

THE GRAVITY
RESTAURANT LEADERSHIP SYSTEM

TRUTH. SYSTEMS. LEADERSHIP. LEGACY.

EMPLOYEE TRAINING & SOP TRACKER

A Practical Workbook for Restaurant Onboarding,
Staff Development, Task Mastery, SOP Building,
and Management Accountability.



THOMAS BUTLER

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Introduction

Restaurant training is one of the biggest differences between a restaurant that runs smoothly and a restaurant that constantly struggles.

When training is weak, the problems show up everywhere. Employees ask the same questions over and over. Managers repeat the same corrections every shift. Guests receive inconsistent service. Food quality changes depending on who is working. Side work gets missed. Opening and closing duties are incomplete. New employees feel overwhelmed. Experienced employees get frustrated.

Most training problems do not happen because employees do not care. They happen because the restaurant does not have a clear enough system.

A new employee cannot meet a standard that has never been clearly explained. A trainer cannot train consistently if every trainer teaches the job differently. A manager cannot hold people accountable if the restaurant has not documented what the correct process is.

This workbook was created to solve that problem.

The Employee Training & SOP Tracker is designed to help full-service restaurant managers build a practical training system that can be used during real restaurant operations.

| This is not a theory book. This is a working tool.

Inside this workbook, managers will find checklists, trackers, sign-off pages, SOP templates, coaching logs, retraining forms, review pages, and action plans that help turn training into a repeatable system.

The goal is simple: train employees clearly, track their progress, document what was taught, confirm task mastery, follow up when standards slip, build stronger SOPs, and create consistency across the restaurant.

A restaurant does not become consistent by hoping employees figure things out. Consistency comes from clear standards, repeated practice, manager follow-up, and documented accountability.

This workbook gives managers a place to start.

HOW TO USE THIS WORKBOOK

This workbook is built for owners, general managers, assistant managers, shift leaders, department leads, and approved trainers. Use it as a working system - not as a requirement to complete every page for every employee.

MINIMUM VIABLE EMPLOYEE TRAINING FILE

- ☐ Onboarding completion record for a new hire.
- ☐ The correct role tracker plus a Daily Training Shift Log while active training is occurring.
- ☐ Task-mastery or certification evidence before independent work.
- ☐ 30/60/90-day reviews and coaching/retraining records only when the restaurant's process or an actual issue requires them.

USE THE SMALLEST TOOL THAT SOLVES THE PROBLEM

Do not complete several forms to document the same event. Choose one primary record, assign the next action, set a due date, and follow up. If a company HR, payroll, safety, or compliance form already controls the same record, use the company form and reference it instead of duplicating sensitive information here.

OPERATING RHYTHM

- ☐ Active training: review after each training shift and at least weekly.
- ☐ Before sign-off: observe performance in real restaurant conditions.
- ☐ When a standard is missed: diagnose the cause before choosing coaching, retraining, process correction, or accountability.

SIGN-OFF STANDARD

A signature confirms verified readiness - not exposure, attendance, time beside a trainer, or personal confidence. The employee should be able to perform the task correctly, safely, consistently, and with the level of supervision appropriate to the role.

QUICK-START IMPLEMENTATION GUIDE

Use this guide to select the right workbook tool at the right moment. Do not try to complete the entire workbook at once. Begin with the employee, position, training stage, or performance issue that needs attention now.

START HERE BEFORE THE EMPLOYEE ARRIVES

- ☐ Complete the New Hire Readiness Checklist.
- ☐ Assign an approved trainer and confirm the training schedule.
- ☐ Select the role-specific tracker for the employee's position.
- ☐ Gather the correct SOPs, recipes, service standards, and safety procedures.

USE ON THE FIRST DAY

- ☐ Complete the First Day Welcome Checklist and employee information pages.
- ☐ Review appearance, attendance, conduct, safety, sanitation, and service culture.
- ☐ Explain how the employee will be trained, observed, coached, and certified.

USE DURING THE FIRST WEEK

- ☐ Follow the First Week Training Plan and the correct position tracker.
- ☐ Record what was explained, demonstrated, practiced, and completed.
- ☐ Use task-mastery sheets before approving independent work.
- ☐ Set the next action and follow-up date after every training shift.

USE BEFORE CERTIFICATION

- ☐ Observe the employee during real operating conditions.
- ☐ Confirm accuracy, consistency, safety, pace, communication, and recovery skills.
- ☐ Complete the station or position certification page only when the standard is truly met.

Elite standard: A signature confirms verified readiness - not exposure, attendance, or time spent beside a trainer.

QUICK-START IMPLEMENTATION GUIDE: 90-DAY ROADMAP

BEFORE THE FIRST SHIFT

Prepare the employee file, identify required forms, assign the trainer, confirm the position standard, and schedule the first review points.

DAY 1

Welcome the employee, explain expectations, complete the restaurant tour, introduce safety and sanitation rules, and begin the role-specific tracker.

DAYS 2-7

Demonstrate tasks, provide supervised practice, document progress after each shift, identify gaps, and assign the next training priority.

DAY 7 CHECKPOINT

Review attendance, attitude, task progress, guest interaction, teamwork, safety, and readiness for additional responsibility. Do not allow unfinished training to become permanent habit.

30-DAY REVIEW

Confirm core task mastery, consistency, reliability, communication, and remaining training needs. Update the employee development plan.

60-DAY REVIEW

Evaluate performance during real volume, independence, judgment, teamwork, and response to coaching. Schedule retraining where needed.

90-DAY REVIEW

Make a documented decision: fully approved, approved with continued development, reassigned, retraining required, or not approved for the position.

WEEKLY MANAGER ROUTINE

- ☐ Review every active trainee and every overdue follow-up.
- ☐ Check for missing signatures, incomplete trackers, and unclear next steps.
- ☐ Confirm trainers are teaching the approved standard consistently.
- ☐ Assign one owner and one due date to every open training action.

MONTHLY SYSTEM ROUTINE

- ☐ Review department training scores, repeated performance issues, certification gaps, and SOPs that need revision.
- ☐ Select the three highest-risk training problems and create a documented correction plan.

MASTER EMPLOYEE TRAINING FILE INDEX

Use this index to see which employee files are complete, which signatures or reviews are missing, and what action must happen next. Keep the index with the manager's active training records.

Restaurant: _____ **Department:** _____

Manager Responsible: _____ **Review Month:** _____

EMPLOYEE FILE 1

Employee Name: _____ Position: _____

Hire Date: _____ Assigned Trainer: _____

Required Forms Complete: ☐ Yes ☐ No Station Certifications: _____

30/60/90 Reviews Completed: _____ Missing Signatures: _____

Next Required Action and Due Date: _____

Employee File Location: _____

EMPLOYEE FILE 2

Employee Name: _____ Position: _____

Hire Date: _____ Assigned Trainer: _____

Required Forms Complete: ☐ Yes ☐ No Station Certifications: _____

30/60/90 Reviews Completed: _____ Missing Signatures: _____

Next Required Action and Due Date: _____

Employee File Location: _____

EMPLOYEE FILE 3

Employee Name: _____ Position: _____

Hire Date: _____ Assigned Trainer: _____

Required Forms Complete: ☐ Yes ☐ No Station Certifications: _____

30/60/90 Reviews Completed: _____ Missing Signatures: _____

Next Required Action and Due Date: _____

Employee File Location: _____

EMPLOYEE FILE 4

Employee Name: _____ Position: _____

Hire Date: _____ Assigned Trainer: _____

Required Forms Complete: ☐ Yes ☐ No Station Certifications: _____

30/60/90 Reviews Completed: _____ Missing Signatures: _____

Next Required Action and Due Date: _____

Employee File Location: _____

EMPLOYEE FILE 5

Employee Name: _____ Position: _____

Hire Date: _____ Assigned Trainer: _____

Required Forms Complete: ☐ Yes ☐ No Station Certifications: _____

30/60/90 Reviews Completed: _____ Missing Signatures: _____

Next Required Action and Due Date: _____

Employee File Location: _____

MASTER EMPLOYEE TRAINING FILE INDEX - CONTINUED

Continue the active employee training-file index below. Review this page weekly until every next action has an owner and due date.

Restaurant: _____ **Department:** _____

Manager Responsible: _____ **Review Month:** _____

EMPLOYEE FILE 6

Employee Name: _____ Position: _____

Hire Date: _____ Assigned Trainer: _____

Required Forms Complete: ☐ Yes ☐ No Station Certifications: _____

30/60/90 Reviews Completed: _____ Missing Signatures: _____

Next Required Action and Due Date: _____

Employee File Location: _____

EMPLOYEE FILE 7

Employee Name: _____ Position: _____

Hire Date: _____ Assigned Trainer: _____

Required Forms Complete: ☐ Yes ☐ No Station Certifications: _____

30/60/90 Reviews Completed: _____ Missing Signatures: _____

Next Required Action and Due Date: _____

Employee File Location: _____

EMPLOYEE FILE 8

Employee Name: _____ Position: _____

Hire Date: _____ Assigned Trainer: _____

Required Forms Complete: ☐ Yes ☐ No Station Certifications: _____

30/60/90 Reviews Completed: _____ Missing Signatures: _____

Next Required Action and Due Date: _____

Employee File Location: _____

EMPLOYEE FILE 9

Employee Name: _____ Position: _____

Hire Date: _____ Assigned Trainer: _____

Required Forms Complete: ☐ Yes ☐ No Station Certifications: _____

30/60/90 Reviews Completed: _____ Missing Signatures: _____

Next Required Action and Due Date: _____

Employee File Location: _____

EMPLOYEE FILE 10

Employee Name: _____ Position: _____

Hire Date: _____ Assigned Trainer: _____

Required Forms Complete: ☐ Yes ☐ No Station Certifications: _____

30/60/90 Reviews Completed: _____ Missing Signatures: _____

Next Required Action and Due Date: _____

Employee File Location: _____

INDEX REVIEW

Number of Active Employee Files: _____ Complete: _____ Requiring Action: _____

Highest-Priority Missing Item: _____

Manager Signature: _____ Date: _____

PART 1

THE PURPOSE OF RESTAURANT TRAINING

Why Training Breaks Down in Restaurants

Restaurant training usually breaks down for one of five reasons:

1. The standard is not written down.
2. Different people train the same job in different ways.
3. Managers assume employees understood the task.
4. Employees are signed off too quickly.
5. No one follows up after the first few shifts.

In many restaurants, training happens informally.

A new employee follows someone around for a few shifts. They watch, ask questions, and try to remember everything. If the trainer is strong, the employee may learn well. If the trainer is rushed, distracted, or inconsistent, the employee may leave training with major gaps.

The problem is not always the trainer.

The problem is the lack of a system.

A strong training system does not leave everything to memory.

It gives the trainer a checklist.

It gives the employee a clear path.

It gives the manager a way to verify progress.

It gives the restaurant documentation.

Training should answer these questions:

What does the employee need to know?

Who is responsible for teaching it?

When should it be taught?

How will the employee practice it?

How will the manager know the employee can do it correctly?

What happens if the employee is not ready?

Without those answers, training becomes guesswork.

Guesswork creates inconsistency.

Inconsistency creates guest complaints, employee frustration, wasted labor, wasted food, poor service, and weak accountability.

A restaurant cannot build strong operations on unclear training.

Clear training protects the guest experience, the employee, the manager, and the business.

Manager Reflection: Current Training Problems

Date: _____

Manager Name: _____

Department: _____

Use this page to identify where training currently breaks down in your restaurant.

1. What position is currently the hardest to train?

2. What task do employees most often perform incorrectly?

3. What question do new employees ask repeatedly?

4. Where do trainers teach different methods for the same task?

5. What duties are often missed during opening or closing?

6. What guest complaints may be connected to poor training?

7. What food quality problems may be connected to poor training?

8. What service problems may be connected to poor training?

9. What is one training problem that needs immediate attention?

10. What action will be taken first?

Action Taken:

Person Responsible: _____

Follow-Up Date: _____

Follow-Up Needed:

☐ Yes

☐ No

Manager Signature: _____

The Cost of Poor Training

Poor training is expensive.

It does not always show up as one large cost. Instead, it shows up in small problems that repeat every day.

A server forgets to ring in an add-on.

A cook over-portioned an expensive ingredient.

A bartender makes drinks inconsistently.

A host seats the dining room unevenly.

A dishwasher falls behind because the closing process was never clearly explained.

A prep cook makes too much product because par levels were not understood.

A manager spends the shift fixing problems that should have been prevented.

Each problem may seem small by itself.

Together, they cost the restaurant money.

Poor training can increase:

Labor cost

Food cost

Waste

Comps

Voids

Refunds

Turnover

Guest complaints

Manager stress

Employee frustration

Poor training also damages morale.

Good employees do not want to work in chaos. They do not want to constantly cover for people who were never trained properly.

They do not want standards to change depending on who is managing the shift.

When training is unclear, accountability feels unfair.

When training is clear, accountability becomes easier.

A manager can say:

"This is the standard."

"This is where we trained it."

"This is where you signed off."

"This is what needs to improve."

"This is when we will follow up."

That kind of accountability is professional.

It is also fair.

The goal of training is not to punish employees.

The goal is to give employees the best possible chance to succeed while protecting the standards of the restaurant.

Poor Training Cost Review

Date: _____

Manager Name: _____

Department: _____

Use this worksheet to identify where poor training may be costing the restaurant money.

Training Issue Review

1. Food Waste

What food items are wasted most often?

Possible training cause:

Action needed:

2. Labor Waste

Where are employees spending too much time because they are unsure what to do?

Possible training cause:

Action needed:

3. Guest Complaints

What complaints may be connected to poor training?

Possible training cause:

Action needed:

4. Service Mistakes

What service steps are being missed?

Possible training cause:

Action needed:

5. Kitchen Mistakes

What food preparation or cooking mistakes happen repeatedly?

Possible training cause:

Action needed:

6. Manager Time

What problems are managers correcting repeatedly?

Possible training cause:

Action needed:

| Top Training Priority

The most expensive training problem right now is:

Why this matters:

Corrective action:

Person responsible: _____

Deadline: _____

Follow-up required:

☐ Yes

☐ No

Manager Signature: _____

What Good Training Actually Looks Like

Good restaurant training is clear, organized, hands-on, and documented.

It does not depend on memory alone.

It does not depend on one strong trainer.

It does not change every time a different manager is working.

Good training follows a simple pattern:

Explain the standard.

Show the correct method.

Let the employee practice.

Observe the employee doing the task.

Correct mistakes immediately.

Have the employee repeat the task.

Confirm consistency.

Document completion.

Follow up later.

Training should always move from instruction to demonstration to practice to verification.

An employee should not be signed off just because they heard the explanation.

They should be signed off when they can perform the task correctly during real operating conditions.

For example, a server should not be considered trained only because they were told how to greet a table.

They should be observed greeting a real table.

A cook should not be considered trained only because they were shown a recipe.

They should be observed preparing the item correctly, using the correct portion, plate presentation, timing, and sanitation standards.

A dishwasher should not be considered trained only because they were told where clean dishes go.

They should be observed handling the dish flow during an actual shift, keeping up with volume, protecting sanitation standards, and completing closing duties correctly.

Training must be practical because restaurant work is practical.

The employee must know what to do when the restaurant is slow.

They must know what to do when the restaurant is busy.

They must know what to do when something goes wrong.

Good training prepares employees for real situations, not perfect situations.

Good Training Checklist

Employee Name: _____

Position: _____

Trainer Name: _____

Manager Name: _____

Training Date: _____

Use this checklist to confirm that training was completed properly.

Training Steps

- ☐ The task was clearly explained.
- ☐ The reason for the task was explained.
- ☐ The correct standard was described.
- ☐ The trainer demonstrated the task.
- ☐ The employee practiced the task.
- ☐ The employee received correction when needed.
- ☐ The employee repeated the task after correction.
- ☐ The employee performed the task during real shift conditions.
- ☐ The trainer confirmed the employee understood the standard.
- ☐ The manager or trainer documented the training.
- ☐ A follow-up date was scheduled if needed.

Task Review

Task Trained:

Standard Expected:

Employee Performance:

- ☐ Not ready
- ☐ Needs more practice
- ☐ Acceptable
- ☐ Strong
- ☐ Ready for sign-off

Correction Needed:

Follow-Up Action:

Follow-Up Date: _____

Trainer Signature: _____

Employee Signature: _____

Manager Signature: _____

The Manager's Role in Training

The manager owns the training system.

A trainer may teach the employee.

An experienced employee may demonstrate the task.

A department lead may help with practice.

But the manager is responsible for making sure the training is clear, complete, documented, and followed up.

Managers should not assume training is complete just because an employee has worked several shifts.

Time worked is not the same as training completed.

An employee can work for weeks and still have serious training gaps if no one verifies task mastery.

The manager's role is to ask:

Was the employee trained on the correct standard?

Who trained the employee?

Was the task demonstrated?

Did the employee practice?

Was performance observed?

Was the employee corrected?

Was the task signed off?

Does the employee still need follow-up?

Is the employee ready to work without constant supervision?

A manager must protect the standard.

That means training cannot be casual.

It must be intentional.

When managers take training seriously, employees usually take it more seriously too.

A strong manager does not just correct mistakes.

A strong manager builds a system that reduces repeat mistakes.

Manager Training Accountability Page

Date: _____

Manager Name: _____

Department: _____

Employee Name: _____

Position: _____

TRAINING STATUS REVIEW

1. What has this employee already been trained on?

2. What has been demonstrated but not yet mastered?

3. What still needs to be taught?

4. What mistakes are still happening?

5. Is this a training issue, effort issue, communication issue, or accountability issue?

☐ Training issue

☐ Effort issue

☐ Communication issue

☐ Accountability issue

☐ Combination

Explain:

6. What is the next required training action?

7. Who is responsible for completing the follow-up?

8. What is the deadline?

9. How will completion be verified?

Manager Follow-Up

Follow-Up Required:

☐ Yes

☐ No

Follow-Up Date: _____

Manager Signature: _____

Training for Consistency, Not Just Completion

The goal of training is not to check boxes.

The goal is consistency.

A completed checklist does not matter if the employee still cannot perform the job correctly.

A signed training page does not matter if the manager never follows up.

A training system only works when it improves the way the restaurant operates.

Consistency means the guest experience does not depend on luck.

It means the guest receives the same standard whether they visit on Monday lunch or Saturday dinner.

It means the food is prepared correctly no matter which cook is working.

It means side work is completed no matter who closes.

It means employees understand expectations before they are held accountable.

Consistency does not happen by accident.

It is built through repeated standards, documented training, clear correction, and manager follow-up.

This workbook should help managers move from verbal training to visible training.

Verbal training is easy to forget.

Visible training can be reviewed, repeated, signed, corrected, and improved.

A restaurant with strong training has fewer surprises.

Employees know what is expected.

Managers know what was taught.

Trainers know what to cover.

Owners can see where the team is improving.

Guests feel the difference.

The purpose of this workbook is to help turn training into a system that lasts.

Part 1 Review: Training System Checkpoint

Date: _____

Manager Name: _____

Restaurant / Location: _____

Department: _____

Use this page to review your current training system before moving into onboarding and position-specific training.

Current Training System

1. Do we currently have written training checklists for each position?

- ☐ Yes
☐ No
☐ Some positions

Notes:

2. Do all trainers teach the same standards?

- ☐ Yes
☐ No
☐ Not sure

Notes:

3. Are employees signed off only after they demonstrate task mastery?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

4. Do managers review training progress weekly?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

5. Do we document retraining when standards are missed?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

6. Do employees understand what they are responsible for learning?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

7. Do we have clear SOPs for repeated tasks?

- ☐ Yes
☐ No
☐ Some tasks

Notes:

Training System Score

Rate the current training system:

- ☐ 1 - Very weak
☐ 2 - Needs major improvement
☐ 3 - Average
☐ 4 - Good
☐ 5 - Strong and consistent

BIGGEST TRAINING GAP RIGHT NOW:

FIRST ACTION TO IMPROVE TRAINING:

Person Responsible: _____

Deadline: _____

Follow-Up Date: _____

Manager Signature: _____

PART 2

NEW HIRE ONBOARDING

Purpose of This Section:

This section helps managers create a clear, professional onboarding process for every new employee.

Onboarding is more than paperwork.

It is the employee's first real impression of the restaurant, the management team, the standards, and the culture.

A strong onboarding process helps new employees understand:

- Where they belong
- What is expected
- Who they report to
- What standards matter
- How training will work
- How progress will be measured
- What success looks like in their position

When onboarding is rushed or unclear, employees often start confused. They may not know the schedule, uniform expectations, service standards, safety rules, station responsibilities, or who to ask for help.

That confusion can turn into mistakes, frustration, poor performance, or early turnover.

A good onboarding process gives the employee direction before they are expected to perform.

This section includes practical checklists and forms that managers can use during the employee's first day, first week, and early training period.

New Hire Readiness Checklist

Employee Name: _____

Position: _____

Start Date: _____

Manager Name: _____

Trainer Assigned: _____

Department:

☐ Front of House

☐ Back of House

☐ Bar

☐ Management

☐ Other: _____

Use this checklist before the employee's first day to make sure the restaurant is ready to train them properly.

Before the First Day

- ☐ Employee has accepted the position.
- ☐ Start date has been confirmed.
- ☐ First shift time has been confirmed.
- ☐ Employee knows where to report.
- ☐ Employee knows who to ask for on arrival.
- ☐ Uniform requirements have been explained.
- ☐ Required documents have been requested.
- ☐ Employee has been added to the schedule.
- ☐ Trainer has been assigned.
- ☐ Manager has reviewed the training plan.
- ☐ Position-specific checklist has been prepared.
- ☐ Employee handbook or policy documents are ready.
- ☐ Login information or system access has been requested if needed.
- ☐ POS access has been requested if needed.
- ☐ Time clock access has been requested if needed.
- ☐ Locker, storage area, or personal item policy has been explained.
- ☐ Meal policy has been explained.
- ☐ Parking instructions have been explained.
- ☐ First-day expectations have been explained.

Training Materials Ready

- ☐ New hire onboarding checklist
- ☐ Position training tracker
- ☐ Uniform and appearance standards
- ☐ Safety and sanitation standards
- ☐ Service standards
- ☐ Menu training materials
- ☐ Side work checklist
- ☐ Opening checklist
- ☐ Closing checklist
- ☐ SOPs for assigned position
- ☐ First-week training plan
- ☐ Training sign-off pages

Manager Preparation

1. What does this employee need to know on the first day?

2. What should the trainer focus on first?

3. What common mistakes should be prevented early?

4. What standards must be explained before the employee works with guests or food?

5. What follow-up should happen after the first shift?

| Ready for First Day?

☐ Yes

☐ No

If no, what still needs to be completed?

Manager Signature: _____ Date: _____

First Day Welcome Checklist

Employee Name: _____

Position: _____

First Day Date: _____

Manager Name: _____

Trainer Name: _____

The first day should help the employee feel welcomed, informed, and clear about expectations.

A new employee should not feel ignored, rushed, or unsure where to go.

Use this checklist to create a professional first-day experience.

Welcome and Introduction

- ☐ Greet employee when they arrive.
- ☐ Introduce employee to the manager on duty.
- ☐ Introduce employee to assigned trainer.
- ☐ Explain the employee's training schedule for the day.
- ☐ Explain where personal items may be stored.
- ☐ Explain break area rules.
- ☐ Explain restroom location.
- ☐ Explain employee meal or drink policy.
- ☐ Explain phone policy.
- ☐ Explain smoking or vape policy if applicable.
- ☐ Explain where the schedule is posted or accessed.
- ☐ Explain who to contact for schedule questions.
- ☐ Explain call-out procedure.
- ☐ Explain who the employee reports to.

Restaurant Overview

- ☐ Explain restaurant concept.
- ☐ Explain style of service.
- ☐ Explain guest expectations.
- ☐ Explain basic menu focus.
- ☐ Explain busiest days and times.
- ☐ Explain teamwork expectations.
- ☐ Explain front-of-house and back-of-house relationship.
- ☐ Explain management expectations.
- ☐ Explain communication standards.
- ☐ Explain importance of consistency.

Policy Introduction

- ☐ Attendance expectations reviewed.
- ☐ Tardiness policy reviewed.
- ☐ Uniform standards reviewed.
- ☐ Appearance standards reviewed.
- ☐ Food safety expectations reviewed.
- ☐ Harassment-free workplace expectations reviewed.
- ☐ Guest interaction expectations reviewed.
- ☐ Alcohol service rules reviewed if applicable.
- ☐ Cash handling expectations reviewed if applicable.
- ☐ Tip procedures reviewed if applicable.
- ☐ Safety reporting procedure reviewed.

First Day Training Focus

Today's training focus:

Tasks introduced today:

1. _____
2. _____
3. _____
4. _____
5. _____

Employee questions:

Manager notes:

| First Day Completion

- ☐ Employee was welcomed properly.
- ☐ Employee understands who to report to.
- ☐ Employee understands basic expectations.
- ☐ Employee understands the next scheduled training shift.
- ☐ Employee knows who to ask for help.

Follow-Up Needed:

- ☐ Yes
- ☐ No

Follow-Up Notes:

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

EMPLOYEE INFORMATION AND POSITION SETUP

Keep this page operational. Sensitive personnel records belong in the restaurant's secure HR/payroll system, not in a training workbook.

Employee Name: _____ **Preferred Name:** _____
Position Hired For: _____ **Department:** _____
Hire Date: _____ **Start Date:** _____
Manager Responsible: _____ **Trainer Assigned:** _____

PRIVACY-SAFE RECORD REFERENCE

Optional Employee ID / secure HR file reference: _____

Do not write Social Security numbers, banking information, tax data, identity-document numbers, medical details, passwords, or other confidential information on this page.

EMPLOYMENT SETUP CHECKLIST

- ☐ Required hiring documents completed in approved HR process.
- ☐ Emergency contact stored in approved secure record.
- ☐ Payroll/tax/direct-deposit setup completed in approved system.
- ☐ Employee added to scheduling and timekeeping systems.
- ☐ POS or system access created only if role requires it.
- ☐ Employee handbook/policies provided or acknowledged if applicable.
- ☐ Uniform requirements reviewed.
- ☐ Training schedule created.
- ☐ Approved trainer assigned.
- ☐ First review date scheduled.

POSITION SETUP

- | | | | | | |
|--------------------------------------|---------------------------------|------------------------------------|--|-------------------------------------|------------------------------------|
| ☐ Server | ☐ Host | ☐ Bartender | ☐ Cook | ☐ Dishwasher | ☐ Prep Cook |
| ☐ Food Runner | ☐ Busser | ☐ Expo | ☐ To-Go / Cashier | ☐ Shift Lead | ☐ Manager |
| ☐ Other _____ | | | | | |

Primary Position: _____

Secondary / Cross-Training Position (if any): _____

Setup Completed By: _____

Date Completed: _____

| Training Plan Setup

First Training Shift Date: _____

Second Training Shift Date: _____

Third Training Shift Date: _____

30-Day Review Date: _____

60-Day Review Date: _____

90-Day Review Date: _____

Manager Notes:

Setup Completed By: _____

Date Completed: _____

Manager Signature: _____

Uniform, Appearance, and Professional Standards

Employee Name: _____

Position: _____

Manager Name: _____

Date Reviewed: _____

Uniform and appearance standards should be explained before the employee begins working regular shifts.

Employees should not have to guess what is acceptable.

Clear standards prevent uncomfortable conversations later.

Uniform Standard

Required shirt/top:

Required pants/bottoms:

Required shoes:

Apron required?

☐ Yes

☐ No

Hat or hair restraint required?

☐ Yes

☐ No

Name tag required?

☐ Yes

☐ No

Other required items:

Appearance Expectations

- ☐ Employee understands clean uniform expectations.
- ☐ Employee understands shoe requirements.
- ☐ Employee understands hair restraint expectations.
- ☐ Employee understands jewelry restrictions if applicable.
- ☐ Employee understands nail standards if applicable.
- ☐ Employee understands fragrance/cologne expectations if applicable.
- ☐ Employee understands hygiene expectations.
- ☐ Employee understands professional appearance expectations.
- ☐ Employee understands what is not allowed.

Position-specific Requirements

For food handling positions:

- ☐ Food-safe appearance standards reviewed.
- ☐ Gloves policy reviewed.
- ☐ Handwashing expectations reviewed.
- ☐ Hair restraint expectations reviewed.
- ☐ Apron use reviewed.
- ☐ Clean towel or sanitizer bucket expectations reviewed if applicable.

For guest-facing positions:

- ☐ Guest-facing appearance standards reviewed.
- ☐ Professional language expectations reviewed.
- ☐ Body language expectations reviewed.
- ☐ Smile and greeting expectations reviewed.
- ☐ Table presence expectations reviewed.
- ☐ Guest complaint response expectations reviewed.

Professional Behavior Standards

- ☐ Arrive on time and ready to work.
- ☐ Communicate respectfully with guests.
- ☐ Communicate respectfully with coworkers.

- ☐ Follow manager direction.
- ☐ Stay focused during the shift.
- ☐ Avoid gossip and unnecessary conflict.
- ☐ Use professional language.
- ☐ Protect guest experience.
- ☐ Protect food safety.
- ☐ Complete assigned duties.
- ☐ Ask questions when unsure.

| Employee Acknowledgment

I understand the restaurant's uniform, appearance, and professional behavior expectations.

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

Correction or Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Restaurant Tour Checklist

Employee Name: _____

Position: _____

Tour Completed By: _____

Date: _____

A restaurant tour helps the employee understand the building, work areas, safety points, storage areas, and team flow.

Do not assume a new employee knows where everything is.

Use this checklist during the first day or first training shift.

General Areas

- ☐ Main entrance
- ☐ Employee entrance
- ☐ Dining room
- ☐ Bar area
- ☐ Host stand
- ☐ Server station
- ☐ POS stations
- ☐ Restrooms
- ☐ Office
- ☐ Break area
- ☐ Employee storage area
- ☐ First aid kit location
- ☐ Fire extinguisher locations
- ☐ Emergency exits
- ☐ Trash area
- ☐ Parking area

Front of House Areas

- ☐ Host stand
- ☐ Waiting area
- ☐ Dining room sections
- ☐ Table numbers
- ☐ Booth numbers
- ☐ Patio or outdoor seating if applicable
- ☐ Server stations
- ☐ Beverage station
- ☐ Coffee/tea station
- ☐ Ice machine
- ☐ Side work areas
- ☐ Clean glassware storage
- ☐ Silverware storage
- ☐ Linen or napkin storage
- ☐ To-go order area
- ☐ Guest recovery supplies if applicable

Back of House Areas

- ☐ Cook line
- ☐ Prep area
- ☐ Dish pit
- ☐ Dry storage
- ☐ Walk-in cooler
- ☐ Walk-in freezer
- ☐ Chemical storage
- ☐ Mop sink
- ☐ Handwashing sinks
- ☐ Three-compartment sink
- ☐ Dishwasher machine
- ☐ Clean dish storage
- ☐ Smallwares storage
- ☐ Food labeling area
- ☐ Waste area
- ☐ Receiving area

Safety and Sanitation Points

- ☐ Handwashing sinks identified.
- ☐ Sanitizer locations identified.
- ☐ Chemical storage reviewed.
- ☐ Slip hazards reviewed.
- ☐ Wet floor sign location reviewed.
- ☐ Knife safety area reviewed if applicable.
- ☐ Hot surface areas reviewed.
- ☐ Emergency exits reviewed.
- ☐ Fire extinguisher locations reviewed.
- ☐ First aid location reviewed.

Tour Notes

Areas employee needs to revisit:

Questions employee asked:

Follow-Up Needed:

- ☐ Yes
- ☐ No

Follow-Up Notes:

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____

Safety and Sanitation Introduction

Employee Name: _____

Position: _____

Trainer Name: _____

Manager Name: _____

Date: _____

Safety and sanitation standards must be introduced early.

No employee should begin regular work without understanding the basic rules that protect guests, coworkers, and the restaurant.

This page is an introduction only. Position-specific safety and sanitation training should continue during hands-on training.

Food Safety Basics

- ☐ Handwashing expectations reviewed.
- ☐ When to wash hands reviewed.
- ☐ Glove use reviewed if applicable.
- ☐ Bare hand contact rules reviewed if applicable.
- ☐ Food temperature importance reviewed.
- ☐ Cross-contamination explained.
- ☐ Food storage basics reviewed.
- ☐ Labeling and dating expectations reviewed.
- ☐ Allergy awareness introduced.
- ☐ Clean-as-you-go expectation reviewed.
- ☐ Sanitizer use reviewed.
- ☐ Sick employee reporting expectation reviewed.

Personal Safety Basics

- ☐ Slip and fall prevention reviewed.
- ☐ Proper lifting basics reviewed.
- ☐ Knife safety introduced if applicable.
- ☐ Burn prevention introduced if applicable.
- ☐ Broken glass procedure reviewed.
- ☐ Chemical safety introduced.
- ☐ Wet floor sign use reviewed.
- ☐ Ladder or step stool safety reviewed if applicable.
- ☐ Emergency exit locations reviewed.
- ☐ Injury reporting process reviewed.

Sanitation Standards

- ☐ Cleaning schedule explained.
- ☐ Sanitizer bucket use reviewed if applicable.
- ☐ Towel use expectations reviewed.
- ☐ Dishwashing sanitation basics reviewed.
- ☐ Restroom check expectations reviewed if applicable.
- ☐ Trash handling expectations reviewed.
- ☐ Pest prevention basics reviewed.
- ☐ Food contact surface cleaning reviewed.
- ☐ End-of-shift cleaning expectations introduced.

Allergy Awareness Introduction

- ☐ Employee understands that food allergies must be taken seriously.
- ☐ Employee knows who to notify about an allergy concern.
- ☐ Employee understands not to guess about ingredients.
- ☐ Employee understands cross-contact risk.
- ☐ Employee understands that allergy questions should be escalated to a manager when needed.

Safety or Sanitation Concerns Discussed

Employee Questions

| Follow-Up Training Needed

- ☐ Food safety
- ☐ Allergy awareness
- ☐ Chemical safety
- ☐ Knife safety
- ☐ Dish sanitation
- ☐ Cleaning procedures
- ☐ Other: _____

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____

Service Culture Introduction

Employee Name: _____

Position: _____

Trainer Name: _____

Manager Name: _____

Date: _____

Every restaurant has a service culture.

Service culture means the way employees treat guests, support each other, solve problems, and protect the guest experience.

A new employee should understand the restaurant's service expectations early.

This is especially important in a full-service restaurant because the guest experience depends on teamwork between front of house, back of house, bar, support staff, and management.

Core Service Expectations

- ☐ Greet guests with professionalism.
- ☐ Make guests feel noticed.
- ☐ Listen carefully.
- ☐ Speak respectfully.
- ☐ Move with purpose.
- ☐ Keep work areas clean.
- ☐ Communicate with the team.
- ☐ Support coworkers during busy times.
- ☐ Take guest concerns seriously.
- ☐ Ask for help before a small problem becomes a bigger problem.
- ☐ Protect food quality.
- ☐ Protect ticket times.
- ☐ Protect the guest's trust.

Service Standard Questions

1. How should guests feel when they enter the restaurant?

2. What should employees do when a guest looks confused or unhappy?

3. What should employees do when they are too busy to handle a guest request immediately?

4. What should employees do if they make a mistake?

5. What does teamwork look like during a busy shift?

| Restaurant Service Promise

Our guests should be able to expect:

| Employee Role in Service Culture

In this position, the employee affects guest experience by:

Examples:

FOLLOW-UP NEEDED

☐ Yes

☐ No

Follow-Up Notes:

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____

First Week Training Plan

Employee Name: _____

Position: _____

Department: _____

Trainer Name: _____

Manager Name: _____

Week Start Date: _____

The first week should give the employee structure.

A new employee should know what they are learning, who is training them, and how their progress will be reviewed.

Use this page to plan the first week of training.

Day 1 Training Plan

Date: _____

Trainer: _____

Main Focus:

Tasks to Introduce:

- ☐ Restaurant tour
- ☐ Uniform and appearance standards
- ☐ Safety and sanitation basics
- ☐ Service culture
- ☐ Position overview
- ☐ Basic station setup
- ☐ Shadow trainer
- ☐ Other: _____

Manager Notes:

Day 2 Training Plan

Date: _____

Trainer: _____

Main Focus:

Tasks to Introduce or Practice:

- ☐ Position-specific duties
- ☐ Station setup
- ☐ Guest interaction if applicable
- ☐ Menu knowledge if applicable
- ☐ Equipment use if applicable
- ☐ Cleaning duties
- ☐ Side work
- ☐ Other: _____

Manager Notes:

Day 3 Training Plan

Date: _____

Trainer: _____

Main Focus:

Tasks to Introduce or Practice:

- ☐ Task repetition
- ☐ Real shift practice
- ☐ Correcting mistakes
- ☐ Speed and accuracy
- ☐ Communication standards

- ☐ Opening or closing duties
- ☐ Position checklist review
- ☐ Other: _____

Manager Notes:

Day 4 Training Plan

Date: _____

Trainer: _____

Main Focus:

Tasks to Introduce or Practice:

- ☐ Increased independence
- ☐ Real-time decision making
- ☐ Guest or ticket flow if applicable
- ☐ Station organization
- ☐ Team communication
- ☐ Side work completion
- ☐ Manager observation
- ☐ Other: _____

Manager Notes:

Day 5 Training Plan

Date: _____

Trainer: _____

Main Focus:

Tasks to Introduce or Practice:

- ☐ Review all first-week training
- ☐ Identify strengths
- ☐ Identify training gaps
- ☐ Confirm next training steps
- ☐ Assign follow-up practice
- ☐ Schedule review
- ☐ Other: _____

Manager Notes:

First Week Review**Employee strengths this week:**

Areas needing more practice:

Tasks not yet ready for sign-off:

Manager follow-up action:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____

New Hire Onboarding Completion Page

Employee Name: _____

Position: _____

Department: _____

Start Date: _____

Manager Name: _____

Trainer Name: _____

Use this page to confirm that the employee has completed the basic onboarding process.

Onboarding Items Completed

- ☐ New hire readiness checklist completed.
- ☐ First day welcome checklist completed.
- ☐ Employee information and position setup completed.
- ☐ Uniform and appearance standards reviewed.
- ☐ Professional behavior standards reviewed.
- ☐ Restaurant tour completed.
- ☐ Safety and sanitation introduction completed.
- ☐ Service culture introduction completed.
- ☐ First week training plan created.
- ☐ Position-specific training tracker assigned.
- ☐ Trainer assigned.
- ☐ Follow-up review scheduled.

Employee Understanding

The employee understands:

- ☐ Who they report to.
- ☐ Their primary position.
- ☐ Their training schedule.
- ☐ Uniform expectations.
- ☐ Attendance expectations.
- ☐ Safety expectations.
- ☐ Sanitation expectations.
- ☐ Guest service expectations.
- ☐ Where to find help.
- ☐ What they are expected to learn next.

Manager Review

1. Is the employee ready to continue into position-specific training?

☐ Yes

☐ No

☐ Needs additional onboarding first

2. What additional onboarding is needed?

3. What should the trainer focus on during the next shift?

4. What concerns, if any, should the manager monitor?

5. What is the next scheduled training review date?

Onboarding Approval

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

COMPLETED EXAMPLE: NEW-HIRE TRAINING TRACKER

The restaurant and employee names in this completed example are fictional. Use the example to see the level of detail expected in a strong training record.

EMPLOYEE AND TRAINING INFORMATION

Restaurant: Harbor Grill Employee: Jordan Lee Position: Server

Hire Date: March 2, 2026 Assigned Trainer: Alexis Morgan Manager: Casey Reed

Training Goal: Complete core server training and earn approval for independent weekday lunch shifts.

FIRST-DAY COMPLETION

- ☒ Welcome and introductions completed - 3/2/26 - Trainer initials: AM
- ☒ Uniform, attendance, conduct, phone, and break standards reviewed - 3/2/26 - AM
- ☒ Restaurant tour, emergency exits, handwashing, and illness reporting reviewed - 3/2/26 - AM
- ☒ Service culture and guest-recovery expectations introduced - 3/2/26 - AM
- ☒ POS login created and basic order-entry demonstration completed - 3/2/26 - AM

TRAINING SHIFT 1 - MARCH 3

Focus: Greeting, table numbers, menu navigation, beverage service, and side work.

Observed Strengths: Warm greeting, strong eye contact, asked questions before guessing.

Practice Needed: Table numbers 21-28 and modifiers for allergy requests.

Next Action: Review floor map before shift; complete five supervised orders with correct modifiers.

Trainer Status: Not ready for independent tables. Follow-Up Date: 3/4/26.

TRAINING SHIFT 2 - MARCH 4

Focus: Two-table section, order accuracy, pacing, pre-bussing, and check presentation.

Observed Strengths: Accurate beverage orders, good table awareness, completed side work without reminders.

Practice Needed: Repeat orders back when several modifications are requested; communicate delays sooner.

Next Action: Run a three-table section with trainer observation during the first hour.

Trainer Status: Progressing as expected. Follow-Up Date: 3/6/26.

COMPLETED EXAMPLE: NEW-HIRE TRAINING FOLLOW-UP

TRAINING SHIFT 3 - MARCH 6

Focus: Three-table section, full order cycle, guest check-backs, payment handling, and closing side work.

Observed Strengths: Maintained calm pace, entered all orders accurately, checked back within two minutes, and communicated one kitchen delay before the guest had to ask.

Practice Needed: Increase confidence describing two specialty entrées and ask for manager support earlier when a guest mentions a severe allergy.

CORRECTIVE COACHING COMPLETED

Issue Observed: Employee initially entered an allergy note without verbally alerting the manager and kitchen.

Standard Reviewed: Allergy requests require POS notation, verbal manager notification, and direct confirmation with the kitchen according to restaurant policy.

Employee Response: Jordan correctly repeated the procedure and demonstrated it on the next supervised order.

TASK-MASTERY DECISION

Greeting and table approach: Approved

Order entry and modifiers: Approved

Allergy communication: Approved after retraining and demonstration

Beverage service and pre-bussing: Approved

Payment handling: Approved

Opening/closing duties: Approved for weekday lunch

FINAL TRAINING DECISION

☒ Approved for independent weekday lunch shifts beginning March 9, 2026.

☐ Approved without restrictions.

☐ Additional full training shift required.

Continued Development: Specialty-menu descriptions and weekend-volume pacing will be reviewed during the 30-day evaluation.

Employee Signature: Jordan Lee Trainer Signature: Alexis Morgan

Manager Approval: Casey Reed Approval Date: March 7, 2026

What makes this example strong: It records what was taught, what was observed, what still needed practice, the corrective action, the follow-up date, and the final readiness decision.

PART 3

ROLE-SPECIFIC TRAINING TRACKERS

| Purpose of This Section:

Every restaurant position needs clear training.

A server, host, bartender, cook, dishwasher, prep cook, and manager all affect the restaurant in different ways. Each role has different responsibilities, different risks, different guest impact, and different standards.

Training should not be the same for every position.

A strong restaurant training system gives each employee a clear path based on the job they are actually expected to perform.

This section gives managers position-specific training trackers that can be used during hands-on training, shift observation, follow-up reviews, and final sign-off.

Each tracker is designed to help managers and trainers answer four important questions:

What has the employee been taught?

What has the employee practiced?

What can the employee perform correctly during real shift conditions?

What still needs follow-up?

Do not sign off on a task just because the employee watched someone else do it.

A task should be signed off only when the employee can complete it correctly, consistently, safely, and without constant reminders.

The goal is not to rush employees through training.

The goal is to build dependable employees who understand the standard before they are held accountable for the standard.

Server Training Tracker

Employee Name: _____

Trainer Name: _____

Manager Name: _____

Training Start Date: _____

Training Completion Date: _____

Department: Front of House

Position: Server

Purpose:

This tracker helps managers train servers on guest service, menu knowledge, table management, order accuracy, POS use, side work, teamwork, and shift accountability.

A server affects the guest experience from the first greeting to the final payment.

A strong server should be able to provide professional service, communicate clearly, protect order accuracy, support the team, and help create repeat guests.

Server Training Checklist

Section 1: Restaurant and Service Basics

- ☐ Restaurant concept explained.
- ☐ Service style explained.
- ☐ Guest expectations explained.
- ☐ Dining room sections reviewed.
- ☐ Table numbers reviewed.
- ☐ Server station locations reviewed.
- ☐ POS station locations reviewed.
- ☐ Side work areas reviewed.
- ☐ Restroom location reviewed.
- ☐ Manager-on-duty communication explained.
- ☐ Shift flow explained.
- ☐ Pre-shift meeting expectations reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 2: Greeting and Table Approach

- ☐ Guest greeting standard reviewed.
- ☐ Timing of first table greeting explained.
- ☐ Proper tone and body language reviewed.
- ☐ How to introduce specials reviewed.
- ☐ How to offer beverages reviewed.
- ☐ How to handle guests who are not ready reviewed.
- ☐ How to read guest pace reviewed.
- ☐ How to communicate wait times reviewed.
- ☐ How to handle first impression mistakes reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 3: Menu Knowledge

- ☐ Menu categories reviewed.

- ☐ Popular items reviewed.
- ☐ Signature items reviewed.
- ☐ High-profit items reviewed if applicable.
- ☐ Common modifications reviewed.
- ☐ Common guest questions reviewed.
- ☐ Allergen communication reviewed.
- ☐ Items with long cook times reviewed.
- ☐ Items that are frequently returned or misunderstood reviewed.
- ☐ Dessert menu reviewed if applicable.
- ☐ Kids menu reviewed if applicable.
- ☐ Drink menu reviewed if applicable.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

| Section 4: Order Taking and Accuracy

- ☐ Proper order-taking process reviewed.
- ☐ Seat numbers reviewed.
- ☐ Modifiers reviewed.
- ☐ Special instructions reviewed.
- ☐ Allergy note procedure reviewed.
- ☐ Timing of appetizer, entree, and dessert orders reviewed.
- ☐ How to repeat orders back reviewed.
- ☐ How to clarify guest requests reviewed.
- ☐ How to prevent missed add-ons reviewed.
- ☐ How to communicate with kitchen reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

| Section 5: POS Training

- ☐ Employee login reviewed.
- ☐ Table selection reviewed.
- ☐ Seat numbers reviewed.
- ☐ Menu item entry reviewed.
- ☐ Modifiers reviewed.
- ☐ Special instructions reviewed.
- ☐ Course timing reviewed if applicable.
- ☐ Splitting checks reviewed.
- ☐ Combining checks reviewed.
- ☐ Discounts reviewed according to policy.
- ☐ Comps and voids reviewed according to policy.
- ☐ Payment processing reviewed.
- ☐ Gift card process reviewed if applicable.
- ☐ Cash handling reviewed if applicable.
- ☐ Receipt process reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 6: Table Maintenance

- ☐ Drink refill expectations reviewed.
- ☐ Pre-bussing expectations reviewed.
- ☐ Plate clearing standards reviewed.
- ☐ Table check-back timing reviewed.
- ☐ How to monitor guest needs reviewed.
- ☐ How to notice unhappy guests reviewed.
- ☐ How to avoid disappearing from the table reviewed.
- ☐ How to support other servers reviewed.
- ☐ How to maintain section cleanliness reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 7: Food Delivery and Quality Checks

- ☐ Food running expectations reviewed.
- ☐ Plate presentation awareness reviewed.
- ☐ Correct table and seat delivery reviewed.
- ☐ Condiment and side item verification reviewed.
- ☐ Temperature or quality concern procedure reviewed.
- ☐ Two-bite or two-minute check-back reviewed if applicable.
- ☐ How to handle missing items reviewed.
- ☐ How to communicate kitchen errors reviewed.
- ☐ How to involve a manager when needed reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 8: Guest Recovery

- ☐ Guest complaint procedure reviewed.
- ☐ When to notify a manager reviewed.
- ☐ How to apologize professionally reviewed.
- ☐ How to avoid blaming coworkers reviewed.
- ☐ How to correct mistakes quickly reviewed.
- ☐ How to document guest issues reviewed if applicable.
- ☐ How to protect guest trust reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 9: Side Work and Cleaning

- ☐ Opening side work reviewed.
- ☐ Running side work reviewed.
- ☐ Closing side work reviewed.
- ☐ Restocking expectations reviewed.
- ☐ Server station cleaning reviewed.

- ☐ Beverage station cleaning reviewed.
- ☐ Silverware rolling or polishing reviewed.
- ☐ Table setup standards reviewed.
- ☐ Trash and linen expectations reviewed.
- ☐ Final side work inspection process reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes

☐ No

Notes:

Section 10: Server Final Readiness Review

Employee can greet tables correctly.

☐ Not yet

☐ Needs more practice

☐ Ready

Employee can take accurate orders.

☐ Not yet

☐ Needs more practice

☐ Ready

Employee can use POS correctly.

☐ Not yet

☐ Needs more practice

☐ Ready

Employee can maintain tables during service.

☐ Not yet

☐ Needs more practice

☐ Ready

Employee can handle guest issues properly.

☐ Not yet

☐ Needs more practice

☐ Ready

Employee can complete side work correctly.

☐ Not yet

☐ Needs more practice

☐ Ready

Employee is ready to work independently as a server.

☐ Yes

☐ No

☐ With limited supervision

Manager Notes:

Follow-Up Action:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

Host Training Tracker

Employee Name: _____

Trainer Name: _____

Manager Name: _____

Training Start Date: _____

Training Completion Date: _____

Department: Front of House

Position: Host

Purpose:

This tracker helps managers train hosts on greeting guests, managing the waitlist, seating rotation, phone etiquette, guest communication, reservation handling, table awareness, and first-impression standards.

The host controls the first impression of the restaurant.

A strong host helps guests feel welcomed, keeps the dining room organized, communicates accurately with servers and managers, and protects the flow of service.

Host Training Checklist

Section 1: Host Stand Basics

- ☐ Host stand setup reviewed.
- ☐ Greeting standard reviewed.
- ☐ Reservation system reviewed if applicable.
- ☐ Waitlist process reviewed.
- ☐ Seating chart reviewed.
- ☐ Table numbers reviewed.
- ☐ Server sections reviewed.
- ☐ Rotation process reviewed.
- ☐ Menus and supplies reviewed.
- ☐ Communication with manager reviewed.
- ☐ Communication with servers reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 2: Guest Greeting

- ☐ Greeting guests promptly reviewed.
- ☐ Eye contact and tone reviewed.
- ☐ How to welcome walk-in guests reviewed.
- ☐ How to confirm party size reviewed.
- ☐ How to ask about seating preference reviewed.
- ☐ How to handle guests with special needs reviewed.
- ☐ How to handle children, high chairs, and boosters reviewed.
- ☐ How to communicate wait times reviewed.
- ☐ How to stay calm during rushes reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 3: Seating Rotation

- ☐ Server rotation explained.
- ☐ Section balance explained.

- ☐ Avoiding double-seating reviewed.
- ☐ When to skip a server reviewed.
- ☐ When to ask manager before seating reviewed.
- ☐ How to handle large parties reviewed.
- ☐ How to manage patio or bar seating reviewed if applicable.
- ☐ How to communicate table changes reviewed.
- ☐ How to avoid overloading the kitchen reviewed if applicable.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 4: Waitlist Management

- ☐ Waitlist process reviewed.
- ☐ Quoted wait time standards reviewed.
- ☐ How to update guests reviewed.
- ☐ How to handle impatient guests reviewed.
- ☐ How to communicate delays reviewed.
- ☐ How to manage no-shows reviewed.
- ☐ How to notify manager of long waits reviewed.
- ☐ How to avoid overpromising reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 5: Phone Etiquette

- ☐ Phone greeting reviewed.
- ☐ Proper tone reviewed.
- ☐ How to answer common questions reviewed.
- ☐ Hours of operation reviewed.
- ☐ Reservation policy reviewed.
- ☐ To-go order process reviewed if applicable.
- ☐ How to place callers on hold reviewed.
- ☐ How to transfer calls reviewed.
- ☐ How to take accurate messages reviewed.
- ☐ When to get a manager reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 6: Reservations

- ☐ Reservation system reviewed if applicable.
- ☐ How to take reservation details reviewed.
- ☐ Guest name and phone number reviewed.
- ☐ Party size reviewed.
- ☐ Date and time confirmation reviewed.
- ☐ Special requests reviewed.
- ☐ Large party procedure reviewed.
- ☐ Deposit or event policy reviewed if applicable.

- ☐ How to confirm reservations reviewed.
- ☐ How to notify manager of special reservations reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 7: Dining Room Awareness

- ☐ Clean table awareness reviewed.
- ☐ Dirty table communication reviewed.
- ☐ Open table tracking reviewed.
- ☐ Guest pacing reviewed.
- ☐ Server workload awareness reviewed.
- ☐ Large party setup reviewed.
- ☐ Restroom check communication reviewed if applicable.
- ☐ Lobby or waiting area cleanliness reviewed.
- ☐ Guest concern awareness reviewed.
- ☐ When to alert manager reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 8: Host Side Work

- ☐ Opening host duties reviewed.
- ☐ Menu cleaning reviewed.
- ☐ Host stand organization reviewed.
- ☐ Reservation materials reviewed.
- ☐ Waiting area cleaning reviewed.
- ☐ Restroom check support reviewed if applicable.
- ☐ Closing host duties reviewed.
- ☐ End-of-shift communication reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 9: Host Final Readiness Review

Employee can greet guests properly.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can manage seating rotation.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can quote wait times responsibly.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can answer phones professionally.

☐ Not yet

☐ Needs more practice

☐ Ready

Employee can communicate with servers and managers.

☐ Not yet

☐ Needs more practice

☐ Ready

Employee can complete host side work.

☐ Not yet

☐ Needs more practice

☐ Ready

Employee is ready to work independently as a host.

☐ Yes

☐ No

☐ With limited supervision

Manager Notes:

Follow-Up Action:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

Bartender Training Tracker

Employee Name: _____

Trainer Name: _____

Manager Name: _____

Training Start Date: _____

Training Completion Date: _____

Department: Bar / Front of House

Position: Bartender

Purpose:

This tracker helps managers train bartenders on bar setup, guest service, drink preparation, responsible alcohol service, POS use, cash handling, cleanliness, inventory awareness, and shift accountability.

A bartender affects guest experience, sales, speed of service, alcohol control, product cost, and restaurant atmosphere.

A strong bartender should be able to serve guests professionally, prepare drinks consistently, follow alcohol service rules, support servers, protect inventory, and keep the bar clean and organized.

Bartender Training Checklist

Section 1: Bar Setup and Station Knowledge

- ☐ Bar layout reviewed.
- ☐ Liquor well reviewed.
- ☐ Beer taps reviewed if applicable.
- ☐ Wine storage reviewed.
- ☐ Glassware locations reviewed.
- ☐ Garnish station reviewed.
- ☐ Ice well reviewed.
- ☐ Mixers and juices reviewed.
- ☐ Soda gun use reviewed if applicable.
- ☐ Bar tools reviewed.
- ☐ Backup product locations reviewed.
- ☐ Cleaning supplies reviewed.
- ☐ Trash and recycling process reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 2: Bar Opening Duties

- ☐ Bar opening checklist reviewed.
- ☐ Ice setup reviewed.
- ☐ Garnish prep reviewed.
- ☐ Fruit cutting standards reviewed.
- ☐ Mixers stocked.
- ☐ Juices stocked.
- ☐ Beer stocked.
- ☐ Wine stocked.
- ☐ Liquor stocked.
- ☐ Glassware stocked.
- ☐ Napkins, straws, picks, and coasters stocked.
- ☐ Bar mats cleaned and placed.
- ☐ Sanitizer setup reviewed.
- ☐ POS readiness reviewed.
- ☐ Opening manager check reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes

☐ No

Notes:

Section 3: Guest Service At the Bar

- ☐ Greeting standard reviewed.
- ☐ Bar guest timing reviewed.
- ☐ Menu and drink recommendation expectations reviewed.
- ☐ How to handle guests waiting for seats reviewed.
- ☐ How to serve guests while making service well drinks reviewed.
- ☐ How to communicate wait times reviewed.
- ☐ How to watch guest body language reviewed.
- ☐ How to handle dissatisfied guests reviewed.
- ☐ How to involve a manager when needed reviewed.
- ☐ Professional conversation boundaries reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes

☐ No

Notes:

Section 4: Drink Preparation Standards

- ☐ House drink recipes reviewed.
- ☐ Signature cocktails reviewed.
- ☐ Standard pour sizes reviewed.
- ☐ Jigger or measuring policy reviewed.
- ☐ Wine pour standards reviewed.
- ☐ Draft beer pour standards reviewed.
- ☐ Bottled beer service reviewed.
- ☐ Garnish standards reviewed.
- ☐ Glassware standards reviewed.
- ☐ Drink presentation standards reviewed.
- ☐ Ticket accuracy reviewed.
- ☐ Speed and consistency expectations reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes

☐ No

Notes:

Section 5: Responsible Alcohol Service

- ☐ Legal drinking age requirement reviewed.
- ☐ ID checking procedure reviewed.
- ☐ Acceptable forms of ID reviewed.
- ☐ Fake ID warning signs reviewed.
- ☐ Refusal of service process reviewed.
- ☐ Over-service warning signs reviewed.
- ☐ Manager notification procedure reviewed.
- ☐ Guest safety expectations reviewed.
- ☐ Alcohol service documentation reviewed if applicable.
- ☐ Local alcohol rules reviewed according to restaurant policy.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes

☐ No

Notes:**Section 6: POS and Payment Handling**

- ☐ Bartender POS login reviewed.
- ☐ Bar tab setup reviewed.
- ☐ Seat or guest tracking reviewed.
- ☐ Drink entry reviewed.
- ☐ Food entry reviewed if applicable.
- ☐ Modifiers reviewed.
- ☐ Happy hour pricing reviewed if applicable.
- ☐ Discounts reviewed according to policy.
- ☐ Voids and comps reviewed according to policy.
- ☐ Cash payment process reviewed.
- ☐ Credit card payment process reviewed.
- ☐ Tip closing procedure reviewed.
- ☐ End-of-shift checkout reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 7: Service Well and Server Support**

- ☐ Service well process reviewed.
- ☐ Ticket priority reviewed.
- ☐ Communication with servers reviewed.
- ☐ Drink pickup area reviewed.
- ☐ Garnish and presentation standards reviewed.
- ☐ Handling remakes reviewed.
- ☐ Handling missing ticket issues reviewed.
- ☐ Rush timing expectations reviewed.
- ☐ Team support expectations reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 8: Bar Cleanliness and Sanitation**

- ☐ Handwashing expectations reviewed.
- ☐ Bar top cleaning reviewed.
- ☐ Glassware sanitation reviewed.
- ☐ Ice handling rules reviewed.
- ☐ Fruit and garnish handling reviewed.
- ☐ Cutting board cleaning reviewed.
- ☐ Spill cleanup reviewed.
- ☐ Floor mat cleaning reviewed.
- ☐ Sink area cleaning reviewed.
- ☐ Trash removal reviewed.
- ☐ End-of-shift sanitation reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 9: Inventory and Product Control**

- ☐ Liquor storage reviewed.
- ☐ Beer storage reviewed.
- ☐ Wine storage reviewed.
- ☐ High-cost product awareness reviewed.
- ☐ Waste and spill reporting reviewed.
- ☐ Broken bottle procedure reviewed.
- ☐ Product transfer process reviewed if applicable.
- ☐ Stocking expectations reviewed.
- ☐ Over-pouring risk reviewed.
- ☐ Shortage reporting reviewed.
- ☐ Manager notification process reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 10: Bar Closing Duties**

- ☐ Closing checklist reviewed.
- ☐ Product storage reviewed.
- ☐ Garnish disposal or storage policy reviewed.
- ☐ Beer tap care reviewed if applicable.
- ☐ Wine storage reviewed.
- ☐ Liquor security reviewed.
- ☐ Glassware cleaning reviewed.
- ☐ Bar top cleaning reviewed.
- ☐ Floor cleaning reviewed.
- ☐ Trash removal reviewed.
- ☐ Drawer or checkout process reviewed.
- ☐ Manager closing inspection reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 11: Bartender Final Readiness Review**

Employee can set up the bar correctly.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can prepare drinks consistently.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can serve bar guests professionally.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee understands responsible alcohol service.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can use the POS correctly.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can support service well volume.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can complete bar closing duties correctly.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee is ready to work independently as a bartender.

- ☐ Yes
- ☐ No
- ☐ With limited supervision

Manager Notes:

Follow-Up Action:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

Cook Training Tracker

Employee Name: _____

Trainer Name: _____

Manager Name: _____

Training Start Date: _____

Training Completion Date: _____

Department: Back of House

Position: Cook

Purpose:

This tracker helps managers train cooks on station setup, food safety, recipe execution, portion control, ticket flow, plate presentation, communication, cleaning, closing duties, and kitchen accountability.

A cook affects food quality, ticket times, guest satisfaction, waste, food cost, and kitchen consistency.

A strong cook should be able to prepare menu items correctly, work cleanly, follow recipes, communicate with the team, manage tickets, protect food safety, and maintain standards under pressure.

Cook Training Checklist

Section 1: Kitchen Orientation

- ☐ Kitchen layout reviewed.
- ☐ Cook line stations reviewed.
- ☐ Prep area reviewed.
- ☐ Dish area reviewed.
- ☐ Dry storage reviewed.
- ☐ Walk-in cooler reviewed.
- ☐ Walk-in freezer reviewed.
- ☐ Handwashing sinks reviewed.
- ☐ Chemical storage reviewed.
- ☐ First aid location reviewed.
- ☐ Fire extinguisher location reviewed.
- ☐ Emergency exits reviewed.
- ☐ Manager or kitchen lead communication reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes

☐ No

Notes:

Section 2: Food Safety Basics

- ☐ Handwashing expectations reviewed.
- ☐ Glove use reviewed if applicable.
- ☐ Cross-contamination prevention reviewed.
- ☐ Raw product handling reviewed.
- ☐ Cook temperature standards reviewed.
- ☐ Cooling procedure reviewed if applicable.
- ☐ Reheating procedure reviewed if applicable.
- ☐ Holding temperature standards reviewed.
- ☐ Food labeling reviewed.
- ☐ Date marking reviewed.
- ☐ Allergy awareness reviewed.
- ☐ Sick employee reporting reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes

☐ No

Notes:

Section 3: Station Setup

- ☐ Assigned station reviewed.
- ☐ Station equipment reviewed.
- ☐ Required utensils reviewed.
- ☐ Product location reviewed.
- ☐ Backup product reviewed.
- ☐ Portion tools reviewed.
- ☐ Plates and packaging reviewed.
- ☐ Towels and sanitizer setup reviewed.
- ☐ Trash location reviewed.
- ☐ Restocking process reviewed.
- ☐ Opening station checklist reviewed.
- ☐ Manager station check reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 4: Recipe and Menu Knowledge

- ☐ Menu items for station reviewed.
- ☐ Recipe cards reviewed.
- ☐ Ingredients reviewed.
- ☐ Build order reviewed.
- ☐ Cooking methods reviewed.
- ☐ Cook times reviewed.
- ☐ Holding times reviewed.
- ☐ Portion sizes reviewed.
- ☐ Garnish standards reviewed.
- ☐ Plate presentation reviewed.
- ☐ Common modifications reviewed.
- ☐ Allergy-related modifications reviewed.
- ☐ Items often made incorrectly reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 5: Portion Control

- ☐ Portion control purpose explained.
- ☐ Portion tools reviewed.
- ☐ Scoops, ladles, scales, or cups reviewed.
- ☐ High-cost ingredients identified.
- ☐ Over-portioning risk explained.
- ☐ Under-portioning guest impact explained.
- ☐ Recipe yield expectations reviewed.
- ☐ Waste tracking process reviewed if applicable.
- ☐ Manager correction process reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 6: Ticket Flow and Timing**

- ☐ Ticket system reviewed.
- ☐ Ticket reading reviewed.
- ☐ Priority order reviewed.
- ☐ Fire times reviewed if applicable.
- ☐ Appetizer timing reviewed.
- ☐ Entree timing reviewed.
- ☐ Modifier awareness reviewed.
- ☐ All-day count communication reviewed.
- ☐ Expo communication reviewed.
- ☐ Rush communication reviewed.
- ☐ How to ask for help reviewed.
- ☐ How to avoid losing tickets reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 7: Plate Presentation and Quality**

- ☐ Plate standards reviewed.
- ☐ Portion appearance reviewed.
- ☐ Garnish placement reviewed.
- ☐ Sauce placement reviewed.
- ☐ Temperature expectations reviewed.
- ☐ Clean plate rim expectations reviewed.
- ☐ Packaging standards reviewed if applicable.
- ☐ Quality check before sending reviewed.
- ☐ Remake procedure reviewed.
- ☐ Manager notification for recurring issues reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 8: Team Communication**

- ☐ Communication with expo reviewed.
- ☐ Communication with other cooks reviewed.
- ☐ Communication with prep reviewed.
- ☐ Communication with dish reviewed.
- ☐ Communication with managers reviewed.
- ☐ Calling back tickets reviewed if applicable.
- ☐ Communicating low product reviewed.
- ☐ Communicating equipment problems reviewed.
- ☐ Communicating food quality concerns reviewed.
- ☐ Respectful kitchen language reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 9: Clean-as-you-go and Sanitation**

- ☐ Clean-as-you-go expectations reviewed.
- ☐ Sanitizer bucket use reviewed.
- ☐ Towel use reviewed.
- ☐ Cutting board sanitation reviewed.
- ☐ Knife sanitation reviewed.
- ☐ Surface cleaning reviewed.
- ☐ Floor safety reviewed.
- ☐ Spill cleanup reviewed.
- ☐ Trash management reviewed.
- ☐ End-of-shift cleaning reviewed.
- ☐ Health inspection readiness reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 10: Cook Closing Duties**

- ☐ Station breakdown reviewed.
- ☐ Product cooling reviewed if applicable.
- ☐ Product labeling reviewed.
- ☐ Product storage reviewed.
- ☐ Equipment cleaning reviewed.
- ☐ Grill or flat top cleaning reviewed if applicable.
- ☐ Fryer area cleaning reviewed if applicable.
- ☐ Oven cleaning reviewed if applicable.
- ☐ Cooler organization reviewed.
- ☐ Trash removal reviewed.
- ☐ Floor cleaning reviewed.
- ☐ Final manager inspection reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 11: Cook Final Readiness Review**

Employee can set up the station correctly.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee follows recipes correctly.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee uses correct portions.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee manages ticket flow properly.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee communicates with the kitchen team.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee maintains food safety standards.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee completes cleaning and closing duties.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee is ready to work independently as a cook.

- ☐ Yes
- ☐ No
- ☐ With limited supervision

Manager Notes:

Follow-Up Action:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

Dishwasher Training Tracker

Employee Name: _____

Trainer Name: _____

Manager Name: _____

Training Start Date: _____

Training Completion Date: _____

Department: Back of House

Position: Dishwasher

Purpose:

This tracker helps managers train dishwashers on dish pit setup, dish machine use, sanitation, sorting, trash handling, kitchen support, closing duties, and shift flow.

The dishwasher affects the entire restaurant.

When the dish area falls behind, the kitchen slows down, servers run out of supplies, cooks lose equipment, and closing takes longer.

A strong dishwasher keeps the restaurant moving by staying organized, protecting sanitation standards, communicating with the team, and keeping clean dishes, glassware, silverware, pans, and smallwares available during service.

Dishwasher Training Checklist

Section 1: Dish Area Orientation

- ☐ Dish pit layout reviewed.
- ☐ Dirty dish drop-off area reviewed.
- ☐ Scraping area reviewed.
- ☐ Pre-rinse area reviewed.
- ☐ Dish machine reviewed.
- ☐ Clean dish landing area reviewed.
- ☐ Glass rack area reviewed.
- ☐ Silverware area reviewed.
- ☐ Pot and pan area reviewed.
- ☐ Trash area reviewed.
- ☐ Chemical storage reviewed.
- ☐ Mop sink reviewed.
- ☐ Clean dish storage reviewed.
- ☐ Manager or kitchen lead communication reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes☐ No

Notes:

Section 2: Safety and Sanitation Basics

- ☐ Handwashing expectations reviewed.
- ☐ Glove use reviewed if applicable.
- ☐ Chemical safety reviewed.
- ☐ Dish machine chemical awareness reviewed.
- ☐ Hot water safety reviewed.
- ☐ Broken glass procedure reviewed.
- ☐ Sharp object handling reviewed.
- ☐ Slip and fall prevention reviewed.
- ☐ Wet floor sign use reviewed.
- ☐ Proper lifting reviewed.
- ☐ Trash handling reviewed.
- ☐ Injury reporting process reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes

☐ No

Notes:

Section 3: Dish Machine Operation

- ☐ Dish machine startup reviewed.
- ☐ Water temperature awareness reviewed.
- ☐ Chemical supply awareness reviewed.
- ☐ Loading racks reviewed.
- ☐ Running dishes reviewed.
- ☐ Checking for clean results reviewed.
- ☐ Rewashing dirty items reviewed.
- ☐ Machine cleaning reviewed.
- ☐ Filter or trap cleaning reviewed if applicable.
- ☐ End-of-shift shutdown reviewed.
- ☐ When to notify manager of machine problems reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes

☐ No

Notes:

Section 4: Sorting and Priority Flow

- ☐ Scraping dishes reviewed.
- ☐ Sorting plates reviewed.
- ☐ Sorting bowls reviewed.
- ☐ Sorting glassware reviewed.
- ☐ Sorting silverware reviewed.
- ☐ Sorting pans reviewed.
- ☐ Sorting utensils reviewed.
- ☐ Separating sharp items reviewed.
- ☐ Keeping dirty and clean items separate reviewed.
- ☐ Prioritizing urgent items reviewed.
- ☐ Communicating shortages reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes

☐ No

Notes:

Section 5: Clean Dish Handling and Storage

- ☐ Clean plate storage reviewed.
- ☐ Bowl storage reviewed.
- ☐ Glassware storage reviewed.
- ☐ Silverware storage reviewed.
- ☐ Pan storage reviewed.
- ☐ Smallwares storage reviewed.
- ☐ Air-drying expectations reviewed.
- ☐ Avoiding towel-drying contamination reviewed if applicable.
- ☐ Checking for food residue reviewed.
- ☐ Returning items to correct locations reviewed.
- ☐ Keeping clean area organized reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes

☐ No

Notes:

Section 6: Silverware and Glassware

- ☐ Silverware soaking process reviewed.
- ☐ Silverware running process reviewed.
- ☐ Silverware sorting reviewed.
- ☐ Silverware polishing reviewed if applicable.
- ☐ Glass rack loading reviewed.
- ☐ Glassware inspection reviewed.
- ☐ Chipped glass procedure reviewed.
- ☐ Clean glass storage reviewed.
- ☐ Server communication reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 7: Trash, Floors, and Cleaning Support

- ☐ Trash removal process reviewed.
- ☐ Cardboard handling reviewed if applicable.
- ☐ Grease or food waste handling reviewed if applicable.
- ☐ Dish area floor cleaning reviewed.
- ☐ Drain area cleaning reviewed.
- ☐ Mop bucket use reviewed.
- ☐ Spill cleanup reviewed.
- ☐ Back door or dumpster area expectations reviewed.
- ☐ End-of-shift floor cleaning reviewed.
- ☐ Cleaning supply storage reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 8: Team Communication

- ☐ Communicating clean dish shortages reviewed.
- ☐ Communicating pan shortages reviewed.
- ☐ Communicating glassware shortages reviewed.
- ☐ Communicating silverware shortages reviewed.
- ☐ Communicating machine problems reviewed.
- ☐ Communicating chemical concerns reviewed.
- ☐ Communicating unsafe conditions reviewed.
- ☐ Asking for help during rushes reviewed.
- ☐ Supporting cooks and servers reviewed.
- ☐ Respectful communication reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 9: Dishwasher Closing Duties

- ☐ Final dish run reviewed.
- ☐ Dish machine cleaning reviewed.
- ☐ Filter or trap cleaning reviewed if applicable.
- ☐ Dish area wipe-down reviewed.
- ☐ Clean dish storage reviewed.
- ☐ Trash removal reviewed.
- ☐ Floor cleaning reviewed.
- ☐ Mats cleaned and stored if applicable.
- ☐ Sink cleaning reviewed.
- ☐ Chemical area checked.
- ☐ Final manager inspection reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 10: Dishwasher Final Readiness Review

Employee can set up the dish area correctly.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can operate the dish machine safely.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can keep dish flow organized.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can protect sanitation standards.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can return clean items to correct locations.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee communicates shortages or problems.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee can complete closing duties correctly.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee is ready to work independently as a dishwasher.

- ☐ Yes
- ☐ No
- ☐ With limited supervision

Manager Notes:

Follow-Up Action:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

Prep Cook Training Tracker

Employee Name: _____

Trainer Name: _____

Manager Name: _____

Training Start Date: _____

Training Completion Date: _____

Department: Back of House

Position: Prep Cook

Purpose:

This tracker helps managers train prep cooks on prep lists, recipes, portioning, food safety, labeling, storage, par levels, waste control, communication, and station readiness.

Prep work affects the entire restaurant before the shift even begins.

When prep is accurate, the kitchen runs smoother, ticket times improve, food quality is more consistent, and waste is easier to control.

When prep is weak, the restaurant runs out of product, overproduces, wastes food, slows service, and frustrates cooks and managers.

A strong prep cook understands recipes, follows par levels, labels product correctly, communicates shortages, protects food safety, and prepares the restaurant for service.

Prep Cook Training Checklist

Section 1: Prep Area Orientation

- ☐ Prep area layout reviewed.
- ☐ Prep tables reviewed.
- ☐ Cutting boards reviewed.
- ☐ Knife storage reviewed.
- ☐ Smallwares reviewed.
- ☐ Scales and measuring tools reviewed.
- ☐ Food processor or slicer reviewed if applicable.
- ☐ Walk-in cooler reviewed.
- ☐ Walk-in freezer reviewed.
- ☐ Dry storage reviewed.
- ☐ Labeling station reviewed.
- ☐ Handwashing sink reviewed.
- ☐ Chemical storage reviewed.
- ☐ Trash and food waste area reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:

Section 2: Food Safety and Sanitation

- ☐ Handwashing expectations reviewed.
- ☐ Glove use reviewed if applicable.
- ☐ Cross-contamination prevention reviewed.
- ☐ Raw product handling reviewed.
- ☐ Produce washing reviewed if applicable.
- ☐ Time and temperature awareness reviewed.
- ☐ Cooling procedure reviewed if applicable.
- ☐ Holding standards reviewed.
- ☐ Clean cutting board use reviewed.
- ☐ Sanitizer bucket use reviewed.
- ☐ Towel use reviewed.
- ☐ Sick employee reporting reviewed.
- ☐ Allergy awareness reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
☐ No

Notes:

Section 3: Prep List Use

- ☐ Daily prep list reviewed.
- ☐ Weekly prep rhythm reviewed.
- ☐ Priority items reviewed.
- ☐ Par levels explained.
- ☐ Batch size expectations reviewed.
- ☐ Prep timing reviewed.
- ☐ Manager approval process reviewed.
- ☐ How to mark completed prep reviewed.
- ☐ How to report shortages reviewed.
- ☐ How to avoid unnecessary prep reviewed.
- ☐ How to communicate low product reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
☐ No

Notes:

Section 4: Recipe Execution

- ☐ Recipe card use reviewed.
- ☐ Ingredient identification reviewed.
- ☐ Measurement standards reviewed.
- ☐ Batch preparation reviewed.
- ☐ Mixing or cooking instructions reviewed.
- ☐ Yield expectations reviewed.
- ☐ Taste or quality check reviewed if applicable.
- ☐ Common mistakes reviewed.
- ☐ Manager approval for recipe changes reviewed.
- ☐ No-guessing standard reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
☐ No

Notes:

Section 5: Portioning and Product Control

- ☐ Portion control purpose explained.
- ☐ Portion tools reviewed.
- ☐ Scales reviewed if applicable.
- ☐ Scoops reviewed if applicable.
- ☐ Ladles reviewed if applicable.
- ☐ Portion cups reviewed if applicable.
- ☐ High-cost ingredients identified.
- ☐ Overproduction risk reviewed.
- ☐ Underproduction risk reviewed.
- ☐ Waste tracking reviewed if applicable.
- ☐ Product yield awareness reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
☐ No

Notes:**Section 6: Labeling, Dating, and Storage**

- ☐ Labeling standards reviewed.
- ☐ Product name requirement reviewed.
- ☐ Prep date requirement reviewed.
- ☐ Use-by date requirement reviewed.
- ☐ Employee initials requirement reviewed if applicable.
- ☐ First in, first out reviewed.
- ☐ Proper container use reviewed.
- ☐ Proper lids and wraps reviewed.
- ☐ Walk-in organization reviewed.
- ☐ Raw product storage reviewed.
- ☐ Ready-to-eat product storage reviewed.
- ☐ Dry storage expectations reviewed.
- ☐ Product rotation reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
☐ No

Notes:**Section 7: Knife and Equipment Safety**

- ☐ Knife handling reviewed.
- ☐ Knife storage reviewed.
- ☐ Cutting technique reviewed.
- ☐ Cut glove use reviewed if applicable.
- ☐ Slicer use reviewed if applicable.
- ☐ Food processor use reviewed if applicable.
- ☐ Mixer use reviewed if applicable.
- ☐ Hot equipment use reviewed if applicable.
- ☐ Equipment cleaning reviewed.
- ☐ Equipment problem reporting reviewed.
- ☐ Injury reporting reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
☐ No

Notes:**Section 8: Communication with Line and Management**

- ☐ Communicating completed prep reviewed.
- ☐ Communicating low product reviewed.
- ☐ Communicating product quality issues reviewed.
- ☐ Communicating equipment problems reviewed.
- ☐ Communicating missing ingredients reviewed.
- ☐ Communicating time concerns reviewed.
- ☐ Asking before changing recipes reviewed.
- ☐ Asking before throwing product away reviewed.
- ☐ Manager check-in expectations reviewed.
- ☐ End-of-prep handoff reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes

☐ No

Notes:

| Section 9: Prep Closing and Cleanup Duties

- ☐ Prep area cleaning reviewed.
- ☐ Cutting board cleaning reviewed.
- ☐ Knife cleaning and storage reviewed.
- ☐ Equipment cleaning reviewed.
- ☐ Food storage reviewed.
- ☐ Label check reviewed.
- ☐ Trash removal reviewed.
- ☐ Floor cleaning reviewed.
- ☐ Sanitizer disposal reviewed.
- ☐ Final manager inspection reviewed.

Trainer Initials: _____

Manager Initials: _____

Follow-Up Needed:

☐ Yes

☐ No

Notes:

Section 10: Prep Cook Final Readiness Review

Employee can read and follow the prep list.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee follows recipes accurately.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee uses correct portions and measurements.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee labels and stores product correctly.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee protects food safety standards.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee communicates shortages or issues.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee completes prep cleanup duties.

- ☐ Not yet
- ☐ Needs more practice
- ☐ Ready

Employee is ready to work independently as a prep cook.

- ☐ Yes
- ☐ No
- ☐ With limited supervision

Manager Notes:

Follow-Up Action:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

Manager Training Tracker

Employee Name: _____

Trainer Name: _____

General Manager Name: _____

Training Start Date: _____

Training Completion Date: _____

Department: Management

Position: Manager / Shift Leader

Purpose:

This tracker helps restaurant leaders train managers and shift leaders on shift control, team leadership, guest recovery, labor awareness, cash handling, food safety, communication, opening duties, closing duties, and accountability.

A manager affects every part of the restaurant.

A strong manager protects standards, supports employees, solves problems, communicates clearly, controls the shift, follows up on issues, and makes decisions that protect the guest experience and the business.

Manager training should be taken seriously because managers create the tone of the restaurant.

Manager Training Checklist

Section 1: Management Role Expectations

- ☐ Manager role explained.
- ☐ Chain of command reviewed.
- ☐ Decision-making authority reviewed.
- ☐ Professional conduct standards reviewed.
- ☐ Confidentiality expectations reviewed.
- ☐ Communication expectations reviewed.
- ☐ Accountability expectations reviewed.
- ☐ Guest-first leadership reviewed.
- ☐ Team support expectations reviewed.
- ☐ Manager appearance standards reviewed.
- ☐ Manager shift presence reviewed.
- ☐ Follow-up expectations reviewed.

Trainer Initials: _____

General Manager Initials: _____

Follow-Up Needed:

☐ Yes☐ No

Notes:

Section 2: Shift Control

- ☐ Opening shift expectations reviewed.
- ☐ Mid-shift expectations reviewed.
- ☐ Closing shift expectations reviewed.
- ☐ Floor presence reviewed.
- ☐ Kitchen presence reviewed.
- ☐ Bar presence reviewed if applicable.
- ☐ Pre-shift meeting reviewed.
- ☐ Station readiness checks reviewed.
- ☐ Guest flow awareness reviewed.
- ☐ Ticket time awareness reviewed.
- ☐ Staff performance monitoring reviewed.
- ☐ Manager notes process reviewed.
- ☐ End-of-shift recap reviewed.

Trainer Initials: _____

General Manager Initials: _____

Follow-Up Needed:

☐ Yes☐ No

Notes:**Section 3: Employee Leadership**

- ☐ Giving clear direction reviewed.
- ☐ Coaching in the moment reviewed.
- ☐ Correcting respectfully reviewed.
- ☐ Avoiding public embarrassment reviewed.
- ☐ Handling pushback reviewed.
- ☐ Recognizing strong performance reviewed.
- ☐ Delegating tasks reviewed.
- ☐ Following up on assigned tasks reviewed.
- ☐ Managing conflict reviewed.
- ☐ Communicating expectations reviewed.
- ☐ Holding standards consistently reviewed.

Trainer Initials: _____

General Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 4: Guest Recovery**

- ☐ Guest complaint response reviewed.
- ☐ Listening without interrupting reviewed.
- ☐ Apology standards reviewed.
- ☐ Solving problems quickly reviewed.
- ☐ Comp and discount policy reviewed.
- ☐ Refund policy reviewed if applicable.
- ☐ When to escalate reviewed.
- ☐ Online review awareness reviewed.
- ☐ Documenting guest issues reviewed.
- ☐ Turning complaints into improvement reviewed.

Trainer Initials: _____

General Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 5: Labor and Scheduling Awareness**

- ☐ Labor percentage basics reviewed.
- ☐ Schedule reading reviewed.
- ☐ Position coverage reviewed.
- ☐ Call-out procedure reviewed.
- ☐ Break management reviewed.
- ☐ Early cut decisions reviewed.
- ☐ Overtime awareness reviewed.
- ☐ Cross-training awareness reviewed.
- ☐ Peak-hour staffing reviewed.
- ☐ Slow-period labor control reviewed.
- ☐ Service impact of labor decisions reviewed.

Trainer Initials: _____

General Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 6: Food Cost, Waste, and Inventory Awareness**

- ☐ Food cost basics reviewed.
- ☐ Waste tracking reviewed.
- ☐ Portion control enforcement reviewed.
- ☐ Overproduction awareness reviewed.
- ☐ Spoilage reporting reviewed.
- ☐ Receiving awareness reviewed if applicable.
- ☐ High-cost item awareness reviewed.
- ☐ Product shortage communication reviewed.
- ☐ Manager responsibility for waste reviewed.
- ☐ Corrective action process reviewed.

Trainer Initials: _____

General Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 7: Cash, POS, and Financial Controls**

- ☐ POS manager functions reviewed.
- ☐ Discounts reviewed.
- ☐ Voids reviewed.
- ☐ Comps reviewed.
- ☐ Refunds reviewed.
- ☐ Cash drawer procedure reviewed.
- ☐ Server checkout process reviewed.
- ☐ Bartender checkout process reviewed.
- ☐ Deposit process reviewed if applicable.
- ☐ Safe handling reviewed if applicable.
- ☐ End-of-day report reviewed.
- ☐ Financial discrepancy process reviewed.

Trainer Initials: _____

General Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 8: Safety, Sanitation, and Compliance**

- ☐ Food safety manager responsibility reviewed.
- ☐ Handwashing enforcement reviewed.
- ☐ Temperature log expectations reviewed if applicable.
- ☐ Cleaning checklist follow-up reviewed.
- ☐ Chemical safety reviewed.
- ☐ Injury reporting reviewed.
- ☐ Incident documentation reviewed.
- ☐ Allergy concern procedure reviewed.
- ☐ Alcohol service oversight reviewed if applicable.
- ☐ Health inspection readiness reviewed.
- ☐ Emergency procedure reviewed.

Trainer Initials: _____

General Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 9: Opening Manager Duties**

- ☐ Building entry procedure reviewed.
- ☐ Alarm or key procedure reviewed if applicable.
- ☐ Opening inspection reviewed.
- ☐ Cash setup reviewed if applicable.
- ☐ FOH readiness reviewed.
- ☐ BOH readiness reviewed.
- ☐ Bar readiness reviewed if applicable.
- ☐ Staff arrival check reviewed.
- ☐ Station setup check reviewed.
- ☐ Reservation or event notes reviewed.
- ☐ Pre-shift meeting preparation reviewed.
- ☐ Opening manager sign-off reviewed.

Trainer Initials: _____

General Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 10: Closing Manager Duties**

- ☐ Closing checklist reviewed.
- ☐ Guest exit standards reviewed.
- ☐ Staff side work inspection reviewed.
- ☐ Kitchen closing inspection reviewed.
- ☐ Bar closing inspection reviewed if applicable.
- ☐ Dish area closing inspection reviewed.
- ☐ Cashout process reviewed.
- ☐ Deposit or money handling reviewed if applicable.
- ☐ Door lock procedure reviewed.
- ☐ Alarm procedure reviewed if applicable.
- ☐ End-of-shift notes reviewed.
- ☐ Manager closing sign-off reviewed.

Trainer Initials: _____

General Manager Initials: _____

Follow-Up Needed:

- ☐ Yes
- ☐ No

Notes:**Section 11: Manager Communication and Follow-up**

- ☐ Shift notes reviewed.
- ☐ Manager log reviewed if applicable.
- ☐ Maintenance issue reporting reviewed.
- ☐ Employee issue reporting reviewed.
- ☐ Guest issue reporting reviewed.
- ☐ Training follow-up reviewed.
- ☐ Owner or GM communication reviewed.
- ☐ Next-shift handoff reviewed.
- ☐ Written documentation expectations reviewed.
- ☐ Follow-through expectations reviewed.

Trainer Initials: _____

General Manager Initials: _____

Follow-Up Needed:

- ☐ Yes

☐ No

Notes:

Section 12: Manager Final Readiness Review

Employee can lead a shift professionally.

- ☐ Not yet
☐ Needs more practice
☐ Ready

Employee can communicate clearly with the team.

- ☐ Not yet
☐ Needs more practice
☐ Ready

Employee can handle guest issues properly.

- ☐ Not yet
☐ Needs more practice
☐ Ready

Employee understands labor awareness.

- ☐ Not yet
☐ Needs more practice
☐ Ready

Employee understands food cost and waste awareness.

- ☐ Not yet
☐ Needs more practice
☐ Ready

Employee can complete cash/POS responsibilities.

- ☐ Not yet
☐ Needs more practice
☐ Ready

Employee can enforce safety and sanitation standards.

- ☐ Not yet
☐ Needs more practice
☐ Ready

Employee can complete opening duties.

- ☐ Not yet
☐ Needs more practice
☐ Ready

Employee can complete closing duties.

- ☐ Not yet
☐ Needs more practice
☐ Ready

Employee is ready to work independently as a manager or shift leader.

- ☐ Yes
☐ No
☐ With limited supervision

General Manager Notes:

Follow-Up Action:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

General Manager Signature: _____ Date: _____

Part 3 Completion Review

ROLE-SPECIFIC TRAINING TRACKER REVIEW

Employee Name: _____

Primary Position: _____

Secondary Position: _____

Trainer Name: _____

Manager Name: _____

Review Date: _____

Purpose:

Use this page after the employee has completed the role-specific training tracker for their position.

This review helps the manager confirm whether the employee is truly ready for independent work, needs additional practice, or should receive targeted retraining before being fully certified.

Training should not be considered complete until the employee can perform the job correctly during real restaurant conditions.

Role-specific Training Completed

Position Tracker Used:

- ☐ Server Training Tracker
- ☐ Host Training Tracker
- ☐ Bartender Training Tracker
- ☐ Cook Training Tracker
- ☐ Dishwasher Training Tracker
- ☐ Prep Cook Training Tracker
- ☐ Manager Training Tracker
- ☐ Other: _____

Training Status

- ☐ All required sections were reviewed.
- ☐ Employee practiced the required tasks.
- ☐ Trainer observed employee performance.
- ☐ Manager reviewed employee progress.
- ☐ Follow-up items were identified.
- ☐ Employee received correction where needed.
- ☐ Employee repeated tasks after correction.
- ☐ Employee demonstrated improvement.
- ☐ Required signatures were completed.
- ☐ Final readiness review was completed.

EMPLOYEE PERFORMANCE REVIEW

What areas did the employee perform well?

What areas still need improvement?

What task caused the most difficulty?

What task should be reviewed again before certification?

What feedback did the trainer provide?

What feedback did the employee provide?

Manager Decision

Employee status after role-specific training:

- ☐ Ready for independent work
- ☐ Ready with limited supervision
- ☐ Needs additional practice

- ☐ Needs retraining before sign-off
- ☐ Not ready for this position

| Follow-up Action Plan

Action Needed:

Person Responsible: _____

Deadline: _____

Follow-Up Date: _____

Final Manager Notes:

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

PART 4

TASK MASTERY SHEETS

WHAT TASK MASTERY MEANS

| Purpose of This Section:

Training is not complete when an employee hears instructions.

Training is not complete when an employee watches someone else perform a task.

Training is not complete just because a checklist was reviewed.

Training is complete when the employee can perform the task correctly, safely, consistently, and without constant reminders during real restaurant conditions.

That is task mastery.

Task mastery means the employee has moved beyond awareness and into dependable performance.

This section gives managers a way to document whether an employee can actually perform key restaurant tasks.

The task mastery sheets can be used for:

Front-of-house duties

Back-of-house duties

Service standards

Cleaning and sanitation

Guest recovery

Cash handling

Opening duties

Closing duties

Station-specific responsibilities

Each task mastery sheet should be completed after training and observation.

The manager or trainer should not sign off unless the employee can demonstrate the task correctly.

If the employee cannot complete the task properly, the manager should assign more practice, coaching, or retraining.

The purpose of this section is to protect consistency.

A restaurant should not depend on memory, assumptions, or verbal promises.

A restaurant should verify that important tasks are being done correctly.

FOH Task Mastery Sheet

Employee Name: _____

Position: _____

Trainer Name: _____

Manager Name: _____

Date: _____

Department: Front of House

Purpose:

Use this sheet to confirm that a front-of-house employee can perform important guest-facing and service-support tasks correctly during real shift conditions.

This sheet may be used for servers, hosts, bartenders, bussers, food runners, cashiers, or other front-of-house team members.

Task Being Reviewed

Task Name: _____

Task Area:

- ☐ Guest greeting
- ☐ Table service
- ☐ Seating
- ☐ Phone service
- ☐ POS use
- ☐ Food running
- ☐ Beverage service
- ☐ Side work
- ☐ Guest recovery
- ☐ Cleaning
- ☐ Opening duties
- ☐ Closing duties
- ☐ Other: _____

Task Standard

What is the correct standard for this task?

Why does this task matter?

Training Status

- ☐ Task was explained.
- ☐ Task was demonstrated by trainer.
- ☐ Employee practiced the task.
- ☐ Employee was observed performing the task.
- ☐ Correction was given if needed.
- ☐ Employee repeated the task after correction.
- ☐ Employee completed the task during real shift conditions.
- ☐ Employee understands when the task must be done.
- ☐ Employee understands who to notify if there is a problem.

Performance Review

Accuracy:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Speed:

- ☐ Too slow
- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Guest impact:

- ☐ Negative
- ☐ Neutral
- ☐ Positive
- ☐ Strong

Consistency:

- ☐ Not consistent
- ☐ Improving
- ☐ Consistent
- ☐ Very consistent

| Task Mastery Decision

- ☐ Introduced only
- ☐ Practiced with support
- ☐ Observed but needs more practice
- ☐ Mastered and ready for sign-off

WHAT WENT WELL?

WHAT NEEDS IMPROVEMENT?

| Follow-up Action**Follow-Up Required:**

- ☐ Yes
- ☐ No

Action Needed:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____

BOH Task Mastery Sheet

Employee Name: _____

Position: _____

Trainer Name: _____

Manager Name: _____

Date: _____

Department: Back of House

Purpose:

Use this sheet to confirm that a back-of-house employee can perform important kitchen, prep, dish, cleaning, and food safety tasks correctly during real shift conditions.

This sheet may be used for cooks, prep cooks, dishwashers, kitchen leads, expo, or other back-of-house team members.

Task Being Reviewed

Task Name: _____

Task Area:

- ☐ Station setup
- ☐ Recipe execution
- ☐ Food preparation
- ☐ Portion control
- ☐ Ticket flow
- ☐ Plate presentation
- ☐ Prep list completion
- ☐ Dish machine operation
- ☐ Cleaning
- ☐ Food labeling
- ☐ Storage
- ☐ Waste control
- ☐ Opening duties
- ☐ Closing duties
- ☐ Other: _____

Task Standard

What is the correct standard for this task?

Why does this task matter?

Training Status

- ☐ Task was explained.
- ☐ Task was demonstrated by trainer.
- ☐ Employee practiced the task.
- ☐ Employee was observed performing the task.
- ☐ Correction was given if needed.
- ☐ Employee repeated the task after correction.
- ☐ Employee completed the task during real shift conditions.
- ☐ Employee understands safety or sanitation concerns.
- ☐ Employee understands who to notify if there is a problem.

Performance Review

Accuracy:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Food safety:

- ☐ Not acceptable
- ☐ Needs practice

- ☐ Acceptable
- ☐ Strong

Speed:

- ☐ Too slow
- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Consistency:

- ☐ Not consistent
- ☐ Improving
- ☐ Consistent
- ☐ Very consistent

Waste control:

- ☐ Poor
- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Task Mastery Decision

- ☐ Introduced only
- ☐ Practiced with support
- ☐ Observed but needs more practice
- ☐ Mastered and ready for sign-off

WHAT WENT WELL?

WHAT NEEDS IMPROVEMENT?

Follow-up Action**Follow-Up Required:**

- ☐ Yes
- ☐ No

Action Needed:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____

Service Standards Mastery Sheet

Employee Name: _____

Position: _____

Trainer Name: _____

Manager Name: _____

Date: _____

Purpose:

Use this sheet to confirm that an employee understands and demonstrates the restaurant's service standards.

Service standards affect guest satisfaction, repeat business, online reviews, tips, teamwork, and the overall reputation of the restaurant.

This sheet may be used for any position that interacts with guests or affects the guest experience.

Service Standard Area

- ☐ Guest greeting
- ☐ Tone of voice
- ☐ Body language
- ☐ Table approach
- ☐ Menu explanation
- ☐ Order accuracy
- ☐ Guest check-back
- ☐ Beverage refills
- ☐ Pre-bussing
- ☐ Guest complaint response
- ☐ Phone etiquette
- ☐ Bar guest service
- ☐ Host stand service
- ☐ Food delivery
- ☐ Team support
- ☐ Other: _____

Standard Being Reviewed

Describe the service standard:

Why this standard matters:

Observation Checklist

- ☐ Employee greeted guests professionally.
- ☐ Employee used respectful language.
- ☐ Employee made guests feel noticed.
- ☐ Employee listened before responding.
- ☐ Employee communicated clearly.
- ☐ Employee avoided arguing or blaming.
- ☐ Employee followed the correct timing standard.
- ☐ Employee supported the team when needed.
- ☐ Employee responded appropriately to guest needs.
- ☐ Employee involved a manager when needed.
- ☐ Employee protected the guest experience.

Performance Review

Guest awareness:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Professional communication:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable

☐ Strong

Timing:

☐ Not acceptable

☐ Needs practice

☐ Acceptable

☐ Strong

Teamwork:

☐ Not acceptable

☐ Needs practice

☐ Acceptable

☐ Strong

Overall service standard:

☐ Not acceptable

☐ Needs practice

☐ Acceptable

☐ Strong

Task Mastery Decision

☐ Introduced only

☐ Practiced with support

☐ Observed but needs more practice

☐ Mastered and ready for sign-off

EXAMPLE OBSERVED DURING SHIFT

What did the employee do well?

What needs to improve?

Follow-up Action

Follow-Up Required:

☐ Yes

☐ No

Action Needed:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____

Cleaning and Sanitation Mastery Sheet

Employee Name: _____

Position: _____

Trainer Name: _____

Manager Name: _____

Date: _____

Purpose:

Use this sheet to confirm that an employee can complete cleaning and sanitation tasks correctly, safely, and consistently. Cleaning is not just appearance.

Proper cleaning protects food safety, guest trust, employee safety, health inspection readiness, and the reputation of the restaurant.

This sheet may be used for front-of-house, back-of-house, bar, dish, prep, restroom, dining room, station, and closing cleaning tasks.

Cleaning or Sanitation Task Being Reviewed

Task Name: _____

Task Area:

- ☐ Dining room
- ☐ Server station
- ☐ Host stand
- ☐ Bar
- ☐ Kitchen line
- ☐ Prep area
- ☐ Dish area
- ☐ Walk-in cooler
- ☐ Walk-in freezer
- ☐ Dry storage
- ☐ Restrooms
- ☐ Floors
- ☐ Equipment
- ☐ Food contact surface
- ☐ Trash area
- ☐ Other: _____

Task Standard

What must be cleaned or sanitized?

What supplies, tools, or chemicals are required?

How often should this task be completed?

- ☐ Before shift
- ☐ During shift
- ☐ After shift
- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ As needed
- ☐ Other: _____

Safety and Sanitation Review

- ☐ Employee understands when the task must be completed.
- ☐ Employee knows the correct supplies to use.
- ☐ Employee knows the correct chemical or sanitizer if applicable.
- ☐ Employee understands safe chemical handling.
- ☐ Employee knows where cleaning supplies are stored.
- ☐ Employee knows how to avoid cross-contamination.
- ☐ Employee understands handwashing expectations.
- ☐ Employee understands wet floor safety.

- ☐ Employee knows how to report unsafe conditions.
- ☐ Employee understands manager inspection expectations.

Performance Review

Correct process followed:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Sanitation standard met:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Safety standard followed:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Completed within reasonable time:

- ☐ No
- ☐ Needs improvement
- ☐ Yes
- ☐ Strong

Task Mastery Decision

- ☐ Introduced only
- ☐ Practiced with support
- ☐ Observed but needs more practice
- ☐ Mastered and ready for sign-off

WHAT WENT WELL?

WHAT NEEDS IMPROVEMENT?

Follow-up Action

Follow-Up Required:

- ☐ Yes
- ☐ No

Action Needed:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____

Guest Recovery Mastery Sheet

Employee Name: _____

Position: _____

Trainer Name: _____

Manager Name: _____

Date: _____

Purpose:

Use this sheet to confirm that an employee understands how to respond when a guest is unhappy, confused, disappointed, or upset.

Guest recovery is one of the most important service skills in a full-service restaurant.

A mistake does not always lose a guest.

How the restaurant responds to the mistake often matters more than the mistake itself.

Employees should understand how to listen, respond professionally, avoid blame, notify a manager, and help protect the guest's trust.

Guest Recovery Situation Being Reviewed

Situation Type:

- ☐ Food quality concern
- ☐ Wrong item
- ☐ Missing item
- ☐ Long wait
- ☐ Cold food
- ☐ Poor service concern
- ☐ Billing issue
- ☐ Reservation or seating issue
- ☐ Allergy concern
- ☐ Bar or drink concern
- ☐ Online review concern
- ☐ Other: _____

Standard Being Reviewed

What is the correct response standard?

When should a manager be involved?

Guest Recovery Steps

- ☐ Employee listened without interrupting.
- ☐ Employee stayed calm and professional.
- ☐ Employee avoided arguing with the guest.
- ☐ Employee avoided blaming another employee.
- ☐ Employee apologized appropriately.
- ☐ Employee clarified the problem.
- ☐ Employee notified a manager when needed.
- ☐ Employee communicated the issue clearly.
- ☐ Employee helped correct the problem quickly.
- ☐ Employee followed restaurant comp, void, or remake policy.
- ☐ Employee protected the guest's trust.
- ☐ Employee followed up when appropriate.

Performance Review

Professional tone:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Listening:

- ☐ Not acceptable
- ☐ Needs practice

- ☐ Acceptable
- ☐ Strong

Problem communication:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Manager notification:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Guest impact:

- ☐ Negative
- ☐ Neutral
- ☐ Positive
- ☐ Strong

Task Mastery Decision

- ☐ Introduced only
- ☐ Practiced with support
- ☐ Observed but needs more practice
- ☐ Mastered and ready for sign-off

EXAMPLE OBSERVED OR PRACTICED

What happened?

How did the employee respond?

What should be improved?

Follow-up Action

Follow-Up Required:

- ☐ Yes
- ☐ No

Action Needed:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____

Cash Handling Mastery Sheet

Employee Name: _____

Position: _____

Trainer Name: _____

Manager Name: _____

Date: _____

Purpose:

Use this sheet to confirm that an employee understands the restaurant's cash handling, payment, checkout, and financial accountability standards.

Cash handling must be trained carefully because mistakes can affect guest trust, employee accountability, manager time, and restaurant financial control.

This sheet may be used for servers, bartenders, cashiers, hosts, managers, or any employee who handles payments.

Cash Handling Task Being Reviewed

Task Area:

- ☐ Cash payment
- ☐ Credit card payment
- ☐ Gift card payment
- ☐ Split check
- ☐ Combined check
- ☐ Server checkout
- ☐ Bartender checkout
- ☐ Cash drawer
- ☐ Tip reporting
- ☐ Refund
- ☐ Discount
- ☐ Void
- ☐ Comp
- ☐ End-of-shift checkout
- ☐ Other: _____

Standard Being Reviewed

What is the correct cash handling or payment standard?

Who should the employee contact if there is a problem?

Payment and Accountability Checklist

- ☐ Employee understands payment process.
- ☐ Employee can enter payment correctly.
- ☐ Employee can count change correctly if applicable.
- ☐ Employee understands split check process if applicable.
- ☐ Employee understands combined check process if applicable.
- ☐ Employee understands gift card process if applicable.
- ☐ Employee understands credit card receipt process.
- ☐ Employee understands tip entry or tip reporting process.
- ☐ Employee understands checkout process.
- ☐ Employee understands discount policy.
- ☐ Employee understands comp policy.
- ☐ Employee understands void policy.
- ☐ Employee understands refund escalation process.
- ☐ Employee understands when manager approval is required.
- ☐ Employee understands how to report payment mistakes.

Performance Review

Accuracy:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Policy understanding:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Guest communication:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Manager approval awareness:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Financial accountability:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Task Mastery Decision

- ☐ Introduced only
- ☐ Practiced with support
- ☐ Observed but needs more practice
- ☐ Mastered and ready for sign-off

MISTAKES OR QUESTIONS REVIEWED

What mistake, question, or situation was discussed?

Correct procedure:

Follow-up Action**Follow-Up Required:**

- ☐ Yes
- ☐ No

Action Needed:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____

Opening and Closing Task Mastery Sheet

Employee Name: _____

Position: _____

Trainer Name: _____

Manager Name: _____

Date: _____

Purpose:

Use this sheet to confirm that an employee can complete opening or closing tasks correctly, consistently, and without constant reminders.

Opening and closing duties protect the flow of the restaurant.

A strong opening shift helps the restaurant begin service prepared, stocked, clean, organized, and ready for guests.

A strong closing shift helps the restaurant end the day safely, cleanly, and ready for the next business day.

Opening and closing tasks should not be rushed, guessed, skipped, or left undocumented.

Task Type

- ☐ Opening task
- ☐ Closing task
- ☐ Mid-shift reset task
- ☐ Station setup task
- ☐ Station breakdown task
- ☐ Other: _____

Task Area

- ☐ Dining room
- ☐ Host stand
- ☐ Server station
- ☐ Bar
- ☐ Kitchen line
- ☐ Prep area
- ☐ Dish area
- ☐ Restrooms
- ☐ Walk-in cooler
- ☐ Dry storage
- ☐ Office
- ☐ Cash drawer
- ☐ Exterior area
- ☐ Other: _____

Task Being Reviewed

Task Name: _____

Correct Standard: _____

Why this task matters: _____

Opening / Closing Task Checklist

- ☐ Employee understands when the task must be completed.
- ☐ Employee knows the correct steps.
- ☐ Employee knows what supplies, tools, or equipment are needed.
- ☐ Employee understands the expected final result.
- ☐ Employee understands safety or sanitation concerns.
- ☐ Employee knows who verifies completion.
- ☐ Employee understands what to do if something is missing, broken, dirty, unsafe, or incomplete.
- ☐ Employee completed the task without skipping steps.
- ☐ Employee corrected mistakes after coaching.
- ☐ Employee completed the task during real shift conditions.

Performance Review

Accuracy:

- ☐ Not acceptable
- ☐ Needs practice
- ☐ Acceptable
- ☐ Strong

Timing:

- ☐ Too slow
- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Completeness:

- ☐ Incomplete
- ☐ Needs improvement
- ☐ Complete
- ☐ Strong

Manager readiness:

- ☐ Not ready for sign-off
- ☐ Needs follow-up
- ☐ Ready for sign-off

Task Mastery Decision

- ☐ Introduced only
- ☐ Practiced with support
- ☐ Observed but needs more practice
- ☐ Mastered and ready for sign-off

WHAT WENT WELL?

WHAT NEEDS IMPROVEMENT?

Follow-up Action

Follow-Up Required:

- ☐ Yes
- ☐ No

Action Needed:

Follow-Up Date: _____

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____

Part 4 Completion Review

TASK MASTERY REVIEW

Employee Name: _____

Position: _____

Department: _____

Trainer Name: _____

Manager Name: _____

Review Date: _____

Purpose:

Use this page after completing one or more task mastery sheets for an employee.

This review helps managers decide whether the employee has truly mastered the required tasks or needs additional training before final sign-off.

Task mastery should be based on observed performance, not assumptions.

Task Mastery Sheets Completed

- ☐ FOH Task Mastery Sheet
- ☐ BOH Task Mastery Sheet
- ☐ Service Standards Mastery Sheet
- ☐ Cleaning and Sanitation Mastery Sheet
- ☐ Guest Recovery Mastery Sheet
- ☐ Cash Handling Mastery Sheet
- ☐ Opening and Closing Task Mastery Sheet
- ☐ Other: _____

Tasks Reviewed

List the main tasks reviewed during this mastery check:

Employee Performance Summary

What tasks has the employee mastered?

What tasks still need more practice?

What corrections were given during observation?

Did the employee improve after correction?

- ☐ Yes
- ☐ No
- ☐ Some improvement

Notes:

Can the employee perform the reviewed tasks during real shift conditions?

- ☐ Yes
- ☐ No
- ☐ With limited supervision

Notes:

Manager Decision

Employee task mastery status:

- ☐ Ready for sign-off
- ☐ Ready with limited supervision
- ☐ Needs additional practice
- ☐ Needs retraining
- ☐ Not ready for independent work

Follow-up Action Plan

Action Needed:

Person Responsible: _____

Deadline: _____

Follow-Up Date: _____

Final Manager Notes:

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

PART 5

SOP BUILDING TEMPLATES

Purpose of This Section:

A restaurant cannot train consistently if the standards only exist in someone's memory.

Standard Operating Procedures, also called SOPs, give managers and employees a clear written process for important restaurant tasks.

An SOP explains what should be done, who should do it, when it should happen, what tools or supplies are needed, and what the correct result should look like.

SOPs are not meant to make the restaurant complicated.

They are meant to make the restaurant clearer.

A strong SOP helps the restaurant:

Train employees faster

Reduce repeated mistakes

Improve consistency

Protect food safety

Improve service standards

Reduce manager correction time

Create fair accountability

Make expectations easier to understand

Keep standards from changing from person to person

An SOP should be simple enough that a new employee can understand it, but complete enough that an experienced employee cannot claim the standard was unclear.

This section gives managers reusable SOP templates for the most common full-service restaurant needs:

Position tasks

Opening procedures

Closing procedures

Cleaning procedures

Food prep procedures

Service procedures

Safety procedures

SOP review and updates

The goal is not to write a perfect policy manual.

The goal is to document the tasks that affect daily restaurant performance.

Start with the tasks that create the most problems.

If employees keep doing something differently, write an SOP.

If managers keep correcting the same mistake, write an SOP.

If a task affects food safety, guest experience, labor, food cost, cash control, or opening and closing readiness, write an SOP.

A written standard gives the team something to train from, follow, review, correct, and improve.

HOW TO BUILD A SIMPLE RESTAURANT SOP

Purpose:

Use this section to turn repeated restaurant tasks into clear written standards.

A strong SOP should answer:

1. What task is being performed?
2. Who is responsible?
3. When does it happen?
4. Why does it matter?
5. What tools, supplies, forms, or equipment are needed?
6. What steps must be followed?
7. What should the finished result look like?
8. What safety, sanitation, service, or cash control rules apply?
9. Who verifies completion?
10. What should the employee do if something goes wrong?

An SOP does not need to be complicated.
It needs to be clear.

Avoid vague instructions such as:

11. Clean the station properly.
12. Give good service.
13. Prep enough product.
14. Close the bar correctly.
15. Watch food quality.

Those phrases sound helpful, but they do not tell the employee exactly what to do.

A better SOP uses observable standards:

16. Wipe and sanitize all food-contact surfaces.
17. Restock lemons, straws, napkins, beverage napkins, and receipt paper before service.
18. Label and date all prepared product before placing it in the walk-in.
19. Check every plate for correct item, correct side, correct garnish, and clean rim before it leaves the kitchen.
20. Count the drawer according to restaurant policy before closing the shift.

If an employee cannot look at the SOP and understand the expected action, the SOP needs to be clearer.

SOP BUILDING CHECKLIST

- ☐ Choose one repeated task.
- ☐ Write the exact task name.
- ☐ Identify the position responsible.

- ☐ Identify when the task should be completed.
- ☐ Watch the task being done correctly.
- ☐ List the steps in the correct order.
- ☐ Add required tools, supplies, equipment, or forms.
- ☐ Add safety or sanitation requirements.
- ☐ Add guest service expectations if applicable.
- ☐ Add food quality or portion standards if applicable.
- ☐ Add cash control or manager approval rules if applicable.
- ☐ Define what the finished result should look like.
- ☐ Identify who verifies completion.
- ☐ Test the SOP with an employee.
- ☐ Revise any unclear steps.
- ☐ Train the team on the SOP.
- ☐ Set a review date.

COMMON SOP MISTAKES

- ☐ SOP is too long.
- ☐ SOP is too vague.
- ☐ SOP is written by someone who does not perform the task.
- ☐ SOP does not include tools or supplies needed.
- ☐ SOP does not explain the finished standard.
- ☐ SOP does not include safety or sanitation.
- ☐ SOP is written but never trained.
- ☐ SOP is trained once but never followed up.
- ☐ SOP is not updated when the process changes.
- ☐ No manager is responsible for verifying the standard.

MANAGER SOP PLANNING PAGE**SOP Needed For:**

Department:

Problem This SOP Solves:

Position Responsible:

When This Task Happens:

Why This Task Matters:

Manager Responsible:

Employees Who Need Training:

SOP Priority Level:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Urgent

Review Date:

Manager Notes:

COMPLETED EXAMPLE: RESTAURANT SOP

The restaurant and employee references in this completed example are fictional. This example shows the level of clarity, sequence, verification, and accountability expected in a usable SOP.

SOP TITLE

Opening the Server Beverage and Service Station

SOP Number: FOH-OPEN-004 Department: Front of House Version: 1.0

Effective Date: March 1, 2026 Owner: FOH Manager Review Frequency: Quarterly

PURPOSE

To ensure the server beverage and service station is clean, stocked, safe, and fully ready before guests are seated.

WHO PERFORMS THIS SOP

The assigned opening server completes the procedure. The opening manager verifies completion before opening the dining room.

SUPPLIES AND EQUIPMENT

- ☐ Sanitizer bucket and test strips ☐ Clean wiping towels ☐ Cups and lids
- ☐ Straws and napkins ☐ Beverage syrups ☐ Tea and coffee supplies
- ☐ Ice scoop and holder ☐ Backup glassware ☐ Approved opening checklist

PROCEDURE

1. Wash hands and inspect the station for spills, food debris, pests, broken equipment, or safety hazards.
2. Prepare sanitizer at the restaurant's approved concentration. Verify the solution with a test strip and record the result.
3. Wipe and sanitize all counters, handles, dispensers, nozzles, trays, and frequently touched surfaces.
4. Inspect beverage nozzles and tea/coffee equipment. Reclean any item that is sticky, stained, or not ready for use.
5. Stock each item to the approved opening par. Rotate dated products using first-in, first-out procedures.
6. Fill the ice bin using the approved scoop. Never use a glass or allow the scoop handle to contact the ice.
7. Brew tea and coffee according to approved recipes and record required times or discard times.
8. Test beverage equipment and report leaks, incorrect carbonation, temperature problems, or empty products immediately.
9. Remove empty boxes, personal items, and unapproved supplies from the station.
10. Complete the opening checklist and request manager verification before the first guest is seated.

COMPLETED EXAMPLE: RESTAURANT SOP - VERIFICATION

STANDARD OF COMPLETION

The station is approved only when surfaces are clean and dry, sanitizer is verified, equipment operates correctly, all required items meet par, products are rotated and dated, no safety hazard is present, and the manager has signed the opening checklist.

COMMON ERRORS TO PREVENT

- ☐ Stocking over dirty surfaces.
- ☐ Preparing sanitizer without testing the concentration.
- ☐ Using an unclean ice scoop or leaving the scoop inside the ice.
- ☐ Mixing old and new dated products without proper rotation.
- ☐ Marking the checklist complete before the work is actually finished.

CORRECTIVE ACTION

If any standard is missed, the employee corrects the issue before opening the station. Repeated misses require coaching, retraining, and manager follow-up documentation.

MANAGER VERIFICATION CHECK

- ☒ Sanitizer tested and acceptable.
- ☒ Station surfaces and equipment clean.
- ☒ Opening pars met and products rotated.
- ☒ Tea, coffee, beverage, and ice procedures completed.
- ☒ No unresolved safety or equipment concern.

Example Completion Record: Completed by Jordan Lee at 10:12 a.m. Verified by Casey Reed at 10:18 a.m. No correction required.

SOP REVISION RECORD

Revision Date: June 1, 2026

Change Made: Added required beverage-equipment test and manager escalation for leaks or carbonation problems.

Reason: Two opening shifts began with an empty product line that had not been identified before service.

Approved By: General Manager - Casey Reed

What makes this example strong: The employee knows who performs the task, the exact sequence, the completion standard, the common errors, the verification method, and what happens when the standard is missed.

SOP TEMPLATE: POSITION TASK

SOP Title:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Management
- ☐ Other: _____

Created By:

Date Created:

Reviewed By:

Review Date:

Purpose:

Use this template to document a task that belongs to a specific restaurant position. This may include server side work, host stand setup, bartender restocking, cook station setup, dish area duties, prep responsibilities, manager shift duties, or any other repeated position task.

TASK INFORMATION

Task Name:

Position Responsible:

When Task Should Be Completed:

- ☐ Before shift
- ☐ During shift
- ☐ After shift
- ☐ Opening
- ☐ Closing

- ☐ Daily
- ☐ Weekly
- ☐ As needed
- ☐ Other: _____

Why This Task Matters:

TOOLS, SUPPLIES, OR EQUIPMENT NEEDED

- ☐ POS
- ☐ Cleaning supplies
- ☐ Sanitizer
- ☐ Towels
- ☐ Gloves
- ☐ Labels
- ☐ Thermometer
- ☐ Prep containers
- ☐ Smallwares
- ☐ Checklist
- ☐ Manager approval
- ☐ Other: _____

List specific items needed:

STEP-BY-STEP PROCEDURE

QUALITY STANDARD

This task is complete when:

The correct result should look like:

SAFETY OR SANITATION NOTES

COMMON MISTAKES TO AVOID

MANAGER VERIFICATION

Manager should check:

Who verifies completion?

How often should this be checked?

- ☐ Every shift
- ☐ Daily
- ☐ Weekly
- ☐ During training
- ☐ During manager walkthrough
- ☐ Other: _____

TRAINING SIGN-OFF

Employee has been trained on this SOP:

- ☐ Yes
- ☐ No

Employee has demonstrated the task correctly:

- ☐ Yes
- ☐ No

Employee is approved to complete this task independently:

- ☐ Yes
- ☐ No
- ☐ Needs more practice

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____

Date: _____

NOTES OR UPDATES

SOP TEMPLATE: OPENING PROCEDURE

SOP Title:

Department / Station:

Position Responsible:

Created By:

Date Created:

Reviewed By:

Review Date:

Purpose:

Use this template to document how a department, station, or position should be opened before service begins. A strong opening procedure helps the restaurant start the shift clean, stocked, organized, safe, and ready for guests.

OPENING AREA

- ☐ Dining room
- ☐ Host stand
- ☐ Server station
- ☐ Bar
- ☐ Kitchen line
- ☐ Prep area
- ☐ Dish area
- ☐ Restrooms
- ☐ Walk-in cooler
- ☐ Dry storage
- ☐ Manager office
- ☐ Patio / exterior
- ☐ Other: _____

Opening Start Time:

Opening Must Be Completed By:

Manager or Lead Responsible for Verification:

REQUIRED SUPPLIES OR EQUIPMENT

OPENING CHECKLIST

- ☐ Lights, equipment, or systems turned on as required.
- ☐ Area inspected for cleanliness.
- ☐ Trash, floors, counters, and surfaces checked.
- ☐ Required supplies stocked.
- ☐ Food or beverage product checked if applicable.
- ☐ Labels, dates, and product quality checked if applicable.
- ☐ Tools and equipment placed correctly.
- ☐ Menus, paper goods, or guest supplies stocked if applicable.
- ☐ Sanitizer, towels, gloves, or cleaning supplies ready if applicable.
- ☐ POS, printer, cash drawer, or payment tools checked if applicable.
- ☐ Safety concerns identified and reported.
- ☐ Station is ready before service begins.

ADDITIONAL OPENING STEPS

SETUP STANDARD

At the end of opening, this area should look like:

The station is not ready if:

SAFETY AND SANITATION CHECK

- ☐ Handwashing sink accessible if applicable.
- ☐ Sanitizer set up correctly if applicable.
- ☐ Food stored safely if applicable.
- ☐ Floors are dry and safe.
- ☐ Chemicals are stored correctly.
- ☐ Equipment is working properly.
- ☐ Broken, missing, unsafe, or dirty items are reported.

PROBLEMS TO REPORT BEFORE OPENING

- ☐ Missing product
- ☐ Missing supplies
- ☐ Dirty station
- ☐ Equipment problem
- ☐ Safety hazard
- ☐ Food quality issue
- ☐ Staffing concern
- ☐ POS or printer problem
- ☐ Other: _____

Manager Notes:

OPENING VERIFICATION

Opening completed by:

Time completed:

Manager checked:

- ☐ Yes
- ☐ No

Corrective action needed:

- ☐ Yes
- ☐ No

Corrective Action:

Employee Signature: _____

Manager Signature: _____

Date: _____

SOP TEMPLATE: CLOSING PROCEDURE

SOP Title:

Department / Station:

Position Responsible:

Created By:

Date Created:

Reviewed By:

Review Date:

Purpose:

Use this template to document how a department, station, or position should be closed at the end of a shift or business day. A strong closing procedure protects cleanliness, food safety, security, equipment, cash control, and readiness for the next shift. Closing should not depend on memory.

Every employee responsible for closing should understand what must be completed, what the finished area should look like, and who verifies that the work was done correctly.

CLOSING AREA

- ☐ Dining room
- ☐ Host stand
- ☐ Server station
- ☐ Bar
- ☐ Kitchen line
- ☐ Prep area
- ☐ Dish area
- ☐ Restrooms
- ☐ Walk-in cooler
- ☐ Walk-in freezer
- ☐ Dry storage
- ☐ Manager office

☐ Patio / exterior

☐ Other: _____

Closing Start Time:

Closing Must Be Completed By:

Manager or Lead Responsible for Verification:

REQUIRED SUPPLIES OR EQUIPMENT

CLOSING CHECKLIST

- ☐ Area cleaned.
- ☐ Area restocked if required.
- ☐ Trash removed.
- ☐ Floors swept.
- ☐ Floors mopped if required.
- ☐ Counters, tables, shelves, or surfaces wiped.
- ☐ Food product stored correctly if applicable.
- ☐ Product labeled and dated if applicable.
- ☐ Equipment turned off according to restaurant procedure.
- ☐ Equipment cleaned according to restaurant procedure.
- ☐ Tools, smallwares, or supplies returned to correct location.
- ☐ Chemicals stored correctly.
- ☐ Dirty towels, linen, or aprons placed in correct area.
- ☐ Personal items removed from work area.
- ☐ Safety hazards reported.
- ☐ Manager or lead completed final check.

ADDITIONAL CLOSING STEPS

CLOSING STANDARD

At the end of closing, this area should look like:

The area is not considered closed if:

SAFETY, SANITATION, OR SECURITY NOTES

COMMON CLOSING MISTAKES TO AVOID

- ☐ Leaving food uncovered.
- ☐ Failing to label or date product.
- ☐ Leaving trash in the area.
- ☐ Skipping floor cleaning.
- ☐ Leaving equipment dirty.
- ☐ Leaving chemicals out.
- ☐ Forgetting to restock for the next shift.
- ☐ Leaving personal items behind.
- ☐ Failing to report broken or missing items.
- ☐ Clocking out before manager inspection.

PROBLEMS TO REPORT BEFORE LEAVING

- ☐ Missing product
- ☐ Missing supplies
- ☐ Dirty area
- ☐ Equipment problem
- ☐ Safety hazard
- ☐ Food quality issue
- ☐ Security concern
- ☐ Cash or POS issue
- ☐ Maintenance issue
- ☐ Other: _____

Manager Notes:

CLOSING VERIFICATION

Closing completed by:

Time completed:

Manager checked:

☐ Yes

☐ No

Corrective action needed:

☐ Yes

☐ No

Corrective Action:

Employee Signature: _____

Manager Signature: _____

Date: _____

SOP TEMPLATE: CLEANING PROCEDURE

SOP Title:

Area / Station:

Position Responsible:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Created By:

Date Created:

Reviewed By:

Review Date:

Purpose:

Use this template to document cleaning procedures for restaurant areas, equipment, surfaces, tools, and stations.

Cleaning procedures must be clear because different employees may have different ideas of what "clean" means.

A good cleaning SOP explains what must be cleaned, how often it must be cleaned, what supplies are required, what safety rules apply, and what the finished result should look like.

CLEANING TASK INFORMATION

Cleaning Task:

Area Being Cleaned:

How Often This Task Must Be Completed:

- ☐ Before shift
- ☐ During shift
- ☐ After shift
- ☐ Opening
- ☐ Closing
- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ As needed
- ☐ Other: _____

Who Is Responsible?

Who Verifies Completion?

CLEANING SUPPLIES NEEDED

- ☐ Sanitizer
- ☐ Degreaser
- ☐ Glass cleaner
- ☐ Soap
- ☐ Towels
- ☐ Mop
- ☐ Broom
- ☐ Scrub pad
- ☐ Brush
- ☐ Gloves
- ☐ Bucket
- ☐ Trash bags
- ☐ Wet floor sign
- ☐ Other: _____

Specific Products or Chemicals Required:

SAFETY REQUIREMENTS

- ☐ Gloves required.
- ☐ Wet floor sign required.
- ☐ Chemical label must be checked.
- ☐ Chemical must not be mixed with other chemicals.
- ☐ Food must be removed or protected before cleaning.
- ☐ Electrical equipment must be turned off if applicable.
- ☐ Hot surfaces must cool before cleaning if applicable.
- ☐ Manager must be notified of unsafe conditions.
- ☐ Other: _____

STEP-BY-STEP CLEANING PROCEDURE

CLEANING STANDARD

This task is complete when:

The area should look, smell, or feel like:

This task is not complete if:

COMMON CLEANING MISTAKES TO AVOID

- ☐ Wiping around items instead of moving them.
- ☐ Using the wrong chemical.
- ☐ Using a dirty towel.
- ☐ Forgetting corners, edges, handles, or under equipment.
- ☐ Leaving streaks, residue, crumbs, grease, or standing water.
- ☐ Forgetting to replace supplies after cleaning.
- ☐ Leaving cleaning tools out.
- ☐ Failing to report damage, pests, leaks, or unsafe conditions.

INSPECTION CHECKLIST

- ☐ Area inspected after cleaning.
- ☐ Correct chemical used.
- ☐ Food-contact surfaces sanitized if applicable.
- ☐ Floor is safe and dry.
- ☐ Supplies returned to proper location.
- ☐ Trash removed if applicable.
- ☐ Manager or lead verified completion.

Corrective Action Needed:

- ☐ Yes
- ☐ No

Corrective Action Notes:

Employee Signature: _____
Manager Signature: _____
Date: _____

SOP TEMPLATE: FOOD PREP PROCEDURE

SOP Title:

Prep Item:

Department / Station:

Position Responsible:

Created By:

Date Created:

Reviewed By:

Review Date:

Purpose:

Use this template to document food prep procedures so products are made consistently, safely, and in the correct amount.

Food prep affects food cost, waste, speed of service, product quality, guest satisfaction, and food safety.

A strong prep SOP helps employees understand the recipe, portion size, batch size, tools needed, labeling requirements, storage method, shelf life, and finished standard.

PREP INFORMATION

Prep Item Name:

Recipe or Menu Item Connected to This Prep:

Prep Frequency:

- ☐ Daily
- ☐ Weekly
- ☐ Before shift
- ☐ During shift
- ☐ As needed
- ☐ Based on prep list
- ☐ Other: _____

Expected Batch Size:

Expected Yield:

Par Level:

Minimum Level Before More Prep Is Needed:

TOOLS, EQUIPMENT, AND SUPPLIES NEEDED

- ☐ Cutting board
- ☐ Knife
- ☐ Scale
- ☐ Measuring cup
- ☐ Measuring spoon
- ☐ Scoop
- ☐ Ladle
- ☐ Mixing bowl
- ☐ Cambro / storage container
- ☐ Sheet pan
- ☐ Labels
- ☐ Marker
- ☐ Gloves
- ☐ Thermometer
- ☐ Other: _____

Specific Items Needed:

INGREDIENTS NEEDED

PREP PROCEDURE

1. Wash hands and prepare the work area.
2. Gather all ingredients, tools, and supplies.
3. Check product quality before beginning.

4. Label, date, and store product correctly.

PORTION OR MEASUREMENT STANDARD
Correct portion size:

Correct measuring tool:

Correct finished amount:

FOOD SAFETY REQUIREMENTS

- ☐ Hands washed before prep.
- ☐ Gloves used according to restaurant policy.
- ☐ Cross-contamination prevented.
- ☐ Product temperature checked if required.
- ☐ Product kept out of temperature danger zone.
- ☐ Prep surface cleaned and sanitized.
- ☐ Ingredients checked for freshness.
- ☐ Product labeled and dated.
- ☐ Product stored in correct location.
- ☐ Allergens identified if applicable.

LABELING REQUIREMENTS

Product Name:

Prep Date:

Use-By Date:

Employee Initials:

Storage Location:

- ☐ Walk-in cooler
- ☐ Walk-in freezer
- ☐ Dry storage
- ☐ Line cooler
- ☐ Prep cooler
- ☐ Other:

FINISHED PRODUCT STANDARD

The finished product should look like:

The finished product should not be used if:

COMMON PREP MISTAKES TO AVOID

- ☐ Making too much product.
- ☐ Making too little product.
- ☐ Using the wrong portion.
- ☐ Skipping label or date.
- ☐ Using poor-quality ingredients.
- ☐ Mixing old and new product incorrectly.
- ☐ Storing product in the wrong place.
- ☐ Failing to communicate low product.
- ☐ Leaving prep area dirty.

PREP VERIFICATION**Prep completed by:****Manager or lead checked:**

- ☐ Yes
- ☐ No

Corrective action needed:

- ☐ Yes
- ☐ No

Corrective Action Notes:

Employee Signature: _____

Manager Signature: _____

Date: _____

SOP TEMPLATE: SERVICE PROCEDURE

SOP Title:

Service Area / Station:

Position Responsible:

Department:

- ☐ Front of House
- ☐ Bar
- ☐ To-Go
- ☐ Management
- ☐ Other: _____

Created By:

Date Created:

Reviewed By:

Review Date:

Purpose:

Use this template to document a guest service procedure so employees know exactly how the restaurant expects service to be delivered.

Service procedures help protect consistency, guest satisfaction, sales, communication, and professionalism.

A strong service SOP explains what the employee should do, when they should do it, how the guest should be treated, what the standard sounds like, and when a manager should be involved.

SERVICE PROCEDURE INFORMATION

Service Task:

Position Responsible:

When This Procedure Happens:

- ☐ Guest arrival
- ☐ Table greeting
- ☐ Order taking
- ☐ Food delivery
- ☐ Check-back
- ☐ Guest complaint
- ☐ Payment
- ☐ To-go pickup
- ☐ Bar service
- ☐ Closing interaction
- ☐ Other: _____

Why This Procedure Matters:

SERVICE STANDARD**The guest should feel:**

The employee should be:

- ☐ Welcoming
- ☐ Professional
- ☐ Clear
- ☐ Calm
- ☐ Helpful
- ☐ Attentive
- ☐ Accurate
- ☐ Respectful
- ☐ Other: _____

TOOLS, SYSTEMS, OR SUPPLIES NEEDED

- ☐ Menu
- ☐ POS
- ☐ Table numbers
- ☐ Seat numbers
- ☐ Order pad
- ☐ To-go packaging
- ☐ Payment device
- ☐ Manager approval
- ☐ Guest recovery form
- ☐ Other: _____

STEP-BY-STEP SERVICE PROCEDURE

REQUIRED LANGUAGE OR SERVICE PHRASES

Use this space to write any required greeting, explanation, apology, offer, or closing phrase.

Example:

"Welcome in. I'll be right with you."

"Let me check with the kitchen before I answer that."

"I'm sorry that happened. I'm going to get a manager so we can make this right."

Required phrase or service language:

QUALITY STANDARD

This service procedure is completed correctly when:

This service procedure is not acceptable if:

COMMON SERVICE MISTAKES TO AVOID

- ☐ Ignoring the guest.
- ☐ Sounding rushed or irritated.
- ☐ Guessing instead of checking.
- ☐ Failing to communicate delays.
- ☐ Forgetting to repeat or confirm important details.
- ☐ Blaming another employee or department.
- ☐ Leaving the guest without a solution.

- ☐ Failing to notify a manager when needed.
- ☐ Failing to follow up.

WHEN TO GET A MANAGER

- ☐ Guest is upset.
- ☐ Guest requests a manager.
- ☐ Food allergy question cannot be answered confidently.
- ☐ Refund, void, comp, or discount is needed.
- ☐ Alcohol service concern occurs.
- ☐ Safety concern occurs.
- ☐ Employee is unsure how to resolve the issue.
- ☐ Other: _____

MANAGER VERIFICATION**Manager should observe this procedure during:**

- ☐ Training shift
- ☐ Live service
- ☐ Guest complaint
- ☐ Table touch
- ☐ Cash/payment process
- ☐ To-go process
- ☐ Other: _____

Employee has demonstrated this procedure correctly:

- ☐ Yes
- ☐ No
- ☐ Needs more practice

Corrective Action Notes:

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

SOP TEMPLATE: SAFETY PROCEDURE

SOP Title:

Safety Area / Task:

Position Responsible:

Department:

☐ Front of House

☐ Back of House

☐ Bar

☐ Dish

☐ Management

☐ All Employees

☐ Other: _____

Created By:

Date Created:

Reviewed By:

Review Date:

Purpose:

Use this template to document safety procedures that protect employees, guests, food, equipment, and the restaurant.

Safety procedures should be written clearly because employees need to know what to do before something goes wrong.

A strong safety SOP explains the risk, the correct steps, who must be notified, what should never be done, and how the situation should be documented.

SAFETY PROCEDURE INFORMATION

Safety Task or Situation:

Possible Risk:

Who This Procedure Applies To:

- ☐ All employees
- ☐ Managers
- ☐ Servers
- ☐ Hosts
- ☐ Bartenders
- ☐ Cooks
- ☐ Dishwashers
- ☐ Prep cooks
- ☐ Other: _____

When This Procedure Should Be Used:**REQUIRED TOOLS, SUPPLIES, OR EQUIPMENT**

- ☐ Gloves
- ☐ First aid kit
- ☐ Wet floor sign
- ☐ Mop
- ☐ Broom
- ☐ Dustpan
- ☐ Sanitizer
- ☐ Chemical label / SDS information
- ☐ Thermometer
- ☐ Cut glove
- ☐ Apron
- ☐ Eye protection
- ☐ Fire extinguisher
- ☐ Manager report form
- ☐ Other: _____

STEP-BY-STEP SAFETY PROCEDURE

1. Stop and identify the safety concern.
2. Protect guests and employees from the hazard.
3. Notify the manager or person in charge if required.

WHAT EMPLOYEES SHOULD NOT DO

- ☐ Do not ignore the hazard.

- ☐ Do not continue working in an unsafe area.
- ☐ Do not mix chemicals.
- ☐ Do not handle broken glass with bare hands.
- ☐ Do not guess about food allergies.
- ☐ Do not move injured people unless necessary for immediate safety.
- ☐ Do not use broken equipment.
- ☐ Do not leave spills unattended.
- ☐ Do not hide injuries, accidents, or near misses.
- ☐ Other: _____

MANAGER NOTIFICATION REQUIRED?

- ☐ Yes
- ☐ No
- ☐ Depends on situation

Manager must be notified when:

DOCUMENTATION REQUIRED?

- ☐ Yes
- ☐ No
- ☐ Depends on situation

If yes, document using:

- ☐ Incident report
- ☐ Manager log
- ☐ Maintenance log
- ☐ Food safety log
- ☐ Temperature log
- ☐ Chemical safety log
- ☐ Other: _____

FOLLOW-UP ACTION

After the safety issue is handled, the manager should:

- ☐ Confirm the hazard is corrected.
- ☐ Check whether equipment needs repair.
- ☐ Check whether product should be discarded.
- ☐ Check whether retraining is needed.
- ☐ Check whether employee injury occurred.
- ☐ Check whether guest injury occurred.
- ☐ Document the situation.
- ☐ Communicate with owner or leadership if required.

SAFETY STANDARD

This procedure is complete when:

The situation is not resolved if:

TRAINING SIGN-OFF**Employee has been trained on this safety procedure:**☐ Yes☐ No**Employee can explain what to do:**☐ Yes☐ No**Employee can demonstrate the correct process if applicable:**☐ Yes☐ No☐ Needs more practice

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

SOP REVIEW AND UPDATE LOG

Purpose:

Use this log to track when SOPs are reviewed, updated, corrected, or retrained.

Restaurant procedures change over time.

Menus change.

Equipment changes.

Staffing changes.

Service expectations change.

Health department expectations may change.

Managers may discover that an SOP is unclear, incomplete, outdated, or not being followed correctly.

An SOP that is not reviewed can become useless.

This log helps managers keep SOPs current and helps the restaurant document when standards were updated.

SOP REVIEW RULES

- ☐ Review important SOPs at least once per year.
- ☐ Review food safety SOPs whenever procedures or equipment change.
- ☐ Review service SOPs when guest complaints reveal a repeated issue.
- ☐ Review cleaning SOPs when inspections, walkthroughs, or manager checks reveal missed standards.
- ☐ Review opening and closing SOPs when shifts are not being completed consistently.
- ☐ Review cash handling SOPs when voids, comps, refunds, drawer issues, or payment mistakes occur.
- ☐ Review training SOPs when employees keep asking the same questions or making the same mistakes.
- ☐ Update an SOP immediately if the current process is unsafe, unclear, or incorrect.

WHEN TO UPDATE AN SOP

- ☐ The process changed.
- ☐ The equipment changed.
- ☐ The menu changed.
- ☐ The layout changed.
- ☐ The law, rule, or policy changed.
- ☐ Employees are confused by the current SOP.
- ☐ The SOP is too vague.
- ☐ The SOP is too long.
- ☐ The SOP does not match the real task.
- ☐ Managers are correcting the same issue repeatedly.
- ☐ Guests are affected by the current process.
- ☐ Food quality is affected by the current process.
- ☐ Safety or sanitation is affected by the current process.

SOP REVIEW AND UPDATE LOG

SOP Title:

Department:

Original Date Created:

Review Date:

Reviewed By:

Reason for Review:

- ☐ Scheduled review
- ☐ Process changed
- ☐ Training issue
- ☐ Guest complaint
- ☐ Food quality issue
- ☐ Safety issue
- ☐ Sanitation issue
- ☐ Equipment change
- ☐ Manager request
- ☐ Employee confusion
- ☐ Other: _____

Does the SOP still match the correct process?

- ☐ Yes
- ☐ No
- ☐ Needs minor updates
- ☐ Needs major rewrite

What needs to be changed?

Updated SOP Completed?

- ☐ Yes
- ☐ No

Date Updated:

Updated By:

Manager Approved?

☐ Yes

☐ No

Approved By:

Employees Need Retraining?

☐ Yes

☐ No

If yes, list employees or positions needing retraining:

Retraining Deadline:

Follow-Up Date: _____

Manager Notes:

Manager Signature: _____ Date: _____

ADDITIONAL SOP UPDATE LOG

SOP Title: _____
Review Date: _____
Change Needed: _____
Updated By: _____
Retraining Needed: ☐ Yes ☐ No
Manager Initials: _____
SOP Title: _____
Review Date: _____
Change Needed: _____
Updated By: _____
Retraining Needed: ☐ Yes ☐ No
Manager Initials: _____
SOP Title: _____
Review Date: _____
Change Needed: _____
Updated By: _____
Retraining Needed: ☐ Yes ☐ No
Manager Initials: _____
SOP Title: _____
Review Date: _____
Change Needed: _____
Updated By: _____
Retraining Needed: ☐ Yes ☐ No
Manager Initials: _____

PART 6

TRAINING SIGN-OFF PAGES

Purpose of This Section:

Training should not end with a verbal "they're good."

A restaurant needs a clear way to confirm that an employee was trained, practiced the task, demonstrated the correct standard, and was approved by a trainer or manager.

Sign-off pages protect the employee, the trainer, the manager, and the restaurant.

They create proof that training happened.

They also help managers see where training is incomplete.

A signed page should never mean, "We showed this once."

A signed page should mean, "This employee has been trained, observed, corrected if needed, and approved to perform this task or position according to the restaurant standard."

This section includes pages for:

1. Trainer sign-off standards
2. Employee training sign-off
3. Station certification
4. Position certification
5. Retraining sign-off
6. Final training approval

Managers should use these pages carefully.

Do not sign off on training that has not truly been completed.

Do not allow trainers to sign off just to move faster.

Do not certify employees who still need major correction.

A strong sign-off system helps the restaurant avoid confusion later.

If performance slips, the manager can review what was trained, when it was trained, who approved it, and what follow-up is needed.

TRAINING SIGN-OFF RULES

- ☐ Training must be explained clearly.
- ☐ The employee must have a chance to practice.
- ☐ The trainer must observe the employee performing the task.
- ☐ Mistakes must be corrected before sign-off.
- ☐ The employee must understand the expected standard.
- ☐ The employee must be able to perform the task during real shift conditions when applicable.
- ☐ The trainer must not sign off unless the employee is ready.
- ☐ The manager should review important sign-offs.
- ☐ Follow-up should be scheduled when the employee needs more practice.
- ☐ Retraining should be documented when standards are missed after sign-off.

WHEN NOT TO SIGN OFF**Do not sign off if:**

- ☐ The employee only watched someone else do the task.
- ☐ The employee still needs constant reminders.
- ☐ The employee cannot explain the standard.
- ☐ The employee performs the task correctly only when the restaurant is slow.
- ☐ The employee skips safety or sanitation steps.
- ☐ The employee does not understand when to ask for help.
- ☐ The trainer is unsure whether the employee is ready.
- ☐ The manager has not reviewed a critical task when manager approval is required.

MANAGER NOTES:

TRAINER SIGN-OFF STANDARDS

Trainer Name:

Position / Department:

Manager Name:

Date Reviewed:

Purpose:

Use this page to confirm that trainers understand what it means to sign off on employee training.

A trainer's signature matters.

When a trainer signs off, they are saying the employee has been taught the correct standard, has practiced the task, and has demonstrated the task well enough to move forward.

Trainer sign-off should never be casual.

A trainer should not sign off because they like the employee, trust the employee, want to finish training faster, or feel pressured to move on.

The trainer should sign only when the employee is actually ready.

TRAINER RESPONSIBILITIES

- ☐ Teach the correct standard.
- ☐ Demonstrate the task clearly.
- ☐ Explain why the task matters.
- ☐ Allow the employee to practice.
- ☐ Observe the employee performing the task.
- ☐ Correct mistakes immediately.
- ☐ Have the employee repeat the task when needed.
- ☐ Confirm the employee understands the standard.
- ☐ Document what was completed.
- ☐ Communicate training concerns to the manager.
- ☐ Refuse to sign off if the employee is not ready.

WHAT THE TRAINER MUST VERIFY

Before signing off, the trainer must verify that the employee can:

- ☐ Perform the task correctly.
- ☐ Follow safety rules.
- ☐ Follow sanitation rules.
- ☐ Follow service standards if applicable.
- ☐ Use required tools, supplies, or equipment.
- ☐ Complete the task in the correct order.
- ☐ Recognize when something is wrong.
- ☐ Ask for help when needed.
- ☐ Complete the task without constant reminders.
- ☐ Repeat the task consistently.

TRAINER SIGN-OFF CHECKPOINT

Task or Position Being Trained:

Employee Name:

Date Training Began:

Date Training Reviewed:

Training Status:

- ☐ Introduced
- ☐ Practiced
- ☐ Observed
- ☐ Corrected
- ☐ Ready for sign-off
- ☐ Needs more practice
- ☐ Not ready

Trainer Notes:

Manager Notes:

TRAINER ACKNOWLEDGMENT

I understand that my signature means I have trained, observed, and verified the employee's performance according to the restaurant standard.

I understand that I should not sign off on incomplete training.

Trainer Signature: _____

Manager Signature: _____

Date: _____

TRAINER AUTHORIZATION AND CALIBRATION FORM

Use this form before assigning an employee to train others. Authorization confirms that the trainer understands the approved standard, demonstrates it consistently, documents honestly, and can coach employees without rushing or lowering expectations.

TRAINER INFORMATION

Trainer Name: _____ **Position:** _____

Department/Station: _____ **Date Reviewed:** _____

Manager Completing Review: _____

TRAINER READINESS REQUIREMENTS

- ☐ Consistently performs the position according to approved SOPs and standards.
- ☐ Can explain not only what to do, but why the standard matters.
- ☐ Demonstrates tasks in a clear, organized sequence.
- ☐ Uses the correct recipes, portions, service steps, safety rules, and equipment procedures.
- ☐ Gives the trainee supervised practice instead of only demonstrating the task.
- ☐ Observes performance closely and corrects errors immediately and respectfully.
- ☐ Does not embarrass, insult, rush, threaten, or intentionally confuse the trainee.
- ☐ Documents what was taught, what was practiced, and what still needs follow-up.
- ☐ Signs off only after independent, consistent performance has been observed.
- ☐ Escalates safety, harassment, discrimination, injury, allergy, cash, or serious conduct concerns to management immediately.

TRAINER KNOWLEDGE CHECK

Which SOPs or standards is this trainer authorized to teach?

What tasks or stations are outside this trainer's authorization?

What should the trainer do when the written standard and current practice do not match?

TRAINER CALIBRATION OBSERVATION

LIVE TRAINING OBSERVATION

Employee Being Trained: _____ Task Observed: _____

Observation Date: _____ Shift/Time: _____

- ☐ Trainer stated the objective and completion standard before beginning.
- ☐ Trainer demonstrated the task in the approved sequence.
- ☐ Trainer explained safety, quality, service, and accountability points.
- ☐ Trainee was given enough supervised practice.
- ☐ Trainer asked questions to confirm understanding.
- ☐ Corrections were specific, respectful, and connected to the standard.
- ☐ Trainer documented progress and set a clear next action.

CALIBRATION QUESTIONS

Did the trainer teach the same method required by the current SOP? ☐ Yes ☐ No

Were any personal shortcuts, outdated practices, or conflicting instructions taught? ☐ Yes ☐ No

Corrections or calibration needed:

TRAINER AUTHORIZATION DECISION

- ☐ Fully authorized to train the listed position or station.
- ☐ Authorized with manager follow-up required.
- ☐ Not authorized until additional training is completed.
- ☐ Authorization suspended pending recalibration.

Required Follow-Up Action: _____

Follow-Up Due Date: _____ Recheck Date: _____

Trainer Signature: _____ Date: _____

Manager Signature: _____ Date: _____

Final Approval by GM/Owner: _____ Date: _____

EMPLOYEE TRAINING SIGN-OFF PAGE

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Management
- ☐ Other: _____

Trainer Name:

Manager Name:

Training Start Date:

Training Completion Date:

Purpose:

Use this page to document that an employee has completed training for a specific task, station, or position requirement. This page should be used after the employee has received instruction, practiced the standard, and demonstrated the task correctly.

TRAINING AREA

Training completed for:

- ☐ Position basics
- ☐ Station setup
- ☐ Opening duties
- ☐ Closing duties
- ☐ Cleaning duties
- ☐ Safety and sanitation
- ☐ Guest service
- ☐ POS use
- ☐ Cash handling
- ☐ Food prep
- ☐ Recipe execution
- ☐ Side work
- ☐ Guest recovery
- ☐ Other: _____

TRAINING CONFIRMATION

- ☐ The task or standard was explained.
- ☐ The trainer demonstrated the correct process.
- ☐ The employee practiced the process.
- ☐ The trainer observed the employee.

- ☐ Corrections were given if needed.
- ☐ The employee repeated the task after correction if needed.
- ☐ The employee understands why the standard matters.
- ☐ The employee knows when to ask for help.
- ☐ The employee performed the task correctly.
- ☐ Follow-up was scheduled if needed.

EMPLOYEE PERFORMANCE REVIEW

Employee performance level:

- ☐ Not ready
- ☐ Needs more practice
- ☐ Acceptable
- ☐ Strong
- ☐ Ready for sign-off

What the employee did well:

What still needs improvement:

Follow-up required?

- ☐ Yes
- ☐ No

If yes, follow-up date:

Follow-up action:

SIGN-OFF

Employee Acknowledgment:

I understand the training I received and the standard I am expected to follow.

Employee Signature: _____

Trainer Acknowledgment:

I have trained and observed this employee and believe the training status marked above is accurate.

Trainer Signature: _____

Manager Approval:

- ☐ Approved
- ☐ Not approved yet
- ☐ Follow-up required before approval

Manager Signature: _____ Date: _____

STATION CERTIFICATION PAGE

Employee Name:

Position:

Station:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Trainer Name:

Manager Name:

Certification Date: _____

Purpose:

Use this page to certify that an employee is ready to work a specific station with limited supervision or independently.

Station certification should happen only after the employee has been trained, observed, corrected when needed, and approved by the trainer or manager.

A station may include a server section, host stand, bar station, cook line station, prep station, dish area, expo, to-go area, or any other defined work area.

Station certification does not mean the employee knows everything.

It means the employee can perform the required duties of that station safely, consistently, and according to the restaurant standard.

STATION BEING CERTIFIED

Station Name:

Primary Duties of This Station:

Required Tools, Equipment, or Systems:

STATION READINESS CHECKLIST

- ☐ Employee understands the station layout.
- ☐ Employee knows required setup.
- ☐ Employee knows required supplies.
- ☐ Employee can complete opening duties.
- ☐ Employee can complete running duties.
- ☐ Employee can complete closing duties.
- ☐ Employee understands safety expectations.
- ☐ Employee understands sanitation expectations.
- ☐ Employee understands guest service expectations if applicable.
- ☐ Employee understands food quality expectations if applicable.
- ☐ Employee understands POS or ticket system expectations if applicable.
- ☐ Employee knows who to ask for help.
- ☐ Employee can communicate with managers and coworkers.
- ☐ Employee can perform the station during real shift conditions.

OBSERVATION REVIEW**Employee was observed during:**

- ☐ Slow shift
- ☐ Moderate shift
- ☐ Busy shift
- ☐ Opening
- ☐ Closing
- ☐ Training shift
- ☐ Live service
- ☐ Other: _____

Employee performance:

- ☐ Not ready
- ☐ Needs more practice
- ☐ Acceptable
- ☐ Strong
- ☐ Ready for certification

What the employee does well on this station:

What still needs follow-up:

CERTIFICATION DECISION

- ☐ Certified for this station
- ☐ Certified with limited supervision
- ☐ Not certified yet
- ☐ Retraining required

Follow-Up Required:

- ☐ Yes
- ☐ No

Follow-Up Date: _____**Employee Acknowledgment:**

I understand the duties and standards required for this station.

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

POSITION CERTIFICATION PAGE

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Management
- ☐ Other: _____

Trainer Name:

Manager Name:

Certification Date: _____

Purpose:

Use this page to certify that an employee has completed the required training for a position.

Position certification should happen after the employee has completed the position tracker, station training, task mastery review, and manager observation.

This page should not be used to rush training.

It should be used to confirm that the employee is ready to perform the position according to the restaurant's expectations.

POSITION CERTIFICATION CHECKLIST

The employee has completed training for:

- ☐ Restaurant standards
- ☐ Position expectations
- ☐ Station setup
- ☐ Opening duties
- ☐ Closing duties
- ☐ Cleaning duties
- ☐ Safety and sanitation
- ☐ Service standards if applicable
- ☐ Food quality standards if applicable
- ☐ POS or order system if applicable
- ☐ Cash handling if applicable
- ☐ Guest recovery if applicable
- ☐ Team communication
- ☐ Side work or support duties
- ☐ Manager follow-up review

POSITION PERFORMANCE REVIEW

Employee can perform this position:

- ☐ Only with direct supervision
- ☐ With frequent support
- ☐ With limited supervision
- ☐ Independently
- ☐ Independently and at a strong level

Employee strengths:

Employee still needs improvement in:

Manager observation completed?

☐ Yes☐ No**Date of manager observation:**

Shift type observed:☐ Slow☐ Moderate☐ Busy☐ Opening☐ Closing☐ Full shift☐ Other: _____

FINAL POSITION READINESS**Employee understands the position responsibilities:**

- ☐ Yes
☐ No

Employee performs required tasks correctly:

- ☐ Yes
☐ No
☐ Needs more practice

Employee follows safety and sanitation standards:

- ☐ Yes
☐ No
☐ Needs more practice

Employee communicates properly with the team:

- ☐ Yes
☐ No
☐ Needs more practice

Employee is ready to work the position:

- ☐ Yes
☐ No
☐ With limited supervision

CERTIFICATION DECISION

- ☐ Position certified
☐ Position certified with follow-up
☐ Not certified yet
☐ Retraining required before certification

Follow-Up Action:

Follow-Up Date: _____**Employee Acknowledgment:**

I understand the responsibilities, standards, and expectations of this position.

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

RETRAINING SIGN-OFF PAGE

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Trainer Name if Assigned:

Date Retraining Assigned:

Date Retraining Completed:

Purpose:

Use this page when an employee needs retraining after a standard has been missed, forgotten, changed, or performed incorrectly.

Retraining should not automatically feel like punishment.

In many cases, retraining is the correct professional response when an employee needs the standard explained again, practiced again, or verified again.

Retraining protects consistency.

It also gives the employee a fair chance to correct the issue before stronger accountability is needed.

REASON FOR RETRAINING

Retraining is needed because:

- ☐ Standard was missed.
- ☐ Task was performed incorrectly.
- ☐ Employee forgot the correct process.
- ☐ SOP changed.
- ☐ Position responsibility changed.
- ☐ Safety issue occurred.
- ☐ Sanitation issue occurred.
- ☐ Guest complaint occurred.
- ☐ Food quality issue occurred.
- ☐ Cash handling issue occurred.
- ☐ Opening or closing duty was missed.
- ☐ Manager observation found a training gap.
- ☐ Other: _____

Issue being corrected:

Date issue was observed:

Observed by:

RETRAINING PLAN

Standard to be retrained:

How retraining will happen:

- ☐ Manager explanation
- ☐ Trainer demonstration
- ☐ Employee practice
- ☐ SOP review
- ☐ Checklist review
- ☐ Live shift observation
- ☐ Station walk-through
- ☐ Written review
- ☐ Other: _____

Employee must demonstrate:

Deadline for completion:

RETRAINING COMPLETION CHECKLIST

- ☐ Standard was explained again.
- ☐ Correct process was demonstrated.
- ☐ Employee practiced the task.
- ☐ Employee was observed.
- ☐ Mistakes were corrected.
- ☐ Employee repeated the task if needed.
- ☐ SOP or checklist was reviewed if applicable.
- ☐ Employee understands what must improve.
- ☐ Follow-up date was scheduled.
- ☐ Manager documented completion.

EMPLOYEE RESPONSE

Employee understands the retraining reason:

- ☐ Yes

☐ No

Employee had opportunity to ask questions:

☐ Yes

☐ No

Employee agrees to follow the standard moving forward:

☐ Yes

☐ No

Employee comments:

MANAGER FOLLOW-UP

Follow-up required?

☐ Yes

☐ No

Follow-up date: _____

If the issue continues, next action may include:

☐ Additional coaching

☐ Additional retraining

☐ Written performance correction

☐ Schedule adjustment

☐ Position review

☐ Manager meeting

☐ Other: _____

SIGN-OFF

Employee Signature: _____

Trainer Signature if Applicable: _____

Manager Signature: _____ Date: _____

FINAL TRAINING APPROVAL PAGE

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Trainer Name:

Manager Name:

Training Start Date:

Final Approval Date:

Purpose:

Use this page as the final approval record after an employee has completed onboarding, position training, task mastery review, required sign-offs, and manager observation.

Final training approval should mean the employee is ready to perform the position according to the restaurant's standards.

This page should not be completed just because the employee has worked a certain number of shifts.

It should be completed only when the employee has demonstrated readiness.

FINAL TRAINING REVIEW

The employee has completed:

- ☐ New hire onboarding
- ☐ Position training tracker
- ☐ Station training
- ☐ Task mastery review
- ☐ Safety and sanitation training
- ☐ Service standards training if applicable
- ☐ POS training if applicable
- ☐ Cash handling training if applicable
- ☐ Opening duties
- ☐ Closing duties
- ☐ Cleaning duties
- ☐ Manager observation
- ☐ Required retraining if applicable
- ☐ Final follow-up review

MANAGER OBSERVATION**Manager observed employee during:**

- ☐ Slow shift
- ☐ Moderate shift
- ☐ Busy shift
- ☐ Opening
- ☐ Closing
- ☐ Full shift
- ☐ Guest interaction
- ☐ Food preparation
- ☐ Station work
- ☐ Other: _____

Date of final manager observation:

Manager observation notes:

FINAL READINESS CHECK**Employee understands position expectations:**

- ☐ Yes
- ☐ No
- ☐ Needs follow-up

Employee performs required tasks correctly:

- ☐ Yes
- ☐ No
- ☐ Needs follow-up

Employee follows safety and sanitation standards:

- ☐ Yes
- ☐ No
- ☐ Needs follow-up

Employee communicates properly with the team:

- ☐ Yes
- ☐ No
- ☐ Needs follow-up

Employee understands when to ask for help:

- ☐ Yes
- ☐ No
- ☐ Needs follow-up

Employee is ready to work independently:

- ☐ Yes
- ☐ No
- ☐ With limited supervision

EMPLOYEE STRENGTHS

AREAS FOR CONTINUED DEVELOPMENT

FINAL TRAINING DECISION

- ☐ Final training approved

- ☐ Approved with follow-up
 - ☐ Not approved yet
 - ☐ Additional training required
 - ☐ Retraining required
- Follow-Up Action if Needed:**

Follow-Up Date: _____

FINAL ACKNOWLEDGMENT

Employee Acknowledgment:

I understand the standards, responsibilities, and expectations of my position. I understand that training approval does not remove my responsibility to keep following restaurant standards.

Employee Signature: _____

Trainer Acknowledgment:

I have trained and/or observed this employee and believe the training record is accurate.

Trainer Signature: _____

Manager Approval:

I have reviewed the training record and approve the training decision marked above.

Manager Signature: _____ Date: _____

PART 7

COACHING AND RETRAINING LOGS

Purpose of This Section:

Even good employees need coaching.

A restaurant should not wait until a problem becomes serious before addressing it.

Coaching gives managers a way to correct small issues early, explain expectations clearly, and help employees improve before stronger action is needed.

Retraining gives employees a chance to relearn the correct standard when something was missed, forgotten, changed, or misunderstood.

This section helps managers document coaching conversations, performance corrections, retraining assignments, follow-up reviews, repeated issues, and manager action plans.

The goal is not to create paperwork for no reason.

The goal is to create fair, clear, useful documentation.

Good documentation helps answer important questions:

1. What happened?
2. What standard was missed?
3. Was the employee coached?
4. Was retraining assigned?
5. Did the manager follow up?
6. Did the issue improve?
7. Is the issue repeating?
8. What is the next action?

Coaching should be professional, specific, and connected to a clear standard.

A manager should avoid vague statements like:

"You need to do better."

"You have to care more."

"You're not paying attention."

Those statements may express frustration, but they do not clearly explain what must change.

A stronger coaching conversation sounds like:

"Tonight, the closing side work was not completed before clock-out. The server station was missing rolled silverware, the tea urns were not cleaned, and the trash was not pulled. The closing checklist requires those items before checkout. Tomorrow, I need you to follow the checklist and have a manager verify it before leaving."

That kind of coaching is specific.

It names the issue.

It connects the issue to a standard.

It explains the expected correction.

It gives the employee a fair chance to improve.

WHEN COACHING IS NEEDED**Coaching may be needed when:**

- ☐ A standard is missed.
- ☐ A task is incomplete.
- ☐ An employee needs repeated reminders.
- ☐ Service quality slips.
- ☐ Food quality slips.
- ☐ Cleaning is missed.
- ☐ Side work is incomplete.
- ☐ Opening or closing duties are missed.
- ☐ Communication breaks down.
- ☐ Guest complaints increase.
- ☐ Safety or sanitation expectations are not followed.
- ☐ The employee seems unsure of the correct process.
- ☐ A small issue may become a bigger issue if ignored.

COACHING RULES FOR MANAGERS

- ☐ Coach privately when possible.
- ☐ Stay calm and professional.
- ☐ Focus on the behavior or standard, not the person.
- ☐ Explain what happened.

PART 7 - WHICH RECORD SHOULD I USE?

Do not create a stack of forms for one event. Choose the record that matches the management need, then use a follow-up page only when verification is required.

COACHING CONVERSATION LOG

Use when: A clear standard exists and the employee needs feedback or direction.

Primary need: Routine correction or clarification

PERFORMANCE CORRECTION LOG

Use when: A standard was missed, the issue is repeated, or the matter needs a formal operating record.

Primary need: Formal performance correction

RETRAINING ASSIGNMENT LOG

Use when: The employee needs the correct method taught, practiced, and re-observed.

Primary need: Skill or knowledge gap

FOLLOW-UP REVIEW PAGE

Use when: A prior coaching, correction, or retraining action has a due date and must be checked.

Primary need: Verify whether action worked

REPEATED ISSUE TRACKER

Use when: The manager needs to see the pattern, causes, and prior actions in one place.

Primary need: Same issue keeps returning

MANAGER ACTION PLAN

Use when: The correction requires coordinated steps rather than one training event.

Primary need: Several actions, owners, or deadlines

DOCUMENTATION STANDARD

Record observable facts, the exact standard, the employee's response, support offered, the next action, due date, and how completion will be verified. Avoid diagnosing attitude, intent, personality, or motive when the evidence only shows behavior or performance.

EMPLOYMENT / HR BOUNDARY

These tools support operational coaching and training documentation. They do not determine disciplinary level, termination, leave, accommodation, protected activity, or other employment-law decisions. Follow company policy and obtain qualified HR or legal guidance when required.

COMPLETED EXAMPLE: COACHING AND RETRAINING FORM

The restaurant and employee names in this completed example are fictional. The example demonstrates objective documentation, a clear standard, a specific retraining plan, and a verified follow-up decision.

EMPLOYEE AND INCIDENT INFORMATION

Employee: Jordan Lee Position: Server Manager: Casey Reed

Date of Coaching: April 12, 2026 Shift: Sunday Dinner

Issue Category: Order accuracy and allergy communication

OBJECTIVE DESCRIPTION OF WHAT OCCURRED

At 6:42 p.m., Table 34 requested that cheese be removed because of a dairy allergy. The order was entered with "no cheese," but the allergy modifier was not selected and the manager and kitchen were not verbally notified. The plate reached the expo window with cheese and was stopped before delivery.

STANDARD THAT APPLIES

Allergy requests require the correct POS allergy modifier, verbal notification to the manager, direct confirmation with the kitchen or expo according to restaurant procedure, and a final verification before delivery.

EMPLOYEE EXPLANATION

Jordan stated that the guest first said "no cheese" and only used the word "allergy" after the order had been entered. Jordan updated the item note but forgot to change the modifier and notify the manager.

IMMEDIATE COACHING PROVIDED

The manager reviewed the allergy procedure, explained why an item note alone is not enough, demonstrated the correct POS steps, and required Jordan to repeat the verbal escalation process.

RETRAINING ASSIGNMENT

1. Review SOP FOH-SAFE-003 before the next shift.
2. Complete three simulated allergy orders with the manager.
3. Correctly process the next two real allergy requests under direct observation.
4. Receive manager verification before independent allergy-order handling resumes.

Due Date: April 15, 2026 Assigned Coach: Casey Reed

COMPLETED EXAMPLE: COACHING FOLLOW-UP

FOLLOW-UP OBSERVATION

Follow-Up Date: April 15, 2026 Observer: Casey Reed

Simulation 1: Correct modifier, manager notification, and kitchen confirmation completed.

Simulation 2: Employee initially forgot final expo verification; task repeated correctly.

Simulation 3: Entire procedure completed correctly without prompting.

Real Order 1: Procedure completed correctly at Table 18.

Real Order 2: Procedure completed correctly at Table 42 during peak volume.

EMPLOYEE UNDERSTANDING

Jordan explained: "When a guest identifies an allergy, I must use the allergy modifier, tell the manager, confirm directly with the kitchen or expo, and verify the plate before delivery. A note by itself is not enough."

FOLLOW-UP DECISION

- ☒ Standard met after retraining. Employee may resume independent handling with normal manager oversight.
- ☐ Additional retraining required.
- ☐ Written performance action required.
- ☐ Position reassignment recommended.

CONTINUED EXPECTATION

Any future missed allergy escalation will require immediate removal from allergy-order handling, documented performance correction, and management review before approval is restored.

Employee Comments: I understand the standard and why every step is required.

Employee Signature: Jordan Lee Date: April 15, 2026

Manager Signature: Casey Reed Date: April 15, 2026

What makes this example strong: It separates facts from assumptions, identifies the exact standard, records the employee's explanation, assigns measurable retraining, verifies real performance, and documents the final decision.

COACHING CONVERSATION LOG

Employee Name:

Position:

Department:

☐ Front of House

☐ Back of House

☐ Bar

☐ Dish

☐ Management

☐ Other: _____

Manager Name:

Date of Coaching Conversation:

Purpose:

Use this log to document a coaching conversation with an employee.

This form should be used when a manager needs to correct a standard, clarify expectations, address a repeated issue, or guide the employee toward better performance.

Coaching should be clear, fair, and specific.

ISSUE BEING COACHED

What happened?

Date issue occurred:

Observed by:

Standard or expectation missed:

Was this issue connected to:

- ☐ Training
- ☐ Communication
- ☐ Effort
- ☐ Accountability
- ☐ Safety
- ☐ Sanitation
- ☐ Guest service
- ☐ Food quality
- ☐ Attendance
- ☐ Teamwork
- ☐ Other: _____

EMPLOYEE RESPONSE**Employee had opportunity to explain or respond:**

- ☐ Yes
- ☐ No

Employee response:

COACHING GIVEN**Manager explained:**

- ☐ What happened
- ☐ What standard was missed
- ☐ Why the standard matters
- ☐ What needs to improve
- ☐ When improvement is expected
- ☐ What support or retraining is available

Correct expectation moving forward:

FOLLOW-UP PLAN

Follow-up required?

☐ Yes☐ No

Follow-up date: _____

Follow-up will include:

☐ Manager observation☐ Trainer review☐ SOP review☐ Checklist review☐ Retraining☐ Performance correction☐ Shift follow-up☐ Other: _____

Manager Notes:

ACKNOWLEDGMENT

Employee Signature: _____

Manager Signature: _____ Date: _____

Employee signature confirms this conversation was reviewed. It does not necessarily mean the employee agrees with every detail.

PERFORMANCE CORRECTION LOG

Employee Name:

Position:

Department:

☐ Front of House

☐ Back of House

☐ Bar

☐ Dish

☐ Management

☐ Other: _____

Manager Name:

Date of Correction:

Purpose:

Use this log when an employee's performance needs formal correction.

This form should be used when a standard has been missed, a problem has repeated, or the issue is serious enough that a simple coaching conversation is not enough.

Performance correction should be clear, specific, and connected to a restaurant standard.

The goal is to correct the issue, protect the operation, and give the employee a clear path forward.

ISSUE SUMMARY

What happened?

Date issue occurred:

Observed by:

Was this issue previously discussed?

☐ Yes

☐ No

☐ Not sure

If yes, date of previous coaching or retraining:

STANDARD MISSED

What standard, policy, checklist, SOP, or expectation was missed?

Why does this standard matter?

- ☐ Guest experience
- ☐ Food quality
- ☐ Food safety
- ☐ Sanitation
- ☐ Labor control
- ☐ Cash control
- ☐ Teamwork
- ☐ Speed of service
- ☐ Opening readiness
- ☐ Closing readiness
- ☐ Professional behavior
- ☐ Other: _____

PERFORMANCE CATEGORY

This correction is related to:

- ☐ Attendance
- ☐ Service
- ☐ Food quality
- ☐ Cleaning
- ☐ Safety
- ☐ Sanitation
- ☐ Side work
- ☐ Opening duties
- ☐ Closing duties
- ☐ Cash handling
- ☐ POS use
- ☐ Communication
- ☐ Teamwork
- ☐ Policy
- ☐ Other: _____

CORRECTIVE EXPECTATION

What must improve?

What should the employee do differently moving forward?

By when must improvement happen?

SUPPORT OR RETRAINING OFFERED

- ☐ SOP reviewed
- ☐ Checklist reviewed
- ☐ Trainer assigned
- ☐ Manager demonstrated correct standard
- ☐ Employee practiced correct standard
- ☐ Follow-up observation scheduled
- ☐ Additional training shift assigned
- ☐ Other: _____

FOLLOW-UP PLAN

Follow-up required?

- ☐ Yes
- ☐ No

Follow-up date: _____

Follow-up will be completed by:

If the issue does not improve, next action may include:

- ☐ Additional coaching
- ☐ Additional retraining
- ☐ Written correction
- ☐ Position review
- ☐ Schedule adjustment
- ☐ Manager meeting
- ☐ Other: _____

EMPLOYEE COMMENTS

ACKNOWLEDGMENT

Employee Signature: _____

Manager Signature: _____ Date: _____

Employee signature confirms this correction was reviewed. It does not necessarily mean the employee agrees with every detail.

RETRAINING ASSIGNMENT LOG

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Trainer Assigned:

Date Assigned:

Purpose:

Use this log when an employee needs additional training on a task, station, procedure, or standard.

Retraining should be assigned when the employee does not yet meet the standard, when a process changes, or when the manager needs to verify that the employee can perform the task correctly.

Retraining should be specific.

Do not write "needs to do better."

Write the exact standard that needs to be reviewed, practiced, and verified.

RETRAINING REASON

Retraining is being assigned because:

- ☐ Task was missed
- ☐ Task was performed incorrectly
- ☐ Employee needs repeated reminders
- ☐ SOP changed
- ☐ Checklist was not followed
- ☐ Safety issue occurred
- ☐ Sanitation issue occurred
- ☐ Guest complaint occurred
- ☐ Food quality issue occurred
- ☐ Cash handling issue occurred
- ☐ Opening duty was missed
- ☐ Closing duty was missed
- ☐ Manager observation found a gap
- ☐ Other: _____

Specific issue:

STANDARD TO BE RETAINED**Task, station, SOP, or standard to review:****Correct result expected:****RETRAINING METHOD****Retraining will include:**

- ☐ Manager explanation
- ☐ Trainer demonstration
- ☐ Employee practice
- ☐ SOP review
- ☐ Checklist review
- ☐ Shadow shift
- ☐ Station walk-through
- ☐ Live shift observation
- ☐ Written review
- ☐ Final manager approval
- ☐ Other: _____

Employee must demonstrate:**RETRAINING SCHEDULE****Retraining start date:****Retraining completion deadline:****Assigned trainer or manager:****Follow-up review date:**

COMPLETION REQUIREMENTS**Retraining is complete when:**

- ☐ Employee can explain the correct standard.
- ☐ Employee can perform the task correctly.
- ☐ Employee follows safety rules.
- ☐ Employee follows sanitation rules.
- ☐ Employee completes the task without constant reminders.
- ☐ Employee understands when to ask for help.
- ☐ Manager or trainer observes the employee.
- ☐ Completion is documented.

Manager Notes:

RETRAINING APPROVAL

Retraining completed?

- ☐ Yes
- ☐ No
- ☐ In progress

Employee ready to return to standard expectation?

- ☐ Yes
- ☐ No
- ☐ Needs more practice

Follow-up still required?

- ☐ Yes
- ☐ No

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

FOLLOW-UP REVIEW PAGE

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Original Coaching / Retraining Date:

Follow-Up Review Date:

Purpose:

Use this page to document whether coaching, correction, or retraining actually improved performance. A follow-up is where the manager confirms whether the issue was resolved, improved, or still needs attention. Without follow-up, coaching can become just a conversation. A strong manager follows up on what was discussed.

ORIGINAL ISSUE REVIEW

Original issue or standard missed:

Original action taken:

- ☐ Coaching conversation
- ☐ Performance correction
- ☐ Retraining assigned
- ☐ SOP reviewed
- ☐ Checklist reviewed
- ☐ Trainer assigned
- ☐ Manager observation
- ☐ Other: _____

Expected improvement:

FOLLOW-UP OBSERVATION

Since the original conversation, the employee's performance has:

- ☐ Improved
- ☐ Improved slightly
- ☐ Stayed the same
- ☐ Gotten worse
- ☐ Not yet observed

Manager observation notes:

STANDARD CHECK

Employee now understands the standard:

- ☐ Yes
- ☐ No
- ☐ Somewhat

Employee is following the standard:

- ☐ Yes
- ☐ No
- ☐ Sometimes

Employee still needs reminders:

- ☐ Yes
- ☐ No
- ☐ Sometimes

Employee needs more training:

- ☐ Yes
- ☐ No
- ☐ Not sure

FOLLOW-UP DECISION

- ☐ Issue resolved
- ☐ Continue monitoring
- ☐ Additional coaching needed
- ☐ Additional retraining needed
- ☐ Performance correction needed
- ☐ Manager meeting needed
- ☐ Position review needed
- ☐ Other: _____

NEXT ACTION**Action to be taken:**

Person responsible: _____**Deadline:** _____**Next follow-up date:**

EMPLOYEE COMMENTS

MANAGER NOTES

ACKNOWLEDGMENT

Employee Signature: _____

Manager Signature: _____ Date: _____

REPEATED ISSUE TRACKER

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Tracking Start Date:

Purpose:

Use this tracker when the same issue keeps happening after coaching, correction, or retraining.

A repeated issue may mean the employee needs more training, clearer expectations, stronger accountability, a position review, or a manager follow-up plan.

Repeated issues should not be ignored.

When the same problem happens again and again, managers need documentation that shows what happened, what action was taken, and whether the employee improved.

This tracker helps managers see patterns instead of treating every incident like a separate surprise.

REPEATED ISSUE SUMMARY

Issue being tracked:

Standard or expectation connected to this issue:

Why this issue matters:

- ☐ Guest experience
- ☐ Food quality
- ☐ Food safety
- ☐ Sanitation
- ☐ Labor control
- ☐ Cash control
- ☐ Teamwork
- ☐ Speed of service
- ☐ Opening readiness
- ☐ Closing readiness

☐ Professional behavior

☐ Other: _____

ISSUE HISTORY

First time issue was observed:

Date: _____

What happened?

Action taken:

☐ Coaching

☐ Retraining

☐ Performance correction

☐ SOP review

☐ Checklist review

☐ Manager observation

☐ Other: _____

Second time issue was observed:

Date: _____

What happened?

Action taken:

☐ Coaching

☐ Retraining

☐ Performance correction

☐ SOP review

☐ Checklist review

☐ Manager observation

☐ Other: _____

Third time issue was observed:

Date: _____

What happened?

Action taken:

☐ Coaching

☐ Retraining

☐ Performance correction

☐ SOP review

☐ Checklist review

☐ Manager observation

☐ Other: _____

PATTERN REVIEW

Does this issue happen:

☐ During busy shifts

☐ During closing

☐ During opening

☐ With certain tasks

☐ With certain managers

☐ When employee is unsupervised

☐ After days off

☐ When station is understaffed

☐ When communication is weak

☐ Other: _____

Possible cause of repeated issue:

☐ Training gap

☐ Lack of understanding

☐ Lack of follow-through

☐ Effort issue

☐ Communication issue

☐ Time management issue

☐ Accountability issue

☐ Process issue

☐ Tool or equipment issue

☐ Staffing issue

☐ Other: _____

MANAGER DECISION

Next action:

☐ Additional coaching

☐ Additional retraining

☐ Written performance correction

☐ Manager meeting

☐ Position review

☐ Schedule adjustment

☐ Trainer reassignment

☐ Final warning according to company policy

☐ Other: _____

Action plan:

Follow-Up Date: _____

Manager Notes:

Employee Signature: _____

Manager Signature: _____ Date: _____

Employee signature confirms this tracker was reviewed. It does not necessarily mean the employee agrees with every detail.

MANAGER ACTION PLAN

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Date:

Purpose:

Use this page when a manager needs a clear plan to help an employee improve, correct a repeated issue, complete retraining, or meet a required standard.

A manager action plan should be specific.

It should explain the issue, the expected result, the support being provided, the deadline, and how improvement will be measured.

This page can be used after coaching, retraining, performance correction, repeated issue tracking, or a manager review.

MAIN ISSUE TO ADDRESS

What issue needs action?

What standard should the employee meet?

Why does this matter to the restaurant?

- ☐ Guest experience
- ☐ Food quality
- ☐ Safety
- ☐ Sanitation
- ☐ Labor control
- ☐ Cash control
- ☐ Teamwork
- ☐ Service speed
- ☐ Opening readiness
- ☐ Closing readiness
- ☐ Training consistency

☐ Other: _____

ACTION PLAN

Step 1:

Person responsible: _____

Deadline: _____

Step 2:

Person responsible: _____

Deadline: _____

Step 3:

Person responsible: _____

Deadline: _____

Step 4:

Person responsible: _____

Deadline: _____

SUPPORT PROVIDED

- ☐ Manager coaching
- ☐ Trainer support
- ☐ SOP review
- ☐ Checklist review
- ☐ Additional practice
- ☐ Shadow shift
- ☐ Station walkthrough
- ☐ Written instructions
- ☐ Follow-up observation
- ☐ Other: _____

How support will be provided:

MEASURING IMPROVEMENT

Improvement will be measured by:

- ☐ Manager observation
- ☐ Completed checklist
- ☐ Reduced mistakes
- ☐ Guest feedback
- ☐ Food quality check
- ☐ Cleaning inspection
- ☐ Cash/POS accuracy
- ☐ Opening or closing inspection
- ☐ Trainer feedback
- ☐ Follow-up meeting
- ☐ Other: _____

Expected result:

Deadline for improvement:

FOLLOW-UP REVIEW**Follow-up date:** _____**Follow-up completed by:**

Result of follow-up:

- ☐ Improved
- ☐ Improved slightly
- ☐ No improvement
- ☐ Issue repeated
- ☐ Additional action needed
- ☐ Issue resolved

Manager notes:

FINAL DECISION

- ☐ Continue monitoring
- ☐ Action plan completed
- ☐ Additional coaching required
- ☐ Additional retraining required
- ☐ Performance correction required
- ☐ Position review required
- ☐ Other: _____

Employee Comments:

ACKNOWLEDGMENT

Employee Signature: _____

Manager Signature: _____ Date: _____

Employee signature confirms this action plan was reviewed. It does not necessarily mean the employee agrees with every detail.

PART 7 COMPLETION REVIEW

Date:

Manager Name:

Restaurant / Location:

Purpose:

Use this page to review how coaching, correction, retraining, and follow-up are being handled in the restaurant.
The goal is to make sure managers are not just correcting employees, but actually building a fair system for improvement.

PART 7 MANAGER REVIEW

1. Are coaching conversations being documented when needed?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

2. Are repeated issues being tracked?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

3. Are employees being retrained before stronger action is taken when appropriate?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

4. Are managers following up after coaching or retraining?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

5. Are performance corrections connected to clear standards?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

6. Are employees given clear expectations for improvement?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

7. Are managers using the same process consistently?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

BIGGEST COACHING OR RETRAINING GAP RIGHT NOW

FIRST ACTION TO IMPROVE FOLLOW-UP

Person Responsible: _____

Deadline: _____

Manager Signature: _____ Date: _____

PART 8

30/60/90 DAY EMPLOYEE REVIEWS

Purpose of This Section:

The first 90 days are one of the most important periods in an employee's time with the restaurant.

This is when managers should confirm whether the employee understands the position, follows standards, fits the team, responds to coaching, and continues improving.

A 30/60/90 day review system gives managers a structured way to check progress before small issues become long-term habits.

These reviews should not be treated like punishment.

They should be treated as checkpoints.

A good review tells the employee:

1. What they are doing well
2. Where they still need improvement
3. What standards matter most
4. What the manager has observed
5. What the next goal is
6. What support or training is still needed

Managers should use these reviews to be honest, fair, and specific.

Avoid vague review comments like:

"You're doing fine."

"Needs to improve."

"Good attitude."

"Not quite there yet."

Those comments do not give the employee enough direction.

Stronger review comments sound like:

"You are greeting tables quickly and your guest tone is strong. The next focus is order accuracy, especially modifiers and seat numbers."

"You are improving on station setup, but closing duties still need manager reminders. For the next 30 days, we will focus on completing the closing checklist before clock-out."

"You work well with the team, but food labeling has been missed twice. We reviewed the labeling SOP today and will follow up next week."

The purpose of a review is not just to judge performance.

The purpose is to create the next step.

30/60/90-DAY REVIEW - EVIDENCE & RATING CALIBRATION

Use the same role standard for every employee. Ratings should describe observed performance during the review period - not popularity, personality, one unusually good shift, or one unusually bad shift.

NEEDS IMPROVEMENT

Performance is below the current communicated standard or still requires more support than the role normally allows. Document a specific example and next action.

ACCEPTABLE

Performance meets the current standard with normal supervision for the role. The employee is dependable at the reviewed level.

STRONG

Performance meets the standard consistently, including normal pressure, with little repeated prompting. Strength should be supported by an example.

EXCELLENT

Use only when the employee consistently exceeds the role standard in observable ways without bypassing procedure or creating risk for others.

NOT APPLICABLE

The category does not apply to this role or has not been observed enough to rate fairly.

FAIR REVIEW RULES

- ☐ Use examples and evidence.
- ☐ Compare the employee to the role standard, not to a favorite employee.
- ☐ Separate a training gap from a process, equipment, staffing, communication, or accountability problem.
- ☐ Do not wait for a scheduled review to address a serious safety, harassment, discrimination, cash, or conduct concern.
- ☐ Allow the employee to respond and document the response fairly.
- ☐ End every improvement rating with one owner, one action, one due date, and one follow-up method.

Evidence / examples to carry into the review:

30-DAY EMPLOYEE REVIEW

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Trainer Name:

Hire Date:

30-Day Review Date:

Purpose:

Use this review to check the employee's early progress after the first month.

At 30 days, the employee should understand basic expectations, position standards, schedule expectations, communication rules, and the training path.

The employee may not be fully independent yet, but there should be clear progress.

30-DAY REVIEW FOCUS

At this stage, the manager should review:

- ☐ Attendance and punctuality
- ☐ Uniform and appearance
- ☐ Professional behavior
- ☐ Basic position understanding
- ☐ Training progress
- ☐ Safety and sanitation awareness
- ☐ Communication with managers
- ☐ Communication with coworkers
- ☐ Guest service if applicable
- ☐ Food quality if applicable
- ☐ Willingness to learn
- ☐ Response to coaching
- ☐ Follow-through on assigned tasks

PERFORMANCE CHECK

Attendance:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

Punctuality:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

Uniform / Appearance:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

Attitude and Professionalism:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

Basic Position Knowledge:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

Training Progress:

- ☐ Behind schedule
- ☐ On track
- ☐ Ahead of schedule

Notes:

Safety and Sanitation:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

Communication:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

Teamwork:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

STRENGTHS OBSERVED

AREAS NEEDING IMPROVEMENT

TRAINING STILL NEEDED

- ☐ Position basics
- ☐ Station setup
- ☐ Opening duties
- ☐ Closing duties
- ☐ Cleaning duties
- ☐ Safety and sanitation
- ☐ Service standards
- ☐ POS training
- ☐ Cash handling
- ☐ Food prep
- ☐ Recipe execution
- ☐ Guest recovery
- ☐ Other: _____

30-DAY ACTION PLAN

Main focus for the next 30 days:

Support or retraining needed:

Follow-Up Date: _____

EMPLOYEE COMMENTS

REVIEW DECISION

- ☐ Continue training
- ☐ Continue employment with normal follow-up
- ☐ Continue employment with additional training
- ☐ Schedule performance follow-up
- ☐ Position review needed
- ☐ Other: _____

Employee Signature: _____

Manager Signature: _____ Date: _____

60-DAY EMPLOYEE REVIEW

Employee Name:

Position:

Department:

☐ Front of House

☐ Back of House

☐ Bar

☐ Dish

☐ Management

☐ Other: _____

Manager Name:

Trainer Name:

Hire Date:

60-Day Review Date:

Purpose:

Use this review to evaluate the employee's progress after two months.

At 60 days, the employee should show stronger position understanding, more consistency, better independence, and clearer response to coaching.

The manager should look for patterns.

Has the employee improved since the 30-day review?

Are the same issues repeating?

Is the employee becoming more dependable?

Does the employee understand the restaurant's standards?

60-DAY REVIEW FOCUS

At this stage, the manager should review:

- ☐ Progress since 30-day review
- ☐ Position knowledge
- ☐ Task consistency
- ☐ Independence
- ☐ Guest service if applicable
- ☐ Food quality if applicable
- ☐ Cleaning and side work
- ☐ Opening or closing duties
- ☐ Team communication
- ☐ Manager communication
- ☐ Safety and sanitation
- ☐ Response to coaching
- ☐ Reliability
- ☐ Readiness for more responsibility

PERFORMANCE CHECK

Progress Since 30-Day Review:

- ☐ Declined
- ☐ No major change
- ☐ Improved slightly
- ☐ Improved
- ☐ Strong improvement

Notes:

Position Knowledge:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

Task Consistency:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

Independence:

- ☐ Needs direct supervision
- ☐ Needs frequent support
- ☐ Needs limited support
- ☐ Works independently

Notes:

Communication:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

Teamwork:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

Safety and Sanitation:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong

Notes:

Opening / Closing Duties:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong
- ☐ Not applicable

Notes:

Guest Service or Food Quality:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong
- ☐ Not applicable

Notes:

STRENGTHS OBSERVED

AREAS STILL NEEDING IMPROVEMENT

REPEATED ISSUES FROM FIRST 60 DAYS

Has the same issue repeated?

- ☐ Yes
- ☐ No
- ☐ Not sure

If yes, describe:

Was coaching or retraining completed?

- ☐ Yes
- ☐ No
- ☐ Not needed

60-DAY ACTION PLAN

Main focus for the next 30 days:

Support, retraining, or coaching needed:

Follow-Up Date: _____

EMPLOYEE COMMENTS

REVIEW DECISION

- ☐ Continue employment with normal follow-up
- ☐ Continue employment with additional training
- ☐ Schedule performance follow-up
- ☐ Consider station certification
- ☐ Consider position certification
- ☐ Position review needed
- ☐ Other: _____

Employee Signature: _____

Manager Signature: _____ Date: _____

90-DAY EMPLOYEE REVIEW

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Trainer Name:

Hire Date:

90-Day Review Date:

Purpose:

Use this review to evaluate the employee's performance after the first 90 days.

At 90 days, the manager should have a clear understanding of whether the employee is meeting the restaurant's standards, still needs development, or may be ready for more responsibility.

This review should look at the full picture:

1. Training completion
2. Position performance
3. Consistency
4. Reliability
5. Teamwork
6. Guest service or food quality
7. Safety and sanitation
8. Response to coaching
9. Long-term fit

A 90-day review should be honest.

If the employee is doing well, document the strengths and set the next growth goal.

If the employee is still struggling, identify the exact issue and decide whether more training, retraining, coaching, position review, or stronger accountability is needed.

90-DAY REVIEW FOCUS

At this stage, the manager should review:

- ☐ Overall position performance
- ☐ Training completion
- ☐ Task mastery
- ☐ Station readiness
- ☐ Reliability
- ☐ Attendance
- ☐ Punctuality
- ☐ Team communication
- ☐ Manager communication
- ☐ Guest service if applicable
- ☐ Food quality if applicable
- ☐ Safety and sanitation
- ☐ Opening or closing duties
- ☐ Response to coaching
- ☐ Ability to work independently
- ☐ Long-term potential

PERFORMANCE CHECK

Overall Performance:

- ☐ Not meeting standard
- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong
- ☐ Excellent

Notes:

Training Completion:

- ☐ Incomplete
- ☐ Mostly complete
- ☐ Complete
- ☐ Complete with follow-up needed

Notes:

Task Consistency:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong
- ☐ Excellent

Notes:

Independence:

- ☐ Needs direct supervision
- ☐ Needs frequent support
- ☐ Needs limited support
- ☐ Works independently
- ☐ Can help others

Notes:

Reliability:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong
- ☐ Excellent

Notes:

Teamwork:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong
- ☐ Excellent

Notes:

Communication:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong
- ☐ Excellent

Notes:

Guest Service or Food Quality:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong
- ☐ Excellent
- ☐ Not applicable

Notes:

Safety and Sanitation:

- ☐ Needs improvement
- ☐ Acceptable
- ☐ Strong
- ☐ Excellent

Notes:

REVIEW OF FIRST 90 DAYS**Biggest improvement since hire:**

Strongest area of performance:

Most important area needing continued development:

Has the employee completed required training?

- ☐ Yes
- ☐ No
- ☐ Mostly
- ☐ Needs follow-up

Has the employee been certified for the position?

- ☐ Yes
- ☐ No
- ☐ Not yet
- ☐ Not applicable

Has the employee needed repeated coaching or retraining?

- ☐ Yes
- ☐ No
- ☐ Minor follow-up only

If yes, explain:

90-DAY DECISION

- ☐ Continue employment with normal follow-up
- ☐ Continue employment with development plan
- ☐ Approve position certification
- ☐ Assign additional training
- ☐ Assign retraining
- ☐ Schedule performance follow-up
- ☐ Review position fit
- ☐ Other: _____

NEXT 90-DAY GOAL

Goal for the employee:

Support needed from manager:

Follow-Up Date: _____

EMPLOYEE COMMENTS

Employee Signature: _____

Manager Signature: _____ Date: _____

EMPLOYEE STRENGTHS AND OPPORTUNITIES

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Review Date:

Purpose:

Use this page to identify what the employee does well and where the employee has room to grow.

A strong review should not only point out problems.

It should also recognize progress, effort, strengths, and potential.

Employees are more likely to improve when they understand both sides:

1. What they should keep doing

2. What they need to work on next

This page can be used during a 30-day, 60-day, 90-day, or ongoing performance review.

EMPLOYEE STRENGTHS

Check all strengths that apply:

- ☐ Positive attitude
- ☐ Strong attendance
- ☐ Good punctuality
- ☐ Learns quickly
- ☐ Responds well to coaching
- ☐ Communicates clearly
- ☐ Works well with the team
- ☐ Handles pressure well
- ☐ Gives good guest service
- ☐ Protects food quality
- ☐ Follows safety standards
- ☐ Follows sanitation standards
- ☐ Completes side work
- ☐ Completes opening duties
- ☐ Completes closing duties
- ☐ Shows leadership potential
- ☐ Helps coworkers
- ☐ Takes initiative
- ☐ Other: _____

Top three strengths:

Examples of strengths observed:

OPPORTUNITIES FOR IMPROVEMENT**Check all areas that need improvement:**

- ☐ Attendance
- ☐ Punctuality
- ☐ Uniform or appearance
- ☐ Professional behavior
- ☐ Communication
- ☐ Teamwork
- ☐ Guest service
- ☐ Food quality
- ☐ Speed
- ☐ Accuracy
- ☐ Cleaning
- ☐ Side work
- ☐ Opening duties
- ☐ Closing duties
- ☐ Safety standards
- ☐ Sanitation standards
- ☐ POS use
- ☐ Cash handling
- ☐ Menu knowledge
- ☐ Recipe knowledge
- ☐ Following direction
- ☐ Responding to coaching
- ☐ Taking initiative
- ☐ Other: _____

Top three opportunities:

Examples of improvement needed:

MANAGER FEEDBACK

What should the employee keep doing?

What should the employee stop doing?

What should the employee start doing?

EMPLOYEE DEVELOPMENT FOCUS**Main focus for the next review period:**

Training or support needed:

- ☐ Coaching
- ☐ Retraining
- ☐ SOP review
- ☐ Checklist review
- ☐ Trainer support
- ☐ Manager observation
- ☐ Position certification
- ☐ Station certification
- ☐ Additional practice
- ☐ Other: _____

Specific support plan:

EMPLOYEE COMMENTS

Manager Signature: _____ Date: _____

Employee Signature: _____

MANAGER FOLLOW-UP PLAN

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Review Date:

Follow-Up Date: _____

Purpose:

Use this page after an employee review to make sure the manager follows through on the next steps.

A review is only useful if it leads to action.

If the manager identifies a training gap, repeated issue, strength, opportunity, or growth goal, there should be a clear follow-up plan.

This page helps prevent reviews from becoming paperwork with no follow-through.

REVIEW SUMMARY

Review completed:

- ☐ 30-day review
- ☐ 60-day review
- ☐ 90-day review
- ☐ Performance review
- ☐ Coaching follow-up
- ☐ Retraining follow-up
- ☐ Other: _____

Main review finding:

Employee's strongest area:

Employee's biggest improvement need:

FOLLOW-UP ACTIONS

Action 1:

Person responsible: _____

Deadline: _____

Action 2:

Person responsible: _____

Deadline: _____

Action 3:

Person responsible: _____

Deadline: _____

TRAINING OR SUPPORT NEEDED

- ☐ Additional coaching
- ☐ Additional retraining
- ☐ SOP review
- ☐ Checklist review
- ☐ Trainer assigned
- ☐ Manager observation
- ☐ Station certification
- ☐ Position certification
- ☐ Menu review
- ☐ Recipe review
- ☐ POS review
- ☐ Cash handling review
- ☐ Service standard review
- ☐ Safety or sanitation review
- ☐ Other: _____

Support details:

MEASURING PROGRESS

Progress will be measured by:

- ☐ Manager observation
- ☐ Trainer feedback
- ☐ Completed checklist
- ☐ Improved performance
- ☐ Reduced mistakes
- ☐ Guest feedback
- ☐ Food quality check
- ☐ Cleaning inspection
- ☐ Cash/POS accuracy
- ☐ Opening or closing inspection

☐ Other: _____

Expected result:

FOLLOW-UP REVIEW

Follow-up completed?

☐ Yes

☐ No

Date completed:

Result:

☐ Improved

☐ Improved slightly

☐ No improvement

☐ Issue repeated

☐ Goal completed

☐ Additional action needed

Manager notes:

NEXT STEP

☐ Continue normal follow-up

☐ Continue monitoring

☐ Assign more training

☐ Assign retraining

☐ Schedule coaching conversation

☐ Schedule performance correction

☐ Approve certification

☐ Other: _____

Employee Signature: _____

Manager Signature: _____ Date: _____

CONTINUED DEVELOPMENT PLAN

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Plan Start Date:

Next Review Date: _____

Purpose:

Use this page when an employee has completed the early review period but still needs a clear growth plan.

A continued development plan can be used for employees who are doing well and ready to grow, or employees who need more structure before they can fully meet expectations.

Development should not stop after the first 90 days.

Strong restaurants keep building employees after basic training is complete.

This page helps managers identify the next skills, responsibilities, habits, and standards the employee should work on.

DEVELOPMENT TYPE

This plan is for:

- ☐ Continued improvement
- ☐ Skill development
- ☐ Cross-training
- ☐ Leadership development
- ☐ Station certification
- ☐ Position certification
- ☐ Performance follow-up
- ☐ Retraining follow-up
- ☐ Promotion preparation
- ☐ Other: _____

CURRENT PERFORMANCE SUMMARY

What is the employee currently doing well?

What still needs development?

What is the main reason this plan is needed?

DEVELOPMENT GOALS

Goal 1:

Why this goal matters:

Action steps:

Deadline: _____

Goal 2:

Why this goal matters:

Action steps:

Deadline: _____

Goal 3:

Why this goal matters:

Action steps:

Deadline: _____

SUPPORT NEEDED

- ☐ Manager coaching
- ☐ Trainer support
- ☐ Additional practice
- ☐ SOP review
- ☐ Checklist review
- ☐ Menu review
- ☐ Recipe review
- ☐ POS review
- ☐ Cash handling review
- ☐ Guest service practice
- ☐ Food quality review
- ☐ Safety or sanitation review
- ☐ Leadership coaching
- ☐ Cross-training
- ☐ Other: _____

Support details:

MEASURING SUCCESS

Success will be measured by:

- ☐ Manager observation
- ☐ Trainer feedback
- ☐ Completed checklist
- ☐ Reduced mistakes
- ☐ Guest feedback
- ☐ Food quality check
- ☐ Cleaning inspection
- ☐ Cash/POS accuracy
- ☐ Opening or closing inspection

- ☐ Station certification
- ☐ Position certification
- ☐ Improved independence
- ☐ Other: _____

The employee will be considered successful when:

FOLLOW-UP SCHEDULE

First follow-up date:

Second follow-up date:

Final review date:

FOLLOW-UP NOTES

First follow-up result:

Second follow-up result:

Final review result:

FINAL DEVELOPMENT DECISION

- ☐ Development plan completed
- ☐ Continue development plan
- ☐ Assign additional training
- ☐ Assign retraining
- ☐ Approve station certification
- ☐ Approve position certification
- ☐ Consider leadership development
- ☐ Schedule manager meeting
- ☐ Other: _____

Employee Comments:

Employee Signature: _____

Manager Signature: _____ Date: _____

PART 8 COMPLETION REVIEW

Date:

Manager Name:

Restaurant / Location:

Purpose:

Use this page to review how employee progress is being evaluated during the first 30, 60, and 90 days.

The goal is to make sure new employees are not simply placed on the schedule and forgotten.

A strong review system gives managers a way to check training progress, recognize strengths, correct issues early, and decide what support the employee needs next.

PART 8 MANAGER REVIEW

1. Are 30-day reviews being completed on time?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

2. Are 60-day reviews being completed on time?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

3. Are 90-day reviews being completed before final training decisions are made?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

4. Are reviews specific enough to be useful?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

5. Are employee strengths being documented?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

6. Are improvement areas being connected to clear standards?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

7. Are managers following up after reviews?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

8. Are development plans being used when employees need continued support?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

BIGGEST REVIEW SYSTEM GAP RIGHT NOW

FIRST ACTION TO IMPROVE EMPLOYEE REVIEWS

Person Responsible: _____

Deadline: _____

Manager Signature: _____ **Date:** _____

PART 9

MANAGER TRAINING ACCOUNTABILITY

PART 9 - MANAGER TRAINING ACCOUNTABILITY

Training accountability should control real risk, not create paperwork for its own sake. Use the lightest review rhythm that still gives management a truthful picture of readiness and open follow-up.

MINIMUM VIABLE RHYTHM

- Active training week:** Complete a weekly review when there is an active trainee, overdue follow-up, trainer concern, certification decision, or repeated training gap.
- Monthly system check:** Review training completion, certification coverage, overdue follow-up, repeated issues, trainer calibration, and SOPs that need correction.
- No active trainees:** Do not manufacture weekly paperwork. Verify the system is ready before the next hire and close any open actions.
- Small restaurant:** One manager may combine weekly and department reviews into a single control page.
- Larger restaurant:** Department leads may review their areas, but one GM/owner-level review should reconcile unresolved risks and conflicting standards.

DO NOT COMPLETE EVERY PART 9 FORM EVERY WEEK

Weekly Review = active people and due actions. Monthly Review = trends and system health. Department Scorecard = one department that needs a deeper look. Training Gaps Review = a specific recurring gap. Team Readiness Review = upcoming shift/event readiness. Manager Accountability Checklist = periodic manager-system verification.

MANAGER ACCOUNTABILITY RULES

- ☐ Confirm employees are not scheduled independently before verified readiness.
- ☐ Confirm trainers use the current standard and sign off honestly.
- ☐ Review open actions until they are closed or reassigned.
- ☐ Treat repeated mistakes as evidence to diagnose - not automatic proof of an attitude problem.
- ☐ Update training or SOPs when the restaurant changes the menu, equipment, process, or role.
- ☐ Escalate serious safety, harassment, discrimination, injury, allergy, cash, or conduct concerns immediately according to policy.

WEEKLY TRAINING REVIEW

Week Of:

Manager Name:

Restaurant / Location:

Purpose:

Use this page once per week to review current training progress, incomplete training, employees needing follow-up, and any standards that were missed during the week.

A weekly training review helps managers catch problems early.

This page should be completed by the general manager, assistant manager, department manager, shift leader, or training lead.

CURRENT TRAINING REVIEW

Employees currently in training:

Positions currently being trained:

- ☐ Server
- ☐ Host
- ☐ Bartender
- ☐ Cook
- ☐ Prep cook
- ☐ Dishwasher
- ☐ Manager
- ☐ Other: _____

TRAINING PROGRESS CHECK

Training trackers reviewed this week?

- ☐ Yes
- ☐ No
- ☐ Some

Notes:

Sign-off pages reviewed this week?

- ☐ Yes
☐ No
☐ Some

Notes:

Any employees behind in training?

- ☐ Yes
☐ No

If yes, list employee names and reason:

Any employees ready for station or position certification?

- ☐ Yes
☐ No

If yes, list names:

INCOMPLETE TRAINING ITEMS

List any training items that still need to be completed.

Employee Name: _____

Training Item Needed: _____

Person Responsible: _____

Deadline: _____

Employee Name: _____

Training Item Needed: _____

Person Responsible: _____

Deadline: _____

Employee Name: _____

Training Item Needed: _____

Person Responsible: _____

Deadline: _____

WEEKLY TRAINING ISSUES

Did any repeated mistakes happen this week?

- ☐ Yes
☐ No

If yes, describe:

Could the issue be connected to a training gap?

- ☐ Yes
☐ No
☐ Not sure

Follow-up needed:

- ☐ Coaching
- ☐ Retraining
- ☐ SOP review
- ☐ Checklist review
- ☐ Trainer follow-up
- ☐ Manager observation
- ☐ Other: _____

TRAINER REVIEW

Were trainers used this week?

- ☐ Yes
- ☐ No

If yes, were trainers following the correct standards?

- ☐ Yes
- ☐ No
- ☐ Needs review

Trainer notes:

MANAGER ACTIONS FOR NEXT WEEK**Action 1:**

Person Responsible: _____

Deadline: _____

Action 2:

Person Responsible: _____

Deadline: _____

Action 3:

Person Responsible: _____

Deadline: _____

Manager Signature: _____ Date: _____

MONTHLY TRAINING REVIEW

Month:

Manager Name:

Restaurant / Location:

Purpose:

Use this page once per month to review the restaurant's overall training system.

The weekly training review catches short-term issues.

The monthly training review helps managers see bigger patterns.

A monthly review should answer:

1. Are new employees being trained on time?
2. Are employees being certified correctly?
3. Are managers following up?
4. Are trainers doing their job?
5. Are SOPs being used?
6. Are repeated mistakes connected to training gaps?
7. Which department needs the most attention?

MONTHLY TRAINING SUMMARY

Number of new employees hired this month:

Number of employees currently in training:

Number of employees who completed training this month:

Number of employees certified this month:

Number of employees needing retraining this month:

TRAINING DOCUMENTATION CHECK

- ☐ New hire onboarding forms completed
- ☐ Position training trackers completed
- ☐ Task mastery sheets completed
- ☐ SOP templates used when needed
- ☐ Training sign-off pages completed
- ☐ Station certification pages completed
- ☐ Position certification pages completed
- ☐ Coaching logs completed when needed
- ☐ Retraining logs completed when needed
- ☐ 30/60/90 day reviews completed when due

DOCUMENTATION GAPS

What training paperwork is missing or incomplete?

DEPARTMENT REVIEW

Front of House training status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs attention
- ☐ Serious gap

Notes:

Back of House training status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs attention
- ☐ Serious gap

Notes:

Bar training status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs attention
- ☐ Serious gap
- ☐ Not applicable

Notes:

Dish training status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs attention
- ☐ Serious gap

Notes:

Management training status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs attention
- ☐ Serious gap

Notes:

REPEATED TRAINING ISSUES THIS MONTH**Issue 1:**

Possible cause:

Action needed:

Issue 2:

Possible cause:

Action needed:

Issue 3:

Possible cause:

Action needed:

MONTHLY TRAINING PRIORITIES

Top training priority for next month:

Second priority:

Third priority:

MONTHLY TRAINING METRICS & ACTION PLAN

Use these measures to see movement and risk. They are diagnostic controls, not universal quotas. Set restaurant-specific targets only after management understands its staffing model, training cycle, and operating needs.

CURRENT COUNTS

Active employees: _____

Employees fully trained for primary role: _____

Employees certified for primary station/role: _____

Employees currently in training: _____

Employees in retraining: _____

Open follow-up actions: _____

Overdue follow-up actions: _____

Repeated issues requiring manager review: _____

SIMPLE CONTROL MEASURES

Training Completion % = Fully trained employees ÷ Active employees × 100

Certification Coverage % = Certified employees ÷ Active employees × 100

Overdue Follow-Up % = Overdue follow-ups ÷ Open follow-ups × 100

If there are no open follow-ups, record 0% rather than dividing by zero.

Training Completion %: _____

Certification Coverage %: _____

Overdue Follow-Up %: _____

TRUTH - COST - SYSTEM REVIEW

TRUTH - What does the evidence show is actually weak or incomplete? _____

COST - What is it costing in time, labor, mistakes, waste, service, safety, turnover, or guest trust? _____

SYSTEM - What repeatable correction will be installed or strengthened? _____

TOP THREE ACTIONS

Action 1: _____

Owner: _____

Due date / verification: _____

Action 2: _____

Owner: _____

Due date / verification: _____

Action 3: _____

Owner: _____

Due date / verification: _____

Manager Signature: _____ Date: _____

DEPARTMENT TRAINING SCORECARD

Month / Week Reviewed:

Manager Name:

Restaurant / Location:

Department Reviewed:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Whole Restaurant
- ☐ Other: _____

Purpose:

Use this scorecard to review how well one department is being trained, supported, certified, and followed up on.

A department may look busy and still have weak training.

A department may be fully staffed but still have employees who are unclear on standards.

This scorecard helps managers look beyond the schedule and check the actual strength of the department.

DEPARTMENT TRAINING STATUS

Number of employees in this department:

Number of employees fully trained:

Number of employees still in training:

Number of employees certified for primary station:

Number of employees needing retraining:

Number of employees needing follow-up review:**TRAINING DOCUMENTATION SCORE**

Rate each item.

Position training trackers:

- ☐ Complete
- ☐ Mostly complete
- ☐ Incomplete
- ☐ Not used

Task mastery sheets:

- ☐ Complete
- ☐ Mostly complete
- ☐ Incomplete
- ☐ Not used

Station certifications:

- ☐ Complete
- ☐ Mostly complete
- ☐ Incomplete
- ☐ Not used

Position certifications:

- ☐ Complete
- ☐ Mostly complete
- ☐ Incomplete
- ☐ Not used

SOPs available for department:

- ☐ Complete
- ☐ Mostly complete
- ☐ Incomplete
- ☐ Not available

Coaching or retraining logs used when needed:

- ☐ Yes
- ☐ No
- ☐ Sometimes
- ☐ Not applicable

DEPARTMENT PERFORMANCE CHECK**Overall department training strength:**

- ☐ Strong
- ☐ Acceptable
- ☐ Needs attention
- ☐ Serious gap

Department consistency:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs attention
- ☐ Serious gap

Team communication:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs attention
- ☐ Serious gap

Safety and sanitation performance:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs attention
- ☐ Serious gap

Guest service or food quality:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs attention
- ☐ Serious gap
- ☐ Not applicable

Opening and closing performance:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs attention
- ☐ Serious gap

COMMON TRAINING GAPS IN THIS DEPARTMENT

- ☐ New employees are not being trained fast enough.
- ☐ Trainers are inconsistent.
- ☐ Sign-offs are missing.
- ☐ Employees know tasks but not standards.
- ☐ Employees need too many reminders.
- ☐ Opening duties are inconsistent.
- ☐ Closing duties are inconsistent.
- ☐ Cleaning standards are inconsistent.
- ☐ Safety or sanitation standards are missed.
- ☐ SOPs are missing or outdated.
- ☐ Managers are not following up.
- ☐ Other: _____

TOP THREE DEPARTMENT TRAINING NEEDS

DEPARTMENT ACTION PLAN**Action 1:**

Person Responsible: _____**Deadline:** _____**Action 2:**

Person Responsible: _____**Deadline:** _____**Action 3:**

Person Responsible: _____**Deadline:** _____

Manager Signature: _____ Date: _____

TRAINING GAPS REVIEW

Date:

Manager Name:

Restaurant / Location:

Purpose:

Use this page to identify where training is weak, missing, unclear, outdated, or not being followed.

A training gap is the space between what the restaurant expects and what employees are actually able to do consistently.

Training gaps often show up as repeated mistakes.

Managers should not assume every mistake is an attitude problem.

Sometimes employees fail because the standard was never explained clearly, never demonstrated, never practiced, never documented, or never followed up on.

This review helps managers find the real cause.

TRAINING GAP IDENTIFICATION

Where is the gap showing up?

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Opening duties
- ☐ Closing duties
- ☐ Cleaning duties
- ☐ Safety and sanitation
- ☐ Guest service
- ☐ Food prep
- ☐ Food quality
- ☐ POS / cash handling
- ☐ Communication
- ☐ Other: _____

What problem is being noticed?

How often is this happening?

- ☐ Once
- ☐ Occasionally
- ☐ Weekly
- ☐ Daily
- ☐ Multiple times per shift
- ☐ Not sure

Who is affected?

- ☐ One employee
- ☐ Several employees
- ☐ Whole department
- ☐ Guests
- ☐ Managers
- ☐ Kitchen

☐ Service team

☐ Other: _____

POSSIBLE CAUSE OF THE GAP

- ☐ Employee was never trained.
- ☐ Employee was trained but not observed.
- ☐ Employee was signed off too early.
- ☐ SOP is missing.
- ☐ SOP is unclear.
- ☐ Checklist is missing.
- ☐ Checklist is not being used.
- ☐ Trainer taught the wrong standard.
- ☐ Managers are correcting inconsistently.
- ☐ Standard changed but employees were not retrained.
- ☐ Equipment, menu, or process changed.
- ☐ Employee needs more practice.
- ☐ Employee is choosing not to follow the standard.

☐ Other: _____

EVIDENCE OF THE GAP

What proof shows this training gap exists?

- ☐ Guest complaints
- ☐ Food mistakes
- ☐ Waste
- ☐ Remakes
- ☐ Missed side work
- ☐ Poor cleaning
- ☐ Opening not ready
- ☐ Closing incomplete
- ☐ Safety issue
- ☐ Sanitation issue
- ☐ Cash/POS mistake
- ☐ Manager observation
- ☐ Employee questions
- ☐ Repeated coaching

☐ Other: _____

Notes:

CORRECTION PLAN

What training needs to happen?

Who needs to be trained or retrained?

What tool should be used?

- ☐ SOP
- ☐ Checklist
- ☐ Task mastery sheet
- ☐ Position tracker
- ☐ Station certification
- ☐ Trainer demonstration
- ☐ Manager observation
- ☐ Coaching log

☐ Retraining log

☐ Other: _____

Person responsible: _____

Training deadline:

Follow-up date: _____

FOLLOW-UP RESULT

☐ Gap resolved

☐ Improved

☐ Still needs work

☐ No improvement

☐ Additional action needed

Manager notes:

Manager Signature: _____ Date: _____

TEAM READINESS REVIEW

Date:

Manager Name:

Restaurant / Location:

Shift / Department Reviewed:

Purpose:

Use this page to review whether the team is ready to handle normal restaurant conditions.

A team can be scheduled and still not be ready.

Readiness means the right people are trained, the right stations are covered, the standards are understood, and managers know where support is needed.

This page can be used before a busy weekend, holiday, private event, seasonal rush, staffing change, menu rollout, or after several new hires have been added.

TEAM READINESS CHECK

Is the team ready for the expected business level?

☐ Yes

☐ No

☐ Somewhat

Expected business level:

☐ Slow

☐ Normal

☐ Busy

☐ Very busy

☐ Holiday / event

☐ Short-staffed shift

☐ New menu rollout

☐ Other: _____

CURRENT STAFFING REVIEW

Positions covered:

☐ Servers

☐ Hosts

☐ Bartenders

☐ Cooks

☐ Prep cooks

☐ Dishwashers

☐ Expo

☐ To-go

☐ Managers

☐ Other: _____

Positions or stations needing support:

TRAINING READINESS

Are all scheduled employees trained for their assigned stations?

- ☐ Yes
☐ No
☐ Some

Employees scheduled outside their strongest station:

Employees needing extra manager support:

Employees who should not work independently yet:

SHIFT RISK AREAS

Possible risk areas for this shift or period:

- ☐ New employee on schedule
☐ Undertrained employee on station
☐ Short staffing
☐ New menu item
☐ Large party
☐ Catering or event
☐ Equipment issue
☐ Weak closing team
☐ Weak opening team
☐ Weak dish coverage
☐ Weak kitchen coverage
☐ Weak service coverage
☐ Manager coverage concern
☐ Other: _____

MANAGER SUPPORT PLAN

Who will support new or weaker employees?

Who will monitor service standards?

Who will monitor kitchen quality?

Who will monitor cleaning and sanitation?

Who will monitor opening or closing completion?

Who will make decisions if the shift gets overwhelmed?

PRE-SHIFT TRAINING REMINDERS

Standards to remind the team about before the shift:

AFTER-SHIFT READINESS NOTES

What went well?

What training gaps showed up?

What needs follow-up before the next shift?

Manager Signature: _____ Date: _____

MANAGER ACCOUNTABILITY CHECKLIST

Date:

Manager Name:

Restaurant / Location:

Review Period:

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Training cycle
- ☐ Other: _____

Purpose:

Use this checklist to hold managers accountable for keeping the training system active.

A training system only works when managers use it consistently.

If managers stop checking training, employees stop seeing it as important.

If managers stop reviewing sign-offs, trainers may rush.

If managers stop following up, repeated problems become normal.

This checklist helps managers confirm that training is being reviewed, documented, corrected, and improved.

MANAGER TRAINING RESPONSIBILITIES

- ☐ Review new hire training progress.
- ☐ Review employees currently in training.
- ☐ Check incomplete training trackers.
- ☐ Check missing sign-off pages.
- ☐ Confirm trainers are using the correct standards.
- ☐ Confirm employees are not being certified too early.
- ☐ Review coaching logs when standards are missed.
- ☐ Review retraining logs when employees need additional support.
- ☐ Review repeated issues for training gaps.
- ☐ Review SOPs that may be missing, unclear, or outdated.
- ☐ Schedule follow-up for employees needing more training.
- ☐ Communicate training priorities to other managers.
- ☐ Make sure training is part of the weekly management routine.

TRAINING DOCUMENTATION CHECK

New hire onboarding forms current?

- ☐ Yes
- ☐ No
- ☐ Some

Notes:

Position training trackers current?

- ☐ Yes
- ☐ No
- ☐ Some

Notes:

Task mastery sheets current?

- ☐ Yes
- ☐ No
- ☐ Some

Notes:

Training sign-off pages current?

- ☐ Yes
- ☐ No
- ☐ Some

Notes:

Station certifications current?

- ☐ Yes
- ☐ No
- ☐ Some

Notes:

Position certifications current?

- ☐ Yes
- ☐ No
- ☐ Some

Notes:

Coaching and retraining logs current?

- ☐ Yes
- ☐ No
- ☐ Some

Notes:

30/60/90 reviews current?

- ☐ Yes
- ☐ No
- ☐ Some

Notes:

TRAINER ACCOUNTABILITY CHECK

Are trainers signing off accurately?

- ☐ Yes
- ☐ No
- ☐ Needs review

Trainer concerns:

Are trainers teaching the same standard?

- ☐ Yes
☐ No
☐ Needs review

Notes:

Do any trainers need coaching or retraining?

- ☐ Yes
☐ No

If yes, explain:

CURRENT TRAINING RISKS

Current training risks:

- ☐ New employees not progressing fast enough.
☐ Employees working before being ready.
☐ Trainers signing off too quickly.
☐ Managers not following up.
☐ SOPs not being used.
☐ Missing documentation.
☐ Repeated mistakes not being retrained.
☐ Employees unclear on standards.
☐ Departments using different standards.
☐ Reviews not completed on time.
☐ Other: _____

Most important training risk right now:

MANAGER ACTIONS REQUIRED

Action 1:

Person Responsible: _____

Deadline: _____

Action 2:

Person Responsible: _____

Deadline: _____

Action 3:

Person Responsible: _____

Deadline: _____

MANAGER ACCOUNTABILITY ACKNOWLEDGMENT

I understand that training accountability is part of management responsibility.

I understand that incomplete training, missing documentation, rushed sign-offs, and lack of follow-up can damage consistency, service, food quality, safety, and employee performance.

Manager Signature: _____ Date: _____

General Manager / Owner Review if Applicable:

Signature: _____ Date: _____

PART 9 COMPLETION REVIEW

Date:

Manager Name:

Restaurant / Location:

Purpose:

Use this page to review whether managers are actually using the training system consistently.

The goal is not just to have training documents.

The goal is to build a restaurant where training is reviewed, followed up, corrected, and improved.

PART 9 MANAGER REVIEW

1. Are weekly training reviews being completed?

- ☐ Yes
- ☐ No
- ☐ Sometimes

Notes:

2. Are monthly training reviews being completed?

- ☐ Yes
- ☐ No
- ☐ Sometimes

Notes:

3. Are department training gaps being reviewed?

- ☐ Yes
- ☐ No
- ☐ Sometimes

Notes:

4. Are managers checking whether employees are ready before scheduling them independently?

- ☐ Yes
- ☐ No
- ☐ Sometimes

Notes:

5. Are trainers being held accountable for accurate sign-offs?

- ☐ Yes
- ☐ No
- ☐ Sometimes

Notes:

6. Are repeated issues being reviewed as possible training gaps?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

7. Are SOPs being reviewed and updated when needed?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

8. Are managers documenting follow-up after training issues?

- ☐ Yes
☐ No
☐ Sometimes

Notes:

BIGGEST MANAGER ACCOUNTABILITY GAP RIGHT NOW

FIRST ACTION TO IMPROVE MANAGER TRAINING ACCOUNTABILITY

Person Responsible: _____

Deadline: _____

Manager Signature: _____ Date: _____

PART 10

FINAL REVIEW AND NOTES

Purpose of This Section:

A training workbook should not end with a stack of completed forms.

It should end with a clear review of what the restaurant has learned.

The purpose of this final section is to help managers look at the full training system and decide what needs to be improved next.

By the time a manager reaches this section, they should have tools for:

1. New hire onboarding
2. Position training
3. Task mastery
4. SOP building
5. Training sign-offs
6. Coaching
7. Retraining
8. Employee reviews
9. Manager accountability

The final question is:

Is the restaurant actually stronger because of the system?

A strong training system should make the restaurant easier to manage.

It should reduce repeated questions.

It should reduce avoidable mistakes.

It should make expectations clearer.

It should help employees know what "good" looks like.

It should help managers coach more fairly.

It should help trainers teach the same standard.

It should help the restaurant protect service, food quality, safety, sanitation, and consistency.

This section gives managers space to review employee development, review the workbook, improve the training system, and keep notes for future updates.

FINAL REVIEW RULES

- ☐ Be honest about what worked.
- ☐ Be honest about what did not work.
- ☐ Review the forms that were actually used.
- ☐ Identify the forms that were skipped.
- ☐ Look for repeated training gaps.
- ☐ Look for weak follow-up.
- ☐ Look for unclear SOPs.
- ☐ Look for missing manager accountability.
- ☐ Choose the next improvement step.
- ☐ Do not let the workbook sit unused after completion.

MANAGER NOTES:

FINAL EMPLOYEE DEVELOPMENT REVIEW

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Review Date:

Purpose:

Use this page to complete a final development review for an employee after training, coaching, retraining, reviews, or certification have been completed.

This page helps managers summarize where the employee started, what progress was made, what standards were met, and what development should continue.

This can be used after the first 90 days, after a training cycle, after retraining, or before considering an employee for more responsibility.

EMPLOYEE DEVELOPMENT SUMMARY

Training period reviewed:

- ☐ First 30 days
- ☐ First 60 days
- ☐ First 90 days
- ☐ Retraining period
- ☐ Development plan
- ☐ Station certification
- ☐ Position certification
- ☐ Other: _____

Training or development completed:

Employee's strongest improvement:

Employee's strongest current skill:

Employee's most important remaining opportunity:

STANDARD REVIEW

The employee currently meets standards for:

- ☐ Attendance
- ☐ Punctuality
- ☐ Uniform and appearance
- ☐ Professional behavior
- ☐ Position knowledge
- ☐ Task consistency
- ☐ Guest service if applicable
- ☐ Food quality if applicable
- ☐ Safety and sanitation
- ☐ Opening duties
- ☐ Closing duties
- ☐ Cleaning duties
- ☐ Communication
- ☐ Teamwork
- ☐ Other: _____

The employee still needs development in:

- ☐ Attendance
- ☐ Punctuality
- ☐ Uniform and appearance
- ☐ Professional behavior
- ☐ Position knowledge
- ☐ Task consistency
- ☐ Guest service if applicable
- ☐ Food quality if applicable
- ☐ Safety and sanitation
- ☐ Opening duties
- ☐ Closing duties
- ☐ Cleaning duties
- ☐ Communication
- ☐ Teamwork
- ☐ Other: _____

MANAGER REVIEW

What should this employee keep doing?

What should this employee improve next?

What support should management provide?

Is this employee ready for additional responsibility?

☐ Yes

☐ No

☐ Not yet

☐ With additional training

If yes, possible next responsibility:

FINAL DEVELOPMENT DECISION

☐ Development completed

☐ Continue normal follow-up

☐ Continue development plan

☐ Assign additional training

☐ Assign retraining

☐ Approve station certification

☐ Approve position certification

☐ Consider cross-training

☐ Consider leadership development

☐ Other: _____

Next Review Date: _____

Employee Comments:

Employee Signature: _____

Manager Signature: _____ Date: _____

FINAL MANAGER WORKBOOK REVIEW

Manager Name:

Restaurant / Location:

Review Date:

Workbook Review Period:

- ☐ First use
- ☐ First 30 days
- ☐ First 60 days
- ☐ First 90 days
- ☐ Monthly review
- ☐ Quarterly review
- ☐ Annual review
- ☐ Other: _____

Purpose:

Use this page to review how well this workbook helped the restaurant manage training, SOPs, employee development, coaching, retraining, and accountability.

The goal is to decide what parts of the system worked, what parts were skipped, and what should be improved before the next training cycle.

WORKBOOK USE REVIEW

Which sections were used?

- ☐ Part 1: The Purpose of Restaurant Training
- ☐ Part 2: New Hire Onboarding
- ☐ Part 3: Role-Specific Training Trackers
- ☐ Part 4: Task Mastery Sheets
- ☐ Part 5: SOP Building Templates
- ☐ Part 6: Training Sign-Off Pages
- ☐ Part 7: Coaching and Retraining Logs
- ☐ Part 8: 30/60/90 Day Employee Reviews
- ☐ Part 9: Manager Training Accountability
- ☐ Part 10: Final Review and Notes

Which sections were most useful?

Which sections were skipped or underused?

Why were they skipped or underused?

- ☐ Managers forgot
- ☐ Not enough time
- ☐ Employees were already trained

- ☐ Forms were too detailed
- ☐ Forms were not detailed enough
- ☐ Managers did not understand when to use them
- ☐ No one was assigned responsibility
- ☐ Other: _____

TRAINING SYSTEM RESULTS**Since using this workbook, training is:**

- ☐ Much stronger
- ☐ Somewhat stronger
- ☐ About the same
- ☐ Still inconsistent
- ☐ Not sure yet

Employee readiness is:

- ☐ Much stronger
- ☐ Somewhat stronger
- ☐ About the same
- ☐ Still inconsistent
- ☐ Not sure yet

Manager follow-up is:

- ☐ Much stronger
- ☐ Somewhat stronger
- ☐ About the same
- ☐ Still inconsistent
- ☐ Not sure yet

SOP clarity is:

- ☐ Much stronger
- ☐ Somewhat stronger
- ☐ About the same
- ☐ Still inconsistent
- ☐ Not sure yet

DOCUMENTATION REVIEW

Are training records easier to find?

- ☐ Yes
- ☐ No
- ☐ Somewhat

Are sign-offs being completed honestly?

- ☐ Yes
- ☐ No
- ☐ Somewhat

Are managers following up on training gaps?

- ☐ Yes
- ☐ No
- ☐ Sometimes

Are employees clearer on expectations?

- ☐ Yes
- ☐ No
- ☐ Somewhat

Are repeated issues being documented?

- ☐ Yes
- ☐ No
- ☐ Sometimes

BIGGEST WIN FROM USING THIS WORKBOOK

BIGGEST GAP STILL REMAINING

WHAT SHOULD BE IMPROVED BEFORE NEXT USE?

Manager Signature: _____ Date: _____

TRAINING SYSTEM IMPROVEMENT PLAN

Manager Name:

Restaurant / Location:

Plan Date:

Review Period:

- ☐ First 30 days
- ☐ First 60 days
- ☐ First 90 days
- ☐ Monthly review
- ☐ Quarterly review
- ☐ Annual review
- ☐ Other: _____

Purpose:

Use this page to turn the final workbook review into a clear improvement plan.

A restaurant training system should keep getting better.

The first version does not have to be perfect.

What matters is that managers keep improving the system based on what is actually happening in the restaurant.

If employees keep making the same mistake, the training system may need to be clearer.

If managers keep skipping a form, the system may need better accountability.

If trainers teach different standards, the SOPs may need to be reviewed.

If new employees are confused, onboarding may need to be stronger.

This page helps managers choose the next steps instead of letting the same problems continue.

TRAINING SYSTEM REVIEW

Biggest training improvement so far:

Biggest training weakness still remaining:

Most useful part of the workbook:

Least used part of the workbook:

Why was it underused?

TRAINING SYSTEM GAPS**Current gaps in the training system:**

- ☐ New hire onboarding is inconsistent.
- ☐ Position training is incomplete.
- ☐ Task mastery is not being verified.
- ☐ SOPs are missing.
- ☐ SOPs are outdated.
- ☐ Training sign-offs are rushed.
- ☐ Trainers are inconsistent.
- ☐ Managers are not following up.
- ☐ Coaching is not being documented.
- ☐ Retraining is not being assigned.
- ☐ 30/60/90 reviews are not completed on time.
- ☐ Department training gaps are not reviewed.
- ☐ Employees are scheduled before they are ready.
- ☐ Other: _____

TOP THREE IMPROVEMENT PRIORITIES**Priority 1:**

Why this matters:

Action needed:

Person responsible: _____

Deadline: _____

Priority 2:

Why this matters:

Action needed:

Person responsible: _____

Deadline: _____

Priority 3:

Why this matters:

Action needed:

Person responsible: _____

Deadline: _____

MANAGER ACCOUNTABILITY PLAN

How will managers keep the training system active?

How often will training be reviewed?

☐ Daily

☐ Weekly

☐ Monthly

☐ Quarterly

☐ Other: _____

Who is responsible for reviewing training documents?

Who is responsible for following up on training gaps?

Who is responsible for updating SOPs?

Who is responsible for trainer accountability?

SUCCESS MEASUREMENT

The training system will be considered stronger when:

☐ New hires are trained more consistently.

☐ Employees understand expectations faster.

☐ Managers spend less time repeating the same corrections.

☐ Fewer tasks are missed.

☐ Opening and closing duties improve.

☐ Cleaning standards improve.

- ☐ Guest service improves.
- ☐ Food quality improves.
- ☐ Safety and sanitation improve.
- ☐ Trainers teach the same standard.
- ☐ Managers follow up consistently.
- ☐ Documentation is complete and useful.
- ☐ Other: _____

Final improvement goal:

Next review date:

Manager Signature: _____ Date: _____

DAILY TRAINING SHIFT LOG

Complete one log for an active training shift. Record what was actually taught and observed, then leave one clear next action for the next trainer or manager.

Employee Name: _____

Position / Station: _____

Trainer: _____

Manager: _____

Date / Shift: _____

TRAINING ACTIVITY

Task / Standard	Expl.	Demo	Practice	Observed	Status
					☐ Not ready ☐ Practice ☐ Ready

SHIFT EVIDENCE AND HANDOFF

What the employee did well:

What still needs practice or correction:

Employee questions / uncertainty:

Next training action: _____

Person responsible: _____

Follow-up date / next shift: _____

Employee Signature: _____ Trainer: _____ Manager: _____

SUPPORT ROLE TRAINING TRACKER

Use this adaptable tracker for important support positions that may not need a separate multi-page role section.

Employee Name: _____

Trainer: _____

Manager: _____

Training Start Date: _____

Review Date: _____

ROLE

- ☐ Busser
 ☐ Food Runner
 ☐ Expo
 ☐ To-Go
 ☐ Cashier
 ☐ Support / Utility
 ☐ Other

READINESS AREAS

- ☐ Role purpose and shift flow
☐ Station / area setup
☐ Core task sequence
☐ Accuracy, quality, timing, and pace
☐ Handoffs with servers, kitchen, bar, host, or expo
☐ Guest communication if applicable
☐ Safety and sanitation
☐ Equipment / POS use if applicable
☐ Restocking, side work, and opening/closing duties

LIVE OBSERVATION

Task observed during real shift: _____

What went well: _____

What needs more practice: _____

Standard or SOP to review: _____

FINAL READINESS DECISION

- ☐ Not ready for independent work
☐ Needs more practice
☐ Ready with limited supervision
☐ Ready for normal role assignment

Next action / follow-up: _____

Follow-up date: _____

Employee: _____ Trainer: _____ Manager: _____

FINAL WORKBOOK CLOSING & CONTROL

A training system is successful only when it changes what people can reliably do during real restaurant work. The goal is not completed paperwork. The goal is clearer standards, stronger employees, fairer accountability, and fewer preventable surprises.

TRUTH - VERIFY WHAT IS REAL

- ☐ Observe performance in real conditions.
- ☐ Use examples, counts, completed work, guest/quality evidence, and current records.
- ☐ Distinguish a training gap from a process, staffing, equipment, communication, or accountability problem.
- ☐ Do not certify readiness because time passed or because someone is well liked

COST - NAME WHY THE GAP MATTERS

Connect important training failures to the consequence they create: manager time, labor, waste, remakes, missed sales, turnover, safety, sanitation, guest trust, employee trust, or operational instability. Do not invent a dollar amount when the restaurant does not have evidence for one.

SYSTEM - CLOSE THE LOOP

- ☐ Name the standard and assign one owner.
- ☐ Set the next action and due date.
- ☐ Provide practice or support when needed.
- ☐ Verify performance after the action.
- ☐ Update the SOP, checklist, trainer authorization, or training plan when the system caused the gap.

FINAL MANAGER CONTROL

Most important training truth right now: _____

Highest-cost training gap: _____

System correction being installed: _____

Owner: _____

Due date: _____

Verification date: _____

TRAINING IS NOT FINISHED WHEN IT IS EXPLAINED. IT IS FINISHED WHEN READINESS IS VERIFIED.

Use the workbook, preserve only useful records, and keep improving the standard from evidence.



HELP IMPROVE GRAVITY

USE IT. TEST IT. TELL US THE TRUTH.

Published by Thomas Monroe Books

USE IT. THEN TELL US WHAT HAPPENED.

Gravity is being used in real restaurant work so owners, managers, trainers, and team leaders can help prove what is useful, what is unclear, and what should improve next. We want the truth about what worked, what did not work, and what would make the system more practical.

WHY YOUR EXPERIENCE MATTERS

A book or tool is only valuable if it holds up during a real shift, with real people, pressure, and consequences. Your specific experience helps us distinguish a strong idea from a proven operating practice.

Honest criticism is useful evidence.

THE FEEDBACK THAT HELPS MOST

- What you used and the problem you were solving
- What worked in actual restaurant conditions
- What felt unclear, repetitive, incomplete, or impractical
- What changed after the product was used
- What would make the next revision more useful

WHY REVIEWS MATTER

Positive, mixed, and critical reviews are all useful. A specific review helps another restaurant decide where to begin, helps Gravity identify which tools create real value, and helps future revisions become clearer and more practical. You never owe us a favorable rating.

SCAN WITH YOUR PHONE CAMERA



PUBLIC REVIEW

Share your experience



PRIVATE FEEDBACK

Tell us directly



OPTIONAL DONATION

Support the work

Feedback and donations are optional. Never include confidential information.

Founding Year note: Completed digital Gravity products are available at no cost through October 1, 2027. Registration is required before digital downloads. No purchase, donation, credit card, paid subscription, or positive review is required. Use the current version at thomasmonroebooks.com/releases.

HOW FEEDBACK IMPROVES THE SYSTEM

USE

1

Apply the current product in real restaurant work.

REPORT

2

Share the result, the friction, and what is missing.

IMPROVE

3

Gravity uses the evidence to strengthen the next revision.