product.
It means using safe, usable product in the correct order before it loses quality.

Questionable product should always be reviewed by a manager.
FIFO should be checked every day in high-risk areas and weekly during manager reviews.
If a product repeatedly expires, the manager should check whether FIFO is being followed.
If a product is found behind newer product, the manager should correct the storage habit immediately.
A restaurant that follows FIFO consistently reduces avoidable waste.

FIFO Rotation Checklist

Date: _____
Manager Name: _____
Restaurant / Location: _____

Area Reviewed:

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Prep area
□ Cook line backup
□ Bar storage
□ Other: _____

FIFO Review

□ Older product is placed in front of newer product when appropriate.
□ New product is placed behind older product when appropriate.
□ Open product is used before opening new product.
□ Products close to expiration are visible.
□ Products close to expiration are marked for use if appropriate.
□ Prepared products are dated.
□ Product dates are easy to read.
□ Employees know which product to use first.
□ Deliveries were put away correctly.
□ Product is not hidden behind newer product.
□ Product is not stored in unnecessary duplicate locations.
□ Questionable product was reported to a manager.
□ Expired product was removed and logged.

Product Rotation Spot Check

Product 1: _____
Oldest Date Found: _____
Newest Date Found: _____
FIFO Correct?
□ Yes
□ No
□ Not sure

Correction Needed:

Product 2: _____
Oldest Date Found: _____
Newest Date Found: _____
FIFO Correct?
□ Yes
□ No
□ Not sure

Correction Needed:

Product 3: _____
Oldest Date Found: _____
Newest Date Found: _____
FIFO Correct?
☐ Yes
☐ No
☐ Not sure

Correction Needed:

Product 4: _____
Oldest Date Found: _____
Newest Date Found: _____
FIFO Correct?
☐ Yes
☐ No
☐ Not sure

Correction Needed:

FIFO Problems Found
☐ New product in front of old product
☐ Old product hidden
☐ Product not dated
☐ Product date unreadable
☐ Open product not used first
☐ Duplicate open containers
☐ Product stored in wrong area
☐ Expired product found
☐ Employee unsure what to use first
☐ Delivery put away incorrectly
☐ Other: _____

Products affected:

Corrective Action Needed
☐ Move older product forward
☐ Move new product behind old product
☐ Mark use-first product
☐ Remove expired product
☐ Record waste
☐ Relabel product
☐ Redate product if appropriate and allowed by policy
☐ Reorganize storage area
☐ Train employee
☐ Review receiving process
☐ Review closing storage process
☐ Manager recheck required
☐ Other: _____

Action Plan:

Person Responsible: _____
Deadline: _____
Manager Signature: _____

LABELING AND DATING AUDIT

Labeling and dating help employees know what product is, when it was made or opened, and when it should be used.
Without labels and dates, product becomes a guessing game.
Employees may not know what is inside a container.
Employees may not know when it was prepared.
Managers may not know whether it is safe to use.
Older product may not be used first.
Product may expire.
Inventory may become inaccurate.
Waste may increase.
Labeling and dating are not optional habits.
They are control habits.

A strong labeling system should answer:

What is the product?
When was it prepared or opened?
Who prepared it if required?
When should it be used by?
Where should it be stored?
Does it contain an allergen if that is part of the restaurant's system?
Does it require manager review?
Labels should be clear enough for another employee to understand.
A label that only one person understands is not strong enough.
Dates should be easy to read.
Containers should not be stored with missing, smeared, hidden, or confusing labels.
Prepared product should be labeled before it is put away.
Open product should be labeled when required.
Use-first product should be marked clearly.
Products close to expiration should be reviewed.
Questionable product should not be guessed on.
Managers should audit labels and dates regularly.

The audit should check:

Prepared product
Open containers
Sauces
Dressings
Proteins
Produce
Dairy
Desserts
Bar garnishes
Cook line backup
Walk-in product
Freezer product if needed
Labeling failures often point to training or follow-up problems.
If one employee forgets once, coach the employee.
If the whole station has unlabeled product, review the station system.
If labels are missing because supplies are unavailable, fix the supply issue.
If labels are hard to read, update the labeling method.
If managers ignore unlabeled product, the team will ignore it too.

Labels and dates protect food safety, food cost, and accountability.

Labeling and Dating Audit Form

Audit Date: _____
Manager Completing Audit: _____
Restaurant / Location: _____

Area Audited:

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Prep area
□ Cook line
□ Bar
□ Dessert station
□ Server station
□ Other: _____
Labeling Supplies Available?
□ Yes
□ No
□ Some supplies missing

Supplies needed:

General Labeling Audit

□ Prepared products are labeled.
□ Prepared products are dated.
□ Open products are labeled if required.
□ Open products are dated if required.
□ Product names are clear.
□ Dates are easy to read.
□ Use-by dates are included if required.
□ Employee initials are included if required.
□ Labels are not smeared or unreadable.
□ Old labels are removed from reused containers.
□ Use-first product is marked clearly.
□ Questionable product was reported to a manager.
□ Expired product was removed and logged.

Product Spot Check

Product 1: _____
Label Present?
□ Yes
□ No
Date Present?
□ Yes
□ No
□ Not required
Date Clear?
□ Yes
□ No
□ Not applicable

Correction Needed:

Product 2: _____
Label Present?
□ Yes
□ No
Date Present?
□ Yes
□ No
□ Not required
Date Clear?
□ Yes
□ No
□ Not applicable

Correction Needed:

Product 3: _____
Label Present?
□ Yes
□ No
Date Present?
□ Yes
□ No
□ Not required
Date Clear?
□ Yes
□ No
□ Not applicable

Correction Needed:

Product 4: _____
Label Present?
□ Yes
□ No
Date Present?
□ Yes
□ No
□ Not required
Date Clear?
□ Yes
□ No
□ Not applicable

Correction Needed:

Labeling Problems Found

□ Product missing label
□ Product missing date
□ Product name unclear
□ Date unreadable
□ Old label left on container
□ Product stored in wrong container
□ Product close to expiration
□ Expired product found
□ Employee unsure of label standard
□ Labeling supplies missing
□ Manager follow-up needed
□ Other: _____

Products affected:

Corrective Action Needed

□ Label product correctly
□ Date product correctly
□ Remove expired product
□ Record waste
□ Replace labeling supplies
□ Train employee
□ Review station labeling standard
□ Review closing checklist
□ Review prep completion sign-off
□ Manager re-audit required
□ Other: _____

Action Plan:

Person Responsible: _____
Deadline: _____
Manager Signature: _____

PRODUCT QUALITY REVIEW

Product quality affects food cost, guest experience, waste, and supplier accountability.
A product may be in the building, but that does not always mean it should be used.
Managers must make sure product is fresh, safe, usable, properly stored, and appropriate for the restaurant's standards.
Poor product quality can create several problems.
Employees may trim away too much product.
Cooks may struggle to prepare the item correctly.
Guests may complain.
Food may be returned.
Remakes may increase.
Waste may increase.
The restaurant may pay for product that should have been rejected, credited, or corrected by the supplier.
Product quality should be reviewed during receiving, storage, prep, and service.
Quality problems can happen at different points.
A supplier may deliver weak produce.

A case may arrive damaged.
Seafood may not meet standard.
Meat may have too much trim loss.
Dairy may be close to expiration.
Bread may arrive stale.
Frozen product may show freezer burn.
Prepared product may lose quality because it was stored too long.
Bar garnish may dry out.
Sauces may separate.
Desserts may lose presentation quality.
Managers should train employees to report quality concerns quickly.
Employees should not ignore questionable product.
They should not use poor-quality product just to avoid wasting it.
They should not throw away product without notifying a manager.
They should not accept poor-quality delivery items without review.
A product quality review helps managers decide what happened and what action is needed.

The action may include:

Using the product quickly if still acceptable
Moving product to a use-first area
Rejecting product during receiving
Requesting supplier credit
Adjusting order quantity
Changing storage method
Reducing prep batch size
Training employees on quality standards
Reviewing product shelf life
Removing product from usable inventory
Logging waste
Following up with supplier
Product quality should not be treated separately from food cost.
Poor quality creates cost loss.
Good quality control protects the guest and the restaurant.

Product Quality Review Form

Date: _____
Manager Name: _____
Restaurant / Location: _____
Product Reviewed: _____

Product Category:

□ Protein
□ Seafood
□ Produce
□ Dairy
□ Sauce / dressing
□ Bread product
□ Dessert
□ Frozen product
□ Dry good
□ Bar item
□ Beverage
□ Prepared product
□ Other: _____

Storage Area:

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar storage
□ Prep area
□ Cook line

□ Receiving area
□ Other: _____

Quality Concern

□ Poor appearance
□ Poor smell
□ Poor texture
□ Wrong color
□ Damaged packaging
□ Freezer burn
□ Stale product
□ Short date
□ Expired product
□ Spoiled product
□ Product too soft
□ Product too dry
□ Product leaking
□ Product not holding quality
□ Supplier quality issue
□ Storage quality issue
□ Prep quality issue
□ Other: _____
What was observed?

When was the issue discovered?
□ During receiving
□ During storage review
□ During prep
□ During service
□ During inventory
□ During waste review
□ Other: _____
Was the product used?
□ Yes
□ No
□ Partially
□ Manager decision pending
Was any product discarded?
□ Yes
□ No

Amount discarded:

Was waste logged?
□ Yes
□ No
□ Not applicable

Possible Cause

□ Supplier quality issue
□ Product arrived damaged
□ Product arrived close to expiration
□ Poor storage
□ Product stored too long

□ Product not rotated
□ Product not labeled
□ Product over-ordered
□ Product over-prepped
□ Product not used fast enough
□ Equipment issue
□ Employee handling issue
□ Other: _____

Supplier Follow-Up Needed?
□ Yes
□ No
□ Not sure

Supplier Name: _____

Contact Person: _____

Credit Requested?
□ Yes
□ No
□ Not needed

Credit Amount if Known: $_____

Manager Decision

□ Product acceptable to use
□ Product must be used first
□ Product should not be used
□ Product discarded and logged
□ Product rejected
□ Supplier contacted
□ Order amount should be reduced
□ Storage method should be changed
□ Prep amount should be changed
□ Employee training needed
□ Manager recheck required
□ Other: _____

Corrective Action:

Person Responsible: _____

Follow-Up Date: _____

Manager Signature: _____

STORAGE PROBLEM CORRECTION LOG

Storage problems should be corrected and documented.
If a manager fixes a storage problem but does not document it, the restaurant may not see whether the problem repeats.
A storage problem correction log helps managers track what went wrong, what was corrected, who was responsible, and whether follow-up is needed.
Storage problems are not always large.
They may look small at first.
A container is missing a label.
A product is stored in the wrong place.
A newer case is placed in front of an older case.
A product is uncovered.
A shelf is crowded.
A delivery is put away incorrectly.
A high-cost item is hidden.
A box is damaged.
A prepared product is not dated.
A freezer item is buried.

A dry storage product is close to expiration.
Each problem matters because storage problems create food cost risk.
If the same storage problem repeats, the restaurant needs more than a quick fix.
It may need employee training, manager follow-up, shelf labels, better storage maps, clearer receiving standards, better closing checklists, or a new inventory process.
Managers should document repeated storage problems so they can identify patterns.

For example:

If the walk-in is always disorganized after deliveries, the receiving process needs review.
If prep containers are often unlabeled, prep sign-off needs review.
If older product is repeatedly hidden, FIFO training needs review.
If dry goods are overstocked, ordering needs review.
If freezer products are hard to count, storage layout needs review.
If high-cost items are not controlled, manager review needs to tighten.
A storage problem correction log should not be used to create unnecessary paperwork.
It should be used when the problem creates food cost, food safety, inventory, or operational risk.

The log should help managers answer:

What happened?
Where did it happen?
What product was involved?
Why does it matter?
Was product wasted?
What correction was made?
Who corrected it?
What follow-up is needed?
When will the manager recheck it?
Storage control improves when corrections are visible and repeated problems are not ignored.

Storage Problem Correction Log

Date: _____
Time: _____
Manager Name: _____
Restaurant / Location: _____

Storage Area:

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar storage
□ Prep area
□ Cook line backup
□ Paper goods
□ Chemical storage
□ Other: _____

Problem Type

□ Product missing label
□ Product missing date
□ Product stored in wrong area
□ FIFO not followed
□ New product placed in front of old product
□ Product uncovered
□ Product damaged
□ Product expired
□ Product spoiled
□ Product hidden
□ Product overstocked
□ Product hard to count
□ Product stored unsafely
□ Chemical separation concern
□ Delivery put away incorrectly
□ Storage area disorganized
□ Other: _____

Product or Area Involved:

What happened?

Food Cost Risk
□ Low
□ Medium
□ High
□ Not sure
Why does this create risk?

Was product wasted or discarded?
□ Yes
□ No

If yes, amount discarded:

Waste logged?
□ Yes
□ No
□ Not applicable

Immediate Correction Made
□ Product labeled
□ Product dated
□ Product moved
□ Older product moved forward
□ New product moved behind older product
□ Product covered or sealed
□ Product discarded and logged
□ Product marked use-first
□ Storage area reorganized
□ Employee coached
□ Manager notified
□ Supplier contacted
□ Other: _____

Correction Notes:

Possible Cause

□ Employee did not know standard
□ Employee forgot standard
□ Receiving process issue
□ Closing process issue
□ Prep process issue
□ Storage map unclear
□ Shelf label missing
□ Labeling supplies missing
□ Area overcrowded
□ Manager did not inspect
□ Ordering too heavy
□ Other: _____

Follow-Up Needed?
□ Yes
□ No

Follow-Up Action:

Person Responsible: _____
Recheck Date: _____
Manager Signature: _____

Part 7 Review: Storage, Rotation, and Labeling Checkpoint

Date: _____
Manager Name: _____
Restaurant / Location: _____
Department / Storage Area: _____
Use this page before moving into manager food cost review.

Are storage standards clearly understood by employees?
□ Yes
□ No
□ Some employees

Notes:

Is the walk-in cooler organized well enough for inventory and FIFO?
□ Yes
□ No
□ Needs improvement

Notes:

Is the walk-in freezer organized well enough for inventory and FIFO?
□ Yes
□ No
□ Needs improvement

Notes:

Is dry storage organized well enough for inventory and ordering control?
□ Yes
□ No
□ Needs improvement

Notes:

Is FIFO being followed consistently?
□ Yes
□ No
□ Sometimes

Notes:

Are labels and dates being used correctly?

□ Yes
□ No
□ Sometimes

Notes:

Are product quality concerns being reviewed by managers?

□ Yes
□ No
□ Sometimes

Notes:

Are storage problems being corrected and documented?

□ Yes
□ No
□ Sometimes

Notes:

What storage area needs the most improvement?

What product is most at risk because of poor storage, labeling, or rotation?

Storage System Status:

□ Strong and consistent
□ Working but needs improvement

□ Inconsistent
□ Not controlled enough
□ Needs employee retraining
□ Needs manager inspections

First Storage Improvement:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

Weekly Food Cost Review Form

Week Of: _____
Review Date: _____
Manager Name: _____
Restaurant / Location: _____

Sales and Cost Snapshot

Weekly Sales: $_____
Food Purchases This Week: $_____
Estimated Food Cost % if Known: _____
Food Cost Goal % if Known: _____

Difference From Goal:

□ Better than goal
□ Worse than goal
□ On target
□ Not sure

Inventory Review

□ Weekly inventory completed.
□ Inventory count appears accurate.
□ High-cost items were reviewed.
□ Overstocked items were identified.
□ Low-stock items were identified.
□ Items close to expiration were identified.
□ Inventory concerns require follow-up.

Inventory notes:

Ordering Review

□ Orders were based on inventory.
□ Par levels were reviewed.
□ Sales forecast was reviewed.
□ Over-ordering risks were reviewed.
□ Emergency orders were reviewed.
□ Supplier issues were reviewed.
□ Invoice price changes were reviewed.

Ordering notes:

Waste Review

□ Daily waste logs were reviewed.
□ Spoilage log was reviewed.
□ Returned food and remake tracker was reviewed.
□ Waste categories were reviewed.
□ Repeated waste patterns were identified.
□ High-cost waste was identified.
□ Waste correction was assigned.

Waste notes:

Prep and Production Review
□ Prep plan was reviewed.
□ Prep pars were reviewed.
□ Overproduction was reviewed.
□ Underproduction was reviewed.
□ Production and usage were compared.
□ Prep communication issues were reviewed.
□ Prep completion sign-off was reviewed.

Prep notes:

Portion Control Review
□ Portion tools were reviewed.
□ Recipe portion standards were reviewed.
□ High-cost ingredients were reviewed.
□ Over-portioning was reviewed.
□ Under-portioning was reviewed.
□ Portion audits were completed.
□ Employee retraining needs were identified.

Portion notes:

Storage, Rotation, and Labeling Review
□ Walk-in cooler reviewed.
□ Walk-in freezer reviewed.
□ Dry storage reviewed.
□ FIFO reviewed.
□ Labeling and dating reviewed.
□ Product quality concerns reviewed.
□ Storage correction log reviewed.

Storage notes:

Top Food Cost Issue This Week

The biggest food cost concern is:

Most likely cause:
□ Inventory issue
□ Ordering issue
□ Supplier issue
□ Receiving issue
□ Waste issue
□ Prep issue
□ Portion issue
□ Storage issue
□ Labeling issue
□ Rotation issue
□ Training issue
□ Manager follow-up issue
□ Other: _____

Action Plan

Corrective action:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____
General Manager / Owner Review if Required: _____

FOOD COST PROBLEM FINDER

A food cost problem finder helps managers identify where food cost loss is actually happening.
Food cost problems are not always obvious.
A manager may see that food cost is high, but the number alone does not explain the cause.
Food cost can rise because of many different issues.
Inventory may be inaccurate.
Orders may be too large.
Product may be wasted.
Portions may be too heavy.
Prep may be overproduced.
Product may expire.
Supplier prices may increase.
Deliveries may be short or damaged.
Recipes may not be followed.
Product may be used without being rung in correctly.
Managers may miss follow-up.
The food cost problem finder helps the manager narrow the issue.
Instead of saying, “Food cost is bad,” the manager can ask:
Where is the loss happening?
What product is involved?
What process failed?
Who needs to correct it?
What action should happen first?
The first step is to identify the symptom.
A symptom is what the manager sees.

Examples include:
Food cost percentage increased
Waste increased
Inventory count does not make sense
Purchases are too high
Product keeps running out
Product keeps expiring
Emergency orders are increasing
A high-cost item is disappearing too fast
Prep leftovers are too high
Guest remakes are increasing
The second step is to identify the likely cause.
The third step is to assign a correction.
Managers should avoid guessing too quickly.
If food cost is high, do not automatically blame waste.
Review inventory, ordering, receiving, prep, portions, storage, and sales mix.
If a product is missing, do not automatically blame theft.
Review waste logs, receiving accuracy, portion control, recipe usage, and count accuracy.
If product expires, do not automatically blame employees.
Review ordering, prep levels, storage visibility, FIFO, sales forecast, and manager inspections.
A strong manager looks for the system problem.
The goal is correction, not accusation.
When managers use a problem finder, they make better decisions because they connect symptoms to causes.

Food Cost Problem Finder Worksheet
Date: _____
Manager Name: _____
Restaurant / Location: _____

Review Period:
□ Daily
□ Weekly
□ Monthly
□ Other: _____

Food Cost Problem Observed

Main problem:
□ Food cost percentage increased
□ Purchases too high
□ Inventory count inaccurate
□ Waste too high
□ Spoilage increased
□ Emergency orders increased
□ Product keeps running out
□ Product is overstocked
□ Prep overproduction
□ Prep underproduction
□ Portion control issue
□ Supplier price increase
□ Receiving issue
□ Storage issue
□ Remakes or returns increased
□ High-cost item usage concern
□ Other: _____

Describe the problem:

Product or Category Involved:

Problem Area Review

Inventory Issue?
□ Yes
□ No
□ Not sure

Possible inventory concern:
□ Count inaccurate
□ Product missed
□ Product counted twice
□ Wrong unit of measure
□ Product stored in multiple areas
□ Expired product counted as usable
□ High-cost item not verified
□ Other: _____

Notes:

Ordering Issue?
□ Yes
□ No
□ Not sure

Possible ordering concern:
□ Ordered too much
□ Ordered too little
□ Ordered from habit
□ Par level wrong
□ Sales forecast not reviewed
□ Emergency order needed
□ Slow-moving item reordered
□ Other: _____

Notes:

Receiving or Supplier Issue?
□ Yes
□ No
□ Not sure

Possible receiving concern:
□ Missing product
□ Damaged product
□ Poor quality product
□ Invoice price change
□ Wrong quantity
□ Unauthorized substitution
□ Credit not requested

□ Supplier problem repeated
□ Other: _____

Notes:

Waste Issue?
□ Yes
□ No
□ Not sure

Possible waste concern:
□ Spoilage
□ Expired product
□ Overproduction
□ Cook line waste
□ Prep waste
□ Remakes
□ Returned food
□ Product damaged
□ Waste not logged
□ Other: _____

Notes:

Prep or Production Issue?
□ Yes
□ No
□ Not sure

Possible prep concern:
□ Prep par too high
□ Prep par too low
□ Batch size too large
□ Batch size too small
□ Existing product not checked
□ Prep made too early
□ Prep communication weak
□ Prep completion not verified
□ Other: _____

Notes:

Portion Issue?
□ Yes
□ No
□ Not sure

Possible portion concern:
□ Over-portioning
□ Under-portioning
□ Portion tool missing
□ Recipe unclear
□ Employee not trained
□ High-cost ingredient uncontrolled

□ Portion audit not completed
□ Other: _____

Notes:

Storage, Labeling, or Rotation Issue?
□ Yes
□ No
□ Not sure

Possible storage concern:
□ FIFO not followed
□ Product unlabeled
□ Product undated
□ Product hidden
□ Product stored wrong
□ Product close to expiration
□ Storage area disorganized
□ Product quality issue
□ Other: _____

Notes:

Training or Manager Follow-Up Issue?
□ Yes
□ No
□ Not sure

Possible accountability concern:
□ Employee not trained
□ Trainer did not verify
□ Manager did not inspect
□ Problem was noticed but not corrected
□ No follow-up date assigned
□ Same problem repeated
□ Other: _____

Notes:

Most Likely Cause
The most likely cause of the food cost problem is:

Evidence supporting this cause:

Correction Plan

Corrective action needed:

□ Recount inventory
□ Adjust order amount
□ Adjust par level
□ Review supplier invoice
□ Request supplier credit
□ Reduce prep amount
□ Increase prep amount
□ Change batch size
□ Review waste log
□ Train employee
□ Audit portion control
□ Replace portion tool
□ Reorganize storage area
□ Review FIFO
□ Review labeling
□ Review recipe
□ Review POS entry
□ Manager follow-up required
□ Other: _____

Detailed action plan:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

TOP 10 COST RISK ITEMS

Every restaurant has certain items that require more attention than others.
These are cost risk items.
A cost risk item is any product that can hurt food cost quickly if it is not controlled.
Cost risk can come from high price, high volume, short shelf life, frequent waste, poor portion control, slow sales, supplier issues, or inconsistent recipe use.
Managers should identify the top 10 cost risk items in the restaurant.
These items should receive extra review during inventory, ordering, prep, portion audits, storage checks, waste review, and manager food cost meetings.

Cost risk items may include:

Steaks
Seafood
Chicken
Ribs
Cheese
Premium toppings
Fresh produce
Sauces
Desserts
Alcohol
Wine
Specialty ingredients
Dough

Bread products
High-volume sides
Expensive garnishes
Limited-time special ingredients
A product does not have to be expensive to be a cost risk.
A low-cost product used in very high volume can still create major loss.
For example, fries, sauce, dressing, bread, to-go containers, or cheese may create large cost issues if portioning or usage is uncontrolled.
A product may also be a cost risk because it spoils quickly.
Fresh produce, seafood, dairy, prepared sauces, and desserts may become expensive if the restaurant orders or preps too much.
A product may be a cost risk because employees guess the portion.
A product may be a cost risk because it is used in many recipes and becomes hard to track.
The purpose of the top 10 list is focus.
Managers cannot watch everything equally every day.
But they can choose the most important items and control them carefully.

A top 10 cost risk item should have:

A clear storage location
A clear unit of measure
A clear par level
A clear recipe portion
A required portion tool if needed
A waste tracking process
A manager review schedule
An assigned responsible person
The list should be reviewed monthly or whenever food cost changes.
If a product is no longer a major risk, it can be replaced with another item.
The list should always reflect the restaurant's current operation.

Top 10 Cost Risk Items Worksheet

Date: _____
Manager Name: _____
Restaurant / Location: _____

Review Period:

□ Weekly
□ Monthly
□ Quarterly
□ Other: _____

Cost Risk Item 1

Product Name: _____
Category: _____
Storage Area: _____
Why is this item a cost risk?
□ High cost
□ High volume
□ Short shelf life
□ Frequent waste
□ Frequent spoilage
□ Portion control issue
□ Ordering issue
□ Prep issue
□ Supplier price change
□ Used in multiple recipes
□ Other: _____

Current control method:

□ Inventory count
□ Waste log
□ Portion audit
□ Manager approval before ordering
□ Par level review

□ Prep par review
□ Recipe standard
□ Other: _____

Manager action needed:

Cost Risk Item 2

Product Name: _____
Category: _____
Storage Area: _____
Why is this item a cost risk?
□ High cost
□ High volume
□ Short shelf life
□ Frequent waste
□ Frequent spoilage
□ Portion control issue
□ Ordering issue
□ Prep issue
□ Supplier price change
□ Used in multiple recipes
□ Other: _____

Current control method:
□ Inventory count
□ Waste log
□ Portion audit
□ Manager approval before ordering
□ Par level review
□ Prep par review
□ Recipe standard
□ Other: _____

Manager action needed:

Cost Risk Item 3

Product Name: _____
Category: _____
Storage Area: _____
Why is this item a cost risk?
□ High cost
□ High volume
□ Short shelf life
□ Frequent waste
□ Frequent spoilage
□ Portion control issue
□ Ordering issue
□ Prep issue
□ Supplier price change
□ Used in multiple recipes
□ Other: _____

Current control method:
□ Inventory count
□ Waste log

□ Portion audit
□ Manager approval before ordering
□ Par level review
□ Prep par review
□ Recipe standard
□ Other: _____

Manager action needed:

Cost Risk Item 4

Product Name: _____
Category: _____
Storage Area: _____
Why is this item a cost risk?
□ High cost
□ High volume
□ Short shelf life
□ Frequent waste
□ Frequent spoilage
□ Portion control issue
□ Ordering issue
□ Prep issue
□ Supplier price change
□ Used in multiple recipes
□ Other: _____

Current control method:

□ Inventory count
□ Waste log
□ Portion audit
□ Manager approval before ordering
□ Par level review
□ Prep par review
□ Recipe standard
□ Other: _____

Manager action needed:

Cost Risk Item 5

Product Name: _____
Category: _____
Storage Area: _____
Why is this item a cost risk?
□ High cost
□ High volume
□ Short shelf life
□ Frequent waste
□ Frequent spoilage
□ Portion control issue
□ Ordering issue
□ Prep issue
□ Supplier price change
□ Used in multiple recipes
□ Other: _____

Current control method:

□ Inventory count
□ Waste log
□ Portion audit
□ Manager approval before ordering
□ Par level review
□ Prep par review
□ Recipe standard
□ Other: _____

Manager action needed:

Cost Risk Item 6

Product Name: _____
Category: _____
Storage Area: _____
Why is this item a cost risk?
□ High cost
□ High volume
□ Short shelf life
□ Frequent waste
□ Frequent spoilage
□ Portion control issue
□ Ordering issue
□ Prep issue
□ Supplier price change
□ Used in multiple recipes
□ Other: _____

Current control method:

□ Inventory count
□ Waste log
□ Portion audit
□ Manager approval before ordering
□ Par level review
□ Prep par review
□ Recipe standard
□ Other: _____

Manager action needed:

Cost Risk Item 7

Product Name: _____
Category: _____
Storage Area: _____
Why is this item a cost risk?
□ High cost
□ High volume
□ Short shelf life
□ Frequent waste
□ Frequent spoilage
□ Portion control issue
□ Ordering issue
□ Prep issue
□ Supplier price change

□ Used in multiple recipes
□ Other: _____

Current control method:

□ Inventory count
□ Waste log
□ Portion audit
□ Manager approval before ordering
□ Par level review
□ Prep par review
□ Recipe standard
□ Other: _____

Manager action needed:

Cost Risk Item 8

Product Name: _____
Category: _____
Storage Area: _____
Why is this item a cost risk?
□ High cost
□ High volume
□ Short shelf life
□ Frequent waste
□ Frequent spoilage
□ Portion control issue
□ Ordering issue
□ Prep issue
□ Supplier price change
□ Used in multiple recipes
□ Other: _____

Current control method:

□ Inventory count
□ Waste log
□ Portion audit
□ Manager approval before ordering
□ Par level review
□ Prep par review
□ Recipe standard
□ Other: _____

Manager action needed:

Cost Risk Item 9

Product Name: _____
Category: _____
Storage Area: _____
Why is this item a cost risk?
□ High cost
□ High volume
□ Short shelf life
□ Frequent waste
□ Frequent spoilage
□ Portion control issue

□ Ordering issue
□ Prep issue
□ Supplier price change
□ Used in multiple recipes
□ Other: _____

Current control method:
□ Inventory count
□ Waste log
□ Portion audit
□ Manager approval before ordering
□ Par level review
□ Prep par review
□ Recipe standard
□ Other: _____

Manager action needed:

Cost Risk Item 10
Product Name: _____
Category: _____
Storage Area: _____
Why is this item a cost risk?
□ High cost
□ High volume
□ Short shelf life
□ Frequent waste
□ Frequent spoilage
□ Portion control issue
□ Ordering issue
□ Prep issue
□ Supplier price change
□ Used in multiple recipes
□ Other: _____

Current control method:
□ Inventory count
□ Waste log
□ Portion audit
□ Manager approval before ordering
□ Par level review
□ Prep par review
□ Recipe standard
□ Other: _____

Manager action needed:

Top 10 Review
Which item needs immediate manager attention?

Which item is most likely hurting food cost right now?

Which item needs portion control review?

Which item needs ordering review?

Which item needs waste review?

Which item needs storage or FIFO review?

Manager Action Plan:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

HIGH-WASTE ITEM REVIEW

A high-waste item is any product that appears on waste logs repeatedly or creates a large cost loss when it is wasted.
High-waste items should receive special manager attention.
Waste does not always come from the most expensive product.
Sometimes waste comes from a product that is used often, prepped often, or handled by many employees.

A high-waste item may be:

Produce
Sauce
Dressing
Bread
Fries
Protein

Seafood
Dessert
Bar garnish
Prepared side
Soup
Dough
Cheese
Rice
Pasta
To-go product
Specialty ingredient
Managers should review high-waste items weekly until the problem improves.
The review should focus on cause.

A product may be wasted because:

Too much was ordered
Too much was prepped
The batch size is too large
The product has a short shelf life
The product is not selling
The product is not rotated
The product is stored poorly
The product is not labeled
Employees are using the wrong portion
Employees are making the wrong recipe
The supplier quality is poor
The product is damaged during receiving
The item is returned or remade often
Managers are not following up
A high-waste item review should not stop at “we wasted too much.”
It should answer why.

For example:

If tomatoes are wasted every week, review ordering, prep cuts, storage, and sales forecast.
If sauce expires, review batch size and prep par.
If bread is thrown away nightly, review daily order amount.
If protein is wasted, review cooking standards and portion control.
If bar fruit is wasted, review garnish prep levels.
If desserts expire, review par levels and menu movement.
The manager should assign one clear correction.
Reducing waste usually works best when the team focuses on a specific action.
Do not simply tell employees, “Waste less.”
Tell them what to do differently.

Examples:

Prep one half batch instead of one full batch.
Use older product first before opening new product.
Reduce the order by one case.
Label and date every container before storage.
Use the scale for every portion.
Review this product at the end of every shift.
Do not prep more without manager approval.
Specific instructions create better results.

High-Waste Item Review Form

Date: _____
Manager Name: _____
Restaurant / Location: _____

Review Period:

□ Daily
□ Weekly
□ Monthly
□ Other: _____

Product Name: _____

Product Category:

□ Protein
□ Seafood
□ Produce
□ Dairy
□ Sauce / dressing
□ Bread product
□ Dessert
□ Frozen product
□ Dry good
□ Bar item
□ Prepared item
□ Other: _____

Storage Area: _____
Station / Use: _____
Unit of Measure: _____
Estimated Amount Wasted This Period: _____
Estimated Cost if Known: $_____

Waste Pattern

How often was this product wasted?
□ Once
□ More than once
□ Daily
□ Weekly
□ Repeated pattern
□ Not sure

Where did the waste happen?
□ Prep
□ Cook line
□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar
□ Receiving
□ Service / guest return
□ Other: _____

Main Type of Waste

□ Over-ordering
□ Over-prepping
□ Spoilage
□ Expired product
□ Poor rotation
□ Poor storage
□ Wrong recipe
□ Over-portioning
□ Cooking mistake
□ Guest return
□ Remake
□ Slow sales
□ Supplier quality issue
□ Other: _____

Cause Review

Was this product ordered too heavily?
□ Yes
□ No
□ Not sure

Notes:

Was this product prepped too heavily?
□ Yes
□ No
□ Not sure

Notes:

Was the batch size too large?
□ Yes
□ No
□ Not applicable

Notes:

Was FIFO followed?
□ Yes
□ No
□ Not sure

Notes:

Was the product labeled and dated correctly?
□ Yes
□ No
□ Not applicable

Notes:

Was the product stored correctly?
□ Yes
□ No
□ Not sure

Notes:

Was the product portioned correctly?
□ Yes
□ No
□ Not applicable
□ Not sure

Notes:

Was the product quality acceptable?
□ Yes
□ No
□ Not sure

Notes:

Did sales support the amount ordered or prepped?
□ Yes
□ No
□ Not sure

Notes:

Corrective Action
□ Reduce order amount
□ Adjust par level
□ Reduce prep amount
□ Reduce batch size
□ Review FIFO
□ Review labeling
□ Review storage
□ Review portion control
□ Review recipe
□ Train employee
□ Contact supplier
□ Watch product daily
□ Require manager approval before prep
□ Other: _____

Specific instruction for the team:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

MENU ITEM COST CONCERN SHEET

A menu item can create a food cost concern when its ingredients, portion size, waste, prep time, selling price, or sales volume do not support a healthy profit.
A menu item may be popular and still create cost problems.
A menu item may sell often but use too much expensive product.
A menu item may be priced too low.
A menu item may require too much prep.
A menu item may create too many remakes.

A menu item may have ingredients that spoil before they are used.
A menu item may have inconsistent portions.
A menu item may look profitable but lose money because employees do not follow the recipe.
Managers should review menu items when they see repeated cost concerns.

Examples of warning signs include:

High-cost ingredients
Frequent over-portioning
Frequent remakes
Frequent guest returns
Short shelf-life ingredients
Low sales volume
High prep waste
Complicated prep process
Specialty product used only for one item
Large price increases from supplier
Portion inconsistency
Item selling heavily but food cost rising
Item not selling enough to justify inventory
A menu item cost concern does not always mean the item should be removed.
It may mean the recipe needs to be clarified.
The portion tool may need to be changed.
The menu price may need review.
The prep batch size may need adjustment.
The order amount may need reduction.
The item may need better promotion to use product before it spoils.
The supplier product may need to be changed.
The team may need retraining.
The menu description may need to be clearer.
The manager should review the full item before deciding.
A menu item should be judged by more than popularity.
It should be reviewed by cost, waste, prep demand, consistency, guest satisfaction, and operational difficulty.
A strong menu item supports the restaurant.
A weak menu item may keep selling while quietly hurting profit.
Managers should document concerns so ownership or leadership can make better menu decisions.

Menu Item Cost Concern Sheet

Date: _____
Manager Name: _____
Restaurant / Location: _____
Menu Item Reviewed: _____

Menu Item Category:

□ Appetizer
□ Salad
□ Sandwich
□ Burger
□ Pizza
□ Pasta
□ Steak
□ Seafood
□ Entree
□ Side item
□ Dessert
□ Beverage
□ Bar item
□ Special
□ Other: _____

Reason for Review

□ High-cost ingredients
□ Supplier price increase
□ Portion control issue

□ Waste concern
□ Prep waste
□ Spoilage concern
□ Low sales
□ High sales but poor cost control
□ Frequent remakes
□ Frequent returns
□ Recipe inconsistency
□ Specialty product not used elsewhere
□ Menu price concern
□ Other: _____

Ingredient Review

Main ingredients:

High-cost ingredients:

Ingredients used only for this item:

Ingredients that spoil quickly:

Portion Review

Is the written recipe clear?
□ Yes
□ No
□ Needs review

Is the correct portion tool available?
□ Yes
□ No
□ Not applicable

Are employees following the portion standard?
□ Yes
□ No
□ Sometimes
□ Not sure

Portion concerns:

Waste Review
Has this item created waste recently?
□ Yes
□ No
□ Not sure

Waste notes:

Has this item required remakes or returns?
□ Yes
□ No
□ Not sure

Remake / return notes:

Sales and Pricing Review
Is this item selling well?
□ Yes
□ No
□ Sometimes
□ Not sure
Is the menu price possibly too low for the current cost?
□ Yes
□ No
□ Needs owner / GM review
□ Not sure

Sales notes:

Operational Review
Is this item easy for the kitchen to execute consistently?
□ Yes
□ No
□ Sometimes
Does this item slow down service?

□ Yes
□ No
□ Sometimes
Does this item require special prep?
□ Yes
□ No

Operational concerns:

Manager Recommendation

□ Keep item as is
□ Review menu price
□ Adjust recipe
□ Adjust portion standard
□ Add portion tool
□ Reduce batch size
□ Reduce order amount
□ Improve promotion
□ Train employees
□ Review supplier product
□ Review menu description
□ Consider removing item
□ Owner / GM review needed
□ Other: _____

Reason for recommendation:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

MANAGER FOOD COST ACTION PLAN

A food cost review is only useful when it leads to action.
Managers may identify problems, complete forms, review waste, check inventory, and discuss cost concerns, but nothing improves unless someone follows through.
The manager food cost action plan turns review into correction.

It answers:

What problem are we fixing?
Why is it happening?
What action will be taken?
Who is responsible?
When is it due?
How will we know it improved?
A strong action plan should be specific.

A weak action plan says:

Reduce waste.
Watch portions.
Do better ordering.
Clean the walk-in.

Train employees.
Those statements are too general.

A strong action plan says:

Reduce tomato prep from two full pans to one full pan on Monday through Thursday and review waste after one week.
Audit cheese portions on pizza station during dinner shift for three days and retrain employees who are not using the scale.
Lower the par level on salmon by one case until sales increase or waste improves.
Reorganize walk-in produce shelf and mark use-first product before opening shift tomorrow.
Review supplier invoice price changes every delivery for the next four orders.
Specific action creates accountability.
The manager should focus on the highest-impact issue first.
Trying to fix every food cost problem at once can overwhelm the team.
Start with the product, station, or process that creates the biggest risk.
Then assign ownership.
A food cost action plan should never end with “everyone.”
Everyone may help, but one person should own the follow-up.
The manager should also set a follow-up date.
Without a follow-up date, the plan may disappear during daily operations.
The action plan should be reviewed again to see whether it worked.
If the problem improved, the restaurant should keep the new standard.
If the problem did not improve, the manager should adjust the plan.

Food cost control is a cycle:

Review the problem.
Find the cause.
Take action.
Follow up.
Adjust if needed.
Repeat.
That cycle is what turns a workbook into a working system.

Manager Food Cost Action Plan

Date: _____
Manager Name: _____
Restaurant / Location: _____

Review Period:

□ Daily
□ Weekly
□ Monthly
□ Other: _____

Food Cost Issue Being Addressed

Issue:

Product, station, category, or process involved:

How was the issue discovered?
□ Inventory review
□ Waste log
□ Spoilage log

□ Ordering review
□ Supplier invoice
□ Receiving check
□ Prep review
□ Portion audit
□ Storage inspection
□ Menu item review
□ Manager observation
□ Employee report
□ Guest return / remake
□ Other: _____

Why does this issue matter?

□ High cost
□ High waste
□ Repeated problem
□ Guest experience risk
□ Food safety risk
□ Inventory accuracy risk
□ Ordering risk
□ Training issue
□ Manager accountability issue
□ Other: _____

Likely Cause

□ Inventory issue
□ Ordering issue
□ Supplier issue
□ Receiving issue
□ Prep issue
□ Production issue
□ Portion issue
□ Storage issue
□ Labeling issue
□ FIFO issue
□ Waste tracking issue
□ Employee training issue
□ Manager follow-up issue
□ Menu item issue
□ Other: _____

Explain likely cause:

Action Plan

Corrective action to take:

Specific instruction for the team:

Person responsible for action:

Support needed from manager, GM, owner, or trainer:

Deadline: _____
Follow-Up Date: _____

Success Measurement

How will improvement be measured?
□ Less waste logged
□ Lower order amount
□ Fewer emergency orders
□ Improved inventory accuracy
□ Fewer expired products
□ Better portion audit results
□ Fewer remakes
□ Better storage inspection
□ Lower usage of high-cost product
□ Improved food cost percentage
□ Manager observation
□ Other: _____

Target result:

Follow-Up Review

Follow-up completed?
□ Yes
□ No
Date completed: _____

Result:

□ Improved
□ Partially improved
□ No improvement
□ Got worse
□ More review needed
What happened after action was taken?

Next step:
□ Keep new standard
□ Continue monitoring
□ Retrain employee
□ Coach manager
□ Adjust par level
□ Adjust prep level
□ Adjust order guide
□ Re-audit portion control
□ Review supplier
□ Review menu item
□ Escalate to GM / owner
□ Other: _____

Manager Signature: _____

GM / Owner Signature if Required: _____

FOOD COST FOLLOW-UP LOG

Follow-up is where food cost control often succeeds or fails.
Many managers notice problems.
Fewer managers follow up until the problem is corrected.
A follow-up log helps managers track whether assigned actions were completed.
It also helps prevent repeated conversations with no results.
Food cost problems can easily get lost during busy restaurant operations.
A manager may identify waste on Monday.
Then staffing problems happen Tuesday.
A delivery problem happens Wednesday.
A busy weekend starts Friday.
By the next week, the original food cost issue may be forgotten.
The follow-up log keeps the issue visible.

It shows:

What problem was found
What action was assigned
Who was responsible
When it was due
Whether it was completed
Whether the issue improved
What still needs attention
A follow-up log is especially important for repeated problems.
If the same product is wasted every week, follow-up should be documented.
If the same employee keeps missing portion standards, follow-up should be documented.
If the same manager keeps skipping inventory review, follow-up should be documented.
If the same supplier problem repeats, follow-up should be documented.
If the same storage area fails inspection, follow-up should be documented.
Follow-up should be direct and professional.
The goal is not to create blame.
The goal is to make sure the restaurant actually improves.

A manager should ask:

Was the action completed?
Was it completed correctly?
Did the problem improve?
Does more training need to happen?
Does the standard need to change?
Does another manager need to be involved?
Does ownership need to review the issue?
If no one follows up, employees learn that the forms do not matter.
If managers follow up consistently, employees learn that food cost control is part of the operation.
Follow-up builds accountability.
Accountability protects profit.

Food Cost Follow-Up Log

Week Of: _____
Manager Name: _____
Restaurant / Location: _____

Follow-Up Item 1

Original Issue:

Date Issue Found: _____

Action Assigned:

Person Responsible: _____
Due Date: _____
Follow-Up Date: _____
Was action completed?
□ Yes
□ No
□ Partially

Result:

□ Improved
□ Partially improved
□ No improvement
□ More review needed

Notes:

Next Step:

□ Continue monitoring
□ Retrain employee
□ Coach manager
□ Adjust process
□ Reassign action
□ Escalate to GM / owner
□ Close issue
□ Other: _____

Follow-Up Item 2

Original Issue:

Date Issue Found: _____

Action Assigned:

Person Responsible: _____
Due Date: _____
Follow-Up Date: _____
Was action completed?
☐ Yes
☐ No
☐ Partially

Result:
☐ Improved
☐ Partially improved
☐ No improvement
☐ More review needed

Notes:

Next Step:
☐ Continue monitoring
☐ Retrain employee
☐ Coach manager
☐ Adjust process
☐ Reassign action
☐ Escalate to GM / owner
☐ Close issue
☐ Other: _____

Follow-Up Item 3

Original Issue:

Date Issue Found: _____

Action Assigned:

Person Responsible: _____
Due Date: _____
Follow-Up Date: _____
Was action completed?
□ Yes
□ No
□ Partially

Result:
□ Improved
□ Partially improved
□ No improvement
□ More review needed

Notes:

Next Step:
□ Continue monitoring
□ Retrain employee
□ Coach manager
□ Adjust process
□ Reassign action
□ Escalate to GM / owner
□ Close issue
□ Other: _____

Weekly Follow-Up Review
What food cost issue improved this week?

What food cost issue did not improve?

What action was not completed?

Who needs additional support, training, or accountability?

What issue should be carried into next week?

Manager Notes:

Manager Signature: _____

Part 8 Review: Manager Food Cost Review Checkpoint

Date: _____
Manager Name: _____
Restaurant / Location: _____
Department / Area: _____
Use this page before moving into employee training and accountability.

Is food cost reviewed weekly by management?
□ Yes
□ No
□ Sometimes

Notes:

Are food cost problems being identified by cause, not just by number?
□ Yes
□ No
□ Sometimes

Notes:

Has the restaurant identified the top 10 cost risk items?
□ Yes
□ No
□ In progress

Notes:

Are high-waste items being reviewed?
□ Yes
□ No
□ Sometimes

Notes:

Are menu item cost concerns being documented?
□ Yes
□ No
□ Sometimes

Notes:

Are managers creating specific action plans?
□ Yes
□ No
□ Sometimes

Notes:

Are managers following up on assigned food cost actions?
□ Yes
□ No
□ Sometimes

Notes:

What is the biggest food cost issue management must own right now?

What issue has been noticed but not fully corrected?

What follow-up habit needs to improve?

Manager Food Cost Review Status:
□ Strong and consistent
□ Working but needs improvement
□ Inconsistent
□ Not enough follow-up
□ Needs clearer accountability
□ Needs GM / owner involvement

First Manager Review Improvement:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

PART 9

EMPLOYEE TRAINING AND ACCOUNTABILITY

Purpose of This Section

Food cost control is not only a manager task.
Employees affect food cost every day.
They portion food.
They prep product.
They rotate inventory.
They label containers.
They make recipes.
They put away deliveries.
They communicate shortages.
They throw away waste.
They remake food.
They open product.
They stock stations.
They follow or ignore standards.
A restaurant cannot control food cost only from the office.
Food cost is controlled through daily behavior.
That means employees need training.
They need to understand what food cost control means in practical terms.
They do not need to become accountants.
They do need to understand how their work affects product, waste, consistency, and profit.

Employees should know:

Why waste matters
Why portion tools matter
Why recipes matter
Why labels and dates matter
Why FIFO matters
Why over-prepping causes loss
Why running out hurts service
Why product should not be thrown away without reporting it
Why remakes should be tracked
Why high-cost ingredients need care
Why storage organization matters
Why managers follow up
Training should be simple and direct.
Employees should be shown the standard.
They should practice the standard.
They should be corrected when needed.
They should be signed off when they can perform correctly.
Accountability should come after training.
A manager should not expect employees to follow a system they have not been taught.
But once employees are trained, managers must follow up when standards are ignored.
This section helps restaurants train employees on the food cost habits that matter most.
It also gives managers forms to document coaching, retraining, and accountability.
The goal is not to scare employees about cost.
The goal is to help them understand that product control is part of doing the job correctly.
A strong food cost culture is built one daily habit at a time.

FOOD COST TRAINING CHECKLIST

Food cost training helps employees understand how their daily work affects the restaurant.
Many employees hear the words “food cost” but do not know what they mean.
Some may think food cost is only something managers worry about.
Others may think it only means not wasting food.
Food cost includes many habits.
It includes portioning, prep, waste, storage, rotation, ordering communication, recipe execution, product handling, and reporting problems.
A food cost training checklist gives managers a clear way to introduce employees to those habits.
Training should be based on the employee’s position.

A line cook may need deep training on portions, recipes, waste, and cook line remakes.
A prep employee may need deep training on batch sizes, labels, dating, FIFO, and production control.
A dishwasher may need to understand when product found in the dish area should be reported.
A server may need to understand accurate ringing, modifiers, guest returns, and extra sauces.
A bartender may need to understand pour control, garnish prep, bottle control, and waste.
A receiver may need training on deliveries, invoices, quality checks, and storage.
A manager needs training on all of it.
Food cost training should include examples from the restaurant.
Employees learn better when the examples are real.

For example:

“This cheese must be weighed because it is one of our high-cost products.”
“This sauce is labeled because we need to know when it was made.”
“This product is use-first because it is older.”
“This remake must be logged so we can see if the same mistake repeats.”
“This prep batch should not be made without manager approval because it spoiled last week.”
“This portion cup protects the recipe and the guest experience.”
Food cost training should be documented.
The checklist helps show what was explained and what still needs follow-up.

Food Cost Training Checklist

Employee Name: _____
Position: _____
Station / Department: _____
Trainer Name: _____
Manager Name: _____
Training Date: _____
Restaurant / Location: _____

Food Cost Basics

□ Employee understands that food cost affects restaurant profit.
□ Employee understands that product waste costs money.
□ Employee understands that correct portions protect consistency.
□ Employee understands that recipes must be followed.
□ Employee understands that food cost control should not hurt guest experience.
□ Employee understands that managers track food cost patterns.

Waste Training

□ Employee knows where the waste log is kept.
□ Employee knows when waste must be recorded.
□ Employee knows not to throw product away without reporting it when required.
□ Employee understands spoilage must be reported.
□ Employee understands remakes and returns may need documentation.
□ Employee understands waste tracking is for correction, not blame.

Portion Training

□ Employee knows which products require portion tools.
□ Employee knows where portion tools are stored.
□ Employee has practiced correct portions.
□ Employee understands over-portioning hurts food cost.
□ Employee understands under-portioning hurts guest experience.
□ Employee knows high-cost ingredients require extra care.

Prep and Production Training

□ Employee understands prep list expectations.
□ Employee knows to check existing product before prepping more.
□ Employee understands batch size requirements.
□ Employee understands prep par levels if applicable.
□ Employee knows to communicate shortages.
□ Employee knows to communicate overproduction.
□ Employee understands product must be labeled, dated, and stored correctly.

Storage, FIFO, and Labeling Training

□ Employee understands storage location standards.
□ Employee understands FIFO.
□ Employee knows older product should be used first when safe and appropriate.
□ Employee understands labeling requirements.
□ Employee understands dating requirements.
□ Employee knows to report questionable product to a manager.
□ Employee understands products should not be hidden, mixed, or stored randomly.

Ordering and Receiving Awareness

□ Employee understands that product counts affect ordering.
□ Employee knows to report low product before it becomes an emergency.
□ Employee knows to report damaged product.
□ Employee knows to report supplier or delivery concerns if involved.
□ Employee understands emergency orders can signal planning problems.

Employee Understanding Check

What should you do if product is wasted?

Why do we use portion tools?

What does FIFO mean?

Why do labels and dates matter?

What should you do if product is close to expiration or looks questionable?

Training Decision

□ Employee understands basic food cost expectations.
□ Employee needs more training.
□ Employee needs station-specific training.
□ Employee needs portion practice.
□ Employee needs storage/FIFO practice.
□ Employee needs waste log practice.

Follow-Up Needed:

Employee Signature: _____
Trainer Signature: _____
Manager Signature: _____

WASTE AWARENESS TRAINING PAGE

Waste awareness training helps employees understand that waste is not just trash.
Waste is product the restaurant paid for but did not turn into a profitable guest experience.
Employees may not always see the cost behind waste.
They may see a dropped item, an old container, a burned product, a remake, an over-prepped pan, or a returned plate.
Managers must help employees understand that every waste event gives the restaurant information.
Waste awareness does not mean blaming employees for every mistake.
Mistakes happen in restaurants.
The goal is to make sure mistakes are seen, recorded, reviewed, and corrected when possible.
If waste is hidden, the restaurant cannot learn from it.
If waste is ignored, the same problem may repeat.
If waste is tracked, managers can find the cause and improve the system.
Employees should know the most common types of waste in the restaurant.

These may include:

Prep waste
Cook line waste
Spoiled product
Expired product
Dropped product
Burned product
Wrong item made
Remade food
Returned food
Overproduction
Trim waste
Bar waste
Product damaged during receiving
Product damaged during storage
Product held too long
Product not labeled or dated
Product not rotated correctly
Employees should also know what to do when waste happens.

They should know:

When to tell a manager
Where to record waste
What information to write down
What product details matter
What amount should be recorded
What reason should be listed
What follow-up may happen
Waste tracking should be explained clearly.
Employees should not feel that the waste log is only used to get them in trouble.
Managers should explain that the log helps the restaurant find patterns.

For example:

If the same sauce expires every week, the batch size may be too large.
If the same item is remade often, the recipe or ticket process may need review.
If the same product spoils often, ordering may need adjustment.
If the same station wastes product often, training may be needed.

If product is thrown away without being logged, managers may not know what is really happening.
Waste awareness is part of professional restaurant work.
Employees who report waste honestly help the restaurant improve.
Managers should thank employees for reporting problems instead of hiding them.
A team that hides waste loses control.
A team that reports waste can fix it.

Waste Awareness Training Page

Employee Name: _____
Position: _____
Station / Department: _____
Trainer Name: _____
Manager Name: _____
Training Date: _____
Restaurant / Location: _____

Waste Training Topics Reviewed

□ Employee understands that waste affects food cost.
□ Employee understands that waste should not be hidden.
□ Employee understands that waste tracking helps find patterns.
□ Employee understands waste tracking is not only about blame.
□ Employee understands that product thrown away may need to be logged.
□ Employee understands that remakes and returned food may need documentation.
□ Employee understands that spoiled or expired product must be reported.
□ Employee understands that overproduction can create waste.
□ Employee understands that poor labeling and rotation can create waste.
□ Employee understands that managers review waste to improve the system.

Types of Waste Explained

□ Prep waste
□ Cook line waste
□ Spoilage
□ Expired product
□ Dropped product
□ Burned product
□ Wrong item made
□ Guest return
□ Remake
□ Overproduction
□ Trim waste
□ Bar waste
□ Damaged product
□ Product held too long
□ Other: _____

Waste Reporting Standard

Where is the waste log kept?

Who should waste be reported to?

When should waste be recorded?

What information should be recorded?
□ Date
□ Shift
□ Product
□ Amount
□ Reason
□ Station
□ Employee or manager initials
□ Follow-up needed
□ Other: _____

Employee Practice Scenario 1

Scenario:
A pan of prepared product is found in the walk-in with no label or date. No one is sure when it was made.
What should the employee do?

Manager / Trainer Notes:

Employee Practice Scenario 2

Scenario:
A cook makes the wrong item during dinner rush and the correct item has to be remade.
What should the employee do?

Manager / Trainer Notes:

Employee Practice Scenario 3

Scenario:
The prep team made too much of an item and part of it spoiled before it could be used.
What should the employee or manager do?

Manager / Trainer Notes:

Employee Understanding Check

Why does waste need to be tracked?

What should you do before throwing away questionable product?

Why is it important to write down the reason for waste?

What should happen if the same product is wasted repeatedly?

How does waste tracking protect the restaurant?

Training Decision

□ Employee understands waste awareness expectations.
□ Employee needs more practice using the waste log.
□ Employee needs station-specific waste training.
□ Employee needs prep waste training.
□ Employee needs cook line waste training.
□ Employee needs storage and spoilage training.
□ Employee needs manager follow-up.

Follow-Up Needed:

Employee Signature: _____
Trainer Signature: _____
Manager Signature: _____

INVENTORY COUNT TRAINING PAGE

Inventory count training helps employees and managers count product accurately and consistently.
Inventory should not depend on guessing.
It should not depend on memory.
It should not change depending on who is counting.
If one person counts by cases, another counts by pounds, and another estimates, the numbers will not be reliable.
Inventory count training teaches the employee how to count product the restaurant's way.

A trained employee should understand:

Where inventory sheets are located
Which storage areas are counted
What order the count should follow
How product categories are organized
What unit of measure should be used
How to count partial cases
How to count open containers
How to handle expired product
How to handle damaged product
How to report missing items from the count sheet
How to flag unusual counts
How to verify high-cost products
Inventory accuracy affects ordering.
If counts are wrong, orders may be wrong.
Wrong orders create waste, shortages, overstocking, emergency orders, and food cost problems.
Inventory training should be hands-on.
The trainer should walk the employee through the storage area.
The trainer should show how the count sheet matches the storage flow.
The trainer should explain product categories.
The trainer should show the correct unit of measure.
The employee should practice counting real product.
The trainer should compare the employee's count with the expected count.
The manager should correct mistakes before the employee counts alone.
Employees should also understand what not to do.
Do not guess if a product is hard to count.
Do not count expired product as usable inventory.
Do not skip product because it is in the wrong location.
Do not change units of measure without manager approval.
Do not count the same product twice.
Do not ignore damaged product.
Do not assume the count sheet is complete if a product is missing.
Inventory training protects the whole food cost system.
Accurate counts create better decisions.

Inventory Count Training Page

Employee Name: _____
Position: _____
Trainer Name: _____
Manager Name: _____
Training Date: _____
Restaurant / Location: _____

Inventory Areas Trained

□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar storage

□ Prep area
□ Cook line backup
□ Paper goods
□ To-go supplies
□ Cleaning supplies
□ Chemical storage
□ Other: _____

Inventory Training Topics Reviewed

□ Employee knows where inventory sheets are kept.
□ Employee understands the storage count order.
□ Employee understands product categories.
□ Employee understands unit of measure.
□ Employee understands how to count full cases.
□ Employee understands how to count partial cases.
□ Employee understands how to count open containers.
□ Employee understands how to count high-cost items carefully.
□ Employee understands not to count expired product as usable inventory.
□ Employee understands damaged product must be reported.
□ Employee understands questionable product must be reviewed by a manager.
□ Employee understands missing items should be added or reported.
□ Employee understands unusual counts should be flagged.
□ Employee understands inventory affects ordering.

Hands-On Count Practice

Product 1: _____
Correct Unit of Measure: _____
Employee Count: _____
Trainer / Manager Verification: _____
Accurate?
□ Yes
□ No
□ Needs practice

Notes:

Product 2: _____
Correct Unit of Measure: _____
Employee Count: _____
Trainer / Manager Verification: _____
Accurate?
□ Yes
□ No
□ Needs practice

Notes:

Product 3: _____
Correct Unit of Measure: _____
Employee Count: _____
Trainer / Manager Verification: _____
Accurate?
□ Yes
□ No
□ Needs practice

Notes:

Product 4: _____
Correct Unit of Measure: _____
Employee Count: _____
Trainer / Manager Verification: _____
Accurate?
□ Yes
□ No
□ Needs practice

Notes:

Inventory Mistake Prevention

Employee was trained not to:

□ Guess counts.
□ Count from memory.
□ Skip hard-to-count products.
□ Count expired product as usable.
□ Count damaged product as usable without manager review.
□ Change unit of measure without approval.
□ Count the same product twice.
□ Ignore products stored in the wrong area.
□ Ignore missing products from the count sheet.
□ Rush through high-cost items.

Employee Understanding Check

Why does inventory accuracy matter?

What should you do if a product is hard to count?

What should you do if a product is expired, damaged, or questionable?

Why is unit of measure important?

What should you do if a product is missing from the count sheet?

Training Decision

□ Employee understands inventory count basics.
□ Employee can count with support.
□ Employee can count independently.
□ Employee needs more practice.
□ Employee should not count inventory alone yet.
□ Manager recheck required.

Follow-Up Needed:

Employee Signature: _____
Trainer Signature: _____
Manager Signature: _____

ORDERING DISCIPLINE TRAINING PAGE

Ordering discipline means orders are placed with facts, not fear, habit, or guesswork.
Employees and managers involved in ordering must understand that every order affects food cost.
Ordering too much creates waste, overstocking, crowded storage, poor rotation, and unnecessary spending.
Ordering too little creates shortages, emergency orders, menu outages, rushed prep, and guest problems.
Ordering the wrong product creates recipe problems, quality problems, and invoice problems.
Ordering discipline does not mean ordering less.
It means ordering correctly.

A disciplined order should be based on:

Inventory count
Par levels
Sales forecast
Upcoming events
Reservations
Weather
Holidays
Menu specials
Waste history
Prep needs
Product shelf life
Storage space
Supplier schedule
Manager approval when needed
Ordering should not be done by memory alone.

A manager should not say:

“We usually order this much.”

A better question is:

“What does the count, forecast, waste history, and par level tell us?”
Employees who help with ordering should know how their information affects the order.
Prep employees should communicate what is already made.

Line cooks should communicate products that are low.
Receivers should report delivery issues.
Managers should review high-cost items before ordering.
Servers and bartenders may communicate large reservations, event needs, or product demand.
Ordering discipline is a team effort, but responsibility must be clear.
The employee who builds the order should know who approves it.
The employee who receives the order should know how to report problems.
The manager should know which items require extra review.
This training page helps make ordering expectations clear.
The goal is to prevent ordering mistakes before the restaurant pays for them.

Ordering Discipline Training Page

Employee Name: _____
Position: _____
Ordering Role if Applicable: _____
Trainer Name: _____
Manager Name: _____
Training Date: _____
Restaurant / Location: _____

Ordering Responsibility Reviewed

Employee role in ordering:

□ Builds order
□ Reviews inventory
□ Reports low product
□ Reviews par levels
□ Reviews prep needs
□ Places order
□ Receives order
□ Reviews invoice
□ Reports supplier issues
□ Provides station communication
□ Not directly ordering, but supports communication
□ Other: _____

Ordering Discipline Topics Reviewed

□ Employee understands orders should be based on counts.
□ Employee understands par levels.
□ Employee understands sales forecast affects ordering.
□ Employee understands waste history affects ordering.
□ Employee understands product shelf life affects ordering.
□ Employee understands storage space affects ordering.
□ Employee understands high-cost items need extra review.
□ Employee understands emergency orders should be tracked.
□ Employee understands supplier issues should be reported.
□ Employee understands ordering from habit can create waste.
□ Employee understands ordering too little can hurt service.
□ Employee understands manager approval rules.

Before Ordering Checklist Training

Employee was trained to review:

□ Current inventory count
□ Product already prepped
□ Product close to expiration
□ Product wasted last week
□ Products that ran out last week
□ Par levels
□ Sales forecast
□ Reservations or events
□ Delivery schedule
□ Storage space
□ High-cost products

□ Slow-moving products
□ Emergency order history
□ Supplier issues

Ordering Scenario Practice 1

Scenario:
The order guide says to order two cases of a product, but the walk-in already has three cases and sales are expected to be slow.
What should happen?

Trainer Notes:

Ordering Scenario Practice 2

Scenario:
A high-cost item sold more than expected last weekend, but one case spoiled the week before.
What should the manager review before ordering?

Trainer Notes:

Ordering Scenario Practice 3

Scenario:
The kitchen ran out of a key product twice this week.
What should be reviewed before simply increasing the order?

Trainer Notes:

Employee Understanding Check

Why should inventory be checked before ordering?

What can happen when the restaurant over-orders?

What can happen when the restaurant under-orders?

Why should waste history be reviewed before ordering?

When should a manager approve an order adjustment?

Training Decision

□ Employee understands ordering discipline basics.
□ Employee can support ordering communication.
□ Employee can help build orders with supervision.
□ Employee can receive deliveries with supervision.
□ Employee needs more training before ordering.
□ Employee needs manager follow-up.

Follow-Up Needed:

Employee Signature: _____
Trainer Signature: _____
Manager Signature: _____

PREP CONTROL TRAINING PAGE

Prep control training helps employees understand how prep decisions affect food cost, waste, service speed, and guest experience.
Prep is not just making food ahead of time.
Prep is production planning.
Every batch, pan, container, bottle, tray, or portion that gets prepared should have a reason.
If employees prep too much, the restaurant may waste product.
If employees prep too little, the restaurant may run out during service.
If employees prep without checking what is already available, duplicate product may build up.
If employees prep without following the recipe, portions and food cost may become inconsistent.
If employees prep without labels and dates, product may become unsafe, confusing, or unusable.
Prep control training teaches employees to think before they produce.

Before prepping, employees should ask:

What is already prepared?
What needs to be used first?
What does the prep list say?
What does the manager want done first?
How much is actually needed?
What batch size should be made?
Is this product high-cost?
Is this product short shelf life?
Does this product need manager approval before making more?
Where should the finished product be stored?
How should it be labeled and dated?
Prep employees should understand that more is not always better.
A full walk-in does not always mean the restaurant is prepared.
Sometimes it means the restaurant is carrying too much product.
Prep should match real need.
Prep should support service without creating unnecessary waste.
Prep control also requires communication.
If an employee sees too much product already made, the manager should know.
If a product is almost out, the manager should know.
If a product is close to expiration, the manager should know.
If a recipe is unclear, the trainer or manager should know.
If prep cannot be completed, the next shift should know.
Prep control training helps employees become part of the food cost system instead of just following tasks.
A trained prep employee can help prevent waste before it happens.

Prep Control Training Page

Employee Name: _____
Position: _____
Station / Department: _____
Trainer Name: _____
Manager Name: _____
Training Date: _____
Restaurant / Location: _____

Prep Control Topics Reviewed

□ Employee understands that prep affects food cost.
□ Employee understands that over-prepping creates waste.
□ Employee understands that under-prepping can hurt service.
□ Employee understands that prep should be based on the prep list.
□ Employee understands to check existing product before prepping more.
□ Employee understands to use older product first when safe and appropriate.
□ Employee understands batch size expectations.
□ Employee understands prep par levels if applicable.
□ Employee understands high-cost prep items need extra care.
□ Employee understands short-shelf-life items should not be overproduced.
□ Employee understands that labels and dates are part of prep completion.
□ Employee understands that prep communication is required between shifts.

Before-Prep Checklist Training

Employee was trained to check:

□ Current product on hand.
□ Existing prepared product.
□ Products close to expiration.
□ Products marked use-first.
□ Prep list priority.
□ Recipe or SOP.
□ Correct batch size.
□ Correct portion tools.
□ Storage container needed.
□ Labeling and dating supplies.
□ Manager approval if required.

Prep Completion Standards

□ Product was made using the correct recipe.
□ Product was made in the correct amount.
□ Product was placed in the correct container.
□ Product was labeled correctly.
□ Product was dated correctly.
□ Product was stored correctly.
□ Product was communicated to the proper station or manager.
□ Waste was reported if it happened.
□ Product not completed was communicated to the next shift.

Prep Scenario Practice 1

Scenario:
The prep list says to make two containers of sauce, but there are already three containers in the walk-in and one is close to expiration.
What should the employee do?

Trainer Notes:

Prep Scenario Practice 2

Scenario:
A prep item keeps getting thrown away every week because too much is being made.
What should the employee or manager review?

Trainer Notes:

Prep Scenario Practice 3

Scenario:
A cook says the station is almost out of a product, but the prep employee sees backup product stored in a different area. What should happen?

Trainer Notes:

Employee Understanding Check

Why should you check existing product before prepping more?

What can happen if the restaurant over-preps?

What can happen if the restaurant under-preps?

Why do labels and dates matter after prep?

What should you do if you cannot finish the prep list?

Training Decision

□ Employee understands prep control basics.
□ Employee can prep with support.
□ Employee can follow the prep list independently.
□ Employee needs more recipe practice.
□ Employee needs more batch size training.
□ Employee needs more labeling and dating training.
□ Employee needs manager follow-up.

Follow-Up Needed:

Employee Signature: _____
Trainer Signature: _____
Manager Signature: _____

PORTION CONTROL COACHING FORM

Portion control coaching helps managers correct portion mistakes professionally and consistently.
Portion mistakes should be corrected quickly because they can affect food cost and guest experience.
But coaching should be fair.
An employee should understand what was wrong, what the correct standard is, why it matters, and what must change next time.
A portion control coaching form should be used when a portion issue is observed during training, prep, service, audit, or manager review.
This form may be used for over-portioning, under-portioning, missing portion tools, incorrect recipe execution, inconsistent plate builds, bar pour issues, dessert portion problems, sauce or dressing issues, or high-cost ingredient concerns.
The purpose of coaching is improvement.
The manager should not simply say, “Do it better.”
The manager should show the employee the correct standard.
The manager should identify the correct portion tool.
The manager should have the employee demonstrate the correct portion.
The manager should explain the reason for the standard.
The manager should document whether follow-up is needed.
Portion coaching should be direct but respectful.

A strong coaching conversation may sound like this:

“This portion is heavier than the recipe allows. We need to use the scale every time so the guest gets the same plate and the restaurant protects food cost.”
“This portion is too light. That can make the guest feel like the plate is not worth the price. The correct portion is the standard.”
“This ladle is the wrong size. The recipe uses the smaller ladle. Let’s reset the station now.”
“This item is high cost, so we cannot guess. Use the portion tool every time.”
If the employee was not trained, the solution is training.
If the tool was missing, the solution is tool replacement.
If the recipe was unclear, the solution is recipe clarification.
If the employee was trained and continues to ignore the standard, the issue becomes accountability.
The coaching form helps managers document the correction and follow-up.
It also helps protect consistency across managers.
Portion control should not depend on which manager is working.
The standard should be the same for every shift.

Portion Control Coaching Form

Date: _____
Manager Name: _____
Employee Name: _____
Restaurant / Location: _____

Station:

☐ Grill
☐ Fry
☐ Sauté
☐ Salad
☐ Pizza
☐ Prep
☐ Bar
☐ Dessert
☐ Expo
☐ Server station
☐ Other: _____

Product or Menu Item:

Type of Portion Issue

☐ Over-portioning
☐ Under-portioning
☐ Wrong portion tool
☐ Portion tool not used
☐ Recipe not followed
☐ Plate build inconsistent
☐ Sauce or dressing portion issue
☐ Topping portion issue
☐ Protein portion issue
☐ Bar pour issue
☐ Dessert portion issue
☐ High-cost ingredient concern
☐ Other: _____

Correct Portion Standard:

Actual Portion Observed:

Required Portion Tool:

☐ Scale
☐ Scoop
☐ Ladle
☐ Spoodle

□ Measuring cup
□ Portion cup
□ Jigger
□ Bottle pourer
□ Counted pieces
□ Cut guide
□ Recipe card
□ Plate guide
□ Other: _____

Was the correct portion tool available?
□ Yes
□ No
□ Not sure

Was the correct portion tool used?
□ Yes
□ No
□ Sometimes
□ Not observed

Coaching Conversation

What was explained to the employee?
□ Correct portion standard
□ Correct portion tool
□ Reason for portion control
□ Food cost impact
□ Guest consistency impact
□ High-cost ingredient risk
□ Recipe requirement
□ Plate presentation standard
□ Need for manager follow-up
□ Other: _____

Manager coaching notes:

Employee practiced correct portion?
□ Yes
□ No
□ Not needed

Employee demonstrated correct portion?
□ Yes
□ No
□ Needs more practice

Employee response or questions:

Cause of Issue

□ Employee was not trained
□ Employee forgot standard
□ Employee guessed
□ Tool was missing
□ Tool was unclear
□ Recipe was unclear

□ Station setup problem
□ Rush pressure
□ Habit from another employee
□ Manager follow-up was weak
□ Other: _____

Follow-Up Decision

□ Coaching completed
□ Retraining required
□ Portion audit required
□ Tool replacement needed
□ Recipe update needed
□ Plate guide needed
□ Trainer follow-up needed
□ Manager recheck required
□ Accountability discussion needed
□ Other: _____

Follow-Up Action:

Person Responsible: _____
Follow-Up Date: _____
Employee Signature: _____
Manager Signature: _____

MANAGER ACCOUNTABILITY CHECKLIST

Managers are responsible for making the food cost system work.
Employees affect food cost every day, but managers set the expectations, train the standards, inspect the work, review the numbers, and follow up when problems happen.
A restaurant cannot expect food cost improvement if managers are not consistent.
Manager accountability means managers do what they say matters.
If waste logs matter, managers review them.
If portion control matters, managers audit portions.
If inventory accuracy matters, managers verify counts.
If storage matters, managers inspect storage areas.
If prep control matters, managers check prep before service.
If ordering matters, managers review inventory and par levels before ordering.
If employee training matters, managers document training and follow-up.
A food cost system fails when managers skip the habits that protect it.

Common manager accountability problems include:

Waste logs are created but not reviewed.
Inventory is counted but not checked for accuracy.
Orders are placed without reviewing current product.
Par levels are written but never updated.
Prep lists are completed but not verified.
Portion tools are required but not available.
Employees are coached but no follow-up happens.
Storage problems are noticed but not corrected.
Supplier issues are accepted without credit requests.
High-cost items are not reviewed weekly.
Food cost meetings happen only after problems become serious.
Manager accountability does not mean managers must do everything alone.
It means managers must make sure the system is being followed.
A manager may delegate tasks, but the manager cannot delegate responsibility for follow-up.

A strong manager asks:

Was the standard clear?

Was the employee trained?
Was the tool available?
Was the work inspected?
Was the issue documented?
Was action assigned?
Was follow-up completed?
Did the problem improve?
This checklist helps managers hold themselves accountable before blaming the team.
Food cost control starts with leadership behavior.
If managers are consistent, employees are more likely to be consistent.
If managers ignore the system, employees will too.

Manager Accountability Checklist

Date: _____
Manager Name: _____
Restaurant / Location: _____

Review Period:

□ Daily
□ Weekly
□ Monthly
□ Other: _____

Inventory Accountability

□ Inventory count was completed.
□ Inventory count was reviewed for accuracy.
□ High-cost items were checked carefully.
□ Missing or unusual counts were investigated.
□ Inventory results were used before ordering.
□ Inventory concerns were assigned for follow-up.

Notes:

Ordering Accountability

□ Orders were based on counts, pars, and forecast.
□ Over-ordering risks were reviewed.
□ Emergency orders were logged.
□ Supplier issues were documented.
□ Invoice price changes were reviewed.
□ High-cost order items were approved.

Notes:

Waste Accountability

□ Daily waste logs were reviewed.
□ Waste patterns were identified.
□ Spoilage was documented.
□ Remakes and returns were reviewed.
□ Waste correction was assigned.
□ Waste follow-up was completed.

Notes:

Prep Accountability

□ Prep list was reviewed before production.
□ Existing product was checked before more was made.
□ Prep pars were reviewed.
□ Overproduction was reviewed.
□ Underproduction was reviewed.
□ Prep completion was verified.

Notes:

Portion Accountability

□ Portion tools were available.
□ Portion standards were reviewed.
□ High-cost ingredients were audited.
□ Over-portioning was corrected.
□ Under-portioning was corrected.
□ Employee portion coaching was documented.

Notes:

Storage Accountability

□ Walk-in cooler was inspected.
□ Walk-in freezer was inspected.
□ Dry storage was inspected.
□ FIFO was reviewed.
□ Labels and dates were reviewed.
□ Storage problems were corrected and documented.

Notes:

Training Accountability

□ Employees received needed food cost training.
□ Training was documented.
□ Employees were coached when standards were missed.
□ Retraining was assigned when needed.
□ Trainers were informed of repeated issues.
□ Follow-up was completed after coaching.

Notes:

Manager Self-Review

What food cost control task did I complete well?

What food cost control task did I miss or delay?

What issue did I notice but not fully correct yet?

What employee or station needs follow-up from me?

What product or process needs my attention first?

What will I do differently next week?

Manager Accountability Status

□ Strong follow-through
□ Mostly consistent
□ Needs improvement
□ Too many missed follow-ups
□ Needs GM / owner support
□ Needs clearer system

Action Plan:

Follow-Up Date: _____
Manager Signature: _____
GM / Owner Signature if Required: _____

Part 9 Review: Employee Training and Accountability Checkpoint

Date: _____
Manager Name: _____
Restaurant / Location: _____
Department / Station: _____
Use this page before moving into the final food cost control system.

Have employees received basic food cost training?
□ Yes
□ No
□ Some employees

Notes:

Have employees been trained on waste awareness?
□ Yes
□ No
□ Some employees

Notes:

Have employees been trained on inventory counting if they help with counts?
□ Yes
□ No
□ Not applicable

Notes:

Have employees involved in ordering been trained on ordering discipline?
□ Yes
□ No
□ Not applicable

Notes:

Have prep employees been trained on prep control?
□ Yes
□ No
□ Some employees

Notes:

Are portion control coaching conversations documented?
□ Yes
□ No
□ Sometimes

Notes:

Are managers holding themselves accountable for food cost follow-up?
□ Yes
□ No
□ Needs improvement

Notes:

What employee training gap needs attention first?

What manager accountability gap needs attention first?

What station needs the most food cost retraining?

Training and Accountability Status:
□ Strong and consistent
□ Working but needs improvement
□ Inconsistent
□ Not documented enough
□ Needs manager follow-up
□ Needs full retraining plan

First Training Improvement:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

Monthly Food Cost Review Form

Month Reviewed: _____
Review Date: _____
Manager Name: _____
Restaurant / Location: _____
GM / Owner Reviewer if Applicable: _____

Monthly Snapshot

Total Monthly Sales: $_____
Total Food Purchases: $_____
Estimated Food Cost %: _____
Food Cost Goal %: _____
Difference From Goal: _____
Inventory Value at Month End: $_____
Waste Cost Estimate if Known: $_____
Emergency Order Cost if Known: $_____

Overall Result

Food cost this month was:

□ Better than goal
□ On goal
□ Worse than goal
□ Not calculated yet
□ Needs more review

Primary reason for result:

Inventory Review

□ Weekly inventory was completed consistently.
□ Inventory counts appeared accurate.
□ High-cost items were reviewed.
□ Count sheets need revision.
□ Unit of measure issues were found.
□ Storage organization affected inventory.
□ Inventory improved this month.
□ Inventory needs improvement next month.

Inventory notes:

Ordering Review

□ Orders were based on counts and pars.
□ Par levels were reviewed.
□ Over-ordering decreased.
□ Under-ordering decreased.
□ Emergency orders decreased.
□ Supplier issues were documented.
□ Invoice price changes were reviewed.
□ Ordering improved this month.
□ Ordering needs improvement next month.

Ordering notes:

Waste Review

□ Daily waste logs were used.
□ Waste patterns were reviewed.
□ Spoilage decreased.
□ Remakes and returns were tracked.
□ High-waste items were reviewed.
□ Waste improved this month.
□ Waste needs improvement next month.

Waste notes:

Prep and Portion Review

□ Prep plans were used.
□ Prep pars were reviewed.
□ Overproduction decreased.
□ Underproduction decreased.
□ Portion tools were available.
□ Portion audits were completed.
□ High-cost ingredients were controlled.
□ Prep and portion control improved this month.
□ Prep and portion control need improvement next month.

Prep and portion notes:

Storage and Product Quality Review

□ Walk-in cooler was inspected.
□ Walk-in freezer was inspected.
□ Dry storage was inspected.
□ FIFO improved.
□ Labeling and dating improved.
□ Product quality issues were documented.
□ Storage problems were corrected.
□ Storage improved this month.
□ Storage needs improvement next month.

Storage notes:

Training and Accountability Review

□ Employees received food cost training.
□ Portion coaching was documented.
□ Prep training was documented.
□ Waste awareness improved.
□ Managers completed follow-up.
□ Manager accountability improved.
□ Training needs improvement next month.
□ Follow-up needs improvement next month.

Training notes:

Top 3 Food Cost Priorities for Next Month

Priority 1:

Action:

Person Responsible: _____
Deadline: _____

Priority 2:

Action:

Person Responsible: _____
Deadline: _____

Priority 3:

Action:

Person Responsible: _____
Deadline: _____

Monthly Decision

□ Continue current system
□ Adjust inventory process
□ Adjust ordering process
□ Adjust waste tracking process
□ Adjust prep system
□ Adjust portion audits
□ Adjust storage inspections
□ Add employee training
□ Add manager accountability review
□ GM / owner meeting required
□ Other: _____

Manager Notes:

Manager Signature: _____
GM / Owner Signature if Required: _____

INVENTORY SYSTEM COMPLETION REVIEW

The inventory system completion review helps the restaurant confirm that inventory is organized enough to support food cost control.
Inventory is the foundation of ordering, prep planning, waste review, and cost analysis.
If inventory is weak, the rest of the system becomes weaker.
A restaurant cannot order accurately if it does not know what is already in the building.
A restaurant cannot explain product usage if counts are inconsistent.
A restaurant cannot control overstocking if storage areas are disorganized.
A restaurant cannot protect high-cost items if they are not counted carefully.
A restaurant cannot compare food cost performance if inventory numbers are unreliable.
This review should be completed after the restaurant has built its storage maps, product categories, units of measure, count sheets, opening inventory, weekly inventory routine, and inventory accuracy process.
The goal is to confirm that the inventory system is ready to be used consistently.

The review should answer:

Are storage areas organized?
Are products grouped logically?
Are count sheets complete?
Are units of measure clear?
Are high-cost products identified?
Are managers counting the same way each week?
Are missing items added to the count sheet?
Are expired or damaged products removed from usable inventory?
Are inventory results reviewed before ordering?
Are inventory problems followed up?
Inventory completion does not mean the system will never need adjustment.
Inventory should keep improving as the restaurant learns.
Products will change.
Menu items will change.
Supplier pack sizes may change.
Storage areas may change.
Sales volume may change.
Par levels may change.
The inventory system should be reviewed regularly so it stays accurate.
A good inventory system is not perfect because it was created once.
It is strong because managers keep it current.

Managers should complete this review before relying fully on the inventory system for ordering decisions, food cost reviews, and monthly tracking.
If major weaknesses are found, the manager should correct them before moving forward.
Accurate inventory creates better decisions.
Better decisions protect food cost.

Inventory System Completion Review

Date: _____
Manager Name: _____
Restaurant / Location: _____

Review Period:

□ Initial setup
□ Weekly review
□ Monthly review
□ Quarterly review
□ System reset
□ Other: _____

Storage Area Setup

□ Walk-in cooler has been organized.
□ Walk-in freezer has been organized.
□ Dry storage has been organized.
□ Bar storage has been organized if applicable.
□ Prep storage areas have been reviewed.
□ Cook line backup areas have been reviewed.
□ Paper goods storage has been reviewed.
□ Chemical storage is separated properly.
□ Products have clear storage locations.
□ Storage areas support accurate counting.

Notes:

Storage Map Review

□ Storage maps have been created.
□ Product categories are assigned to storage areas.
□ High-cost products are easy to locate.
□ Use-first product areas are clear.
□ Products that should not be stored together are separated.
□ Storage maps match the real building.
□ Employees know where products belong.

Notes:

Product Category Review

□ Product categories are clear.
□ Categories match the menu and operation.
□ High-cost categories are identified.
□ High-waste categories are identified.
□ Slow-moving categories are identified.
□ Categories support inventory and ordering.

Notes:

Unit of Measure Review

□ Units of measure are written clearly.
□ Purchase units are understood.
□ Count units are understood.
□ Partial product counting rules are clear.
□ High-cost item units are reviewed carefully.
□ Employees counting inventory understand the units.
□ Count sheets match the units of measure.

Notes:

Count Sheet Review

□ Count sheet includes all major products.
□ Count sheet follows storage flow.
□ Product names are clear.
□ Categories are included.
□ Storage locations are included.
□ Units of measure are included.
□ High-cost items are identified.
□ Missing products are added when found.
□ Discontinued products are removed when needed.

Notes:

Weekly Inventory Routine Review

□ Inventory is counted on a regular schedule.
□ Count responsibilities are assigned.
□ Backup count person is identified.
□ Inventory is reviewed before ordering.
□ High-cost items are verified.
□ Expired product is not counted as usable inventory.
□ Damaged product is reported.
□ Inventory concerns are assigned for follow-up.

Notes:

Inventory Accuracy Review

□ Counts are reviewed for unusual changes.
□ Products stored in multiple places are checked carefully.
□ Items counted twice are corrected.
□ Items skipped are corrected.
□ Incorrect units are corrected.
□ Employees receive inventory training when needed.
□ Managers can trust the count for ordering decisions.

Notes:

Inventory System Status

□ Inventory system is ready for regular use.
□ Inventory system is mostly ready but needs minor correction.
□ Inventory system needs major improvement before use.
□ Inventory count sheet needs revision.
□ Storage areas need more organization.
□ Units of measure need clarification.
□ Employees need inventory training.
□ Manager follow-up is required.

Top Inventory Weakness:

Correction Needed:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

WASTE REDUCTION ACTION PLAN

A waste reduction action plan helps the restaurant move from tracking waste to reducing waste.
Tracking is only the first step.
The restaurant must use the information to make changes.
A waste log shows what was wasted.
A waste pattern review shows what keeps happening.
A waste reduction action plan tells the team what will change next.
Waste reduction should be specific.

A manager should not simply say:

Waste less.
Be careful.
Do better.
That kind of instruction is too vague.
Employees need clear direction.

A stronger instruction sounds like:

Prep one half batch of ranch on slow weekdays instead of one full batch.
Use the oldest lettuce first before opening a new case.
Do not prep more sliced tomatoes after 7:00 p.m. without manager approval.
Log every remake during dinner service this week.
Reduce bread order by one case and review waste after seven days.
Audit steak temperatures during peak dinner shift for three nights.
Clear instructions give the team something to follow.
Waste reduction should focus on the biggest problem first.
Trying to correct every waste issue at once can overwhelm the team.
The manager should choose the item, category, station, or process that creates the most loss or repeats most often.
Waste reduction may require changes in ordering, prep, storage, portioning, recipes, training, or manager follow-up.

The action plan should include:

The waste problem
The product or station involved
The cause
The correction
The person responsible
The deadline
The follow-up date
The measurement of improvement
Waste reduction should be reviewed after the action is taken.
If waste improved, the new standard should become part of the system.
If waste did not improve, the manager should review the cause again.
Sometimes the first correction is not enough.
The manager may need to adjust par levels, change batch sizes, retrain employees, review suppliers, or increase manager observation.
The goal is progress.
Waste reduction is a habit.
The more consistently managers review and correct waste, the stronger the restaurant becomes.

Waste Reduction Action Plan

Date: _____
Manager Name: _____
Restaurant / Location: _____

Review Period:

□ Daily
□ Weekly
□ Monthly
□ Other: _____

Waste Problem Being Addressed

Product / Item:

Station / Area:

□ Prep
□ Cook line
□ Walk-in cooler
□ Walk-in freezer
□ Dry storage
□ Bar
□ Receiving
□ Service / guest return
□ Other: _____

Product Category:

□ Protein
□ Seafood
□ Produce
□ Dairy
□ Sauce / dressing
□ Bread product
□ Dessert
□ Frozen product
□ Dry good
□ Bar item
□ Prepared item
□ Other: _____

Waste Pattern

How often is this waste happening?
□ First time
□ More than once
□ Daily
□ Weekly
□ Repeated monthly pattern
□ Not sure

Estimated amount wasted:

Estimated cost if known: $_____

Main Cause

□ Over-ordering
□ Over-prepping
□ Prep par too high
□ Batch size too large
□ Slow sales
□ Poor rotation
□ Poor storage
□ Missing label
□ Missing date
□ Product expired
□ Product spoiled
□ Portion issue
□ Recipe issue
□ Cook line mistake
□ Guest return
□ Remake
□ Supplier quality issue
□ Manager follow-up issue
□ Other: _____

Explain cause:

Waste Reduction Action

Corrective action:

□ Reduce order amount
□ Adjust par level
□ Reduce prep amount
□ Reduce batch size
□ Use older product first
□ Improve labeling
□ Improve dating
□ Improve FIFO
□ Reorganize storage
□ Review recipe
□ Review portion control
□ Train employee
□ Coach manager
□ Contact supplier
□ Track item daily
□ Require manager approval before prep
□ Other: _____

Specific instruction for the team:

Person responsible for action:

Deadline: _____
Follow-Up Date: _____

Success Measurement

Improvement will be measured by:

□ Less waste logged
□ Product no longer expiring
□ Lower prep leftovers
□ Better portion audit
□ Fewer remakes
□ Better storage inspection
□ Reduced order amount
□ Better par level match
□ Manager observation
□ Other: _____

Target result:

Follow-Up Review

Follow-up completed?
□ Yes
□ No

Date completed: _____

Result:

□ Waste decreased
□ Waste stayed the same
□ Waste increased
□ More review needed
□ Action not completed
What happened?

Next step:

□ Keep new standard
□ Continue monitoring
□ Change action plan
□ Retrain employee
□ Adjust ordering
□ Adjust prep level
□ Review supplier
□ Escalate to GM / owner
□ Other: _____
Manager Signature: _____

ORDERING CONTROL FINAL REVIEW

The ordering control final review helps the restaurant confirm that orders are being placed with discipline.
Ordering is one of the biggest food cost control points in the restaurant.
A strong ordering system protects product, cash flow, storage space, prep planning, and guest experience.
A weak ordering system creates waste, shortages, emergency purchases, overstocking, and cost confusion.
This review should be completed after the restaurant has built ordering responsibility, sales forecasting, par levels, order guides, supplier review, over-ordering checks, emergency order logs, and receiving procedures.
The goal is to make sure the ordering process is clear enough to repeat.

The review should answer:

Who builds the order?
Who approves the order?
Who places the order?
Who receives the delivery?
Who checks the invoice?
Are orders based on inventory counts?
Are par levels reviewed?
Are sales forecasts reviewed?
Are high-cost products approved before ordering?
Are slow-moving products reviewed?
Are emergency orders logged?
Are supplier issues documented?
Are invoice price changes reviewed?
Is receiving connected to food cost control?
Ordering should never be automatic.
The order guide may suggest what to buy, but the manager must still review the real situation.
The manager should consider current inventory, expected sales, storage space, waste history, prep needs, supplier performance, and upcoming events.
The ordering control final review should identify whether the restaurant is ordering with facts or still ordering from habit.
If ordering is still based mostly on habit, the system needs more work.
If emergency orders happen often, the manager should review par levels, sales forecasting, and communication.
If overstocking happens often, the manager should review order amounts, storage space, and waste patterns.
If shortages happen often, the manager should review inventory accuracy, prep planning, and par levels.
Ordering control is not about buying less.
It is about buying correctly.

Ordering Control Final Review

Date: _____
Manager Name: _____
Restaurant / Location: _____

Review Period:

□ Weekly
□ Monthly
□ Quarterly
□ System completion
□ Other: _____

Ordering Responsibility

□ Person responsible for food order is identified.
□ Backup person for food order is identified.
□ Person responsible for bar order is identified if applicable.
□ Person responsible for paper/to-go supplies is identified.
□ Person responsible for final review is identified.
□ Person responsible for final approval is identified.
□ Person responsible for receiving is identified.
□ Person responsible for invoice review is identified.
□ Ordering accountability is clear.

Notes:

Inventory and Par Review

□ Inventory is reviewed before ordering.
□ Count sheets are used before ordering.
□ Par levels are written.
□ Par levels are reviewed regularly.
□ High-cost pars are reviewed carefully.
□ Slow-moving items are reviewed before reordering.
□ Products close to expiration are reviewed before ordering.
□ Products already overstocked are not reordered without review.

Notes:

Sales Forecast Review

□ Sales forecast is reviewed before ordering.
□ Reservations are reviewed.
□ Events are reviewed.
□ Holidays are reviewed.
□ Weather or seasonal patterns are considered.
□ Menu specials are considered.
□ Expected volume affects order amount.

Notes:

Order Guide Review

□ Order guide is current.
□ Product names are clear.
□ Supplier names are clear.
□ Pack sizes are current.
□ Storage areas are listed.
□ Par levels are included.
□ High-cost items are identified.
□ Discontinued products are removed.
□ New products are added.
□ Final order amount is reviewed before placing.

Notes:

Supplier and Receiving Review

□ Supplier issues are documented.
□ Substitutions are reviewed.
□ Missing products are reported.
□ Damaged products are reported.
□ Credits are requested when needed.
□ Invoice prices are reviewed.
□ Price changes are flagged.
□ Deliveries are checked before product is fully accepted.
□ Receiving issues are connected to ordering decisions.

Notes:

Emergency Order Review

□ Emergency orders are logged.
□ Reason for emergency orders is reviewed.
□ Emergency order cost is reviewed.
□ Repeated emergency order patterns are identified.
□ Corrective action is assigned.

Notes:

Ordering Control Score

Ordering system status:

□ Strong and consistent
□ Working but needs improvement

□ Inconsistent
□ Still based too much on habit
□ Needs manager retraining
□ Needs GM / owner review

Biggest ordering weakness:

First ordering correction needed:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

PREP AND PORTION CONTROL REVIEW

Prep and portion control are closely connected.
Prep determines how much product is made.
Portion control determines how much product is used each time an item is served.
If prep is too high, waste increases.
If prep is too low, service suffers.
If portions are too heavy, food cost rises.
If portions are too light, guest value suffers.
If recipes are unclear, both prep and portion control become inconsistent.
This review helps managers confirm that the restaurant has control over production and recipe execution.

The prep side of the review should answer:

Are prep lists specific?
Are daily prep plans used?
Are prep pars written?
Are batch sizes correct?
Is existing product checked before more is made?
Are products close to expiration used first?
Is overproduction reviewed?
Is underproduction reviewed?
Is prep completion verified?
Is prep communication strong between shifts?

The portion side of the review should answer:

Are recipe portions written?
Are portion tools available?
Are employees trained?
Are high-cost ingredients controlled?
Are over-portioning issues corrected?
Are under-portioning issues corrected?
Are portion audits completed?
Are portion coaching conversations documented?
Prep and portion control should protect both profit and guest experience.
A restaurant should not reduce waste by running out of product.
A restaurant should not reduce food cost by under-serving guests.
A restaurant should not increase guest value by over-portioning without control.
The goal is the right amount of product prepared and the correct amount of product served.
Managers should review prep and portion control together because one area can hide problems in the other.

For example:

If prep keeps running out, portions may be too heavy.
If prep is often leftover, sales forecast or batch size may be wrong.
If food cost is high but waste looks low, over-portioning may be the issue.
If guest complaints increase, under-portioning or inconsistency may be happening.
If inventory usage does not match sales, recipe execution may need review.
Prep and portion control are daily leadership habits.
They need training, tools, observation, and follow-up.

Prep and Portion Control Review

Date: _____
Manager Name: _____
Restaurant / Location: _____

Review Period:

□ Daily
□ Weekly
□ Monthly
□ System completion
□ Other: _____

Prep Control Review

□ Prep list is specific.
□ Daily prep plan is used.
□ Prep pars are written.
□ Prep pars are adjusted by volume when needed.
□ Batch sizes are clear.
□ Existing product is checked before more is made.
□ Products close to expiration are used first.
□ Short-shelf-life products are controlled.
□ High-cost prep items are reviewed.
□ Overproduction is documented.
□ Underproduction is documented.
□ Production and usage are compared.
□ Prep communication log is used when needed.
□ Prep completion is signed off.

Prep notes:

Portion Control Review

□ Recipe portion standards are written.
□ Portion tools are available.
□ Portion tools are stored correctly.
□ Employees are trained on portions.
□ Portion training is documented.
□ High-cost ingredients are controlled.
□ Over-portioning is corrected.
□ Under-portioning is corrected.
□ Portion audits are completed.
□ Portion coaching is documented.
□ Recipes are reviewed when standards are unclear.
□ Plate guides are used when needed.

Portion notes:

High-Risk Products

Prep item most at risk for waste:

Prep item most at risk for running out:

Ingredient most at risk for over-portioning:

Menu item most at risk for guest inconsistency:

Cause Review

Biggest prep control weakness:
□ Prep list unclear
□ Prep par wrong
□ Batch size wrong
□ Existing product not checked
□ Sales forecast not used
□ Overproduction
□ Underproduction
□ Poor communication
□ Manager verification missing
□ Other: _____

Notes:

Biggest portion control weakness:
□ Recipe unclear
□ Portion tool missing

□ Portion tool not used
□ Employee not trained
□ Over-portioning
□ Under-portioning
□ High-cost ingredient uncontrolled
□ Manager audit missing
□ Other: _____

Notes:

Action Plan

Prep correction needed:

Portion correction needed:

Person Responsible: _____
Deadline: _____
Follow-Up Date: _____
Manager Signature: _____

FINAL MANAGER FOOD COST SYSTEM REVIEW

The final manager food cost system review confirms whether the restaurant has a complete working system.
This page should be completed when the manager believes the food cost control process is ready to use.
It may also be completed monthly, quarterly, or after a major food cost issue.
The purpose is to review the full system from start to finish.
Food cost control is not one form.
It is not one meeting.
It is not one inventory count.
It is a combination of connected habits.

The restaurant needs to know:

What product is in the building.
What product is being ordered.
What product is being wasted.
What product is being prepared.
What product is being portioned.
What product is being stored.
What product is being used first.
What product is creating risk.
What employees have been trained.
What managers are following up.
The final review helps leadership see whether the system is strong enough to protect profit.

A complete food cost system should include:

Organized inventory
Clear ordering responsibility
Par levels
Order guides
Receiving checks
Waste tracking
Waste review
Prep planning
Production tracking
Portion standards
Portion tools
Storage standards
FIFO
Labels and dates
Product quality review
Manager weekly review
Monthly review
Employee training
Manager accountability
Action plans
Follow-up logs
If any area is missing, the restaurant can still use the workbook, but the manager should know where the weakness is.
The final review should be honest.
Do not mark an area complete if it is not being used.
A system that looks complete on paper but is not followed in daily work will not protect food cost.

Managers should use this page to decide:

What is ready?
What needs repair?
What needs training?
What needs owner or GM review?
What should be the next priority?
The goal is not perfection.
The goal is a system that managers can use consistently.

Final Manager Food Cost System Review

Date: _____
Manager Name: _____
Restaurant / Location: _____

Review Type:

□ First completion review
□ Monthly review
□ Quarterly review
□ Food cost problem review
□ GM / owner review
□ Other: _____

Inventory System

□ Storage areas are organized.
□ Storage maps are created.
□ Product categories are clear.
□ Units of measure are clear.
□ Inventory count sheets are ready.
□ Opening inventory has been completed.
□ Weekly inventory routine is assigned.
□ Inventory accuracy is reviewed.

Status:

□ Complete
□ Mostly complete
□ Needs improvement
□ Not ready

Notes:

Ordering System

□ Ordering responsibility is assigned.
□ Sales forecast is reviewed.
□ Par levels are built.
□ Order guide is used.
□ Supplier orders are reviewed.
□ Over-ordering risks are checked.
□ Emergency orders are logged.
□ Receiving and invoices are checked.

Status:

□ Complete
□ Mostly complete
□ Needs improvement
□ Not ready

Notes:

Waste System

□ Waste is tracked daily.
□ Waste categories are reviewed.
□ Prep waste is reviewed.
□ Cook line waste is reviewed.
□ Spoilage and expired product are logged.
□ Returned food and remakes are tracked.
□ Waste patterns are reviewed.
□ Waste action plans are assigned.

Status:

□ Complete
□ Mostly complete
□ Needs improvement
□ Not ready

Notes:

Portion Control System

□ Portion tools are available.
□ Recipe portion standards are written.
□ High-cost ingredients are controlled.
□ Over-portioning is reviewed.
□ Under-portioning is reviewed.
□ Portion training is signed off.

□ Portion audits are completed.
□ Portion coaching is documented.

Status:
□ Complete
□ Mostly complete
□ Needs improvement
□ Not ready

Notes:

Prep and Production System
□ Prep lists are specific.
□ Daily prep plans are used.
□ Prep par levels are reviewed.
□ Production and usage are tracked.
□ Overproduction is reviewed.
□ Underproduction is reviewed.
□ Prep communication is documented.
□ Prep completion is signed off.

Status:
□ Complete
□ Mostly complete
□ Needs improvement
□ Not ready

Notes:

Storage, Rotation, and Labeling System
□ Storage standards are trained.
□ Walk-in cooler is inspected.
□ Walk-in freezer is inspected.
□ Dry storage is inspected.
□ FIFO is reviewed.
□ Labeling and dating are audited.
□ Product quality is reviewed.
□ Storage problems are corrected and logged.

Status:
□ Complete
□ Mostly complete
□ Needs improvement
□ Not ready

Notes:

Manager Review System

□ Weekly food cost review is completed.
□ Food cost problems are identified by cause.
□ Top 10 cost risk items are reviewed.
□ High-waste items are reviewed.
□ Menu item cost concerns are documented.
□ Manager action plans are created.
□ Food cost follow-up is logged.
□ Monthly food cost review is completed.

Status:

□ Complete
□ Mostly complete
□ Needs improvement
□ Not ready

Notes:

Training and Accountability System

□ Employees receive food cost training.
□ Employees receive waste awareness training.
□ Inventory count training is completed when needed.
□ Ordering discipline training is completed when needed.
□ Prep control training is completed.
□ Portion coaching is documented.
□ Manager accountability checklist is used.
□ Training gaps are followed up.

Status:

□ Complete
□ Mostly complete
□ Needs improvement
□ Not ready

Notes:

Final System Score

Overall food cost system status:

□ Ready to use
□ Mostly ready
□ Needs targeted improvement
□ Needs major repair
□ Not ready yet

Strongest part of the system:

Weakest part of the system:

Highest food cost risk remaining:

First priority for improvement:

Second priority for improvement:

Third priority for improvement:

Manager Commitment

The food cost control system will be reviewed:
□ Daily by shift managers
□ Weekly by management
□ Monthly by GM / owner
□ Quarterly by leadership
□ Other: _____

Primary manager responsible for system follow-up:

GM / owner review needed?
□ Yes
□ No

Reason:

Final Notes:

Manager Signature: _____
GM / Owner Signature if Required: _____

NOTES PAGES

Use the following pages for additional food cost notes, inventory notes, ordering concerns, supplier issues, waste review, prep planning, portion control follow-up, storage concerns, employee training notes, manager meeting notes, and monthly review comments.

Notes Page

Date: _____
Topic: _____
Manager Name: _____
Restaurant / Location: _____

Notes:

Action Items:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

Notes Page

Date: _____
Topic: _____
Manager Name: _____
Restaurant / Location: _____

Notes:

Action Items:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

Notes Page

Date: _____
Topic: _____
Manager Name: _____
Restaurant / Location: _____

Notes:

Action Items:

Person Responsible: _____
Follow-Up Date: _____
Manager Signature: _____

Final Workbook Completion Page

Workbook Title:

Food Cost, Waste & Inventory Control Workbook

Series:
The Restaurant Manager's Toolkit

System:

The Gravity System
This workbook applies The Gravity Restaurant Leadership System to food cost, inventory, ordering, receiving, waste, production, portion control, record accuracy, and manager follow-up.

Author:

Thomas Butler

Completion Review

This workbook is designed to help restaurant managers build a practical food cost control system that can be used in real operations.
It includes tools for inventory, ordering, receiving, waste tracking, prep planning, production control, portion control, storage, labeling, employee training, manager accountability, and final system review.
The workbook should be used as a working document.
Managers should write in it, copy forms, customize pages, train employees from it, and use the completed pages to make better decisions.
Food cost control improves when managers stop guessing and start reviewing facts.
The restaurant should continue using these tools as part of its regular management rhythm.

Final Manager Checklist

□ Inventory system has been reviewed.
□ Weekly high-dollar and high-risk item counts have been assigned.
□ Monthly full inventory and second-review procedures have been assigned.
□ Ordering system has been reviewed.
□ Receiving and invoice process has been reviewed.
□ Transfer records have been reviewed.
□ Waste tracking system has been reviewed.
□ Prep planning and production records have been reviewed.
□ Portion control system has been reviewed.
□ Inventory variance is compared with sales, recipes, waste, production, transfers, remakes, and comps.
□ Missing or inaccurate waste and production records can be identified and corrected.
□ Repeated unexplained variances are documented and followed up fairly.
□ Storage, rotation, and labeling system has been reviewed.
□ Employee training system has been reviewed.
□ Manager accountability system has been reviewed.
□ Weekly review process has been assigned.
□ Monthly review process has been assigned.
□ Follow-up process has been assigned.
□ Top food cost priorities have been identified.
□ Next action steps have been assigned.

Final Top Priorities

Priority 1:

Action:

Person Responsible: _____
Deadline: _____

Priority 2:

Action:

Person Responsible: _____
Deadline: _____

Priority 3:

Action:

Person Responsible: _____
Deadline: _____

Final Manager Statement

I understand that food cost control is not a one-time project. It is a daily record habit, a weekly review habit, and a monthly verification habit. I understand that inventory, ordering, receiving, transfers, waste, production, portions, sales, storage, training, variance review, and follow-up must work together. I will use facts as a reason to check the system, not as permission to accuse without support. I will use this workbook to protect product, standards, guest experience, employees, and restaurant profit.

Manager Name: _____
Manager Signature: _____
Date: _____

GM / Owner Review if Required

Reviewed By: _____
Signature: _____
Date: _____

End of Workbook