

THE RESTAURANT MANAGER'S TOOLKIT

LABOR CONTROL & SCHEDULING PLANNER

A Practical Workbook for Restaurant Staffing, Weekly Scheduling, Labor Percent Control, Shift Coverage, Productivity Tracking, and Manager Accountability

Thomas Butler

THOMAS MONROE BOOKS

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This workbook is designed for educational, operational planning, scheduling, labor review, and restaurant management support purposes. It is not legal, payroll, tax, accounting, financial, human resources, or compliance advice.

Restaurant owners and managers should always follow federal, state, and local labor laws, overtime rules, break requirements, scheduling regulations, tip rules, payroll procedures, company policies, insurance requirements, and legal guidance specific to their business.

The forms, worksheets, trackers, schedules, and templates in this workbook are intended to help restaurant managers organize labor decisions, improve schedule quality, monitor staffing levels, and strengthen accountability.

Each restaurant should adjust these tools to match its own service model, pay structure, operating hours, staffing requirements, and approved labor targets.

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ABOUT THIS WORKBOOK

Labor is one of the most important controllable costs in a restaurant.

A restaurant can have great food, loyal guests, strong sales, and hardworking employees, but still lose profit if labor is not planned, tracked, reviewed, and corrected.

This workbook was created to help restaurant managers build smarter schedules, control labor percent, prepare for sales volume, reduce overstaffing, prevent understaffing, make better cut decisions, and hold managers accountable for labor choices.

This is not a theory book.

This is a practical workbook.

It is designed to be written in, copied, reviewed, used in manager meetings, kept in a labor binder, and used during real restaurant operations.

The goal is not to cut labor as low as possible.

The goal is to use the right amount of labor, in the right positions, at the right times, for the sales volume and guest experience the restaurant needs to protect.

Good labor control does not mean running short.

Good labor control means running smart.

WHO THIS WORKBOOK IS FOR

This workbook is for:

General managers

Assistant managers

Shift leads

Kitchen managers

Bar managers

Floor managers

Owners

Trainers

Department leads

Restaurant operators

Managers being trained for higher responsibility

This workbook can be used in full-service restaurants, casual dining restaurants, bar and grill operations, steakhouses, independent restaurants, family restaurants, and restaurant teams with multiple departments and stations.

WHAT THIS WORKBOOK HELPS MANAGERS DO

Use this workbook to:

Build stronger weekly schedules

Match labor to expected sales

Plan staffing by position

Review coverage before the schedule is posted

Track daily labor percent

Track weekly labor percent

Review labor by department

Review labor by shift

Plan opening, lunch, dinner, weekend, and closing coverage

Make better cut decisions

Protect guest experience while controlling labor

Reduce standing-around labor

Reduce understaffed rushes

Identify staffing gaps

Improve cross-training coverage

Track productivity problems

Review repeated staffing issues

Hold managers accountable for labor decisions

Build a repeatable labor control system

HOW TO USE THIS WORKBOOK

This workbook should be used as an active management tool.

Do not treat it like a book that only gets read once.

Use the worksheets.

Fill in the trackers.

Review the checklists.

Initial the sign-off pages.

Bring the forms to manager meetings.

Compare the schedule to actual sales.

Compare labor decisions to guest impact.

Look for repeated problems.

Correct the schedule before the same mistake happens again.

Labor control improves when managers stop guessing and start reviewing facts.

RECOMMENDED WEEKLY ROUTINE

Before Writing the Schedule

Review:

Last week's sales

Last week's labor percent

Last week's problem shifts

Upcoming events

Weather or seasonal changes

Reservations or expected volume

Employee availability

Time-off requests

Staffing gaps

Cross-training coverage

Manager coverage needs

Department weaknesses

Overtime risk

While Writing the Schedule

Check:

Each daypart

Each department

Each position

Peak periods

Slow periods

Opening needs

Closing needs

Prep needs

Dish needs

Bar support

Manager coverage

Call-out risk

Training shifts

Weak spots in the schedule

Before Posting the Schedule

Review:

Schedule conflicts

Employee availability

Approved time-off requests
Uncovered shifts
Overtime risk
Weak coverage
Too many trainees together
Too many weak employees together
Missing key positions
Missing manager coverage
Expected sales volume
Labor target
Final manager approval

During the Week

Track:

Daily sales
Labor dollars
Labor percent
Cuts made
Late clock-outs
Early clock-outs
Call-outs
No-shows
Guest impact
Staffing problems
Productivity concerns
Side work completion
Manager decisions

After the Week Ends

Review:

What worked
What failed
Where labor was too high
Where labor was too low
Which shifts were overstaffed
Which shifts were understaffed
Which managers made strong labor decisions
Which managers need follow-up
Which employees created scheduling problems
Which positions need hiring support
What must change next week

MANAGER STANDARD

A manager is responsible for more than filling shifts.

A manager is responsible for building a labor plan that gives the restaurant the best chance to succeed.

That means the schedule should support:

Guest service
Food quality
Cleanliness
Speed
Team morale
Sales volume
Labor control
Manager accountability

A schedule is not just a list of names.

A schedule is a labor plan.

Every shift should have a reason.

Every position should have a purpose.

Every labor decision should be reviewed.

Every manager should be able to explain why the schedule was built the way it was.

WORKBOOK RULE

Before adding labor, ask:

Does this shift need more people, better placement, better training, or better management?

Before cutting labor, ask:

Can we protect the guest experience, food quality, cleanliness, and closing standards with fewer people?

Before approving a schedule, ask:

Does this schedule match the sales we expect and the service we promise?

Before blaming labor percent, ask:

Was this a scheduling problem, a sales problem, a productivity problem, a training problem, or a manager decision problem?

HOW EACH TOOL IS ORGANIZED

Most major tools in this workbook follow the same structure:

Purpose

Why It Matters

When to Use It

Manager Instructions

Worksheet, Checklist, Form, Tracker, or Review Page

Manager Review or Sign-Off

This structure keeps each section practical and easy to use.

Managers should not have to guess what a page is for.

Every form should have a purpose.

Every checklist should lead to a decision.

Every tracker should help the manager improve the next schedule.

COMPLETE WORKBOOK OVERVIEW

Part 1: Labor Control Foundations

This part explains the basic labor control principles every restaurant manager needs to understand before writing schedules or making labor decisions.

Sections include:

Why labor control matters

What labor percent means

Labor dollars versus labor percent

Sales volume and staffing connection

Common labor mistakes

Labor control without hurting guest experience

Part 1 gives managers the foundation they need before using the rest of the workbook.

Part 2: Staffing Position Planner

This part helps managers review the positions needed to run the restaurant properly.

Sections include:

FOH position planner

BOH position planner

Bar position planner

Prep position planner

Dish position planner

Manager coverage planner

Cross-training coverage chart

Part 2 helps managers stop scheduling only by names and start scheduling by position need.

Part 3: Weekly Schedule Builder

This part helps managers build a smarter weekly schedule before it is posted.

Sections include:

Weekly schedule planning page

Sales forecast worksheet

Staffing needs by daypart

Position-by-position schedule planner

Employee availability tracker

Time-off request tracker

Schedule conflict review

Manager schedule approval checklist

Part 3 turns schedule writing into a repeatable planning system.

Part 4: Labor Percent Tracker

This part helps managers track labor percent and understand where labor problems are happening.

Sections include:

Daily labor percent tracker

Weekly labor percent tracker

Labor by department

Labor by shift

Labor by daypart

Sales versus labor review

Labor problem diagnosis page

Part 4 helps managers compare labor decisions to actual results.

Part 5: Shift Coverage Planner

This part helps managers plan coverage for different types of shifts and business levels.

Sections include:

Opening coverage planner

Lunch coverage planner

Dinner coverage planner

Weekend coverage planner

Event coverage planner

Slow shift coverage planner

Emergency call-out coverage planner

Part 5 helps managers prepare for the shift before the problems happen.

Part 6: Manager Cut Decision System

This part helps managers decide when to cut staff and when not to cut staff.

Sections include:

When to cut staff

When not to cut staff

FOH cut decision form

BOH cut decision form

Bar cut decision form

Manager labor decision log

Guest impact review

Part 6 helps managers avoid careless labor cuts that hurt service, food quality, cleanliness, and sales.

Part 7: Productivity and Performance Tracking

This part helps managers review whether employees and stations are producing enough value for the labor being used.

Sections include:

Employee productivity review

Station productivity tracker

Side work completion tracker

Speed and quality review

Labor waste review

Repeated staffing issue form

Part 7 helps managers separate a staffing problem from a productivity problem.

Part 8: Hiring Needs and Staffing Gap Review

This part helps managers identify where the restaurant is short-staffed, weak, or too dependent on too few people.

Sections include:

Staffing gap worksheet

Position shortage tracker

Cross-training needs

Hiring priority planner

New hire coverage plan

Retention risk review

Part 8 connects labor control to hiring, training, and retention.

Part 9: Manager Accountability

This part helps owners, general managers, and leadership teams hold managers accountable for schedule quality, labor decisions, and follow-up.

Sections include:

Weekly labor meeting form

Manager schedule review checklist

Labor decision scorecard

Labor mistake review

Manager follow-up log

30-day labor improvement plan

Part 9 makes labor control a management responsibility, not just a report number.

Part 10: Final Labor Control System

This part helps the restaurant put the whole labor system together.

Sections include:

Labor control binder setup

Weekly labor routine

30-day implementation plan

Final labor control checklist

Notes pages

Part 10 turns the workbook into a repeatable restaurant labor control system.

ADDITIONAL WORKBOOK TOOLS

This workbook includes the following additional tools to strengthen the labor control system:

- Labor Budget Builder - turns forecasted sales and target labor percent into a labor dollar budget before the schedule is written.
- Weekly Schedule Grid Template - gives managers a full-week planning grid for reviewing coverage before posting.
- Overtime Risk Tracker - helps managers identify overtime risk before it damages labor results.
- Schedule Revision Log - tracks schedule changes after posting so managers can explain actual labor results.
- Scheduled Labor vs. Actual Labor Tracker - compares the labor plan to the labor that actually happened.
- Monthly Labor Review Dashboard - reviews four weeks of labor results, patterns, staffing gaps, and improvement priorities.

Use these tools with the weekly labor routine in Part 10 and review them during manager labor meetings.

- Employee Data & Record-Handling Standard - protects sensitive labor, schedule, performance, and employee information used with the workbook.
- Completed Weekly Scheduling Cycle Example - shows how forecast, budget, coverage, overtime review, approval, and actual results connect.
- Core Labor Metrics & Formula Reference - adds sales per labor hour, labor cost per guest, forecast accuracy, and variance measures.
- Labor-Control Manager Certification Assessment - verifies knowledge, calculations, judgment, practical scheduling ability, and accountability.

QUICK-START LABOR CONTROL IMPLEMENTATION GUIDE

Use this guide to know which tools to complete at each stage of the weekly labor cycle.

BEFORE WRITING THE SCHEDULE:

- ☐ Review the prior week's sales and labor results.
- ☐ Complete the Weekly Schedule Planning Page.
- ☐ Complete the Sales Forecast Worksheet.
- ☐ Review employee availability and approved time-off requests.
- ☐ Review staffing gaps, cross-training coverage, and overtime risk.

WHILE BUILDING THE SCHEDULE:

- ☐ Use the Labor Budget Builder before assigning final hours.
- ☐ Plan coverage by department, position, and daypart.
- ☐ Compare scheduled labor dollars with the weekly labor budget.
- ☐ Check that strong employees and leaders are placed during peak periods.

BEFORE POSTING:

- ☐ Complete the schedule conflict, coverage, and overtime reviews.
- ☐ Confirm manager coverage, opening coverage, and closing coverage.
- ☐ Obtain final schedule approval.

DURING THE WEEK:

- ☐ Track daily sales, labor dollars, labor percent, schedule changes, and cut decisions.
- ☐ Record call-outs, late clock-outs, early cuts, and guest impact.

AFTER THE WEEK:

- ☐ Compare forecasted sales with actual sales.
- ☐ Compare scheduled labor with actual labor.
- ☐ Complete the weekly labor review and assign follow-up actions.

MASTER LABOR CONTROL FILE INDEX

Restaurant Name: _____

Location: _____

Schedule Week / Review Period: _____

Manager Responsible: _____

☐ Sales forecast completed Date: _____ Filed: _____

☐ Labor budget completed Date: _____ Filed: _____

☐ Weekly schedule approved Date: _____ Filed: _____

☐ Availability reviewed Date: _____ Filed: _____

☐ Time-off requests reviewed Date: _____ Filed: _____

☐ Overtime risk reviewed Date: _____ Filed: _____

☐ Coverage plan completed Date: _____ Filed: _____

☐ Schedule revisions logged Date: _____ Filed: _____

☐ Daily labor tracked Date: _____ Filed: _____

☐ Scheduled vs. actual reviewed Date: _____ Filed: _____

☐ Weekly labor meeting held Date: _____ Filed: _____

☐ Follow-up actions assigned Date: _____ Filed: _____

Missing documents or signatures:

Next required action: _____

Responsible manager: _____ Due date: _____

SCHEDULING MANAGER AUTHORIZATION & CALIBRATION FORM

Manager Name: _____

Position: _____ Date: _____

Authorizing Leader: _____

The manager has demonstrated the ability to:

- ☐ Read and explain the restaurant's approved labor reports.
- ☐ Calculate and interpret labor percent correctly.
- ☐ Build a schedule from forecasted sales and position needs.
- ☐ Apply availability, time-off, overtime, and company rules correctly.
- ☐ Protect guest experience while controlling labor.
- ☐ Make and document responsible cut decisions.
- ☐ Compare scheduled labor with actual labor.
- ☐ Explain labor variances and assign corrective action.

Authorization status: ☐ Approved ☐ Approved with coaching ☐ Not yet approved

Required coaching or limitations:

Manager Signature: _____ Date: _____

Authorizing Leader Signature: _____ Date: _____

EMPLOYEE DATA & RECORD-HANDLING STANDARD

Purpose

This standard helps managers protect employee information, labor records, schedules, availability details, performance notes, and completed workbook forms. It is an operational safeguard and does not replace company policy or legal guidance.

Records Covered

- ☐ Employee schedules, availability, and time-off records
- ☐ Labor reports, payroll summaries, and overtime reviews
- ☐ Performance, productivity, coaching, and follow-up notes
- ☐ Contact information, emergency information, and manager notes
- ☐ Completed forms containing employee names, signatures, or work history
- ☐ Digital exports, screenshots, spreadsheets, and printed reports used with this workbook

Minimum Handling Rules

- ☐ Limit access to owners, authorized managers, payroll staff, human resources staff, and others approved by company policy.
- ☐ Store completed paper records in a secured office, locked cabinet, or other controlled location.
- ☐ Store digital files in an approved account or folder protected by passwords and appropriate access permissions.
- ☐ Do not leave schedules, wage information, performance notes, or completed forms where guests or unauthorized employees can view them.
- ☐ Do not send employee records through personal text messages, personal email, or unapproved file-sharing services.
- ☐ Use only the minimum information needed to make and document the labor decision.
- ☐ Keep factual operational notes. Avoid gossip, insults, assumptions, medical conclusions, or unrelated personal information.
- ☐ Follow company policy for record retention, legal holds, payroll documentation, and employee access requests.
- ☐ Shred or securely destroy paper records when authorized for disposal. Permanently delete digital copies according to company policy.
- ☐ Report lost, misdirected, exposed, or improperly accessed records to the appropriate owner or company leader immediately.

Important Boundary

This workbook should organize labor decisions, not become an unsecured personnel file. Sensitive payroll, medical, tax, immigration, background-check, banking, or identity documents should remain in the company systems and files specifically approved for those records.

RECORD-HANDLING COMPLIANCE CHECKLIST

Restaurant Name: _____

Location: _____

Manager Responsible: _____

Review Date: _____

Approved paper storage location: _____

Approved digital storage location: _____

Authorized roles with access:

Current Control Check

- ☐ Completed forms are removed from public or employee-accessible areas.
- ☐ Payroll and wage reports are visible only to authorized personnel.
- ☐ Digital folders use appropriate passwords and access permissions.
- ☐ Printed schedules do not display unnecessary private information.
- ☐ Coaching and performance notes are factual, dated, and signed when required.
- ☐ Old copies are removed or destroyed according to company policy.
- ☐ Managers know whom to contact if information is lost or exposed.

Correction Needed: ☐ No ☐ Yes

Required correction:

Person Responsible: _____ Due Date: _____

Manager Acknowledgment

I understand that labor-control records may contain private employee and business information. I will use, store, share, retain, and dispose of these records only as authorized by company policy and applicable requirements.

Manager Signature: _____ Date: _____

Reviewing Leader Signature: _____ Date: _____

WORKBOOK SETUP PAGE

Use this page before beginning the workbook.

Restaurant Name: _____

Location: _____

General Manager: _____

Owner or Operator: _____

Workbook Start Date: _____

Primary Labor Target: _____

FOH Labor Target: _____

BOH Labor Target: _____

Bar Labor Target: _____

Scheduling Week Begins On: _____

Scheduling Week Ends On: _____

Schedule Posted On: _____

Manager Responsible for Schedule: _____

Manager Responsible for Labor Review: _____

Manager Responsible for Weekly Meeting: _____

CURRENT LABOR SYSTEM REVIEW

Before beginning this workbook, review how labor is currently managed.

Current Schedule Process

Who writes the schedule?

When is the schedule written?

When is the schedule posted?

Is the schedule reviewed before posting?

Circle one:

Yes / No / Sometimes

Who approves the schedule?

Current schedule problems:

Current Labor Tracking Process

Is labor percent reviewed daily?

Circle one:

Yes / No / Sometimes

Is labor percent reviewed weekly?

Circle one:

Yes / No / Sometimes

Who reviews labor results?

Where are labor numbers pulled from?

Current labor tracking problems:

Current Staffing Problems

Check all that apply:

- ☐ Overstaffed slow shifts
- ☐ Understaffed busy shifts
- ☐ Too many call-outs
- ☐ Too many schedule conflicts
- ☐ Not enough cross-training
- ☐ Too much overtime
- ☐ Poor prep coverage
- ☐ Poor dish coverage
- ☐ Weak bar coverage
- ☐ Weak manager coverage
- ☐ Too many trainees at once
- ☐ Strong employees overloaded
- ☐ Weak employees not coached
- ☐ Employees standing around
- ☐ Employees staying too late
- ☐ Employees being cut too early
- ☐ Guest service affected by staffing
- ☐ Closing work affected by staffing
- ☐ Other: _____

Notes:

MANAGER COMMITMENT PAGE

Labor control requires discipline.

It requires planning before the schedule is posted.

It requires attention during the shift.

It requires review after the week is over.

It requires honest manager accountability.

By using this workbook, the manager agrees to review labor decisions with the goal of improving the restaurant, protecting the guest experience, supporting the team, and controlling cost responsibly.

Manager Name: _____

Position: _____

Restaurant: _____

Date Started: _____

Manager Signature: _____

Reviewing Manager or Owner: _____

Signature: _____

PART 1

LABOR CONTROL FOUNDATIONS

Labor control is one of the most important responsibilities in restaurant management.

A restaurant can have strong food, good service, loyal guests, and high sales, but still lose money if labor is not managed correctly.

Labor affects profit.

Labor affects guest experience.

Labor affects speed.

Labor affects food quality.

Labor affects cleanliness.

Labor affects morale.

Labor affects whether managers are leading the business or simply reacting to it.

This part of the workbook builds the foundation for understanding labor control before moving into scheduling, tracking, coverage planning, cut decisions, productivity, staffing gaps, and manager follow-up.

The goal is not to cut labor blindly.

The goal is to understand labor well enough to make better decisions.

A strong manager knows when labor is too high.

A strong manager also knows when labor is too low.

Both problems can hurt the restaurant.

Labor control works best when managers understand the connection between sales, staffing, productivity, guest flow, and operational standards.

WHY LABOR CONTROL MATTERS

Purpose

The purpose of this section is to help managers understand why labor control is a major part of restaurant success.

Labor control is not just about saving money.

It is about using the right amount of labor to protect the business and protect the guest experience at the same time.

Good labor control helps the restaurant:

Stay profitable

Serve guests faster

Avoid overstaffing

Avoid understaffing

Protect food quality

Protect cleanliness

Reduce employee frustration

Improve manager decision-making

Build stronger schedules

Hold managers accountable

Labor control is one of the clearest signs of whether a manager is paying attention to the business.

Why It Matters

Labor is usually one of the largest controllable expenses in a restaurant.

Every hour scheduled affects the restaurant's cost.

Every hour worked must produce value.

When labor is controlled well, the restaurant has enough people to serve guests, prepare food, clean, restock, close properly, and support sales.

When labor is controlled poorly, one of two problems usually happens.

The restaurant may be overstaffed.

This means too many labor hours are being used for the amount of sales or guest demand. Overstaffing can cause employees to stand around, lose urgency, depend too much on extra help, and increase labor cost without improving the guest experience.

The restaurant may also be understaffed.

This means there are not enough people to handle the guest volume or operational needs. Understaffing can lead to slow service, mistakes, long ticket times, poor cleanliness, stressed employees, weak closing work, and unhappy guests.

Both overstaffing and understaffing are labor problems.

A manager's job is to find the correct balance.

Labor control matters because the schedule should be built with a purpose. It should not be copied from last week without review. It should not be built only around employee preference. It should not be based on habit.

It should be based on expected sales, known business patterns, guest demand, staffing strength, training needs, and operational standards.

A restaurant does not control labor by accident.

It controls labor through planning, tracking, reviewing, and correcting.

When to Use This Tool

Use this section:

Before building the weekly schedule

During manager training

When labor percent is too high

When service is suffering because labor is too low

When managers are making poor cut decisions

When the restaurant keeps repeating the same staffing problems

During weekly labor meetings

When explaining labor control expectations to new managers

When reviewing manager accountability

This section should be reviewed anytime a manager needs to understand the bigger purpose behind labor control.

Manager Instructions

Use the worksheet below to review how labor control currently affects the restaurant.

Be honest.

Do not write what should be happening.

Write what is actually happening.

Think about the last several weeks of operation.

Look at slow shifts, busy shifts, overstaffed shifts, understaffed shifts, call-outs, late cuts, employee standing time, poor side work, missed prep, long ticket times, guest complaints, and manager decisions.

The goal is not to blame one person.

The goal is to identify where labor control needs to improve.

LABOR CONTROL REFLECTION WORKSHEET

Restaurant Name: _____

Manager Name: _____

Date: _____

Review Period: _____

Example: Last week, last pay period, last month, current schedule period.

1. Current Labor Control Review

How would you rate the restaurant's current labor control?

Circle one:

Excellent / Good / Average / Weak / Poor

Explain your rating:

2. Overstaffing Review

Do we have shifts where too many people are scheduled for the actual sales volume?

Circle one:

Yes / No / Sometimes / Not Sure

Which shifts are most often overstaffed?

What positions are most often overstaffed?

What usually causes the overstaffing?

Check all that apply:

- ☐ Schedule copied from previous week without review
- ☐ Sales forecast was too high
- ☐ Too many people scheduled for slow dayparts
- ☐ Managers did not make cuts soon enough
- ☐ Employees stayed after work was complete
- ☐ Too many trainees scheduled at the same time
- ☐ Too many support positions scheduled
- ☐ Event or rush was expected but did not happen
- ☐ Manager was afraid to cut staff
- ☐ No clear cut decision system
- ☐ Other: _____

Notes:

3. Understaffing Review

Do we have shifts where too few people are scheduled for the actual sales volume?

Circle one:

Yes / No / Sometimes / Not Sure

Which shifts are most often understaffed?

What positions are most often understaffed?

What usually causes the understaffing?

Check all that apply:

- ☐ Sales forecast was too low
- ☐ Schedule was built too tight
- ☐ Call-outs were not covered
- ☐ Not enough cross-trained employees
- ☐ Time-off requests created gaps
- ☐ Weak weekend planning
- ☐ Weak event planning
- ☐ Not enough prep coverage
- ☐ Not enough dish coverage
- ☐ Not enough manager coverage
- ☐ Employees were cut too early
- ☐ Other: _____

Notes:

4. Guest Experience Impact

Has labor control affected the guest experience?

Circle one:

Yes / No / Sometimes / Not Sure

If yes, how?

Check all that apply:

- ☐ Slow greeting
- ☐ Long wait times
- ☐ Long ticket times
- ☐ Poor table maintenance
- ☐ Poor bar service
- ☐ Slow refills
- ☐ Food quality problems
- ☐ Cleanliness problems
- ☐ Poor bathroom checks
- ☐ Delayed seating
- ☐ Missed side work
- ☐ Weak closing work
- ☐ Stressed employees
- ☐ Guest complaints
- ☐ Other: _____

Describe the biggest guest experience issue caused by labor problems:

5. Employee Impact

Has labor control affected the employees?

Circle one:

Yes / No / Sometimes / Not Sure

If yes, how?

Check all that apply:

- ☐ Employees are standing around
- ☐ Employees are not getting enough hours
- ☐ Employees are working too many hours
- ☐ Strong employees are carrying weak employees
- ☐ Employees are rushed and stressed
- ☐ Employees are leaving early too often
- ☐ Employees are staying too late
- ☐ Employees are frustrated with the schedule
- ☐ Employees are burned out
- ☐ Employees are not cross-trained enough
- ☐ Employees are not placed in the right stations
- ☐ Other: _____

Notes:

6. Manager Decision Review

What labor decisions are managers currently making well?

What labor decisions need improvement?

What labor decision keeps causing repeated problems?

7. Biggest Labor Control Problem Right Now

Identify the biggest labor control problem in the restaurant right now.

The biggest labor control problem is:

Why is this problem happening?

What needs to change?

Who is responsible for follow-up?

Follow-up Date: _____

Manager Review

Manager Notes:

Reviewed By: _____

Date: _____

Manager Signature: _____

WHAT LABOR PERCENT MEANS

Purpose

The purpose of this section is to help managers understand labor percent in simple, practical restaurant terms.

Labor percent shows how much of the restaurant's sales are being used to pay for labor.

It helps managers compare labor cost to sales volume.

Labor percent is not just a number on a report.

It is a management tool.

It helps show whether the restaurant used too much labor, too little labor, or the right amount of labor for the amount of sales produced.

Why It Matters

Managers cannot control what they do not understand.

If managers do not understand labor percent, they may only look at the schedule as names and shifts.

But every scheduled shift creates labor cost.

Every clocked-in employee affects labor percent.

Labor percent helps managers see whether labor hours are in balance with sales.

For example, a restaurant may spend the same amount of labor dollars on two different days, but the labor percent can be very different if the sales are different.

If labor dollars are high but sales are also high, the labor percent may still be acceptable.

If labor dollars are high and sales are low, the labor percent may be too high.

This is why labor percent must always be reviewed with sales.

Labor percent is not about punishing managers or employees. It is about understanding the relationship between sales and labor cost.

A manager should know:

What the labor target is

What the actual labor percent is

Why labor was high or low

Which department caused the variance

Which shift caused the variance

Whether the schedule matched the sales

What needs to change next time

Basic Labor Percent Formula

$\text{Labor Percent} = \text{Labor Dollars} \div \text{Sales} \times 100$

Example:

Labor Dollars: \$2,500

Sales: \$10,000

$\$2,500 \div \$10,000 = 0.25$

$0.25 \times 100 = 25\%$

Labor Percent = 25%

This means that 25 cents of every sales dollar was used for labor.

Important Note

This workbook does not provide legal payroll advice.

Restaurants should follow company policy, payroll rules, local labor laws, overtime rules, tipped employee rules, and ownership direction when calculating labor.

For workbook use, managers should use the labor numbers provided by their restaurant's approved payroll, POS, accounting, or reporting system.

When to Use This Tool

Use this section:

When training managers on labor control

Before reviewing labor reports

Before weekly labor meetings

When labor percent is too high
When labor percent looks low but service suffered
When comparing scheduled labor to actual labor
When reviewing sales versus labor
When teaching shift leads how their decisions affect labor

Manager Instructions

Use the worksheet below to practice calculating labor percent and reviewing what the number means.
Use actual numbers when possible.
If actual numbers are not available, use sample numbers for practice.
The goal is to make sure managers understand what labor percent is showing before they are expected to manage it.

LABOR PERCENT CALCULATION WORKSHEET

Restaurant Name: _____

Manager Name: _____

Date: _____

Review Period: _____

Labor Target Percent: _____

1. Daily Labor Percent Practice

Day: _____

Sales: \$ _____

Labor Dollars: \$ _____

Formula:

$\text{Labor Dollars} \div \text{Sales} \times 100 = \text{Labor Percent}$

Calculation:

\$ _____ $\div$ \$ _____ $\times 100 =$ _____ %

Actual Labor Percent: _____

Was this above or below target?

Circle one:

Above Target / Below Target / On Target

Difference from Target:

Notes:

2. Weekly Labor Percent Practice

Week Starting: _____

Week Ending: _____

Total Weekly Sales: \$ _____

Total Weekly Labor Dollars: \$ _____

Formula:

$\text{Labor Dollars} \div \text{Sales} \times 100 = \text{Labor Percent}$

Calculation:

\$ _____ $\div$ \$ _____ $\times 100 =$ _____ %

Weekly Labor Percent: _____

Labor Target: _____

Was weekly labor above or below target?

Circle one:

Above Target / Below Target / On Target

Explain what happened:

3. Manager Explanation

In your own words, explain what labor percent means.

Explain why labor percent must be reviewed with sales.

Explain why a low labor percent is not always good.

Manager Review and Sign-Off

Manager understands labor percent:

- ☐ Yes
- ☐ Needs more training
- ☐ Needs review with actual reports

Trainer or Reviewing Manager: _____

Date: _____

Manager Signature: _____

LABOR DOLLARS VS. LABOR PERCENT

Purpose

The purpose of this section is to help managers understand the difference between labor dollars and labor percent.

Labor dollars show the actual amount of money spent on labor.

Labor percent shows how labor spending compares to sales.

Both numbers matter.

A manager should not review one without the other.

Why It Matters

Labor dollars and labor percent tell different parts of the labor story.

Labor dollars answer:

How much money did we spend on labor?

Labor percent answers:

How much of our sales did we use for labor?

A restaurant can spend more labor dollars on a busy day and still have a better labor percent than a slow day.

A restaurant can spend fewer labor dollars on a slow day and still have a worse labor percent if sales were too low.

Managers who only look at labor dollars may cut too aggressively during important sales periods.

Managers who only look at labor percent may miss the fact that the restaurant spent too much actual payroll.

Strong managers review both.

Labor dollars matter because payroll must be paid.

Labor percent matters because it shows whether sales supported that payroll.

The schedule should be built with both in mind.

Practical Example

Day 1:

Sales: \$20,000

Labor Dollars: \$4,500

Labor Percent: 22.5%

Day 2:

Sales: \$8,000

Labor Dollars: \$2,400

Labor Percent: 30%

Day 2 spent less total money on labor, but the labor percent was worse because sales were much lower.

This is why managers must not assume that lower labor dollars always mean better labor control.

When to Use This Tool

Use this section:

When reviewing labor reports

When labor dollars look high

When labor percent looks high

When managers disagree about staffing

When reviewing slow sales days

When reviewing high sales days

Before making cuts based only on cost

During weekly schedule review

During manager training

Manager Instructions

Use the worksheet below to compare labor dollars and labor percent.

Look for days where labor dollars were high but acceptable because sales were high.

Also look for days where labor dollars seemed low, but labor percent was high because sales were weak.

The goal is to understand the full labor picture.

LABOR DOLLARS REVIEW PAGE

Restaurant Name: _____

Manager Name: _____

Review Week: _____

Labor Target Percent: _____

Daily Labor Dollar and Percent Review

Monday Sales: \$ _____

Monday Labor Dollars: \$ _____

Monday Labor Percent: _____ %

Monday Target: _____ %

Monday Difference: _____

Monday Notes:

Tuesday Sales: \$ _____

Tuesday Labor Dollars: \$ _____

Tuesday Labor Percent: _____ %

Tuesday Target: _____ %

Tuesday Difference: _____

Tuesday Notes:

Wednesday Sales: \$ _____

Wednesday Labor Dollars: \$ _____

Wednesday Labor Percent: _____ %

Wednesday Target: _____ %

Wednesday Difference: _____

Wednesday Notes:

Thursday Sales: \$ _____

Thursday Labor Dollars: \$ _____

Thursday Labor Percent: _____ %

Thursday Target: _____ %

Thursday Difference: _____

Thursday Notes:

Friday Sales: \$ _____

Friday Labor Dollars: \$ _____

Friday Labor Percent: _____ %

Friday Target: _____ %

Friday Difference: _____

Friday Notes:

Saturday Sales: \$ _____

Saturday Labor Dollars: \$ _____
Saturday Labor Percent: _____ %
Saturday Target: _____ %
Saturday Difference: _____
Saturday Notes:

Sunday Sales: \$ _____
Sunday Labor Dollars: \$ _____
Sunday Labor Percent: _____ %
Sunday Target: _____ %
Sunday Difference: _____
Sunday Notes:

Highest Labor Dollar Day
Which day had the highest labor dollars?

Was this expected?
Circle one:
Yes / No / Not Sure
Why?

Was the labor percent acceptable on this day?
Circle one:
Yes / No / Not Sure
Explain:

Highest Labor Percent Day
Which day had the highest labor percent?

Was this caused by high labor dollars, low sales, or both?
Circle one:
High Labor Dollars / Low Sales / Both / Not Sure
Explain:

What should be reviewed before the next schedule?

Lowest Labor Dollar Day
Which day had the lowest labor dollars?

Did the restaurant operate well with this labor level?

Circle one:

Yes / No / Not Sure

What was the guest experience like?

Did the lower labor dollars create any problems?

Check all that apply:

- ☐ Slow service
- ☐ Long ticket times
- ☐ Dirty dining room
- ☐ Dirty restrooms
- ☐ Weak prep
- ☐ Weak dish flow
- ☐ Poor closing work
- ☐ Employee stress
- ☐ Manager had to cover too much
- ☐ No problems noticed
- ☐ Other: _____

Lowest Labor Percent Day

Which day had the lowest labor percent?

Was this because sales were strong, labor was low, or both?

Circle one:

Strong Sales / Low Labor / Both / Not Sure

Did service quality remain strong?

Circle one:

Yes / No / Not Sure

Explain:

Manager Notes

What did this review show?

What labor adjustment should be made next week?

Who is responsible?

Follow-up Date: _____

Manager Sign-Off

Reviewed By: _____

Position: _____

Date: _____

Signature: _____

SALES VOLUME AND STAFFING CONNECTION

Purpose

The purpose of this section is to help managers connect staffing decisions to expected sales volume.

The schedule should not be built only by habit.

It should be built around what the restaurant expects to sell and what the team needs in order to handle that volume.

Sales volume should influence:

Number of employees scheduled

Positions scheduled

Start times

Cut times

Prep coverage

Dish coverage

Bar coverage

Manager coverage

Cross-training needs

Support positions

The better a manager understands sales volume, the better the schedule becomes.

Why It Matters

Restaurant sales are not the same every day.

A Monday lunch usually does not need the same labor as a Saturday dinner.

A rainy Tuesday may not need the same staffing as a holiday weekend.

A large reservation, local event, catering order, tournament, concert, or seasonal rush may change the labor needs of the entire shift.

When managers fail to connect sales volume to staffing, schedules become inaccurate.

If managers schedule too many people for low sales, labor percent rises and productivity drops.

If managers schedule too few people for high sales, service suffers and sales can be lost.

Good scheduling starts with asking:

What sales are we expecting?

Then the manager must ask:

What staffing do we need to handle those sales properly?

This connection is the heart of labor control.

Sales Volume Factors to Consider

Before building a schedule, review factors that may affect sales.

Possible sales volume factors include:

Prior year sales

Prior week sales

Current sales trend

Weather

Holidays

School schedules

Local events

Sports events

Reservations

Large parties

Catering orders

Promotions

Paydays

Tourist season

Patio season

Slow season

Staffing strength

Employee training level
Kitchen capacity
Bar volume
Takeout volume
Delivery volume
Manager coverage
No sales forecast will be perfect.
But a thoughtful forecast is better than guessing.

When to Use This Tool

Use this section:
Before writing the weekly schedule
Before busy weekends
Before holidays
Before local events
Before changing staffing levels
When labor percent is repeatedly high
When service is repeatedly slow
When managers are scheduling from habit
During weekly manager meetings

Manager Instructions

Use the worksheet below to connect expected sales volume to staffing needs.
Start with the sales forecast.
Then review each daypart and each department.
Do not schedule only based on who wants hours.
Build the labor plan around the needs of the business.

SALES-TO-STAFFING REVIEW WORKSHEET

Restaurant Name: _____

Schedule Week: _____

Manager Completing Review: _____

Date Completed: _____

Weekly Sales Forecast

Forecasted Weekly Sales: \$ _____

Last Week's Sales: \$ _____

Same Week Last Year: \$ _____

Expected Increase or Decrease: _____

Reason for Expected Change:

Sales Volume Factors This Week

Check all that apply:

- ☐ Holiday
- ☐ Local event
- ☐ Sporting event
- ☐ School event
- ☐ Weather concern
- ☐ Large reservations
- ☐ Catering order
- ☐ Banquet or party
- ☐ Promotion
- ☐ Seasonal increase
- ☐ Seasonal decrease
- ☐ Construction or road issue
- ☐ Staff shortage
- ☐ New menu item
- ☐ Patio seating impact
- ☐ Tourist traffic
- ☐ Other: _____

Notes:

Daily Sales Forecast and Staffing Notes

Monday Forecasted Sales: \$ _____

Monday Expected Volume:

Low / Medium / High

Monday Staffing Concern:

Monday Manager Notes:

Tuesday Forecasted Sales: \$ _____

Tuesday Expected Volume:

Low / Medium / High

Tuesday Staffing Concern:

Tuesday Manager Notes:

Wednesday Forecasted Sales: \$ _____

Wednesday Expected Volume:

Low / Medium / High

Wednesday Staffing Concern:

Wednesday Manager Notes:

Thursday Forecasted Sales: \$ _____

Thursday Expected Volume:

Low / Medium / High

Thursday Staffing Concern:

Thursday Manager Notes:

Friday Forecasted Sales: \$ _____

Friday Expected Volume:

Low / Medium / High

Friday Staffing Concern:

Friday Manager Notes:

Saturday Forecasted Sales: \$ _____

Saturday Expected Volume:

Low / Medium / High

Saturday Staffing Concern:

Saturday Manager Notes:

Sunday Forecasted Sales: \$ _____

Sunday Expected Volume:

Low / Medium / High

Sunday Staffing Concern:

Sunday Manager Notes:

Daypart Staffing Review

Opening

Expected opening volume:

Low / Medium / High

Positions needed:

- ☐ Opening manager
- ☐ Prep
- ☐ Line cook
- ☐ Server
- ☐ Host
- ☐ Bar
- ☐ Dish
- ☐ To-go
- ☐ Other: _____

Opening staffing notes:

Lunch

Expected lunch volume:

Low / Medium / High

Positions needed:

- ☐ Floor manager
- ☐ Kitchen manager or lead
- ☐ Servers
- ☐ Host
- ☐ Bar
- ☐ Line cooks
- ☐ Expo
- ☐ Runner
- ☐ Dish
- ☐ Prep support
- ☐ To-go
- ☐ Other: _____

Lunch staffing notes:

Afternoon / Mid-Shift

Expected afternoon volume:

Low / Medium / High

Positions needed:

- ☐ Manager coverage
- ☐ Prep support
- ☐ Server coverage
- ☐ Bar coverage
- ☐ Line coverage
- ☐ Dish coverage
- ☐ Cleaning support
- ☐ Other: _____

Afternoon staffing notes:

Dinner

Expected dinner volume:

Low / Medium / High

Positions needed:

- ☐ Floor manager

- ☐ Kitchen manager or lead
- ☐ Host
- ☐ Servers
- ☐ Bartenders
- ☐ Barback
- ☐ Expo
- ☐ Food runner
- ☐ Bussers
- ☐ Line cooks
- ☐ Dish
- ☐ Prep support
- ☐ To-go
- ☐ Other: _____

Dinner staffing notes:

Closing

Expected closing workload:

Low / Medium / High

Positions needed:

- ☐ Closing manager
- ☐ Closing server
- ☐ Closing bartender
- ☐ Closing line cook
- ☐ Closing dish
- ☐ Cleaning support
- ☐ Prep completion
- ☐ Other: _____

Closing staffing notes:

Staffing Adjustment Plan

Where should labor be increased this week?

Why?

Where should labor be reduced this week?

Why?

Which daypart needs the closest manager attention?

Why?

Manager Approval

This schedule plan has been reviewed against expected sales volume.

Approved By: _____

Date: _____

Signature: _____

COMMON LABOR MISTAKES

Purpose

The purpose of this section is to help managers identify common labor mistakes before they become repeated habits.

Most labor problems are not caused by one bad schedule.

They are caused by repeated decisions that are not reviewed or corrected.

A labor mistake can happen before the schedule is posted, during the shift, or after the shift when no one reviews what happened.

This section helps managers recognize those mistakes and correct them.

Why It Matters

Labor mistakes cost money.

They also damage operations.

A schedule that is too heavy can make the restaurant less productive.

A schedule that is too light can make the restaurant stressful and inconsistent.

Poor cut decisions can save a small amount of labor but create a larger service problem.

Weak coverage can cause strong employees to burn out.

Poor planning can make managers spend the entire shift reacting instead of leading.

Common labor mistakes include:

Copying last week's schedule without reviewing sales

Scheduling by employee preference instead of business need

Ignoring sales forecasts

Ignoring events or weather

Not reviewing time-off requests early enough

Scheduling too many weak employees together

Scheduling too many trainees at peak times

Cutting too early

Cutting too late

Not protecting dish or prep coverage

Forgetting manager coverage

Ignoring overtime risk

Not tracking actual labor

Not reviewing labor after the week ends

A manager does not have to be perfect.

But a manager must be willing to review labor decisions honestly and improve the next schedule.

When to Use This Tool

Use this section:

Before posting the schedule

After a bad labor week

When labor percent is too high

When guest service suffered

When employees complain about coverage

When overtime keeps happening

When managers repeat the same schedule problems

During labor meetings

During manager coaching

Manager Instructions

Use the checklist below to review common labor mistakes.

Check every item that applies to the current schedule, recent schedule, or current labor control process.

For each checked item, write a correction plan.

The goal is to stop repeating the same labor mistakes.

LABOR MISTAKE CHECKLIST

Restaurant Name: _____

Manager Name: _____

Schedule Week Reviewed: _____

Date: _____

Schedule Planning Mistakes

Check all that apply:

- ☐ Schedule was copied from last week without enough review
- ☐ Sales forecast was not reviewed
- ☐ Prior week labor results were not reviewed
- ☐ Same week last year was not reviewed
- ☐ Weather was not considered
- ☐ Local events were not considered
- ☐ Reservations were not considered
- ☐ Catering or large orders were not considered
- ☐ Holiday impact was not considered
- ☐ School schedule impact was not considered
- ☐ Manager coverage was not reviewed
- ☐ Department coverage was not reviewed
- ☐ Daypart coverage was not reviewed

Correction Plan:

Employee Scheduling Mistakes

Check all that apply:

- ☐ Too many employees scheduled based on preference instead of need
- ☐ Strong employees were not placed during peak periods
- ☐ Weak employees were scheduled together without enough support
- ☐ Too many trainees were scheduled during peak times
- ☐ Employee availability was not updated
- ☐ Time-off requests were missed
- ☐ Schedule conflicts were not caught before posting
- ☐ Overtime risk was ignored
- ☐ Employees were scheduled outside approved availability
- ☐ Cross-trained employees were not used properly
- ☐ New employees were not given a clear training schedule

Correction Plan:

Department Coverage Mistakes

Check all that apply:

- ☐ FOH was overstaffed
- ☐ FOH was understaffed
- ☐ BOH was overstaffed
- ☐ BOH was understaffed
- ☐ Bar was overstaffed
- ☐ Bar was understaffed
- ☐ Prep was overstaffed
- ☐ Prep was understaffed
- ☐ Dish was overstaffed

- ☐ Dish was understaffed
- ☐ Manager coverage was too heavy
- ☐ Manager coverage was too light
- ☐ Support staff was missing during peak periods
- ☐ Closing coverage was too weak

Correction Plan:

Shift Management Mistakes

Check all that apply:

- ☐ Employees were cut too early
- ☐ Employees were cut too late
- ☐ Employees stayed on the clock after work was complete
- ☐ Managers did not watch sales pace during the shift
- ☐ Managers did not adjust staffing during the shift
- ☐ Managers did not communicate cut plans
- ☐ Managers cut staff without checking guest impact
- ☐ Managers cut staff before side work was complete
- ☐ Managers cut BOH before kitchen work was stable
- ☐ Managers cut dish before dish flow was controlled
- ☐ Managers cut bar support too early
- ☐ Managers failed to send people home during very slow periods
- ☐ Managers added labor without reviewing actual need

Correction Plan:

Labor Tracking Mistakes

Check all that apply:

- ☐ Daily labor percent was not reviewed
- ☐ Weekly labor percent was not reviewed
- ☐ Labor by department was not reviewed
- ☐ Labor by shift was not reviewed
- ☐ Labor by daypart was not reviewed
- ☐ Scheduled labor was not compared to actual labor
- ☐ Sales forecast was not compared to actual sales
- ☐ Labor problems were not written down
- ☐ Manager decisions were not logged
- ☐ No follow-up was assigned
- ☐ Same issue happened more than once

Correction Plan:

Biggest Labor Mistake This Week

The biggest labor mistake this week was:

Why did it happen?

What did it cost the restaurant?

Check all that apply:

- ☐ Higher labor percent
- ☐ Lost sales
- ☐ Guest complaints
- ☐ Slow service
- ☐ Poor food quality
- ☐ Dirty restaurant
- ☐ Employee frustration
- ☐ Weak closing work
- ☐ Manager stress
- ☐ Overtime
- ☐ Other: _____

What will be done differently next week?

Person Responsible: _____

Follow-Up Date: _____

Manager Review

Reviewed By: _____

Date: _____

Manager Signature: _____

LABOR CONTROL WITHOUT HURTING GUEST EXPERIENCE

Purpose

The purpose of this section is to help managers control labor without damaging service, food quality, cleanliness, or the overall guest experience.

Labor control should never become careless labor cutting.

A restaurant can lower labor too far and create bigger problems than the labor savings are worth.

Good labor control protects both profit and the guest.

Why It Matters

A manager can make labor look better for one shift by cutting staff too aggressively.

But if that decision causes slow service, poor food quality, dirty tables, long ticket times, stressed employees, or unhappy guests, the restaurant may lose more than it saved.

Poor guest experience can lead to:

Lower sales

Fewer repeat guests

Bad reviews

Lower tips

Employee frustration

Manager complaints

Poor morale

Reduced trust in leadership

Labor decisions must be made with judgment.

The question is not only:

Can we cut labor?

The better question is:

Can we cut labor and still protect the guest experience?

Strong managers know the difference.

Labor Control Balance

Good labor control protects:

Sales

Service speed

Food quality

Cleanliness

Team morale

Closing standards

Manager control

Guest satisfaction

Profitability

Bad labor control only looks at the labor number.

Good labor control looks at the entire shift.

When to Use This Tool

Use this section:

Before making cut decisions

During slow shifts

During labor meetings

When labor percent is too high

When guest complaints increase

When ticket times are too long

When employees say the shift was understaffed

When managers are cutting without reviewing impact

When service is suffering after labor reductions

Manager Instructions

Use the worksheet below to review whether labor decisions are protecting or hurting the guest experience. This page should be used after shifts where labor was cut, staffing was tight, or guest service was affected. Do not only review the labor savings. Review the full result of the decision.

GUEST EXPERIENCE LABOR BALANCE WORKSHEET

Restaurant Name: _____

Manager Name: _____

Date: _____

Shift Reviewed: _____

Daypart:

- ☐ Opening
- ☐ Lunch
- ☐ Afternoon
- ☐ Dinner
- ☐ Late Night
- ☐ Closing

1. Shift Labor Review

Was labor reduced during this shift?

Circle one:

Yes / No

If yes, how?

Check all that apply:

- ☐ Employee was cut early
- ☐ Employee was not replaced after call-out
- ☐ Fewer employees were scheduled
- ☐ Support position was removed
- ☐ Prep labor was reduced
- ☐ Dish labor was reduced
- ☐ Bar support was reduced
- ☐ Manager coverage was reduced
- ☐ Other: _____

Who made the labor decision?

What was the reason?

2. Sales and Volume Review

Forecasted Sales: \$ _____

Actual Sales: \$ _____

Sales Difference: \$ _____

Guest Count or Covers: _____

Reservation Count: _____

Large Parties: _____

Takeout / Delivery Volume: _____

Bar Volume: _____

Notes:

3. Service Impact Review

Did the labor decision affect service?

Circle one:

Yes / No / Not Sure

Check all that apply:

- ☐ Guests waited longer to be greeted

- ☐ Tables waited too long to be seated
- ☐ Servers had too many tables
- ☐ Drinks were slow
- ☐ Food was slow
- ☐ Refills were missed
- ☐ Tables were not cleared quickly
- ☐ Hosts were overwhelmed
- ☐ Bar was overwhelmed
- ☐ To-go orders were delayed
- ☐ Managers had to cover too many positions
- ☐ No service issue noticed
- ☐ Other: _____

Service notes:

4. Food Quality and Kitchen Impact

Did the labor decision affect food quality or kitchen performance?

Circle one:

Yes / No / Not Sure

Check all that apply:

- ☐ Ticket times increased
- ☐ Food quality dropped
- ☐ Plates were delayed
- ☐ Expo was overwhelmed
- ☐ Line cooks were overloaded
- ☐ Prep ran short
- ☐ Dish fell behind
- ☐ Kitchen cleaning suffered
- ☐ Closing duties were rushed
- ☐ No kitchen issue noticed
- ☐ Other: _____

Kitchen notes:

5. Cleanliness Impact

Did the labor decision affect cleanliness?

Circle one:

Yes / No / Not Sure

Check all that apply:

- ☐ Dining room was not maintained
- ☐ Tables stayed dirty too long
- ☐ Restrooms were not checked enough
- ☐ Bar area became messy
- ☐ Server stations were not stocked
- ☐ Dish area backed up
- ☐ Kitchen floors or stations were not maintained
- ☐ Trash was not handled on time
- ☐ Closing cleaning was weak
- ☐ No cleanliness issue noticed
- ☐ Other: _____

Cleanliness notes:

6. Employee Impact

Did the labor decision affect the team?

Circle one:

Yes / No / Not Sure

Check all that apply:

- ☐ Employees were overwhelmed
- ☐ Employees were frustrated
- ☐ Employees rushed side work
- ☐ Employees stayed later than expected
- ☐ Strong employees carried too much of the shift
- ☐ New employees did not receive enough support
- ☐ Team morale dropped
- ☐ Employees handled the shift well
- ☐ No employee issue noticed
- ☐ Other: _____

Employee impact notes:

7. Guest Impact Summary

Did guests feel the labor decision?

Circle one:

Yes / No / Not Sure

Explain:

Were there guest complaints?

Circle one:

Yes / No

If yes, describe:

Were there visible service problems even without complaints?

Circle one:

Yes / No / Not Sure

Explain:

8. Labor Decision Review

Was the labor decision correct?

Circle one:

Yes / No / Partly / Not Sure

Why?

What should have been done differently?

Should this decision be repeated in a similar situation?

Circle one:

Yes / No / Only With Changes

Explain:

9. Future Labor Balance Plan

Next time this situation happens, the manager should:

- ☐ Keep more coverage
- ☐ Cut sooner
- ☐ Cut later
- ☐ Keep dish coverage longer
- ☐ Keep prep coverage longer
- ☐ Keep bar support longer
- ☐ Keep host support longer
- ☐ Keep expo or runner support longer
- ☐ Use cross-trained employee differently
- ☐ Watch sales pace more closely
- ☐ Review reservations before cutting
- ☐ Review ticket times before cutting
- ☐ Review side work before cutting
- ☐ Other: _____

Action Plan:

Person Responsible: _____

Follow-Up Date: _____

Manager Sign-Off

Reviewed By: _____

Position: _____

Date: _____

Signature: _____

PART 1 FINAL REVIEW

LABOR CONTROL FOUNDATIONS

This final review should be completed after Part 1 has been finished.

The manager should now understand:

Why labor control matters

What labor percent means

The difference between labor dollars and labor percent

How sales volume connects to staffing

Common labor mistakes

How to control labor without hurting the guest experience

Manager Knowledge Check

Answer the following questions.

1. Why does labor control matter in a restaurant?

2. What does labor percent show?

3. Why should labor dollars and labor percent be reviewed together?

4. Why should sales volume be reviewed before building the schedule?

5. What is one common labor mistake this restaurant needs to improve?

6. Why can cutting too much labor hurt the business?

7. What should a manager review before cutting staff?

8. What is one labor control habit you need to improve as a manager?

PART 1 MANAGER ACTION PLAN

The main labor control issue I need to improve is:

The reason this issue matters is:

The first action I will take is:

The second action I will take is:

The third action I will take is:

I will review my progress on this date:

Manager Name: _____

Manager Signature: _____

Reviewing Manager: _____

Date: _____

PART 1 COMPLETION SIGN-OFF

Part 1: Labor Control Foundations has been reviewed and completed.

Manager Name: _____

Position: _____

Restaurant: _____

Date Completed: _____

Manager Signature: _____

Reviewing Manager Signature: _____

Notes:

PART 2

STAFFING POSITION PLANNER

A strong schedule starts with understanding positions.

Managers should not build schedules by only asking, "Who is available?"

Managers should first ask, "What positions does the restaurant need covered?"

A restaurant can have enough people on the schedule and still be staffed incorrectly if the wrong positions are covered, the wrong employees are placed in key areas, or the strongest employees are not scheduled during the most important shifts.

Part 2 helps managers review staffing by department, position, daypart, and coverage need.

The purpose is to make sure the schedule supports real restaurant operations.

This part focuses on:

FOH coverage

BOH coverage

Bar coverage

Prep coverage

Dish coverage

Manager coverage

Cross-training coverage

The goal is to move from guessing to planning.

FOH POSITION PLANNER

Purpose

The purpose of this section is to help managers plan front-of-house coverage by position.

FOH labor should support guest flow, service speed, table maintenance, communication, hospitality, and sales.

A front-of-house schedule should not only list servers.

It should review every position needed to operate the dining room, bar area, host stand, to-go station, expo window, and guest-facing service areas.

Why It Matters

The front of house is where guests experience the restaurant most directly.

If FOH labor is too light, guests may wait too long, tables may sit dirty, refills may be missed, food may sit in the window, and servers may become overwhelmed.

If FOH labor is too heavy, employees may stand around, labor percent may rise, and productivity may drop.

Good FOH staffing protects both service and labor.

Strong FOH scheduling considers:

Guest count

Reservation flow

Table turns

Server sections

Host stand needs

Busser support

Food runner support

To-go volume

Bar guests

Expo needs

Side work

Opening duties

Closing duties

Manager floor coverage

A manager should never assume the FOH is covered just because servers are scheduled.

The real question is whether the right guest-facing positions are covered at the right times.

When to Use This Tool

Use this section:

Before writing the weekly schedule

Before busy weekends

Before holidays or events

When guest service has been slow

When hosts, servers, bussers, or runners are overwhelmed

When FOH labor percent is too high

When table maintenance is weak

When server sections are unbalanced

When to-go or bar service affects dining room flow

During FOH manager training

Manager Instructions

Use this planner to review FOH position needs before the schedule is posted.

Start with expected sales volume and guest count.

Then review each FOH position.

Do not schedule FOH based only on how many servers want hours.

Schedule based on guest flow, service standard, seating volume, and support needs.

FOH POSITION PLANNER WORKSHEET

Restaurant Name: _____

Schedule Week: _____

Manager Completing Planner: _____

Date Completed: _____

FOH Weekly Coverage Review

Expected Weekly Sales: \$ _____

Expected Guest Count or Covers: _____

Busiest Expected Day: _____

Busiest Expected Daypart: _____

Special Events or Large Parties: _____

Primary FOH Concern This Week:

FOH Positions Needed

Review each position and mark whether it is needed this week.

Host

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Host coverage concerns:

Server

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Server coverage concerns:

Server Assistant / Busser

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Busser coverage concerns:

Food Runner

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Runner coverage concerns:

Expo

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Expo coverage concerns:

To-Go / Carryout

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

To-go coverage concerns:

Cashier

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Cashier coverage concerns:

Floor Lead

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Floor lead coverage concerns:

FOH Daypart Coverage Review

Opening FOH Coverage

Expected volume:

Low / Medium / High

Positions needed:

- ☐ Opening server
- ☐ Opening host
- ☐ Opening bartender
- ☐ Opening to-go
- ☐ Opening busser
- ☐ Opening floor lead
- ☐ Other: _____

Opening FOH notes:

Lunch FOH Coverage

Expected volume:

Low / Medium / High

Positions needed:

- ☐ Lunch servers
- ☐ Host
- ☐ Busser
- ☐ Runner
- ☐ Expo
- ☐ To-go
- ☐ Floor manager
- ☐ Other: _____

Lunch FOH notes:

Afternoon FOH Coverage

Expected volume:

Low / Medium / High

Positions needed:

- ☐ Mid server
- ☐ Host
- ☐ To-go
- ☐ Bar support
- ☐ Side work support
- ☐ Cleaning support
- ☐ Other: _____

Afternoon FOH notes:

Dinner FOH Coverage

Expected volume:

Low / Medium / High

Positions needed:

- ☐ Dinner servers
- ☐ Host
- ☐ Busser
- ☐ Runner
- ☐ Expo
- ☐ To-go
- ☐ Bartender support
- ☐ Floor manager
- ☐ Other: _____

Dinner FOH notes:

Closing FOH Coverage

Expected closing workload:

Low / Medium / High

Positions needed:

- ☐ Closing server
- ☐ Closing bartender
- ☐ Closing host

- ☐ Closing busser
- ☐ Closing to-go
- ☐ Closing floor lead
- ☐ Other: _____

Closing FOH notes:

FOH Staffing Strength Review

Strongest FOH employees for peak shifts:

Employees who need support or coaching:

Employees who should not be scheduled together without support:

Employees who can cover multiple FOH positions:

FOH Risk Review

Check all FOH risks that apply this week:

- ☐ Not enough host coverage
- ☐ Not enough strong servers
- ☐ Not enough bussing support
- ☐ Not enough runner support
- ☐ To-go volume may overwhelm staff
- ☐ Bar guests may affect dining room service
- ☐ Too many new employees scheduled
- ☐ Too many weak employees on same shift
- ☐ Large parties may affect table flow
- ☐ Side work may not get completed
- ☐ Closing work may be weak
- ☐ Other: _____

FOH risk correction plan:

FOH Manager Review

Does FOH coverage match expected sales volume?

Yes / No / Needs Adjustment

What needs to be adjusted before posting the schedule?

Manager Approval:

Approved / Not Approved / Approved With Changes

Reviewed By: _____

Date: _____

Signature: _____

BOH POSITION PLANNER

Purpose

The purpose of this section is to help managers plan back-of-house coverage by position.

BOH labor should support food quality, ticket times, prep readiness, station flow, cleanliness, dish flow, and closing standards.

A kitchen schedule should not only ask, "How many cooks are working?"

It should ask, "Are the right stations covered by the right people at the right times?"

Why It Matters

The kitchen controls the speed and quality of the food.

If BOH labor is too light, ticket times increase, food quality drops, prep may run short, dish may fall behind, and closing work may suffer.

If BOH labor is too heavy, labor percent rises, employees may lose urgency, and productivity may drop.

Good BOH scheduling protects food quality and labor control at the same time.

Strong BOH scheduling considers:

Expected sales

Menu mix

Station difficulty

Prep needs

Ticket volume

Peak rush timing

Station strength

Dish flow

Closing duties

Training needs

Kitchen leadership

A restaurant can lose sales and guest trust when the kitchen is scheduled poorly.

The best schedule protects the line before the rush starts.

When to Use This Tool

Use this section:

Before writing the weekly schedule

Before high-volume shifts

Before weekends

Before holidays and events

When ticket times are too long

When food quality is inconsistent

When prep is not ready

When dish falls behind

When closing work is weak

When BOH labor percent is too high

During kitchen manager training

Manager Instructions

Use this planner to review BOH position needs before the schedule is posted.

Review each station and daypart.

Pay attention to the difference between having enough people and having enough station strength.

One strong cook in the right place can protect the shift.

One weak station during a rush can slow down the whole restaurant.

BOH POSITION PLANNER WORKSHEET

Restaurant Name: _____

Schedule Week: _____

Manager Completing Planner: _____

Date Completed: _____

BOH Weekly Coverage Review

Expected Weekly Sales: \$ _____

Expected High-Volume Days: _____

Expected High-Volume Dayparts: _____

Primary Kitchen Concern This Week:

Station Most Likely to Struggle:

BOH Positions Needed

Review each position and mark whether it is needed this week.

Grill

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Grill coverage concerns:

Fry

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Fry coverage concerns:

Sauté

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Sauté coverage concerns:

Pantry / Salad

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Pantry / salad coverage concerns:

Pizza / Specialty Station

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Pizza / specialty station concerns:

Kitchen Expo

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Kitchen expo concerns:

Prep Cook

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Prep coverage concerns:

Dishwasher / Utility

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Dish / utility concerns:

Kitchen Lead

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Kitchen lead concerns:

BOH Daypart Coverage Review

Opening BOH Coverage

Expected volume:

Low / Medium / High

Positions needed:

☐ Opening cook

- ☐ Prep cook
- ☐ Dish / utility
- ☐ Kitchen lead
- ☐ Grill
- ☐ Fry
- ☐ Pantry
- ☐ Other: _____

Opening BOH notes:

Lunch BOH Coverage

Expected volume:

Low / Medium / High

Positions needed:

- ☐ Grill
- ☐ Fry
- ☐ Sauté
- ☐ Pantry
- ☐ Pizza / specialty station
- ☐ Kitchen expo
- ☐ Dish
- ☐ Prep support
- ☐ Kitchen lead
- ☐ Other: _____

Lunch BOH notes:

Afternoon BOH Coverage

Expected volume:

Low / Medium / High

Positions needed:

- ☐ Line coverage
- ☐ Prep coverage
- ☐ Dish coverage
- ☐ Restock support
- ☐ Cleaning support
- ☐ Kitchen lead
- ☐ Other: _____

Afternoon BOH notes:

Dinner BOH Coverage

Expected volume:

Low / Medium / High

Positions needed:

- ☐ Grill
- ☐ Fry
- ☐ Sauté
- ☐ Pantry
- ☐ Pizza / specialty station
- ☐ Kitchen expo
- ☐ Dish
- ☐ Prep support

☐ Kitchen lead

☐ Other: _____

Dinner BOH notes:

Closing BOH Coverage

Expected closing workload:

Low / Medium / High

Positions needed:

☐ Closing cook

☐ Closing dish

☐ Closing prep support

☐ Closing kitchen lead

☐ Cleaning support

☐ Trash / floors

☐ Other: _____

Closing BOH notes:

BOH Staffing Strength Review

Strongest BOH employees for peak shifts:

Employees who need support or coaching:

Employees who should not be scheduled together without support:

Employees who can cover multiple BOH stations:

BOH Risk Review

Check all BOH risks that apply this week:

☐ Grill coverage is weak

☐ Fry coverage is weak

☐ Sauté coverage is weak

☐ Pantry / salad coverage is weak

☐ Pizza / specialty station coverage is weak

☐ Prep may fall behind

☐ Dish may fall behind

☐ Ticket times may increase

☐ Too many new cooks scheduled together

☐ Not enough kitchen leadership

☐ Closing work may be weak

☐ Other: _____

BOH risk correction plan:

BOH Manager Review

Does BOH coverage match expected sales volume?

Yes / No / Needs Adjustment

What needs to be adjusted before posting the schedule?

Manager Approval:

Approved / Not Approved / Approved With Changes

Reviewed By: _____

Date: _____

Signature: _____

BAR POSITION PLANNER

Purpose

The purpose of this section is to help managers plan bar coverage based on expected sales, guest volume, service bar demand, and support needs.

Bar staffing should protect drink speed, guest service, cleanliness, responsible service standards, and sales opportunity.

A bar can affect the entire restaurant.

If the bar is behind, servers wait on drinks, guests wait longer, table service slows down, and sales can be lost.

Why It Matters

Bar labor must be planned carefully.

Too much bar labor creates wasted hours and standing time.

Too little bar labor slows down service, weakens guest experience, and puts pressure on servers and managers.

Strong bar scheduling considers:

Bar seating

Dining room drink volume

Service bar demand

Cocktail complexity

Happy hour volume

Weekend volume

Event volume

Large parties

Barback needs

Opening setup

Closing cleaning

Stocking needs

Responsible service expectations

A strong bartender can help drive sales, protect regular guests, and keep service moving.

A poorly staffed bar can slow down the entire building.

When to Use This Tool

Use this section:

Before writing the weekly schedule

Before busy bar shifts

Before weekends

Before holidays

Before sporting events

Before live music or local events

When bar service is slow

When servers wait too long for drinks

When bar labor percent is too high

When bartenders are overwhelmed

When bar closing work is weak

During bar manager training

Manager Instructions

Use this planner to review bar coverage before the schedule is posted.

Review guest-facing bar needs and service bar needs separately.

Do not schedule the bar based only on how busy it "usually feels."

Review sales, events, reservations, dayparts, and service bar pressure.

BAR POSITION PLANNER WORKSHEET

Restaurant Name: _____

Schedule Week: _____

Manager Completing Planner: _____

Date Completed: _____

Bar Weekly Coverage Review

Expected Bar Sales: \$ _____

Expected Highest Bar Volume Day: _____

Expected Highest Bar Volume Daypart: _____

Special Bar Events or Promotions: _____

Primary Bar Concern This Week: _____

Bar Positions Needed

Bartender

Needed this week?

Yes / No / Some Shifts

Main shifts needed: _____

Bartender coverage concerns: _____

Service Bartender

Needed this week?

Yes / No / Some Shifts

Main shifts needed: _____

Service bartender concerns: _____

Barback

Needed this week?

Yes / No / Some Shifts

Main shifts needed: _____

Barback coverage concerns: _____

Cocktail Server

Needed this week?

Yes / No / Some Shifts

Main shifts needed: _____

Cocktail server concerns: _____

Bar Lead

Needed this week?

Yes / No / Some Shifts

Main shifts needed:

Bar lead concerns:

Bar Daypart Coverage Review

Opening Bar Coverage

Expected volume:

Low / Medium / High

Positions needed:

- ☐ Opening bartender
- ☐ Service bar setup
- ☐ Bar prep
- ☐ Stocking
- ☐ Other: _____

Opening bar notes:

Lunch Bar Coverage

Expected volume:

Low / Medium / High

Positions needed:

- ☐ Bartender
- ☐ Service bartender
- ☐ Barback
- ☐ Cocktail server
- ☐ Other: _____

Lunch bar notes:

Afternoon Bar Coverage

Expected volume:

Low / Medium / High

Positions needed:

- ☐ Bartender
- ☐ Service bar
- ☐ Stocking support
- ☐ Happy hour support
- ☐ Other: _____

Afternoon bar notes:

Dinner Bar Coverage

Expected volume:

Low / Medium / High

Positions needed:

- ☐ Bartender
- ☐ Service bartender
- ☐ Barback
- ☐ Cocktail server
- ☐ Bar lead
- ☐ Other: _____

Dinner bar notes:

Closing Bar Coverage

Expected closing workload:

Low / Medium / High

Positions needed:

- ☐ Closing bartender
- ☐ Barback
- ☐ Cleaning support
- ☐ Restocking
- ☐ Inventory check
- ☐ Other: _____

Closing bar notes:

Bar Risk Review

Check all bar risks that apply this week:

- ☐ Bartender coverage is weak
- ☐ Service bar may fall behind
- ☐ Barback support may be needed
- ☐ Bar may affect dining room drink speed
- ☐ Large parties may increase drink volume
- ☐ Weekend bar volume may be high
- ☐ Happy hour may need extra coverage
- ☐ Closing bar work may be weak
- ☐ Too many new bar employees scheduled
- ☐ Other: _____

Bar risk correction plan:

Bar Manager Review

Does bar coverage match expected sales volume?

Yes / No / Needs Adjustment

What needs to be adjusted before posting the schedule?

Manager Approval:

Approved / Not Approved / Approved With Changes

Reviewed By: _____

Date: _____

Signature: _____

PREP POSITION PLANNER

Purpose

The purpose of this section is to help managers plan prep labor correctly.

Prep labor supports the entire operation.

If prep is short, the line struggles.

If prep is overstaffed, labor rises without enough production value.

A good prep plan helps the restaurant enter service ready, stocked, organized, and prepared for expected sales.

Why It Matters

Prep is easy to overlook because it often happens before the busiest part of the day.

But prep failure usually shows up later during the rush.

When prep is not planned correctly, the restaurant may experience:

Missing ingredients

Slow ticket times

Line cooks leaving stations to prep

Inconsistent portions

Poor food quality

Higher waste

Employee frustration

Late closing work

Emergency prep during peak volume

Prep labor should be connected to expected sales, menu mix, events, large parties, catering, and current inventory levels.

Prep should be scheduled with a production purpose, not just as extra kitchen labor.

When to Use This Tool

Use this section:

Before writing the weekly schedule

Before weekends

Before holidays

Before catering or event orders

When prep keeps running short

When prep labor is too high

When line cooks are doing too much prep during service

When waste increases

When closing prep is weak

During kitchen manager training

Manager Instructions

Use this planner to review prep needs before the schedule is posted.

Connect prep labor to expected production.

The prep schedule should answer three questions:

What needs to be made?

Who is making it?

When does it need to be ready?

PREP POSITION PLANNER WORKSHEET

Restaurant Name: _____

Schedule Week: _____

Manager Completing Planner: _____

Date Completed: _____

Prep Weekly Review

Expected Weekly Sales: \$ _____

High Prep Demand Days: _____

Large Events / Catering / Parties: _____

Primary Prep Concern This Week: _____

Prep Coverage Needed

Opening prep needed?

Yes / No / Some Days

Notes: _____

Mid-shift prep needed?

Yes / No / Some Days

Notes: _____

Closing prep needed?

Yes / No / Some Days

Notes: _____

Extra event prep needed?

Yes / No

Notes: _____

Prep by Day

Monday Prep Needs: _____

Tuesday Prep Needs: _____

Wednesday Prep Needs: _____

Thursday Prep Needs: _____

Friday Prep Needs: _____

Saturday Prep Needs: _____

Sunday Prep Needs:

Prep Staffing Strength

Strongest prep employees:

Employees who need prep training:

Employees who can prep and work line:

Prep Risk Review

Check all prep risks that apply this week:

- ☐ Not enough prep labor
- ☐ Too much prep labor
- ☐ Prep list is unclear
- ☐ Prep has been running short
- ☐ Prep has been overproduced
- ☐ Line cooks are leaving station to prep
- ☐ Event prep may not be completed
- ☐ Catering prep may affect regular service
- ☐ Prep employees need training
- ☐ Waste has increased
- ☐ Other: _____

Prep correction plan:

Prep Manager Review

Does prep coverage match expected sales and production needs?

Yes / No / Needs Adjustment

What needs to be adjusted before posting the schedule?

Manager Approval:

Approved / Not Approved / Approved With Changes

Reviewed By: _____

Date: _____

Signature: _____

DISH POSITION PLANNER

Purpose

The purpose of this section is to help managers plan dish coverage correctly.

Dish coverage affects the entire restaurant.

If dish falls behind, the dining room, kitchen, bar, prep, and closing team all feel it.

Dish is not just a support position.

Dish is part of the restaurant's flow.

Why It Matters

Weak dish coverage can create serious operational problems.

When dish falls behind, restaurants may run short on plates, pans, silverware, glassware, utensils, and kitchen tools.

Servers may wait on clean silverware.

Cooks may wait on pans.

Bartenders may wait on glassware.

Managers may have to pull employees away from guests or stations to help recover the dish area.

Closing may run late.

Labor can look controlled on paper but still create a poor shift if dish coverage is too weak.

Dish scheduling should consider:

Expected sales

Guest count

Menu volume

Bar glassware

Prep dishes

Kitchen pans

Closing workload

Dishwasher strength

Utility needs

Peak rush timing

Dish coverage is especially important during weekends, high-volume shifts, events, and closing periods.

When to Use This Tool

Use this section:

Before writing the weekly schedule

Before weekends

Before holidays or events

When dish falls behind

When closing runs late

When kitchen tools are unavailable

When servers run out of silverware or glassware

When managers frequently have to rescue the dish area

When dish labor is too high or too low

During support staff training

Manager Instructions

Use this planner to review dish coverage before the schedule is posted.

Do not treat dish as an afterthought.

Review when dish pressure actually happens.

Some shifts may need dish coverage earlier.

Some shifts may need coverage later.

Some shifts may need a stronger closer.

The right dish schedule protects the whole restaurant.

DISH POSITION PLANNER WORKSHEET

Restaurant Name: _____

Schedule Week: _____

Manager Completing Planner: _____

Date Completed: _____

Dish Weekly Review

Expected Weekly Sales: \$ _____

Highest Dish Pressure Days: _____

Highest Dish Pressure Dayparts: _____

Primary Dish Concern This Week:

Dish Coverage Needed

Opening dish needed?

Yes / No / Some Days

Notes:

Lunch dish needed?

Yes / No / Some Days

Notes:

Dinner dish needed?

Yes / No / Some Days

Notes:

Closing dish needed?

Yes / No / Some Days

Notes:

Utility support needed?

Yes / No / Some Days

Notes:

Dish by Day

Monday Dish Coverage Need:

Tuesday Dish Coverage Need:

Wednesday Dish Coverage Need:

Thursday Dish Coverage Need:

Friday Dish Coverage Need:

Saturday Dish Coverage Need:

Sunday Dish Coverage Need:

Dish Staffing Strength

Strongest dish employees:

Employees who need training or coaching:

Employees who can help dish when needed:

Dish Risk Review

Check all dish risks that apply this week:

- ☐ Dish may fall behind during lunch
- ☐ Dish may fall behind during dinner
- ☐ Closing dish may be too weak
- ☐ Bar glassware may run short
- ☐ Silverware may run short
- ☐ Kitchen pans may run short
- ☐ Prep dishes may overwhelm dish
- ☐ Dishwasher is new or slow
- ☐ Utility support may be needed
- ☐ Managers may need backup plan
- ☐ Other: _____

Dish correction plan:

Dish Manager Review

Does dish coverage match expected volume and closing needs?

Yes / No / Needs Adjustment

What needs to be adjusted before posting the schedule?

Manager Approval:

Approved / Not Approved / Approved With Changes

Reviewed By: _____

Date: _____

Signature: _____

MANAGER COVERAGE PLANNER

Purpose

The purpose of this section is to help restaurants plan manager coverage by shift, department, and business need.

Manager coverage is labor too.

Too little manager coverage creates weak control.

Too much manager coverage can raise labor cost without enough value.

Good manager coverage supports service, kitchen flow, employee decisions, guest recovery, cash control, labor decisions, and closing standards.

Why It Matters

A restaurant can be fully staffed with hourly employees and still run poorly if manager coverage is weak.

Managers make decisions throughout the shift that affect labor, sales, guest experience, cleanliness, employee performance, and accountability.

Strong manager coverage helps protect:

Shift leadership

Guest recovery

Labor decisions

Cut decisions

Employee placement

Kitchen communication

FOH communication

Bar control

Cash handling

Closing standards

Training follow-up

Manager coverage should be planned based on volume, risk, and leadership need.

A slow shift may only need one manager.

A busy dinner may need floor leadership and kitchen leadership.

A high-risk weekend may need stronger coverage even if labor looks higher on paper.

When to Use This Tool

Use this section:

Before writing the weekly schedule

Before weekends

Before holidays

Before high-volume events

When shifts lack leadership

When labor decisions are poor

When guest recovery is weak

When closing standards are inconsistent

When managers are overloaded

When manager labor is too high

During leadership planning

Manager Instructions

Use this planner to review manager coverage before posting the schedule.

Review each daypart.

Ask whether the shift has the right leadership, not just whether a manager is present.

Strong coverage means the manager can actually lead the shift, not spend the whole shift trapped in one task.

MANAGER COVERAGE PLANNER WORKSHEET

Restaurant Name: _____

Schedule Week: _____

Manager Completing Planner: _____

Date Completed: _____

Manager Coverage Review

Expected Weekly Sales: \$ _____

Highest Risk Shift This Week: _____

Primary Manager Coverage Concern:

Manager Roles Needed

Opening manager needed?

Yes / No / Some Days

Notes:

Lunch manager needed?

Yes / No / Some Days

Notes:

Dinner manager needed?

Yes / No / Some Days

Notes:

Closing manager needed?

Yes / No / Some Days

Notes:

Kitchen manager or kitchen lead needed?

Yes / No / Some Days

Notes:

Floor manager or floor lead needed?

Yes / No / Some Days

Notes:

Bar manager or bar lead needed?

Yes / No / Some Days

Notes:

Manager Coverage by Day

Monday Manager Coverage Plan:

Tuesday Manager Coverage Plan:

Wednesday Manager Coverage Plan:

Thursday Manager Coverage Plan:

Friday Manager Coverage Plan:

Saturday Manager Coverage Plan:

Sunday Manager Coverage Plan:

Manager Strength Review

Managers strongest at labor control:

Managers strongest at FOH leadership:

Managers strongest at BOH leadership:

Managers strongest at guest recovery:

Managers needing coaching:

Manager Coverage Risk Review

Check all risks that apply this week:

- ☐ Not enough opening leadership
- ☐ Not enough lunch leadership
- ☐ Not enough dinner leadership
- ☐ Not enough closing leadership
- ☐ Kitchen needs stronger leadership
- ☐ FOH needs stronger leadership
- ☐ Bar needs stronger leadership
- ☐ Manager labor may be too high
- ☐ Manager labor may be too low
- ☐ New manager needs support
- ☐ Guest recovery may be weak
- ☐ Labor decisions may need supervision
- ☐ Other: _____

Manager coverage correction plan:

Manager Coverage Approval

Does manager coverage match the expected needs of the business?

Yes / No / Needs Adjustment

What needs to be adjusted before posting the schedule?

Approved By: _____

Date: _____

Signature: _____

CROSS-TRAINING COVERAGE CHART

Purpose

The purpose of this section is to help managers identify which employees can cover multiple positions. Cross-training gives the restaurant more flexibility. It helps cover call-outs, schedule gaps, vacations, training needs, and sudden changes in sales volume. A restaurant with strong cross-training can protect service with fewer staffing emergencies.

Why It Matters

A restaurant becomes vulnerable when only one or two people can work a key position. If those employees call out, request time off, quit, or become unavailable, the schedule can fall apart. Cross-training protects the restaurant. It also helps employees grow, gives managers more scheduling options, and reduces the risk of one position becoming a constant problem. Cross-training can help with:

- Emergency coverage
- Call-outs
- Schedule conflicts
- Vacation coverage
- Labor flexibility
- Employee development
- Promotion readiness
- Staffing gaps
- Better teamwork
- Stronger shift recovery

Cross-training does not mean every employee should work every position. It means managers should know who can safely and effectively help where needed.

When to Use This Tool

Use this section:

- Before writing the schedule
- During staffing gap reviews
- After repeated call-outs
- When one position is always short
- When building training plans
- When promoting employees
- When reducing coverage risk
- During manager meetings
- During hiring planning

Manager Instructions

Use the cross-training chart to list each employee's primary position, secondary position, emergency coverage ability, and training status. Be honest. Do not mark an employee as trained unless they can perform the position safely and correctly without hurting the shift. Use this chart to identify where the restaurant is too dependent on too few people.

CROSS-TRAINING COVERAGE CHART

Restaurant Name: _____

Manager Completing Chart: _____

Date Completed: _____

Review Period: _____

Employee Cross-Training Review

Employee Name: _____

Primary Position: _____

Secondary Position: _____

Emergency Coverage Position: _____

Training Status:

- ☐ Not Trained
- ☐ In Training
- ☐ Can Cover Slow Shift
- ☐ Can Cover Busy Shift
- ☐ Fully Certified

Manager Notes:

Employee Name: _____

Primary Position: _____

Secondary Position: _____

Emergency Coverage Position: _____

Training Status:

- ☐ Not Trained
- ☐ In Training
- ☐ Can Cover Slow Shift
- ☐ Can Cover Busy Shift
- ☐ Fully Certified

Manager Notes:

Employee Name: _____

Primary Position: _____

Secondary Position: _____

Emergency Coverage Position: _____

Training Status:

- ☐ Not Trained
- ☐ In Training
- ☐ Can Cover Slow Shift
- ☐ Can Cover Busy Shift
- ☐ Fully Certified

Manager Notes:

Employee Name: _____

Primary Position: _____

Secondary Position: _____

Emergency Coverage Position: _____

Training Status:

- ☐ Not Trained
- ☐ In Training
- ☐ Can Cover Slow Shift
- ☐ Can Cover Busy Shift
- ☐ Fully Certified

Manager Notes:

Employee Name: _____

Primary Position: _____

Secondary Position: _____

Emergency Coverage Position: _____

Training Status:

- ☐ Not Trained
- ☐ In Training
- ☐ Can Cover Slow Shift
- ☐ Can Cover Busy Shift
- ☐ Fully Certified

Manager Notes:

Cross-Training Gap Review

Positions with enough backup coverage:

Positions with weak backup coverage:

Positions with no reliable backup coverage:

Employees who should be cross-trained next:

Cross-Training Priority Plan

Highest priority position to cross-train:

Reason:

Employee assigned for training:

Trainer assigned:

Training start date: _____

Target completion date: _____

Manager follow-up date: _____

Part 2 Manager Review

What did this staffing position review show?

Which department needs the most scheduling attention?

Why?

Which position creates the biggest coverage risk?

Why?

What staffing change should be made before the next schedule?

PART 2 COMPLETION SIGN-OFF

Part 2: Staffing Position Planner has been reviewed and completed.

Manager Name: _____

Position: _____

Restaurant: _____

Date Completed: _____

Manager Signature: _____

Reviewing Manager Signature: _____

Notes:

PART 3

WEEKLY SCHEDULE BUILDER

The weekly schedule is one of the most important labor control tools in the restaurant.

A schedule should not be built by habit.

A schedule should not be built only around who wants hours.

A schedule should not be copied from last week without review.

A strong schedule is built from expected sales, position needs, employee availability, business patterns, staffing strength, manager coverage, and labor targets.

Part 3 gives managers a step-by-step system for building a better weekly schedule before it is posted.

The goal is to make sure the schedule is reviewed before it becomes a problem.

A weak schedule creates problems all week.

A strong schedule gives the restaurant a better chance to control labor, protect service, and run smoother shifts.

WEEKLY SCHEDULE PLANNING PAGE

Purpose

The purpose of this section is to help managers prepare before writing the weekly schedule.

The schedule should begin with a planning page.

This page helps the manager review the week before placing employees into shifts.

Why It Matters

Many scheduling problems happen because managers begin with names instead of needs.

They start filling shifts before reviewing sales, events, labor results, availability, time-off requests, and position coverage.

This leads to repeated mistakes.

A weekly planning page helps the manager slow down and review the business first.

Before writing the schedule, the manager should know:

What sales are expected

Which days may be busy

Which days may be slow

Which employees are unavailable

Which time-off requests are approved

Which positions are weak

Which shifts need stronger employees

Which managers need to be scheduled

Where overtime risk may happen

What labor mistakes happened last week

A schedule should be built with purpose.

When to Use This Tool

Use this section:

Before writing every weekly schedule

Before holiday schedules

Before event weeks

Before seasonal changes

When labor percent has been high

When staffing complaints are increasing

When managers keep repeating the same schedule mistakes

When training a new scheduling manager

Manager Instructions

Complete this planning page before placing employees into shifts.

Do not skip the planning step.

The more carefully the schedule is reviewed before posting, the fewer problems the team should face during the week.

WEEKLY SCHEDULE PLANNING PAGE

Restaurant Name: _____
 Schedule Week Starting: _____
 Schedule Week Ending: _____
 Manager Writing Schedule: _____
 Date Schedule Started: _____
 Date Schedule Must Be Posted: _____
 Labor Target for Week: _____

1. Weekly Business Review

Forecasted Weekly Sales: \$ _____
 Last Week's Sales: \$ _____
 Same Week Last Year Sales: \$ _____
 Expected Sales Change:
 Increase / Decrease / Similar / Not Sure
 Reason for expected change:

2. Important Dates This Week

Check all that apply:

- ☐ Holiday
- ☐ Local event
- ☐ School event
- ☐ Sports event
- ☐ Concert or entertainment event
- ☐ Large reservation
- ☐ Catering order
- ☐ Banquet or private party
- ☐ Weather concern
- ☐ Promotion
- ☐ Payday
- ☐ Tourist traffic
- ☐ Seasonal change
- ☐ Staff meeting
- ☐ Training event
- ☐ Other: _____

Important notes:

3. Last Week's Labor Review

Last Week's Labor Percent: _____
 Labor Target: _____
 Was labor above target, below target, or on target?
 Above Target / Below Target / On Target / Not Sure
 Which day had the worst labor result?

Why?

Which shift had the biggest labor problem?

Why?

What must be corrected in this week's schedule?

4. Last Week's Staffing Review

Which shifts were overstaffed?

Which shifts were understaffed?

Which position caused the most problems?

Why?

Which employee placement did not work well?

Why?

5. Current Availability and Time-Off Review

Have all availability changes been reviewed?

Yes / No / Needs Review

Have all approved time-off requests been entered?

Yes / No / Needs Review

Are there any denied time-off requests that may still cause conflict?

Yes / No / Not Sure

Notes:

6. Weekly Schedule Priorities

This week, the schedule must protect:

- ☐ Labor target
- ☐ Guest service
- ☐ Kitchen speed
- ☐ Bar speed
- ☐ Prep readiness
- ☐ Dish flow
- ☐ Closing standards
- ☐ Training shifts
- ☐ Manager coverage
- ☐ Weekend coverage
- ☐ Event coverage
- ☐ Overtime control
- ☐ Cross-training

☐ Employee morale

☐ Other: _____

Top 3 schedule priorities this week:

7. Manager Notes Before Writing Schedule

Schedule Planning Sign-Off

Planning page completed before schedule was written.

Manager Name: _____

Date: _____

Signature: _____

SALES FORECAST WORKSHEET

Purpose

The purpose of this section is to help managers forecast sales before building the schedule.

The sales forecast does not have to be perfect.

It does need to be thoughtful.

A schedule built without a sales forecast is usually a guess.

Why It Matters

Labor should match expected business volume.

If the sales forecast is too high, the restaurant may schedule too much labor.

If the sales forecast is too low, the restaurant may schedule too little labor.

A good sales forecast helps the manager plan:

How many people are needed

Which positions are needed

When employees should start

When employees may be cut

Which shifts need strongest staff

Which dayparts need extra support

Which departments need closer attention

Sales forecasting helps managers prepare instead of react.

When to Use This Tool

Use this section:

Before every weekly schedule

Before holidays

Before weekends

Before events

Before seasonal changes

Before large catering orders

When labor percent is repeatedly high

When service is repeatedly understaffed

When managers are guessing at staffing levels

Manager Instructions

Use the worksheet below to forecast sales by day.

Review available reports, prior sales, reservations, known events, weather, seasonality, and current trends.

Write down the reason behind the forecast.

This helps future managers understand why the schedule was built the way it was.

SALES FORECAST WORKSHEET

Restaurant Name: _____

Schedule Week: _____

Manager Completing Forecast: _____

Date Completed: _____

Forecast Sources Used

Check all that apply:

- ☐ Last week sales
- ☐ Same week last year
- ☐ Four-week sales average
- ☐ Reservation book
- ☐ Event calendar
- ☐ Catering calendar
- ☐ Weather forecast
- ☐ Holiday calendar
- ☐ School calendar
- ☐ Sports calendar
- ☐ Local business trends
- ☐ Manager judgment
- ☐ Owner direction
- ☐ Other: _____

Notes:

Daily Sales Forecast

Monday

Last Week Monday Sales: \$ _____

Same Week Last Year Monday Sales: \$ _____

Forecasted Monday Sales: \$ _____

Expected Volume:

Low / Medium / High

Reason for Forecast:

Staffing Note:

Tuesday

Last Week Tuesday Sales: \$ _____

Same Week Last Year Tuesday Sales: \$ _____

Forecasted Tuesday Sales: \$ _____

Expected Volume:

Low / Medium / High

Reason for Forecast:

Staffing Note:

Wednesday

Last Week Wednesday Sales: \$ _____

Same Week Last Year Wednesday Sales: \$ _____

Forecasted Wednesday Sales: \$ _____

Expected Volume:

Low / Medium / High

Reason for Forecast:

Staffing Note:

Thursday

Last Week Thursday Sales: \$ _____

Same Week Last Year Thursday Sales: \$ _____

Forecasted Thursday Sales: \$ _____

Expected Volume:

Low / Medium / High

Reason for Forecast:

Staffing Note:

Friday

Last Week Friday Sales: \$ _____

Same Week Last Year Friday Sales: \$ _____

Forecasted Friday Sales: \$ _____

Expected Volume:

Low / Medium / High

Reason for Forecast:

Staffing Note:

Saturday

Last Week Saturday Sales: \$ _____

Same Week Last Year Saturday Sales: \$ _____

Forecasted Saturday Sales: \$ _____

Expected Volume:

Low / Medium / High

Reason for Forecast:

Staffing Note:

Sunday

Last Week Sunday Sales: \$ _____

Same Week Last Year Sunday Sales: \$ _____

Forecasted Sunday Sales: \$ _____

Expected Volume:

Low / Medium / High

Reason for Forecast:

Staffing Note:

Weekly Forecast Summary

Total Forecasted Weekly Sales: \$ _____

Highest Forecasted Sales Day: _____

Lowest Forecasted Sales Day: _____

Biggest Forecast Risk:

Manager Notes:

Sales Forecast Approval

Forecast reviewed before schedule was built.

Approved By: _____

Date: _____

Signature: _____

ADDITIONAL TOOL: LABOR BUDGET BUILDER

Purpose

This tool helps managers convert forecasted sales into a realistic labor dollar budget before the schedule is written.

Why It Matters

A schedule should be connected to a labor budget. Forecasted sales show expected volume. The labor target shows how much labor the restaurant can afford. Together, they help the manager decide how many labor dollars should be planned before names are placed on the schedule.

Manager Instructions

Use this page after the sales forecast is completed and before the schedule is built. Multiply forecasted sales by the labor target percent to create a labor dollar budget for each day. Then compare the planned schedule to the budget before posting.

Labor Budget Formula

Forecasted Sales x Labor Target Percent = Labor Dollar Budget

Example: \$10,000 x 25% = \$2,500 labor budget

LABOR BUDGET BUILDER WORKSHEET

Restaurant Name: _____

Schedule Week: _____

Manager Completing Budget: _____

Date Completed: _____

Day	Forecasted Sales	Labor Target %	Labor Dollar Budget	Scheduled Labor \$	Over/Under Budget	Notes
Monday	\$ _____	_____ %	\$ _____	\$ _____	\$ _____	_____
Tuesday	\$ _____	_____ %	\$ _____	\$ _____	\$ _____	_____
Wednesday	\$ _____	_____ %	\$ _____	\$ _____	\$ _____	_____
Thursday	\$ _____	_____ %	\$ _____	\$ _____	\$ _____	_____
Friday	\$ _____	_____ %	\$ _____	\$ _____	\$ _____	_____
Saturday	\$ _____	_____ %	\$ _____	\$ _____	\$ _____	_____
Sunday	\$ _____	_____ %	\$ _____	\$ _____	\$ _____	_____
Weekly Total	\$ _____	_____ %	\$ _____	\$ _____	\$ _____	_____

Budget Review Questions

Which day is most likely to exceed labor budget?

Which day has the most room for labor adjustment?

Which day needs strongest labor control attention?

What change should be made before the schedule is posted?

Labor Budget Approval

Reviewed By: _____

Date: _____

Signature: _____

COMPLETED EXAMPLE: LABOR BUDGET BUILDER

This example shows the level of detail expected before a weekly schedule is approved.

Restaurant Name: Riverside Grill

Schedule Week: August 3-9

Manager Completing Budget: Jordan Lee

Forecasted Weekly Sales: \$42,000

Labor Target: 25%

Weekly Labor Dollar Budget: \$10,500

Monday: \$4,500 sales $\times$ 25% = \$1,125 labor budget

Tuesday: \$4,800 sales $\times$ 25% = \$1,200 labor budget

Wednesday: \$5,200 sales $\times$ 25% = \$1,300 labor budget

Thursday: \$5,500 sales $\times$ 25% = \$1,375 labor budget

Friday: \$7,000 sales $\times$ 25% = \$1,750 labor budget

Saturday: \$8,500 sales $\times$ 25% = \$2,125 labor budget

Sunday: \$6,500 sales $\times$ 25% = \$1,625 labor budget

Manager review: Friday and Saturday require the strongest FOH, BOH, bar, dish, and manager coverage. Monday and Tuesday should use staggered start times and earlier cut checkpoints.

Approved by: Taylor Morgan Date: August 1

STAFFING NEEDS BY DAYPART

Purpose

The purpose of this section is to help managers break the schedule down by daypart.
A restaurant does not need the same staffing level all day.
Opening, lunch, afternoon, dinner, late night, and closing may all require different labor.
Daypart planning helps managers schedule labor where it is needed most.

Why It Matters

Many labor problems happen because staffing is not adjusted by time of day.
A restaurant may be overstaffed in the afternoon and understaffed at dinner.
It may have enough people scheduled for the day but not enough during the rush.
It may have enough servers but not enough support.
It may have enough cooks but not enough dish coverage.
Daypart planning helps managers review the shift in smaller pieces.
A strong schedule should answer:
Who opens?
Who handles lunch?
Who covers the afternoon?
Who protects dinner?
Who closes?
Who supports each transition?
When does each position need to arrive?
When should each position be cut if volume drops?

When to Use This Tool

Use this section:
Before writing the weekly schedule
When labor is high during slow periods
When the restaurant is short during peak periods
When shift transitions are weak
When opening work is incomplete
When closing work is inconsistent
When employees are scheduled at the wrong times
During manager schedule training

Manager Instructions

Use this page to review each daypart before finalizing the schedule.
Do not only review total labor hours.
Review when those labor hours are scheduled.
Labor in the wrong place at the wrong time is still a labor problem.

STAFFING NEEDS BY DAYPART WORKSHEET

Restaurant Name: _____

Schedule Week: _____

Manager Completing Review: _____

Date Completed: _____

Opening Daypart Review

Opening Volume Expected:

Low / Medium / High

Opening Positions Needed:

- ☐ Opening manager
- ☐ Opening server
- ☐ Opening host
- ☐ Opening bartender
- ☐ Opening cook
- ☐ Opening prep
- ☐ Opening dish
- ☐ Opening to-go
- ☐ Cleaning / setup support
- ☐ Other: _____

Opening Start Time Review:

Earliest Needed Start Time: _____

Latest Acceptable Start Time: _____

Opening labor concern:

Lunch Daypart Review

Lunch Volume Expected:

Low / Medium / High

Lunch Positions Needed:

- ☐ Floor manager
- ☐ Kitchen lead
- ☐ Servers
- ☐ Host
- ☐ Bartender
- ☐ Bussers
- ☐ Food runners
- ☐ Expo
- ☐ Line cooks
- ☐ Dish
- ☐ Prep support
- ☐ To-go
- ☐ Other: _____

Lunch Rush Time Expected:

From: _____ To: _____

Lunch labor concern:

Afternoon / Mid-Shift Review

Afternoon Volume Expected:

Low / Medium / High

Afternoon Positions Needed:

- ☐ Manager coverage
- ☐ Server coverage
- ☐ Bar coverage
- ☐ Line coverage
- ☐ Prep support
- ☐ Dish support
- ☐ Side work support
- ☐ Cleaning support
- ☐ Other: _____

Afternoon transition risk:

Should labor be reduced during this daypart?

Yes / No / Possibly

Possible cut positions:

Dinner Daypart Review

Dinner Volume Expected:

Low / Medium / High

Dinner Positions Needed:

- ☐ Floor manager
- ☐ Kitchen manager or lead
- ☐ Host
- ☐ Servers
- ☐ Bartenders
- ☐ Bussers
- ☐ Runners
- ☐ Expo
- ☐ Line cooks
- ☐ Prep support
- ☐ Dish
- ☐ To-go
- ☐ Barback
- ☐ Other: _____

Expected Dinner Rush:

From: _____ To: _____

Dinner labor concern:

Late Night / Final Service Review

Late Night Volume Expected:

Low / Medium / High / Not Applicable

Late Night Positions Needed:

- ☐ Closing manager
- ☐ Server
- ☐ Bartender
- ☐ Cook
- ☐ Dish
- ☐ Cleaning support
- ☐ Other: _____

Late night cut plan:

Closing Daypart Review

Closing Workload Expected:

Low / Medium / High

Closing Positions Needed:

- ☐ Closing manager
- ☐ Closing server
- ☐ Closing bartender
- ☐ Closing cook
- ☐ Closing dish
- ☐ Closing prep
- ☐ Cleaning support
- ☐ Other: _____

Closing labor concern:

Daypart Adjustment Notes

Where is the schedule likely too heavy?

Where is the schedule likely too light?

Which daypart needs the strongest manager attention?

Why?

Daypart Review Approval

Daypart staffing has been reviewed before schedule posting.

Reviewed By: _____

Date: _____

Signature: _____

POSITION-BY-POSITION SCHEDULE PLANNER

Purpose

The purpose of this section is to help managers schedule by position instead of only by employee name.

A complete schedule should cover every required operating position.

This planner helps managers review the schedule one department at a time.

Why It Matters

A schedule can look full and still be weak.

For example:

The restaurant may have servers but no host.

The kitchen may have cooks but no strong grill cook.

The bar may have a bartender but no barback on a high-volume night.

The restaurant may have opening coverage but weak closing coverage.

The schedule should be reviewed by position before it is posted.

This helps prevent coverage gaps that are easy to miss when the manager only looks at names.

When to Use This Tool

Use this section:

While writing the weekly schedule

Before posting the weekly schedule

When a department keeps struggling

When managers need a final coverage review

When cross-training coverage is being used

When call-out risk is high

When training shifts are scheduled

Manager Instructions

Use this planner after the first schedule draft is built.

Review each position.

Mark whether it is covered, weak, overstaffed, or needs adjustment.

Do not post the schedule until major position gaps are corrected or approved.

POSITION-BY-POSITION SCHEDULE PLANNER

Restaurant Name: _____

Schedule Week: _____

Manager Completing Planner: _____

Date Completed: _____

FOH Position Review

Host Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

Server Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

Busser / Server Assistant Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

Runner Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

Expo Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

To-Go Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

BOH Position Review

Grill Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed

☐ Needs Adjustment

Notes:

Fry Coverage:

☐ Covered

☐ Weak

☐ Overstaffed

☐ Needs Adjustment

Notes:

Sauté Coverage:

☐ Covered

☐ Weak

☐ Overstaffed

☐ Needs Adjustment

Notes:

Pantry / Salad Coverage:

☐ Covered

☐ Weak

☐ Overstaffed

☐ Needs Adjustment

Notes:

Pizza / Specialty Station Coverage:

☐ Covered

☐ Weak

☐ Overstaffed

☐ Needs Adjustment

Notes:

Kitchen Expo Coverage:

☐ Covered

☐ Weak

☐ Overstaffed

☐ Needs Adjustment

Notes:

Prep Coverage:

☐ Covered

☐ Weak

☐ Overstaffed

☐ Needs Adjustment

Notes:

Dish Coverage:

☐ Covered

☐ Weak

☐ Overstaffed

☐ Needs Adjustment

Notes:

Bar Position Review

Bartender Coverage:

☐ Covered

- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

Service Bar Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

Barback Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

Cocktail / Bar Floor Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

Management Position Review

Opening Manager Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

Lunch Manager Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

Dinner Manager Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

Closing Manager Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes:

Kitchen Lead Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes: _____

Floor Lead Coverage:

- ☐ Covered
- ☐ Weak
- ☐ Overstaffed
- ☐ Needs Adjustment

Notes: _____

Position Gaps Before Posting

Positions that must be fixed before posting:

_____Positions that are approved but need manager attention:

_____Positions with possible overstaffing:

Position Planner Approval

Position coverage has been reviewed.

Approved By: _____

Date: _____

Signature: _____

ADDITIONAL TOOL: WEEKLY SCHEDULE GRID TEMPLATE

Purpose

This tool gives managers a blank weekly schedule grid that can be used before entering the final schedule into the restaurant scheduling system.

Why It Matters

A schedule grid helps managers see coverage gaps, overlap problems, weak dayparts, and overstaffed periods before the schedule is posted. It also makes it easier to compare department coverage across the full week.

Manager Instructions

Use this grid as a planning draft. Write the employee name, position, and shift time in the correct day. Review the full week before posting the final schedule.

WEEKLY SCHEDULE GRID

Restaurant Name: _____

Schedule Week: _____

Manager Writing Schedule: _____

Labor Target: _____

Position / Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Manager	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Host	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Server	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Server Support	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Bartender	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Barback	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Grill	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Fry	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Sauté	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Pantry / Salad	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Prep	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Dish	____-____	____-____	____-____	____-____	____-____	____-____	____-____
To-Go	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Expo / Runner	____-____	____-____	____-____	____-____	____-____	____-____	____-____
Closer / Utility	____-____	____-____	____-____	____-____	____-____	____-____	____-____

Schedule Grid Review

Which day looks too heavy?

Which day looks too light?

Which position is missing coverage?

Which shift needs stronger employees?

What must change before posting?

Schedule Grid Sign-Off

Reviewed By: _____

Date: _____

Signature: _____

EMPLOYEE AVAILABILITY TRACKER

Purpose

The purpose of this section is to help managers track employee availability before writing the schedule.

Availability problems create schedule problems.

A manager needs a clear record of who can work, who cannot work, and what restrictions have been approved.

Why It Matters

Scheduling mistakes often happen when availability is outdated, unclear, or ignored.

Employees may change school schedules, family responsibilities, second jobs, transportation needs, or personal availability.

If managers do not track those changes clearly, schedules may be posted with avoidable conflicts.

This can lead to:

Call-outs

Shift swaps

Employee frustration

Manager frustration

Uncovered shifts

Overtime risk

Weak coverage

Late schedule changes

A clear availability tracker helps managers build a schedule that is more accurate before it is posted.

When to Use This Tool

Use this section:

Before writing every schedule

When employees submit availability changes

When school schedules change

When employees repeatedly request shift swaps

When schedule conflicts increase

When managers are training on scheduling

When reviewing employee reliability

Manager Instructions

Use this tracker to record approved employee availability.

Do not rely only on memory.

If an employee requests a change, record whether it was approved, denied, or pending.

Only approved availability should be used for schedule building.

EMPLOYEE AVAILABILITY TRACKER

Restaurant Name: _____

Schedule Week: _____

Manager Completing Tracker: _____

Date Completed: _____

Employee Availability Record

Employee Name: _____

Position: _____

Approved Availability:

Monday: _____

Tuesday: _____

Wednesday: _____

Thursday: _____

Friday: _____

Saturday: _____

Sunday: _____

Restrictions or Notes: _____

Availability Status:

- ☐ Current
- ☐ Needs Update
- ☐ Pending Approval
- ☐ Temporary Restriction

Manager Initials: _____

Employee Name: _____

Position: _____

Approved Availability:

Monday: _____

Tuesday: _____

Wednesday: _____

Thursday: _____

Friday: _____

Saturday: _____

Sunday: _____

Restrictions or Notes: _____

Availability Status:

- ☐ Current
- ☐ Needs Update
- ☐ Pending Approval
- ☐ Temporary Restriction

Manager Initials: _____

Employee Name: _____

Position: _____

Approved Availability:

Monday: _____

Tuesday: _____

Wednesday: _____

Thursday: _____

Friday: _____

Saturday: _____

Sunday: _____

Restrictions or Notes: _____

Availability Status:

- ☐ Current
- ☐ Needs Update
- ☐ Pending Approval
- ☐ Temporary Restriction

Manager Initials: _____

Employee Name: _____

Position: _____

Approved Availability:

Monday: _____

Tuesday: _____

Wednesday: _____

Thursday: _____

Friday: _____

Saturday: _____

Sunday: _____

Restrictions or Notes: _____

Availability Status:

- ☐ Current
- ☐ Needs Update
- ☐ Pending Approval
- ☐ Temporary Restriction

Manager Initials: _____

Availability Problem Review

Employees with unclear availability:

Employees with repeated schedule conflicts:

Employees who may need follow-up:

Availability issues that affect this week's schedule:

Manager Action Needed:

Availability Review Sign-Off

Availability has been reviewed before schedule posting.

Reviewed By: _____

Date: _____

Signature: _____

TIME-OFF REQUEST TRACKER

Purpose

The purpose of this section is to help managers track time-off requests before the weekly schedule is written. Time-off requests affect coverage, labor planning, manager scheduling, cross-training, and shift strength. A clear tracker helps prevent missed requests and last-minute schedule problems.

Why It Matters

Time-off requests can create serious schedule gaps if they are not reviewed early.

A single approved request may not create a problem.

Several requests in the same department, on the same weekend, or during the same event can create a major coverage issue.

Managers need to know:

Who requested off

What date they requested

Whether it was approved

Which position they normally cover

Whether coverage has been found

Whether the request creates a staffing risk

A time-off request is not only an employee note.

It is a schedule planning factor.

When to Use This Tool

Use this section:

Before writing the weekly schedule

When time-off requests are submitted

Before holidays

Before school breaks

Before summer season

Before weekends with events

When several employees request the same dates off

When managers keep missing requests

Manager Instructions

Use this tracker to record time-off requests clearly.

Do not wait until the schedule is almost finished to review requests.

If a request creates a coverage issue, write down the coverage plan before approving the schedule.

TIME-OFF REQUEST TRACKER

Restaurant Name: _____

Schedule Week: _____

Manager Completing Tracker: _____

Date Completed: _____

Time-Off Request Record

Employee Name: _____

Position: _____

Date Requested Off: _____

Request Submitted On: _____

Status:

- ☐ Approved
- ☐ Denied
- ☐ Pending
- ☐ Needs Coverage

Coverage Needed?

Yes / No

Coverage Plan:

Manager Notes:

Manager Initials: _____

Employee Name: _____

Position: _____

Date Requested Off: _____

Request Submitted On: _____

Status:

- ☐ Approved
- ☐ Denied
- ☐ Pending
- ☐ Needs Coverage

Coverage Needed?

Yes / No

Coverage Plan:

Manager Notes:

Manager Initials: _____

Employee Name: _____

Position: _____

Date Requested Off: _____

Request Submitted On: _____

Status:

- ☐ Approved
- ☐ Denied
- ☐ Pending
- ☐ Needs Coverage

Coverage Needed?

Yes / No

Coverage Plan:

Manager Notes:

Manager Initials: _____

Employee Name: _____

Position: _____

Date Requested Off: _____

Request Submitted On: _____

Status:

☐ Approved

☐ Denied

☐ Pending

☐ Needs Coverage

Coverage Needed?

Yes / No

Coverage Plan:

Manager Notes:

Manager Initials: _____

Time-Off Risk Review

Are multiple employees off on the same day?

Yes / No / Not Sure

If yes, list dates:

Are multiple employees off from the same department?

Yes / No / Not Sure

If yes, list department and dates:

Does any approved request create a weak shift?

Yes / No / Not Sure

Explain:

Does coverage need to be found before posting the schedule?

Yes / No

Coverage needed:

Time-Off Review Sign-Off

Time-off requests have been reviewed before schedule posting.

Reviewed By: _____

Date: _____

Signature: _____

SCHEDULE CONFLICT REVIEW

Purpose

The purpose of this section is to help managers catch schedule problems before the schedule is posted.

A schedule conflict that is caught before posting is a planning issue.

A schedule conflict that is found after posting becomes an operational problem.

Why It Matters

Schedule conflicts create stress for employees and managers.

They can cause call-outs, shift swaps, uncovered positions, overtime, weak coverage, and unnecessary frustration.

Common schedule conflicts include:

Employee scheduled outside availability

Approved time-off missed

Too many employees off in one department

Not enough coverage during a peak shift

Too many trainees scheduled together

Overtime risk

Weak closing coverage

No backup for call-out risk

Manager coverage gap

Position coverage gap

A schedule should be reviewed before it is posted.

This review gives managers one final chance to correct problems.

When to Use This Tool

Use this section:

After the schedule draft is written

Before the schedule is posted

Before holiday schedules

Before high-volume weeks

When scheduling errors have happened before

When a new manager is learning schedule writing

When multiple managers contribute to the schedule

Manager Instructions

Use the checklist below as the final conflict review before posting.

If any item is checked as a problem, correct it or write the reason it is being approved.

Do not post a schedule with known problems unless the manager understands the risk.

SCHEDULE CONFLICT REVIEW

Restaurant Name: _____

Schedule Week: _____

Manager Reviewing Schedule: _____

Date Reviewed: _____

Availability Conflicts

- ☐ No employees scheduled outside approved availability
- ☐ All availability changes reviewed
- ☐ Temporary restrictions reviewed
- ☐ Employees with unclear availability flagged

Availability conflict notes:

Time-Off Conflicts

- ☐ All approved time-off requests entered
- ☐ Denied requests reviewed for possible conflict
- ☐ Pending requests resolved or noted
- ☐ Coverage plan created for approved requests

Time-off conflict notes:

Position Coverage Conflicts

- ☐ FOH positions covered
- ☐ BOH positions covered
- ☐ Bar positions covered
- ☐ Prep positions covered
- ☐ Dish positions covered
- ☐ Manager positions covered
- ☐ Closing positions covered

Position coverage notes:

Shift Strength Conflicts

- ☐ Strong employees placed during peak periods
- ☐ Weak employees not grouped without support
- ☐ New employees scheduled with trainers or support
- ☐ Key stations covered by capable employees
- ☐ Busy shifts have enough leadership

Shift strength notes:

Labor Control Conflicts

- ☐ Slow periods reviewed for overstaffing
- ☐ Peak periods reviewed for understaffing
- ☐ Overtime risk reviewed
- ☐ Too many long shifts reviewed
- ☐ Too many short shifts reviewed
- ☐ Labor target considered

Labor control notes:

Manager Coverage Conflicts

- ☐ Opening manager coverage reviewed
- ☐ Lunch manager coverage reviewed
- ☐ Dinner manager coverage reviewed
- ☐ Closing manager coverage reviewed
- ☐ Kitchen leadership reviewed
- ☐ FOH leadership reviewed

Manager coverage notes:

Final Conflict List

Conflicts that must be corrected before posting:

Conflicts approved with manager awareness:

Reason approved:

Schedule Conflict Review Sign-Off

Schedule conflicts have been reviewed.

Approved for posting?

Yes / No / Approved With Changes

Reviewed By: _____

Date: _____

Signature: _____

ADDITIONAL TOOL: OVERTIME RISK TRACKER

Purpose

This tool helps managers identify overtime risk before the schedule is posted and during the operating week.

Why It Matters

Overtime can damage labor control quickly. Sometimes overtime happens because the schedule was built incorrectly. Sometimes it happens because of call-outs, late cuts, staffing gaps, or repeated use of the same strong employees. Managers should review overtime risk before it becomes payroll damage.

Manager Instructions

Use this tracker before posting the schedule and update it during the week when employees pick up shifts, stay late, or cover call-outs. Follow company policy and applicable labor rules for all overtime decisions.

OVERTIME RISK TRACKER

Restaurant Name: _____

Schedule Week: _____

Manager Completing Tracker: _____

Employee	Position	Scheduled Hours	Current Actual Hours	Risk Level	Cause of Risk	Manager Action
_____	_____	_____	_____	Low / Med / High	_____	_____
_____	_____	_____	_____	Low / Med / High	_____	_____
_____	_____	_____	_____	Low / Med / High	_____	_____
_____	_____	_____	_____	Low / Med / High	_____	_____
_____	_____	_____	_____	Low / Med / High	_____	_____
_____	_____	_____	_____	Low / Med / High	_____	_____
_____	_____	_____	_____	Low / Med / High	_____	_____
_____	_____	_____	_____	Low / Med / High	_____	_____
_____	_____	_____	_____	Low / Med / High	_____	_____
_____	_____	_____	_____	Low / Med / High	_____	_____

Overtime Cause Review

- ☐ Too many scheduled hours
- ☐ Employee stayed late
- ☐ Call-out coverage
- ☐ Position shortage
- ☐ Not enough cross-training
- ☐ Manager did not cut on time
- ☐ Employee picked up extra shift
- ☐ Other: _____

Overtime Prevention Plan

Who is closest to overtime?

What shift needs adjustment?

Can another trained employee cover instead?

What schedule change should be made before posting?

What manager decision must be watched this week?

Overtime Risk Sign-Off

Reviewed By: _____

Date: _____

Signature: _____

MANAGER SCHEDULE APPROVAL CHECKLIST

Purpose

The purpose of this section is to give managers a final approval checklist before posting the weekly schedule. This checklist helps confirm that the schedule has been reviewed for labor, coverage, availability, sales, and manager accountability.

Why It Matters

Once a schedule is posted, it becomes the labor plan for the week.

If the schedule is poorly reviewed, the restaurant may spend the entire week correcting avoidable problems.

A final approval checklist helps managers pause before posting and ask:

Does this schedule match expected sales?

Does it protect guest experience?

Does it control labor?

Does it cover key positions?

Does it support managers?

Does it reduce known risks?

The final review should not be skipped.

When to Use This Tool

Use this section:

Before posting every weekly schedule

Before holiday schedules

Before event schedules

Before new manager schedules are approved

When labor problems keep repeating

When ownership wants stronger schedule accountability

Manager Instructions

Complete this checklist before the schedule is posted.

If an item is not completed, either correct the schedule or write why the schedule is being approved anyway.

The manager who signs this page is accepting responsibility for the schedule plan.

MANAGER SCHEDULE APPROVAL CHECKLIST

Restaurant Name: _____

Schedule Week: _____

Schedule Written By: _____

Schedule Reviewed By: _____

Date Reviewed: _____

Date Posted: _____

Sales and Forecast Review

- ☐ Weekly sales forecast reviewed
- ☐ Daily sales forecast reviewed
- ☐ Prior week sales reviewed
- ☐ Same week last year reviewed when available
- ☐ Weather reviewed
- ☐ Events reviewed
- ☐ Reservations reviewed
- ☐ Catering or large orders reviewed

Notes:

Labor Review

- ☐ Weekly labor target reviewed
- ☐ Prior week labor percent reviewed
- ☐ High labor days reviewed
- ☐ Low labor days reviewed
- ☐ Scheduled labor reviewed against expected sales
- ☐ Overtime risk reviewed
- ☐ Slow dayparts reviewed for possible overstaffing
- ☐ Peak dayparts reviewed for possible understaffing

Notes:

Department Coverage Review

- ☐ FOH coverage reviewed
- ☐ BOH coverage reviewed
- ☐ Bar coverage reviewed
- ☐ Prep coverage reviewed
- ☐ Dish coverage reviewed
- ☐ Manager coverage reviewed

Notes:

Employee Review

- ☐ Availability reviewed
- ☐ Time-off requests reviewed
- ☐ Training shifts reviewed
- ☐ Strong employees placed on key shifts
- ☐ New employees scheduled with support
- ☐ Repeated schedule conflict employees reviewed
- ☐ Cross-trained employees used where needed

Notes:

Manager Accountability Review

- ☐ Schedule has a clear labor plan
- ☐ Known weak shifts have manager notes
- ☐ Coverage risks have a backup plan
- ☐ Manager coverage supports the business
- ☐ Schedule can be explained if questioned
- ☐ Manager accepts responsibility for schedule quality

Notes:

Final Approval

Schedule Status:

- ☐ Approved for Posting
- ☐ Approved With Changes
- ☐ Not Approved

Required changes before posting:

Manager Approving Schedule: _____

Position: _____

Date: _____

Signature: _____

ADDITIONAL TOOL: SCHEDULE REVISION LOG

Purpose

This tool helps managers track changes made after the schedule has been posted.

Why It Matters

A schedule may look good when posted, but changes during the week can create labor problems. Shift swaps, call-ins, time changes, added employees, removed employees, and late approvals should be documented so managers can understand what changed between the posted schedule and the actual labor result.

Manager Instructions

Use this log any time the posted schedule changes. Record who approved the change and why it was made. Review the log during the weekly labor meeting.

SCHEDULE REVISION LOG

Restaurant Name: _____

Schedule Week: _____

Manager Maintaining Log: _____

Date Changed	Employee	Original Shift	New Shift / Change	Reason	Approved By	Labor Impact
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Schedule Revision Review

How many schedule changes happened this week?

Which department had the most changes?

Did any revision create overtime risk?

Did any revision weaken coverage?

What should change in the next schedule?

Schedule Revision Log Sign-Off

Reviewed By: _____

Date: _____

Signature: _____

PART 3 FINAL REVIEW

WEEKLY SCHEDULE BUILDER

This final review should be completed after Part 3 has been finished.

The manager should now understand:

- How to prepare before writing the schedule
- How to forecast sales before scheduling labor
- How to review staffing by daypart
- How to check position coverage
- How to track availability
- How to track time-off requests
- How to catch schedule conflicts
- How to approve the schedule before posting

Manager Knowledge Check

1. Why should the schedule start with a planning page?

2. Why is sales forecasting important before scheduling labor?

3. Why should staffing be reviewed by daypart?

4. What is the difference between scheduling by name and scheduling by position?

5. What schedule conflict happens most often in this restaurant?

6. What should be reviewed before the schedule is posted?

PART 3 MANAGER ACTION PLAN

The biggest schedule-building issue I need to improve is:

The reason this issue matters is:

The first action I will take is:

The second action I will take is:

The third action I will take is:

I will review my progress on this date:

Manager Name: _____

Manager Signature: _____

Reviewing Manager: _____

Date: _____

PART 3 COMPLETION SIGN-OFF

Part 3: Weekly Schedule Builder has been reviewed and completed.

Manager Name: _____

Position: _____

Restaurant: _____

Date Completed: _____

Manager Signature: _____

Reviewing Manager Signature: _____

Notes:

COMPLETED WEEKLY SCHEDULING CYCLE EXAMPLE

This completed example shows how the sales forecast, labor budget, staffing plan, overtime review, schedule approval, and actual results should connect. The numbers are examples only and should be replaced with the restaurant's approved reports and targets.

Example Restaurant and Week

Restaurant: Riverside Grill Schedule Week: August 3-9

Scheduling Manager: Jordan Lee Reviewing Manager: Taylor Morgan

Weekly Sales Forecast: \$42,000 Labor Target: 25%

Weekly Labor Dollar Budget: \$10,500 Planned Scheduled Labor: \$10,380

STEP 1: SALES FORECAST AND LABOR BUDGET

Day	Forecasted Sales	Labor Target	Labor Budget
Monday	\$4,500	25%	\$1,125
Tuesday	\$4,800	25%	\$1,200
Wednesday	\$5,200	25%	\$1,300
Thursday	\$5,500	25%	\$1,375
Friday	\$7,000	25%	\$1,750
Saturday	\$8,500	25%	\$2,125
Sunday	\$6,500	25%	\$1,625
WEEK	\$42,000	25%	\$10,500

Forecast notes: Friday and Saturday require the strongest FOH, BOH, bar, dish, and manager coverage. Monday and Tuesday should use staggered start times and earlier cut checkpoints. A Saturday sports event and two large reservations are included in the forecast.

STEP 2: POSITION AND DAYPART COVERAGE PLAN

Day	Peak Period	Coverage Priority	Planned Decision Checkpoint
Monday	Lunch	Lean opening; protect prep and dish	1:30 p.m.
Tuesday	Dinner	Strong line lead; flexible server sections	7:30 p.m.
Wednesday	Dinner	Full core stations; one cross-trained closer	8:00 p.m.
Thursday	Dinner	Add runner only if reservation pace holds	7:00 p.m.
Friday	Dinner	Strong host, bar, expo, runner, dish, and two leaders	8:00 p.m.
Saturday	Dinner	Maximum approved peak coverage; late dish protection	8:30 p.m.
Sunday	Lunch	Strong lunch; controlled dinner close	2:00 p.m.

Manager placement decisions:

- ☐ Strongest kitchen lead scheduled Friday and Saturday dinner.
- ☐ Strongest floor lead scheduled during the Saturday event period.
- ☐ New server scheduled Tuesday and Wednesday with a certified trainer, not during the Saturday peak.
- ☐ Cross-trained utility employee available Friday and Saturday for dish or prep recovery.
- ☐ Closing responsibilities assigned before the schedule is posted.

STEP 3: OVERTIME AND CONFLICT REVIEW

Employee	Planned Hours	Risk	Action Taken
Alexis R.	39.0	High	Removed optional Thursday close; manager verifies Friday clock-out.
Marcus T.	37.5	Medium	No unscheduled extension without manager approval.
Riley S.	34.0	Low	Cross-trained backup for Friday call-out only.
Jordan L.	45.0 salaried	Review	Manager schedule reviewed separately under company policy.

Conflict review: All approved time-off requests and current availability records were checked. One Saturday availability conflict was corrected before posting. No uncovered key position remained.

Final Approval Check

- ☐ Forecast reviewed
- ☐ Labor budget reviewed
- ☐ Position coverage reviewed
- ☐ Manager coverage reviewed
- ☐ Overtime risk reviewed
- ☐ Availability and time-off reviewed
- ☐ Opening and closing coverage reviewed
- ☐ Schedule approved before posting

Approved By: Taylor Morgan Approval Date: August 1

STEP 4: ACTUAL RESULTS AND VARIANCE REVIEW

Measure	Plan / Forecast	Actual	Variance
Weekly Sales	\$42,000	\$41,250	-\$750
Labor Dollars	\$10,380 scheduled	\$10,690	+\$310
Labor Percent	25.0% target	25.92%	+0.92 points
Labor Hours	414 scheduled	426 actual	+12 hours
Overtime Hours	0 planned	4 actual	+4 hours

What changed during the week:

- ☐ Friday call-out required a replacement who entered overtime.
- ☐ Saturday dish coverage stayed 2.5 hours longer because the event ran late.
- ☐ Sunday sales finished \$600 below forecast, but closing labor was not reduced soon enough.
- ☐ Guest service and ticket times remained within standards during the busiest shifts.

Manager conclusion: The schedule protected peak service, but overtime prevention and Sunday closing decisions need improvement. The next schedule should assign a non-overtime Friday backup, set a Sunday 7:30 p.m. labor checkpoint, and require approval before extending any employee projected above the weekly overtime threshold.

Next Week's Corrections

- ☐ Schedule a qualified Friday backup with at least eight hours of overtime room.
- ☐ Add a Sunday sales-and-labor checkpoint before the final dinner cut.
- ☐ Keep Saturday dish protection, but set a documented recovery and release standard.
- ☐ Review schedule revisions during the next weekly labor meeting.

Reviewed By: Taylor Morgan Review Date: August 10

PART 4

LABOR PERCENT TRACKER

Labor control must be tracked after the schedule is written.

A schedule is only the plan.

Actual labor results show what really happened.

Part 4 helps managers track labor percent by day, week, department, shift, and daypart. It also helps managers compare sales to labor and diagnose labor problems before they repeat.

The purpose of this part is to help managers stop guessing.

A labor report should not be something managers only look at after the damage is done.

Labor should be reviewed during the week, discussed after the week, and used to build a better next schedule.

Good labor tracking helps managers answer:

Did labor match sales?

Was the schedule too heavy?

Was the schedule too light?

Did managers cut correctly?

Did employees stay too late?

Did call-outs affect labor?

Did low labor hurt service?

Which department caused the issue?

Which shift caused the issue?

What needs to change next week?

Labor percent is not just a number.

It is a clue.

Managers must learn how to read the clue and act on it.

DAILY LABOR PERCENT TRACKER

Purpose

The purpose of this section is to help managers track labor percent each day.

Daily tracking allows managers to see problems before the week is over.

If labor is high on Monday, Tuesday, and Wednesday, the manager should not wait until the end of the week to start correcting the problem.

Why It Matters

Weekly labor control is built one day at a time.

A restaurant may miss its weekly labor target because of one terrible labor day, several small misses, or repeated late cuts.

Daily tracking helps managers see the pattern earlier.

A daily labor percent tracker helps identify:

Sales below forecast

Labor over target

Employees staying too late

Cuts made too late

Weak productivity

Department problems

Call-out coverage problems

Training labor impact

Manager decision problems

Guest impact from low labor

Daily tracking does not mean managers should panic over every number.

It means managers should pay attention and respond with judgment.

When to Use This Tool

Use this section:

At the end of each business day

During the next morning manager review

When labor percent is above target

When sales are below forecast

When managers need daily accountability

When reviewing cut decisions

When comparing schedule plan to actual results

When preparing for weekly labor meetings

Manager Instructions

Complete one daily tracker for each business day.

Use the restaurant's approved labor report, POS report, payroll report, or management report.

Write the reason for the result, not just the number.

A number without explanation does not help the next schedule improve.

DAILY LABOR PERCENT TRACKER

Restaurant Name: _____

Date: _____

Day of Week: _____

Manager Completing Tracker: _____

Shift or Full Day Reviewed: _____

Labor Target Percent: _____

1. Sales and Labor Numbers

Forecasted Sales: \$ _____

Actual Sales: \$ _____

Sales Difference: \$ _____

Scheduled Labor Dollars: \$ _____

Actual Labor Dollars: \$ _____

Labor Dollar Difference: \$ _____

Actual Labor Percent: _____

Labor Target Percent: _____

Difference From Target: _____

2. Result Review

Was labor above, below, or on target?

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Not Sure

Was sales volume above or below forecast?

- ☐ Above Forecast
- ☐ Below Forecast
- ☐ On Forecast
- ☐ Not Sure

Was the labor result acceptable?

Yes / No / Needs Review

Explain:

3. Labor Issue Checklist

Check all that apply:

- ☐ Sales were lower than expected
- ☐ Sales were higher than expected
- ☐ Too many employees scheduled
- ☐ Too few employees scheduled
- ☐ Employees stayed too late
- ☐ Employees were cut too early
- ☐ Employees were cut too late
- ☐ Call-outs affected the shift
- ☐ Extra employees were called in
- ☐ Training hours affected labor
- ☐ Prep labor was high
- ☐ Dish labor was high
- ☐ Bar labor was high
- ☐ FOH labor was high
- ☐ BOH labor was high

- ☐ Manager labor was high
- ☐ Overtime affected labor
- ☐ Productivity was weak
- ☐ Guest experience required extra labor
- ☐ Weather affected sales
- ☐ Event volume changed sales
- ☐ No major issue noticed
- ☐ Other: _____

4. Manager Decision Review

Were cut decisions made during the day?

Yes / No / Not Needed

If yes, who was cut and when?

Were any employees kept longer than planned?

Yes / No

If yes, who and why?

Were any employees called in?

Yes / No

If yes, who and why?

Did manager decisions help or hurt labor?

Helped / Hurt / Mixed / Not Sure

Explain:

5. Guest Experience Review

Did labor level affect guest experience?

Yes / No / Not Sure

If yes, check all that apply:

- ☐ Slow greeting
- ☐ Long wait
- ☐ Slow drinks
- ☐ Slow food
- ☐ Long ticket times
- ☐ Poor table maintenance
- ☐ Dirty dining room
- ☐ Restrooms not checked enough
- ☐ Bar fell behind
- ☐ Dish fell behind
- ☐ Prep ran short
- ☐ Staff overwhelmed
- ☐ Closing work suffered
- ☐ Guest complaints
- ☐ Other: _____

Guest impact notes:

6. Correction for Next Time

What should be changed next time this day or shift is scheduled?

Should the next schedule be adjusted?

Yes / No / Needs Review

If yes, what adjustment is needed?

Person responsible for follow-up:

Follow-up date:

Daily Labor Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

WEEKLY LABOR PERCENT TRACKER

Purpose

The purpose of this section is to help managers review labor percent for the full week.

The weekly labor tracker shows whether the restaurant met its labor goal and why the result happened.

Why It Matters

Daily labor results matter, but weekly labor results show the bigger picture.

A single high labor day may be offset by strong sales or better control later in the week.

A single low labor day may not be worth celebrating if guest service suffered.

Weekly tracking helps managers see:

Total sales

Total labor dollars

Final labor percent

Labor target variance

Best labor day

Worst labor day

Department problems

Schedule problems

Manager decision problems

Corrective actions for next week

The weekly labor tracker should be used before the next schedule is written.

A manager should not build the next schedule without reviewing the last one.

When to Use This Tool

Use this section:

At the end of each schedule week

Before writing the next schedule

During weekly manager meetings

When reporting labor results to ownership

When reviewing manager performance

When labor percent is above target

When service suffered from low labor

When building a 30-day improvement plan

Manager Instructions

Complete this review after the week ends and before the next schedule is posted.

Use actual weekly sales and labor numbers.

Review what happened, why it happened, and what will change next week.

WEEKLY LABOR PERCENT TRACKER

Restaurant Name: _____

Week Starting: _____

Week Ending: _____

Manager Completing Review: _____

Labor Target Percent: _____

1. Weekly Labor Summary

Forecasted Weekly Sales: \$ _____

Actual Weekly Sales: \$ _____

Sales Difference: \$ _____

Scheduled Labor Dollars: \$ _____

Actual Labor Dollars: \$ _____

Labor Dollar Difference: \$ _____

Actual Weekly Labor Percent: _____

Labor Target Percent: _____

Difference From Target: _____

Weekly Labor Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

2. Daily Results Summary

Monday Sales: \$ _____ Labor %: _____

Tuesday Sales: \$ _____ Labor %: _____

Wednesday Sales: \$ _____ Labor %: _____

Thursday Sales: \$ _____ Labor %: _____

Friday Sales: \$ _____ Labor %: _____

Saturday Sales: \$ _____ Labor %: _____

Sunday Sales: \$ _____ Labor %: _____

3. Best and Worst Labor Results

Best labor day:

Why was it strong?

Worst labor day:

Why was it weak?

Day that needs the most schedule adjustment:

Reason:

4. Weekly Labor Cause Review

What caused the weekly labor result?

Check all that apply:

- ☐ Sales were higher than forecast

- ☐ Sales were lower than forecast
- ☐ Schedule was too heavy
- ☐ Schedule was too tight
- ☐ Too many people scheduled during slow periods
- ☐ Not enough people scheduled during peak periods
- ☐ Managers cut too late
- ☐ Managers cut too early
- ☐ Employees stayed too late
- ☐ Call-outs affected coverage
- ☐ Extra labor was called in
- ☐ Overtime affected labor
- ☐ Training labor affected labor
- ☐ Prep labor was higher than planned
- ☐ Dish labor was higher than planned
- ☐ Bar labor was higher than planned
- ☐ FOH labor was higher than planned
- ☐ BOH labor was higher than planned
- ☐ Manager labor was higher than planned
- ☐ Productivity was weak
- ☐ Guest experience required more labor
- ☐ Other: _____

5. Weekly Guest Impact Review

Did labor control affect guest experience this week?

Yes / No / Not Sure

If yes, explain:

Were there any shifts where labor was too low?

Yes / No / Not Sure

Which shifts?

What happened?

Were there any shifts where labor was too high?

Yes / No / Not Sure

Which shifts?

What happened?

6. Next Schedule Adjustment Plan

What should be changed in the next schedule?

Which day needs adjustment?

Which department needs adjustment?

Which manager needs follow-up?

Which employee issue needs review?

7. Weekly Labor Meeting Notes

Main labor discussion point:

Action assigned:

Person responsible:

Due date:

Weekly Labor Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

Owner or General Manager Review: _____

Date: _____

Signature: _____

ADDITIONAL TOOL: SCHEDULED LABOR VS. ACTUAL LABOR TRACKER

Purpose

This tool helps managers compare the schedule plan to what actually happened.

Why It Matters

A schedule is the plan, but actual labor shows the truth. Employees may clock in early, stay late, call out, get cut early, or be added during the shift. Comparing scheduled labor to actual labor helps managers identify where the plan changed and why.

Manager Instructions

Use this tracker after the week ends and before the next schedule is written. Review differences by day and identify what caused the largest variances.

SCHEDULED LABOR VS. ACTUAL LABOR TRACKER

Restaurant Name: _____

Week Starting: _____

Week Ending: _____

Manager Completing Review: _____

Day	Scheduled Labor \$	Actual Labor \$	Difference \$	Scheduled Hours	Actual Hours	Main Reason for Difference
Monday	\$ _____	\$ _____	\$ _____	_____	_____	_____
Tuesday	\$ _____	\$ _____	\$ _____	_____	_____	_____
Wednesday	\$ _____	\$ _____	\$ _____	_____	_____	_____
Thursday	\$ _____	\$ _____	\$ _____	_____	_____	_____
Friday	\$ _____	\$ _____	\$ _____	_____	_____	_____
Saturday	\$ _____	\$ _____	\$ _____	_____	_____	_____
Sunday	\$ _____	\$ _____	\$ _____	_____	_____	_____
Weekly Total	\$ _____	\$ _____	\$ _____	_____	_____	_____

Variance Review

Which day had the biggest labor difference?

Was the difference caused by scheduling, sales, call-outs, cuts, or productivity?

Which manager decision affected actual labor most?

What should change in the next schedule?

Scheduled vs. Actual Sign-Off

Reviewed By: _____

Date: _____

Signature: _____

LABOR BY DEPARTMENT

Purpose

The purpose of this section is to help managers review labor by department.

Total labor percent may show that labor is high, but it does not always show where the problem happened.

Department labor review helps managers identify which area needs attention.

Why It Matters

A restaurant can miss labor target for different reasons.

FOH may be overstaffed.

BOH may have too many hours.

Bar may need better scheduling.

Prep may be too heavy.

Dish may be running late.

Manager labor may be too high.

Without department review, managers may make the wrong correction.

For example, cutting FOH labor will not fix a prep labor problem.

Reducing dish labor may make the number look better but create a closing problem.

Department labor review helps managers make a smarter adjustment.

When to Use This Tool

Use this section:

During weekly labor review

When total labor percent is above target

When one department feels overstaffed

When one department feels understaffed

When department managers need accountability

When building next week's schedule

When reviewing staffing gaps

When preparing for manager meetings

Manager Instructions

Complete the department labor review after the week ends.

Use the restaurant's approved reports when available.

If exact department labor is not available, use the best available internal tracking method.

The goal is to understand which department needs schedule, training, productivity, or manager attention.

LABOR BY DEPARTMENT REVIEW

Restaurant Name: _____

Week Starting: _____

Week Ending: _____

Manager Completing Review: _____

FOH Labor Review

FOH Labor Dollars: \$ _____

FOH Labor Percent: _____

FOH Target: _____

FOH Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

FOH labor notes:

What caused the FOH result?

What needs to change?

BOH Labor Review

BOH Labor Dollars: \$ _____

BOH Labor Percent: _____

BOH Target: _____

BOH Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

BOH labor notes:

What caused the BOH result?

What needs to change?

Bar Labor Review

Bar Labor Dollars: \$ _____

Bar Labor Percent: _____

Bar Target: _____

Bar Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

Bar labor notes:

What caused the bar result?

What needs to change?

Prep Labor Review

Prep Labor Dollars: \$ _____

Prep Labor Percent: _____

Prep Target: _____

Prep Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

Prep labor notes:

What caused the prep result?

What needs to change?

Dish Labor Review

Dish Labor Dollars: \$ _____

Dish Labor Percent: _____

Dish Target: _____

Dish Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

Dish labor notes:

What caused the dish result?

What needs to change?

Manager Labor Review

Manager Labor Dollars: \$ _____

Manager Labor Percent: _____

Manager Labor Target: _____

Manager Labor Result:

- ☐ Above Target

- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

Manager labor notes:

What caused the manager labor result?

What needs to change?

Department Labor Summary

Department with strongest labor control:

Why?

Department with weakest labor control:

Why?

Department needing schedule adjustment:

Department needing productivity review:

Department needing staffing or hiring review:

Department Labor Action Plan

Action needed:

Person responsible:

Due date:

Follow-up notes:

Department Labor Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

LABOR BY SHIFT

Purpose

The purpose of this section is to help managers review labor by shift.

A weekly labor result may look acceptable while certain shifts are still creating problems.

Labor by shift review helps managers find where labor is working and where it is not.

Why It Matters

Different shifts have different labor needs.

Opening labor may be too high.

Lunch may be too tight.

Dinner may be overstaffed.

Closing labor may be running late.

If managers only review the full day or full week, these shift-level problems may stay hidden.

Labor by shift review helps managers understand:

Which shifts are overstaffed

Which shifts are understaffed

Which shifts need stronger employees

Which shifts need better manager decisions

Which shifts need different start times

Which shifts need better cut times

Which shifts need better closing control

This helps managers adjust the schedule more precisely.

When to Use This Tool

Use this section:

During weekly labor review

When one shift repeatedly struggles

When opening labor is too high

When lunch service is slow

When dinner labor is high

When closing takes too long

When managers need shift-level accountability

Before building the next schedule

Manager Instructions

Use this tracker to review labor by shift.

If exact shift labor is not available, managers may use clock-in times, sales reports, manager notes, or internal tracking.

The goal is to find the shift where labor needs correction.

LABOR BY SHIFT REVIEW

Restaurant Name: _____

Week Starting: _____

Week Ending: _____

Manager Completing Review: _____

Opening Shift Review

Opening Sales: \$ _____

Opening Labor Dollars: \$ _____

Opening Labor Percent: _____

Opening Labor Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

Opening labor notes:

Was opening labor too high, too low, or correct?

Too High / Too Low / Correct / Not Sure

What needs to change?

Lunch Shift Review

Lunch Sales: \$ _____

Lunch Labor Dollars: \$ _____

Lunch Labor Percent: _____

Lunch Labor Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

Lunch labor notes:

Was lunch labor too high, too low, or correct?

Too High / Too Low / Correct / Not Sure

What needs to change?

Afternoon / Mid-Shift Review

Afternoon Sales: \$ _____

Afternoon Labor Dollars: \$ _____

Afternoon Labor Percent: _____

Afternoon Labor Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

Afternoon labor notes:

Was afternoon labor too high, too low, or correct?

Too High / Too Low / Correct / Not Sure

What needs to change?

Dinner Shift Review

Dinner Sales: \$ _____

Dinner Labor Dollars: \$ _____

Dinner Labor Percent: _____

Dinner Labor Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

Dinner labor notes:

Was dinner labor too high, too low, or correct?

Too High / Too Low / Correct / Not Sure

What needs to change?

Closing Shift Review

Closing Sales: \$ _____

Closing Labor Dollars: \$ _____

Closing Labor Percent: _____

Closing Labor Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

Closing labor notes:

Was closing labor too high, too low, or correct?

Too High / Too Low / Correct / Not Sure

What needs to change?

Shift Labor Summary

Shift with strongest labor control:

Why?

Shift with weakest labor control:

Why?

Shift most likely to need schedule change:

Shift most likely to need manager coaching:

Shift most likely to need employee productivity review:

Shift Labor Action Plan

What shift needs correction next week?

Correction needed:

Manager responsible:

Follow-up date:

Shift Labor Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

LABOR BY DAYPART

Purpose

The purpose of this section is to help managers review labor by smaller parts of the day.

Daypart labor review helps managers find labor problems that may not show clearly in a full-shift review.

Why It Matters

Restaurants do not operate at the same speed all day.

A schedule can be too heavy from 2:00 to 4:00 and too light from 6:00 to 8:00.

If managers only review total labor, they may miss when the labor problem actually happened.

Daypart labor review helps managers adjust:

Start times

Cut times

Shift overlaps

Prep timing

Dish coverage

Support labor

Manager coverage

Daypart labor tracking makes the next schedule more accurate.

When to Use This Tool

Use this section:

When labor is high but managers are not sure why

When certain hours feel overstaffed

When certain rushes feel understaffed

When employees stand around during slow periods

When managers cut too late

When managers cut too early

When schedule start times need adjustment

When schedule out-times need adjustment

Manager Instructions

Use this worksheet to review labor by daypart.

The manager should compare sales volume, labor used, guest flow, and service impact.

This page is especially useful for restaurants that need better control during slow afternoon periods, dinner rushes, or closing hours.

LABOR BY DAYPART REVIEW

Restaurant Name: _____

Date or Week Reviewed: _____

Manager Completing Review: _____

Opening Daypart

Time Range Reviewed: _____

Sales: \$ _____

Labor Dollars: \$ _____

Labor Percent: _____

Was labor appropriate?

Yes / No / Not Sure

Notes:

Adjustment needed:

Lunch Daypart

Time Range Reviewed: _____

Sales: \$ _____

Labor Dollars: \$ _____

Labor Percent: _____

Was labor appropriate?

Yes / No / Not Sure

Notes:

Adjustment needed:

Afternoon Daypart

Time Range Reviewed: _____

Sales: \$ _____

Labor Dollars: \$ _____

Labor Percent: _____

Was labor appropriate?

Yes / No / Not Sure

Notes:

Adjustment needed:

Dinner Daypart

Time Range Reviewed: _____

Sales: \$ _____

Labor Dollars: \$ _____

Labor Percent: _____

Was labor appropriate?

Yes / No / Not Sure

Notes:

Adjustment needed:

Late Night / Closing Daypart

Time Range Reviewed: _____

Sales: \$ _____

Labor Dollars: \$ _____

Labor Percent: _____

Was labor appropriate?

Yes / No / Not Sure

Notes:

Adjustment needed:

Daypart Labor Findings

Which daypart was overstaffed?

Why?

Which daypart was understaffed?

Why?

Which start times need adjustment?

Which cut times need adjustment?

Which daypart needs closer manager control?

Daypart Labor Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

SALES VS. LABOR REVIEW

Purpose

The purpose of this section is to help managers compare sales performance to labor usage.

Labor cannot be judged correctly without sales.

This review helps managers understand whether labor matched the business that actually happened.

Why It Matters

Labor should be reviewed against sales, not only against the schedule.

A shift may look overstaffed if sales dropped unexpectedly.

A shift may look understaffed if sales were higher than expected.

A manager needs to know whether the labor issue was caused by:

Wrong forecast

Wrong schedule

Wrong cut decision

Wrong employee placement

Wrong productivity

Unexpected sales change

Guest experience needs

Sales versus labor review helps managers make better corrections.

Without this review, managers may blame the wrong thing and repeat the same problem.

When to Use This Tool

Use this section:

After each week

After a poor labor result

After a surprising sales result

Before changing the next schedule

During manager meetings

When ownership asks why labor was high

When managers need to explain labor results

When sales volume was very different than forecast

Manager Instructions

Use this page to compare forecasted sales, actual sales, scheduled labor, and actual labor.

The goal is to identify whether the schedule was wrong, the sales forecast was wrong, or the shift was managed poorly.

SALES VS. LABOR REVIEW

Restaurant Name: _____

Date or Week Reviewed: _____

Manager Completing Review: _____

Labor Target: _____

1. Sales Review

Forecasted Sales: \$ _____

Actual Sales: \$ _____

Difference: \$ _____

Sales Result:

- ☐ Above Forecast
- ☐ Below Forecast
- ☐ On Forecast
- ☐ Not Sure

Reason sales were different from forecast:

2. Labor Review

Scheduled Labor Dollars: \$ _____

Actual Labor Dollars: \$ _____

Difference: \$ _____

Scheduled Labor Percent: _____

Actual Labor Percent: _____

Labor Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

Reason labor was different from plan:

3. Schedule Accuracy Review

Did the schedule match expected sales?

Yes / No / Partly / Not Sure

Explain:

Did actual sales match the forecast?

Yes / No / Partly / Not Sure

Explain:

Did managers adjust labor during the shift?

Yes / No / Not Needed / Not Sure

Explain:

4. Labor Decision Review

Were cuts made at the right time?

Yes / No / Not Needed / Not Sure

Were any employees kept too long?

Yes / No / Not Sure

Were any employees cut too early?

Yes / No / Not Sure

Was extra labor added?

Yes / No

If yes, why?

Did the labor decisions protect guest experience?

Yes / No / Partly / Not Sure

Explain:

5. What Actually Caused the Labor Result?

Check the main cause:

- ☐ Sales forecast was wrong
- ☐ Schedule was too heavy
- ☐ Schedule was too light
- ☐ Managers cut too late
- ☐ Managers cut too early
- ☐ Employees stayed too late
- ☐ Productivity was weak
- ☐ Department coverage was wrong
- ☐ Call-outs changed the labor plan
- ☐ Extra volume required more labor
- ☐ Guest experience required more labor
- ☐ Training hours affected labor
- ☐ Overtime affected labor
- ☐ Other: _____

Explain:

6. Next Schedule Correction

What should be changed in the next schedule?

Which day or shift should be adjusted?

Which position should be adjusted?

Which manager needs follow-up?

Follow-up date:

Sales vs. Labor Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

LABOR PROBLEM DIAGNOSIS PAGE

Purpose

The purpose of this section is to help managers diagnose labor problems clearly.
A labor problem should not be treated as one general issue.
Managers need to identify the specific cause before choosing the correction.

Why It Matters

Not every labor problem is a scheduling problem.
Some labor problems are caused by poor sales forecasting.
Some are caused by weak productivity.
Some are caused by poor employee placement.
Some are caused by late cuts.
Some are caused by staffing shortages.
Some are caused by training.
Some are caused by manager decisions.
If managers diagnose the problem incorrectly, they may choose the wrong solution.
For example:
If the real problem is weak productivity, cutting more staff may make the shift worse.
If the real problem is overstaffing, hiring more employees will not fix it.
If the real problem is poor sales forecasting, the schedule may keep missing the target.
This diagnosis page helps managers slow down and identify what actually happened.

When to Use This Tool

Use this section:
When labor percent is above target
When labor percent is below target but service suffered
When the same labor issue repeats
When managers disagree about the cause
Before making schedule changes
Before coaching a manager
Before changing staffing levels
During weekly labor meetings

Manager Instructions

Use this page any time a labor result needs deeper review.
Identify the problem, the cause, the impact, the correction, and the follow-up.
Do not leave the page without assigning responsibility.
A labor problem that has no owner usually becomes a repeated problem.

LABOR PROBLEM DIAGNOSIS PAGE

Restaurant Name: _____

Date or Week Reviewed: _____

Manager Completing Diagnosis: _____

Labor Target: _____

Actual Labor Percent: _____

1. Labor Problem Identified

What labor problem happened?

- ☐ Labor percent too high
- ☐ Labor percent too low and service suffered
- ☐ Sales forecast was missed
- ☐ Schedule was too heavy
- ☐ Schedule was too tight
- ☐ Department labor was too high
- ☐ Shift labor was too high
- ☐ Daypart labor was too high
- ☐ Cut decisions were poor
- ☐ Employees stayed too late
- ☐ Productivity was weak
- ☐ Overtime issue
- ☐ Staffing gap
- ☐ Call-out issue
- ☐ Other: _____

Describe the problem:

2. Where Did the Problem Happen?

Department:

☐ **FOH**

☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management
- ☐ Whole Restaurant
- ☐ Other: _____

Shift:

- ☐ Opening
- ☐ Lunch
- ☐ Afternoon
- ☐ Dinner
- ☐ Late Night
- ☐ Closing

Day or Date:

Position involved: _____

Manager involved: _____

3. Main Cause Review

What caused the problem?

Check all that apply:

- ☐ Forecast was wrong
- ☐ Schedule was not reviewed well enough
- ☐ Too many employees scheduled
- ☐ Not enough employees scheduled
- ☐ Wrong employees scheduled
- ☐ Strong employee missing from key shift
- ☐ Too many new employees scheduled
- ☐ Employees were not productive
- ☐ Employees stayed late
- ☐ Manager did not cut soon enough
- ☐ Manager cut too soon
- ☐ Prep was not ready
- ☐ Dish fell behind
- ☐ Bar fell behind
- ☐ Guest volume changed
- ☐ Weather affected sales
- ☐ Event affected sales
- ☐ Call-out affected staffing
- ☐ Overtime was not controlled
- ☐ Training affected labor
- ☐ Other: _____

Main cause:

4. Impact Review

What did this problem affect?

- ☐ Labor percent
- ☐ Labor dollars
- ☐ Guest service
- ☐ Ticket times
- ☐ Food quality
- ☐ Bar speed
- ☐ Table turns
- ☐ Cleanliness
- ☐ Dish flow
- ☐ Prep readiness
- ☐ Closing work
- ☐ Employee morale
- ☐ Manager control
- ☐ Overtime
- ☐ Sales
- ☐ Other: _____

Describe the impact:

5. Correction Plan

What needs to change?

- ☐ Adjust next schedule
- ☐ Change start times
- ☐ Change cut times

- ☐ Reduce staffing for slow period
- ☐ Add staffing for peak period
- ☐ Change employee placement
- ☐ Coach employee
- ☐ Coach manager
- ☐ Improve prep plan
- ☐ Improve dish coverage
- ☐ Improve bar coverage
- ☐ Improve sales forecasting
- ☐ Improve cut decision process
- ☐ Improve productivity tracking
- ☐ Hire for position
- ☐ Cross-train employee
- ☐ Other: _____

Specific correction:

6. Follow-Up Assignment

Person responsible: _____

Action due by: _____

Follow-up meeting date: _____

How will success be measured? _____

7. Manager Review

Was this problem preventable?

Yes / No / Partly / Not Sure

Explain: _____

What should the manager learn from this? _____

What should be watched next week? _____

Labor Diagnosis Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

Reviewing Manager or Owner: _____

Date: _____

Signature: _____

ADDITIONAL TOOL: CORE LABOR METRICS & FORMULA REFERENCE

Purpose

This tool gives managers one consistent reference for the most useful labor measurements in the workbook. Use the same approved definitions, sales figures, labor figures, and reporting periods used by the restaurant's payroll, POS, accounting, or reporting system.

Formula Reference

Metric	Formula	What It Shows
Labor Percent	$\text{Labor Dollars} \div \text{Net Sales} \times 100$	Share of sales used for labor.
Labor Dollar Budget	$\text{Forecasted Sales} \times \text{Target Labor \%}$	Labor dollars available for the plan.
Sales per Labor Hour	$\text{Net Sales} \div \text{Labor Hours}$	Sales produced for each labor hour.
Labor Hours per \$1,000 Sales	$\text{Labor Hours} \div \text{Net Sales} \times 1,000$	Hours used for each \$1,000 in sales.
Labor Cost per Guest	$\text{Labor Dollars} \div \text{Guest Count}$	Average labor cost per guest or cover.
Labor Dollar Variance	$\text{Actual Labor \$} - \text{Scheduled Labor \$}$	Dollars over or under the schedule.
Labor Hour Variance	$\text{Actual Hours} - \text{Scheduled Hours}$	Hours over or under the schedule.
Sales Forecast Variance	$\text{Actual Sales} - \text{Forecasted Sales}$	Sales above or below forecast.
Forecast Accuracy %	$100 - (\text{Actual} - \text{Forecast} \div \text{Forecast} \times 100)$	How closely the forecast matched actual sales.
Department Labor Share	$\text{Department Labor \$} \div \text{Total Labor \$} \times 100$	Department share of total labor spending.
Overtime Exposure	Approved overtime hours and dollars from payroll report	Risk requiring schedule and approval review.

Important Notes

- ☐ Use net sales or the sales figure approved by ownership consistently.
- ☐ Use the approved labor figure consistently. Do not mix scheduled wages, payroll expense, taxes, benefits, or manager labor unless the company's target includes them.
- ☐ Compare the same time periods. Daily numbers should be compared with daily numbers; weekly numbers with weekly numbers.
- ☐ A favorable metric does not excuse weak service, poor food quality, unsafe work, missed cleaning, or incomplete closing standards.
- ☐ Overtime rules vary. Use the company's approved payroll report and follow applicable requirements.

COMPLETED CORE METRICS EXAMPLE

Example Shift: Saturday Dinner

Net Sales: \$10,000 Labor Dollars: \$2,500 Labor Hours: 100 Guest Count: 500

Scheduled Labor Dollars: \$2,400 Scheduled Hours: 96 Forecasted Sales: \$9,800

Metric	Calculation	Result	Manager Meaning
Labor Percent	$\$2,500 \div \$10,000 \times 100$	25.0%	On a 25% target.
Sales per Labor Hour	$\$10,000 \div 100$	\$100.00	Each hour supported \$100 in sales.
Hours per \$1,000 Sales	$100 \div \$10,000 \times 1,000$	10.0	Ten labor hours per \$1,000.
Labor Cost per Guest	$\$2,500 \div 500$	\$5.00	Average labor cost per cover.
Labor Dollar Variance	$\$2,500 - \$2,400$	+\$100	Actual labor was \$100 over schedule.
Labor Hour Variance	$100 - 96$	+4 hours	Four more hours were used than planned.
Sales Forecast Variance	$\$10,000 - \$9,800$	+\$200	Sales exceeded forecast.
Forecast Accuracy	$100 - (\$200 \div \$9,800 \times 100)$	97.96%	Forecast was close enough to guide staffing.

Manager conclusion: Sales exceeded forecast and labor percent remained on target, but actual hours and dollars exceeded the schedule. The manager should confirm whether the extra four hours protected the late sales increase or resulted from avoidable extensions.

CORE LABOR METRICS WORKSHEET

Restaurant Name: _____

Manager Name: _____

Review Period: _____

Approved Sales Source: _____

Approved Labor Source: _____

Metric	Target / Plan	Actual	Variance	Action Needed
Labor Percent	_____	_____	_____	_____
Labor Dollars	_____	_____	_____	_____
Labor Hours	_____	_____	_____	_____
Sales per Labor Hour	_____	_____	_____	_____
Hours per \$1,000 Sales	_____	_____	_____	_____
Labor Cost per Guest	_____	_____	_____	_____
Forecasted vs. Actual Sales	_____	_____	_____	_____
Scheduled vs. Actual Labor	_____	_____	_____	_____
Overtime Hours / Dollars	_____	_____	_____	_____

Diagnosis

Which metric requires the most attention?

Was the variance caused primarily by sales, scheduling, call-outs, overtime, productivity, training, management decisions, or another factor?

Required correction for the next schedule or shift:

Person Responsible: _____ Due Date: _____

Manager Sign-Off

Reviewed By: _____ Date: _____

Manager Signature: _____

PART 4 FINAL REVIEW

LABOR PERCENT TRACKER

This final review should be completed after Part 4 has been finished.

The manager should now understand:

How to track daily labor percent

How to review weekly labor percent

How to review labor by department

How to review labor by shift

How to review labor by daypart

How to compare sales to labor

How to diagnose labor problems

How to assign labor follow-up

Manager Knowledge Check

1. Why should labor be tracked daily?

2. Why should the weekly labor result be reviewed before writing the next schedule?

3. Why is department labor review important?

4. Why should labor be reviewed by shift or daypart?

5. Why should sales and labor be reviewed together?

6. What is one labor problem that keeps repeating in this restaurant?

7. What correction should be made before the next schedule is posted?

PART 4 MANAGER ACTION PLAN

The biggest labor tracking issue I need to improve is:

The reason this issue matters is:

The first action I will take is:

The second action I will take is:

The third action I will take is:

I will review my progress on this date:

Manager Name: _____

Manager Signature: _____

Reviewing Manager: _____

Date: _____

PART 4 COMPLETION SIGN-OFF

Part 4: Labor Percent Tracker has been reviewed and completed.

Manager Name: _____

Position: _____

Restaurant: _____

Date Completed: _____

Manager Signature: _____

Reviewing Manager Signature: _____

Notes:

PART 5

SHIFT COVERAGE PLANNER

A strong schedule does not only cover the week.

It covers each shift.

Every shift has a different purpose, different pressure points, different staffing needs, and different risks.

Opening coverage protects setup and readiness.

Lunch coverage protects speed and service.

Dinner coverage protects peak volume.

Weekend coverage protects high demand.

Event coverage protects unusual volume.

Slow shift coverage protects labor control without damaging the guest experience.

Emergency coverage protects the restaurant when something goes wrong.

Part 5 helps managers prepare for the shift before the shift exposes the problem.

The goal is to stop walking into shifts unprepared.

A manager should know:

Who is scheduled

What positions are covered

What positions are weak

Who may need support

What volume is expected

What the cut plan may be

What the backup plan is

What must be protected

A schedule is only useful if it works during the actual shift.

OPENING COVERAGE PLANNER

Purpose

The purpose of this section is to help managers plan opening coverage.

Opening coverage sets the tone for the entire day.

If the opening team is not strong enough, the restaurant can begin the day behind and spend the rest of the shift trying to recover.

Why It Matters

Opening labor is not only about unlocking the doors.

Opening labor prepares the restaurant for service.

A strong opening team helps make sure:

Stations are stocked

Prep is started

Equipment is ready

Dining room is clean

Bar is ready

Kitchen is ready

Dish area is ready

To-go area is ready

Bathrooms are checked

Managers are prepared

Employees are assigned

The day begins with control

If opening coverage is too light, important work may be rushed, skipped, or pushed into the lunch rush.

If opening coverage is too heavy, labor can become high before sales begin.

The manager must find the right balance between readiness and labor control.

When to Use This Tool

Use this section:

Before writing the weekly schedule

Before each opening shift

When opening work is incomplete

When lunch starts behind

When prep is not ready

When opening labor is too high

When opening labor is too low

When training opening managers

When reviewing repeated opening problems

Manager Instructions

Use this planner to review opening labor needs.

Look at expected sales, prep needs, opening duties, staffing strength, and manager coverage.

Do not schedule opening labor only by habit.

Ask what the restaurant actually needs to be ready for the day.

OPENING COVERAGE PLANNER

Restaurant Name: _____

Date or Schedule Week: _____

Manager Completing Planner: _____

Opening Manager: _____

1. Opening Business Review

Expected Opening Volume:

Low / Medium / High

Expected Lunch Volume:

Low / Medium / High

Forecasted Sales for Day: \$_____

Special Events or Large Orders:

Weather or Local Factors:

Primary Opening Concern:

2. Opening Positions Needed

Check all positions needed for this opening shift:

- ☐ Opening manager
- ☐ Opening server
- ☐ Opening host
- ☐ Opening bartender
- ☐ Opening cook
- ☐ Opening prep
- ☐ Opening dish
- ☐ Opening to-go
- ☐ Opening expo
- ☐ Cleaning support
- ☐ Other: _____

Positions that must be strong today:

Positions that may be light today:

3. Opening Staff Assigned

Opening Manager: _____

Opening Server: _____

Opening Host: _____

Opening Bartender: _____

Opening Cook: _____

Opening Prep: _____

Opening Dish: _____

Opening To-Go: _____

Other: _____

4. Opening Readiness Checklist

- ☐ Doors unlocked on time

- ☐ Lights and music checked
- ☐ Dining room clean
- ☐ Tables clean and set
- ☐ Restrooms checked
- ☐ Server stations stocked
- ☐ Host stand ready
- ☐ Menus ready
- ☐ To-go supplies stocked
- ☐ Bar stocked
- ☐ Ice filled
- ☐ Tea, coffee, or beverage setup complete
- ☐ Kitchen equipment on and working
- ☐ Line stocked
- ☐ Prep started
- ☐ Dish area ready
- ☐ Trash areas checked
- ☐ Manager walk-through completed
- ☐ Opening assignments communicated
- ☐ Labor plan reviewed
- ☐ Other: _____

Opening notes:

5. Opening Labor Review

Is opening labor too heavy, too light, or correct?

Too Heavy / Too Light / Correct / Not Sure

Explain:

Should opening start times be adjusted?

Yes / No / Needs Review

If yes, what should change?

Should opening positions be adjusted?

Yes / No / Needs Review

If yes, what should change?

6. Opening Manager Decision Notes

What must the opening manager watch closely?

- ☐ Labor percent
- ☐ Sales pace
- ☐ Prep completion
- ☐ Dish setup
- ☐ Dining room readiness
- ☐ Bar readiness
- ☐ Employee arrival times
- ☐ Lunch transition
- ☐ Cut decisions
- ☐ Guest wait
- ☐ Other: _____

Manager notes:

Opening Coverage Sign-Off

Opening coverage has been reviewed.

Reviewed By: _____

Date: _____

Signature: _____

LUNCH COVERAGE PLANNER

Purpose

The purpose of this section is to help managers plan lunch coverage.

Lunch can be fast, compressed, and unforgiving.

If the team is not ready, service can fall behind quickly.

Why It Matters

Lunch guests often have limited time.

They may expect quick seating, quick drinks, quick food, and quick payment.

A weak lunch shift can create long waits, poor table turns, delayed food, and frustrated guests.

Lunch coverage must protect:

Speed

Service flow

Kitchen readiness

Server sections

Host control

Bar or beverage service

To-go orders

Dish flow

Manager visibility

A lunch schedule should not be treated as a smaller version of dinner.

Lunch has its own rhythm.

It needs the right team at the right time.

When to Use This Tool

Use this section:

Before writing the weekly schedule

Before each lunch shift

When lunch ticket times are long

When guests wait too long

When servers are overwhelmed

When kitchen falls behind at lunch

When lunch labor is too high

When lunch labor is too low

When reviewing lunch productivity

Manager Instructions

Use this planner to review lunch sales, guest flow, positions, and risks.

Pay close attention to rush timing.

Lunch labor must be ready before the rush, not after it starts.

LUNCH COVERAGE PLANNER

Restaurant Name: _____

Date or Schedule Week: _____

Manager Completing Planner: _____

Lunch Manager: _____

1. Lunch Business Review

Forecasted Lunch Sales: \$ _____

Expected Guest Count: _____

Expected Lunch Rush Time:

From: _____ To: _____

Expected Lunch Volume:

Low / Medium / High

Large Parties or Reservations:

To-Go / Carryout Expected Volume:

Low / Medium / High

Primary Lunch Concern:

2. Lunch Positions Needed

Check all positions needed:

- ☐ Lunch manager
- ☐ Host
- ☐ Servers
- ☐ Bartender
- ☐ Busser
- ☐ Food runner
- ☐ Expo
- ☐ To-go
- ☐ Grill
- ☐ Fry
- ☐ Pantry / salad
- ☐ Pizza / specialty station
- ☐ Dish
- ☐ Prep support
- ☐ Other: _____

Positions that must be strong:

Positions that may need backup:

3. Lunch Staff Assigned

Lunch Manager: _____

Host: _____

Servers: _____

Bartender: _____

Busser / Support: _____

Runner / Expo: _____

To-Go: _____

Kitchen Lead: _____
Line Cooks: _____

Dish: _____
Prep Support: _____
Other: _____

4. Lunch Readiness Checklist

- ☐ Opening work complete before lunch rush
- ☐ Dining room ready
- ☐ Host stand ready
- ☐ Server stations stocked
- ☐ Ice and beverages stocked
- ☐ Bar ready
- ☐ To-go supplies ready
- ☐ Kitchen line stocked
- ☐ Prep ready for lunch volume
- ☐ Dish area ready
- ☐ Managers assigned to floor or kitchen
- ☐ Employee sections assigned
- ☐ Cut plan reviewed
- ☐ Rush time reviewed
- ☐ Large parties reviewed
- ☐ Other: _____

Lunch readiness notes:

5. Lunch Labor Control Review

Is lunch labor too heavy, too light, or correct?

Too Heavy / Too Light / Correct / Not Sure

Should any position be adjusted?

Yes / No / Needs Review

If yes, what adjustment?

Possible lunch cut time:

Positions that may be cut if sales are slow:

Positions that should not be cut early:

6. Lunch Guest Experience Protection

What must be protected during lunch?

- ☐ Fast greeting
- ☐ Fast seating
- ☐ Quick drink service
- ☐ Quick food delivery
- ☐ Ticket times
- ☐ Table turns
- ☐ To-go speed
- ☐ Bar speed

- ☐ Clean tables
- ☐ Restroom checks
- ☐ Manager presence
- ☐ Other: _____

Guest experience notes:

Lunch Coverage Sign-Off

Lunch coverage has been reviewed.

Reviewed By: _____

Date: _____

Signature: _____

DINNER COVERAGE PLANNER

Purpose

The purpose of this section is to help managers plan dinner coverage.

Dinner is often the highest-volume and highest-risk daypart in a full-service restaurant.

The dinner schedule must protect service, kitchen speed, table turns, bar flow, guest recovery, and manager control.

Why It Matters

Dinner volume can expose every weakness in the schedule.

If the host stand is weak, the door backs up.

If the servers are weak, guests wait.

If the kitchen is weak, ticket times rise.

If expo is weak, food quality and timing suffer.

If dish is weak, the restaurant runs out of tools.

If bar is weak, drinks slow down.

If manager coverage is weak, the shift becomes reactive.

Dinner coverage must be planned carefully because the restaurant may have the greatest sales opportunity and the greatest risk at the same time.

Good dinner coverage helps protect:

Sales

Guest experience

Food quality

Ticket times

Bar speed

Team morale

Cleanliness

Shift control

Closing standards

When to Use This Tool

Use this section:

Before writing the weekly schedule

Before each dinner shift

Before weekends

Before holidays

Before large reservations

Before events

When dinner service is slow

When ticket times are high

When dinner labor is high

When dinner labor is too low

When managers need better shift control

Manager Instructions

Use this planner before finalizing dinner coverage.

Review guest volume, reservations, kitchen strength, FOH support, bar demand, dish needs, and manager coverage.

Dinner coverage should be strong enough to protect peak service without becoming careless overstaffing.

DINNER COVERAGE PLANNER

Restaurant Name: _____

Date or Schedule Week: _____

Manager Completing Planner: _____

Dinner Manager: _____

1. Dinner Business Review

Forecasted Dinner Sales: \$ _____

Expected Guest Count or Covers: _____

Expected Dinner Rush Time:

From: _____ To: _____

Expected Dinner Volume:

Low / Medium / High

Reservations or Large Parties:

Bar Volume Expected:

Low / Medium / High

To-Go / Carryout Expected:

Low / Medium / High

Primary Dinner Concern:

2. Dinner Positions Needed

Check all positions needed:

- ☐ Dinner manager
- ☐ Kitchen manager or lead
- ☐ Host
- ☐ Servers
- ☐ Bartenders
- ☐ Barback
- ☐ Busser
- ☐ Food runner
- ☐ Expo
- ☐ To-go
- ☐ Grill
- ☐ Fry
- ☐ Sauté
- ☐ Pantry / salad
- ☐ Pizza / specialty station
- ☐ Dish
- ☐ Prep support
- ☐ Closing support
- ☐ Other: _____

Positions that must be strongest tonight:

Positions that may create risk:

3. Dinner Staff Assigned

Dinner Manager: _____

Kitchen Lead: _____

Host: _____
Servers: _____

Bartenders: _____
Barback: _____
Busser / Support: _____
Runner / Expo: _____
To-Go: _____
Grill: _____
Fry: _____
Sauté: _____
Pantry / Salad: _____
Pizza / Specialty: _____
Dish: _____
Prep Support: _____
Other: _____

4. Dinner Readiness Checklist

- ☐ Reservations reviewed
- ☐ Large parties reviewed
- ☐ Host stand ready
- ☐ Server sections assigned
- ☐ Support staff assigned
- ☐ Expo plan reviewed
- ☐ Bar setup complete
- ☐ Service bar ready
- ☐ Kitchen line stocked
- ☐ Prep checked before rush
- ☐ Dish area ready
- ☐ Manager positions assigned
- ☐ Cut plan discussed
- ☐ Guest recovery plan reviewed
- ☐ Closing coverage reviewed
- ☐ Labor target reviewed
- ☐ Other: _____

Dinner readiness notes:

5. Dinner Labor Control Review

Is dinner labor too heavy, too light, or correct?

Too Heavy / Too Light / Correct / Not Sure

Explain:

Possible dinner cut time:

Positions that may be cut if sales are slow:

Positions that should not be cut early:

What sales or guest count would justify keeping full coverage?

6. Dinner Guest Experience Protection

What must be protected during dinner?

- ☐ Door control
- ☐ Seating flow
- ☐ Server section balance
- ☐ Drink speed
- ☐ Ticket times
- ☐ Food quality
- ☐ Table maintenance
- ☐ Bar service
- ☐ To-go timing
- ☐ Guest recovery
- ☐ Clean restrooms
- ☐ Manager floor presence
- ☐ Kitchen communication
- ☐ Other: _____

Guest experience notes:

Dinner Coverage Sign-Off

Dinner coverage has been reviewed.

Reviewed By: _____

Date: _____

Signature: _____

WEEKEND COVERAGE PLANNER

Purpose

The purpose of this section is to help managers plan weekend coverage.

Weekends often require stronger staffing, stronger leadership, better prep, better dish support, and more detailed labor control.

A weekend schedule should not be treated like an ordinary weekday schedule.

Why It Matters

Weekend shifts often bring higher sales, larger parties, longer waits, higher bar volume, more takeout, more stress, and more guest expectations.

A weak weekend schedule can damage sales and service quickly.

Weekend coverage must protect:

Friday dinner

Saturday lunch

Saturday dinner

Sunday lunch or brunch

Sunday dinner

Bar volume

Kitchen speed

Prep levels

Dish flow

Manager coverage

Closing standards

Weekend labor may need to be higher than weekday labor, but it still must be planned and controlled.

The goal is not to overstaff every weekend.

The goal is to staff according to expected volume and risk.

When to Use This Tool

Use this section:

Before every weekend schedule

Before holiday weekends

Before local events

Before sports weekends

Before seasonal rushes

When weekend service is inconsistent

When weekend labor is high

When weekend guest complaints increase

When kitchen or dish falls behind on weekends

Manager Instructions

Use this planner before finalizing the weekend schedule.

Review Friday, Saturday, and Sunday separately.

Identify the highest-risk shift and plan manager coverage accordingly.

WEEKEND COVERAGE PLANNER

Restaurant Name: _____

Weekend Dates: _____

Manager Completing Planner: _____

1. Weekend Sales Forecast

Friday Forecasted Sales: \$ _____

Saturday Forecasted Sales: \$ _____

Sunday Forecasted Sales: \$ _____

Total Weekend Forecasted Sales: \$ _____

Highest Expected Volume Day:

Friday / Saturday / Sunday

Highest Expected Volume Daypart:

Lunch / Dinner / Bar / Brunch / Closing

Weekend Labor Target:

2. Weekend Factors

Check all that apply:

- ☐ Holiday weekend
- ☐ Local event
- ☐ Sporting event
- ☐ Tourist traffic
- ☐ Large reservations
- ☐ Banquet or party
- ☐ Catering order
- ☐ Weather concern
- ☐ Patio volume
- ☐ Bar promotion
- ☐ Live music or entertainment
- ☐ School event
- ☐ Staff shortage
- ☐ Training shifts
- ☐ Other: _____

Notes:

3. Friday Coverage Review

Expected Friday Volume:

Low / Medium / High

Highest Friday Risk:

☐ **FOH**

☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management
- ☐ Closing
- ☐ Other: _____

Friday positions that must be strong:

Friday coverage concerns:

Friday manager plan:

4. Saturday Coverage Review

Expected Saturday Volume:

Low / Medium / High

Highest Saturday Risk:

☐ **FOH**

☐ **BOH**

☐ Bar

☐ Prep

☐ Dish

☐ Management

☐ Closing

☐ Other: _____

Saturday positions that must be strong:

Saturday coverage concerns:

Saturday manager plan:

5. Sunday Coverage Review

Expected Sunday Volume:

Low / Medium / High

Highest Sunday Risk:

☐ **FOH**

☐ **BOH**

☐ Bar

☐ Prep

☐ Dish

☐ Management

☐ Closing

☐ Other: _____

Sunday positions that must be strong:

Sunday coverage concerns:

Sunday manager plan:

6. Weekend Prep and Dish Review

Prep ready for weekend?

Yes / No / Needs Review

Prep concerns:

Dish coverage ready for weekend?

Yes / No / Needs Review

Dish concerns:

Bar stocked for weekend?

Yes / No / Needs Review

Bar concerns:

7. Weekend Labor Control Plan

Where may labor be too heavy?

Where may labor be too light?

What cut decisions will need manager attention?

What positions should not be cut too early?

Weekend Coverage Sign-Off

Weekend coverage has been reviewed.

Reviewed By: _____

Date: _____

Signature: _____

EVENT COVERAGE PLANNER

Purpose

The purpose of this section is to help managers plan labor for events, large parties, holidays, banquets, catering, sports events, local events, and unusual sales volume.

Event labor should be planned separately from regular labor.

An event can change the entire shift.

Why It Matters

Events create different labor needs than normal business.

A large party may affect the kitchen, bar, dish, host stand, servers, and manager coverage.

A catering order may affect prep and kitchen timing before regular service begins.

A local event may bring sudden volume at unusual times.

A holiday may bring higher sales, more guests, or different dining patterns.

If events are not planned, managers may be forced to react during the shift.

Event planning helps managers protect:

Guest experience

Kitchen timing

Bar speed

Food quality

Prep readiness

Dish flow

Table flow

Employee placement

Manager control

Labor percent

The goal is not always to add more labor.

The goal is to add the right labor where the event creates real need.

When to Use This Tool

Use this section:

Before holidays

Before local events

Before large reservations

Before banquets

Before catering orders

Before sports events

Before concerts or festivals

Before private parties

Before unusually high-volume shifts

When event coverage has failed before

Manager Instructions

Use this planner as soon as the event is known.

Do not wait until the day of the event.

Review what the event affects and schedule labor accordingly.

After the event, review whether the labor plan worked.

EVENT COVERAGE PLANNER

Restaurant Name: _____

Event Date: _____

Event Name or Type: _____

Manager Completing Planner: _____

1. Event Details

Event Type:

- ☐ Holiday
- ☐ Large reservation
- ☐ Banquet
- ☐ Catering order
- ☐ Sports event
- ☐ Concert or local event
- ☐ Patio event
- ☐ Bar event
- ☐ Private party
- ☐ Promotion
- ☐ Other: _____

Expected Event Time:

From: _____ To: _____

Expected Guest Count or Order Size:

Expected Sales Impact: \$ _____

Event Notes:

2. Event Labor Impact

Which areas will the event affect?

☐ **FOH**

☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Host stand
- ☐ To-go
- ☐ Management
- ☐ Closing
- ☐ Other: _____

Main labor concern:

3. Event Coverage Needed

Extra FOH coverage needed?

Yes / No / Not Sure

Notes:

Extra BOH coverage needed?

Yes / No / Not Sure

Notes:

Extra bar coverage needed?

Yes / No / Not Sure

Notes:

Extra prep coverage needed?

Yes / No / Not Sure

Notes:

Extra dish coverage needed?

Yes / No / Not Sure

Notes:

Extra manager coverage needed?

Yes / No / Not Sure

Notes:

4. Event Staff Assigned

Event Manager: _____

FOH Lead: _____

BOH Lead: _____

Bar Lead: _____

Prep Assigned: _____

Dish Assigned: _____

Servers Assigned:

Cooks Assigned:

Support Assigned:

5. Event Readiness Checklist

- ☐ Event details confirmed
- ☐ Guest count confirmed
- ☐ Reservation or order confirmed
- ☐ Menu needs reviewed
- ☐ Prep needs reviewed
- ☐ Bar needs reviewed
- ☐ Dish needs reviewed
- ☐ Table setup reviewed
- ☐ Staff assigned
- ☐ Manager assigned
- ☐ Timeline reviewed
- ☐ Labor impact reviewed
- ☐ Backup plan reviewed
- ☐ Guest experience plan reviewed
- ☐ Other: _____

Event readiness notes:

6. Event Labor Review After Completion

Actual Event Sales: \$ _____

Actual Labor Impact: _____

Was staffing correct?

Yes / No / Partly / Not Sure

What worked?

What failed?

What should be changed for the next event?

Event Coverage Sign-Off

Event coverage has been reviewed.

Reviewed By: _____

Date: _____

Signature: _____

SLOW SHIFT COVERAGE PLANNER

Purpose

The purpose of this section is to help managers plan labor for slow shifts without damaging the restaurant.

Slow shifts still require coverage, cleanliness, prep, guest service, and manager control.

The goal is to reduce waste without running careless.

Why It Matters

Slow shifts are one of the easiest places to lose labor control.

Employees may stand around.

Managers may delay cuts.

Side work may be stretched out.

Prep may be overdone.

Support positions may remain longer than needed.

At the same time, cutting too much labor can still hurt the restaurant.

Slow shifts still need:

Guest service

Kitchen coverage

Bar coverage

Cleanliness

Prep control

Dish control

Closing standards

Manager attention

A slow shift coverage plan helps managers decide the minimum safe labor level.

The goal is not to leave the restaurant exposed.

The goal is to stay lean and ready.

When to Use This Tool

Use this section:

Before known slow shifts

During slow seasons

During bad weather

During low-volume weekdays

When labor is high on slow days

When managers are slow to cut

When employees stand around

When slow shifts still have poor closing work

When reviewing minimum coverage

Manager Instructions

Use this planner to identify the minimum practical coverage for slow shifts.

Managers should know which positions can be reduced and which positions must remain protected.

This page should also help managers build a cut plan before the shift begins.

SLOW SHIFT COVERAGE PLANNER

Restaurant Name: _____

Date or Schedule Week: _____

Manager Completing Planner: _____

Shift Reviewed: _____

1. Slow Shift Review

Expected Sales: \$ _____

Expected Guest Count: _____

Expected Volume: _____

Low / Very Low / Weather Risk / Unknown

Reason shift may be slow:

- ☐ Weekday pattern
- ☐ Weather
- ☐ Seasonal slowdown
- ☐ No reservations
- ☐ Local event pulling guests away
- ☐ Holiday slowdown
- ☐ Construction or road issue
- ☐ Prior trend
- ☐ Other: _____

Notes:

2. Minimum Coverage Needed

Minimum FOH coverage:

Minimum BOH coverage:

Minimum bar coverage:

Minimum prep coverage:

Minimum dish coverage:

Minimum manager coverage:

Positions that must remain covered:

3. Possible Cut Plan

Employees or positions that may be cut first if volume is slow:

Positions that should not be cut too early:

Reason:

4. Slow Shift Watch Points

Manager should watch:

- ☐ Sales pace
- ☐ Guest count
- ☐ Reservations
- ☐ Weather change
- ☐ Bar volume
- ☐ To-go volume
- ☐ Ticket times
- ☐ Side work completion
- ☐ Prep production
- ☐ Dish flow
- ☐ Closing workload
- ☐ Employee productivity
- ☐ Other: _____

Notes:

5. Guest Experience Protection

Even on a slow shift, the restaurant must protect:

- ☐ Greeting
- ☐ Service speed
- ☐ Food quality
- ☐ Bar service
- ☐ Clean tables
- ☐ Restrooms
- ☐ Kitchen readiness
- ☐ Dish readiness
- ☐ Closing work
- ☐ Manager presence
- ☐ Other: _____

Guest experience notes:

6. Slow Shift Review After Completion

Actual Sales: \$ _____

Actual Labor Percent: _____

Was labor controlled well?

Yes / No / Partly / Not Sure

Were cuts made at the right time?

Yes / No / Not Needed / Not Sure

Did guest experience suffer?

Yes / No / Not Sure

What should change next time?

Slow Shift Coverage Sign-Off

Slow shift coverage has been reviewed.

Reviewed By: _____

Date: _____

Signature: _____

EMERGENCY CALL-OUT COVERAGE PLANNER

Purpose

The purpose of this section is to help managers respond to call-outs, no-shows, and sudden staffing gaps.

A call-out should not automatically create panic.

Managers need a clear system for deciding whether to replace the shift, adjust the schedule, use cross-training, or operate with a different plan.

Why It Matters

Call-outs can damage the shift quickly if managers do not respond well.

A missing employee can affect:

Guest service

Kitchen speed

Bar speed

Dish flow

Prep readiness

Table turns

Ticket times

Closing work

Employee morale

Manager control

But not every call-out requires the same response.

Sometimes the shift must be covered.

Sometimes the team can adjust.

Sometimes a cross-trained employee can move positions.

Sometimes the schedule can be tightened.

Sometimes the manager must protect labor and avoid calling in unnecessary help.

A good manager does not only ask:

Who can come in?

A good manager asks:

What position is missing?

How busy will we be?

Can the shift still operate?

What guest impact could happen?

Who can cover safely?

Will calling someone in help or waste labor?

When to Use This Tool

Use this section:

Any time an employee calls out

Any time an employee no-shows

When a position becomes uncovered

When a manager needs to decide whether to call someone in

When cross-training coverage is needed

When call-outs keep repeating

When reviewing staffing gap problems

When building emergency coverage lists

Manager Instructions

Use this planner whenever a call-out or no-show creates a staffing concern.

Do not immediately call in extra labor without reviewing actual need.

Do not ignore the call-out if it creates guest, kitchen, bar, or closing risk.

Use judgment.

Write down the decision so it can be reviewed later.

EMERGENCY CALL-OUT COVERAGE PLANNER

Restaurant Name: _____

Date: _____

Manager Handling Call-Out: _____

Shift Affected: _____

1. Call-Out Details

Employee Name: _____

Position: _____

Scheduled Time: _____

Call-Out Time: _____

Reason Given: _____

Is this a repeated issue?

Yes / No / Not Sure

Notes:

2. Shift Impact Review

Expected Sales: \$ _____

Expected Volume:

Low / Medium / High

Daypart Affected:

- ☐ Opening
- ☐ Lunch
- ☐ Afternoon
- ☐ Dinner
- ☐ Late Night
- ☐ Closing

Position Impact:

☐ **FOH**

☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management
- ☐ Other: _____

How serious is the coverage gap?

Low / Medium / High / Critical

Explain:

3. Coverage Options

Option 1: Replace the shift

Possible replacement:

Can replacement work the position safely?

Yes / No / Not Sure

Notes:

Option 2: Use cross-trained employee already scheduled
Employee:

Move from position:

Move to position:

Risk created by moving employee:

Option 3: Adjust sections or stations
Adjustment:

Risk:

Option 4: Manager covers temporarily
Manager assigned:

Position covered:

How long:

Risk:

Option 5: Operate without replacement
Is this safe for guest experience and operations?
Yes / No / Not Sure
Explain:

4. Decision Made

Decision:

- ☐ Replacement called in
- ☐ Cross-trained employee moved
- ☐ Sections or stations adjusted
- ☐ Manager covered position
- ☐ Operated without replacement
- ☐ Shift shortened
- ☐ Other: _____

Reason for decision:

Labor impact:

Guest impact risk:

5. Call-Out Follow-Up

Does employee need follow-up?

Yes / No / Not Sure

Follow-up needed:

- ☐ Attendance conversation
- ☐ Documentation according to company policy
- ☐ Schedule review
- ☐ Availability review
- ☐ Reliability review
- ☐ Training review
- ☐ No follow-up needed
- ☐ Other: _____

Manager assigned to follow up:

Follow-up date:

6. Emergency Coverage Review

Did the coverage plan work?

Yes / No / Partly / Not Sure

What worked?

What did not work?

What should be changed for future call-outs?

Emergency Coverage Sign-Off

Call-out coverage decision has been reviewed.

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

PART 5 FINAL REVIEW

SHIFT COVERAGE PLANNER

This final review should be completed after Part 5 has been finished.

The manager should now understand:

How to plan opening coverage

How to plan lunch coverage

How to plan dinner coverage

How to plan weekend coverage

How to plan event coverage

How to plan slow shift coverage

How to respond to emergency call-outs

How to protect labor control and guest experience at the same time

Manager Knowledge Check

1. Why does opening coverage matter?

2. What makes lunch coverage different from dinner coverage?

3. Why should weekend coverage be reviewed separately?

4. Why should event labor be planned before the event happens?

5. What positions should not be cut too early on a slow shift?

6. What should a manager review before calling someone in for a call-out?

7. What is the biggest shift coverage problem in this restaurant right now?

PART 5 MANAGER ACTION PLAN

The biggest shift coverage issue I need to improve is:

The reason this issue matters is:

The first action I will take is:

The second action I will take is:

The third action I will take is:

I will review my progress on this date:

Manager Name: _____

Manager Signature: _____

Reviewing Manager: _____

Date: _____

PART 5 COMPLETION SIGN-OFF

Part 5: Shift Coverage Planner has been reviewed and completed.

Manager Name: _____

Position: _____

Restaurant: _____

Date Completed: _____

Manager Signature: _____

Reviewing Manager Signature: _____

Notes:

PART 6

MANAGER CUT DECISION SYSTEM

Cutting labor is one of the most important shift decisions a manager makes.

A good cut decision can protect labor without hurting the shift.

A bad cut decision can damage service, food quality, cleanliness, employee morale, and sales.

Managers should not cut staff only because labor is high.

Managers should not keep staff only because they are afraid to make a decision.

Managers need a clear system.

Part 6 gives managers a practical cut decision process that can be used during real restaurant shifts.

The goal is to help managers decide:

When to cut

When not to cut

Who to cut first

Who should stay

What must be completed before someone leaves

How the cut affects the guest

How the cut affects the kitchen

How the cut affects the bar

How the cut affects closing

How the decision should be documented

Labor control is not about sending people home without thinking.

Labor control is about making the right decision at the right time.

WHEN TO CUT STAFF

Purpose

The purpose of this section is to help managers understand when it is appropriate to cut staff.

A cut should happen when the restaurant can reduce labor without damaging service, food quality, cleanliness, safety, or closing standards.

A cut decision should be based on the shift, not just the clock.

Why It Matters

Every employee who stays on the clock adds labor cost.

If sales are slow, guest count is low, side work is complete, stations are stocked, and the team can still operate properly, keeping extra employees may waste labor.

Good managers watch the shift and adjust.

Cutting staff at the right time helps:

Lower labor percent

Reduce standing-around time

Improve productivity

Keep employees focused

Protect profit

Build manager discipline

Prevent unnecessary payroll waste

But cutting must be done carefully.

The manager should understand the full shift before sending anyone home.

A good cut decision should answer:

Is the rush over?

Are guests still coming in?

Are stations stocked?

Is side work complete?

Can the remaining team handle the shift?

Will ticket times stay controlled?

Will the bar stay caught up?

Will dish stay caught up?

Will closing work still be protected?

Will guest experience be safe?

If the answer is yes, a cut may be the right decision.

When to Use This Tool

Use this section:

During slow shifts

After the rush is over

When sales are below forecast

When employees are standing around

When labor percent is high

When the schedule is heavier than needed

When managers need cut decision training

When reviewing shift labor decisions

Before sending employees home

Manager Instructions

Use the checklist below before cutting staff.

Do not cut based only on one sign.

For example, do not cut just because the dining room looks slow for five minutes.

Review sales pace, guest count, open tables, reservations, kitchen status, bar status, dish status, side work, and closing needs.

A cut should be a decision, not a reaction.

WHEN TO CUT STAFF CHECKLIST

Restaurant Name: _____

Date: _____

Shift: _____

Manager Completing Review: _____

1. Sales and Guest Flow Review

Current Sales: \$ _____

Forecasted Sales for This Time: \$ _____

Sales Pace:

- ☐ Above Forecast
- ☐ Below Forecast
- ☐ On Forecast
- ☐ Not Sure

Current Guest Count or Covers: _____

Open Tables or Active Checks: _____

Reservations Remaining:

- ☐ None
- ☐ Few
- ☐ Several
- ☐ Large Party Remaining
- ☐ Not Sure

Guest flow appears:

- ☐ Slowing down
- ☐ Steady
- ☐ Increasing
- ☐ Unpredictable

2. Shift Status Review

Before cutting, confirm the following:

- ☐ Rush has slowed down
- ☐ No large party is about to arrive
- ☐ No known reservation needs extra coverage
- ☐ Host stand is controlled
- ☐ Server sections can be handled
- ☐ Bar can keep up
- ☐ Kitchen can keep up
- ☐ Dish can keep up
- ☐ To-go or carryout is controlled
- ☐ Side work is assigned
- ☐ Stations are stocked
- ☐ Closing work will still be protected
- ☐ Remaining employees are strong enough
- ☐ Manager can still lead the shift

3. Cut Readiness Questions

Is anyone standing around without a clear task?

Yes / No / Not Sure

Who?

Is there enough work left to justify keeping the current staff?

Yes / No / Not Sure

Explain:

Can the remaining team protect guest service?

Yes / No / Not Sure

Can the remaining team protect food quality?

Yes / No / Not Sure

Can the remaining team protect cleanliness?

Yes / No / Not Sure

Can the remaining team protect closing standards?

Yes / No / Not Sure

4. Employees or Positions to Consider Cutting

Position or Employee Considered for Cut:

Reason:

Is this person needed for later volume?

Yes / No / Not Sure

Is this person needed for side work or closing?

Yes / No / Not Sure

Is this person needed because of skill level or cross-training?

Yes / No / Not Sure

Position or Employee Considered for Cut:

Reason:

Is this person needed for later volume?

Yes / No / Not Sure

Is this person needed for side work or closing?

Yes / No / Not Sure

Is this person needed because of skill level or cross-training?

Yes / No / Not Sure

5. Cut Decision

Cut decision made?

Yes / No / Wait and Review Again

If yes, who was cut?

Position:

Time cut:

Required work before leaving:

If no, why was cut delayed?

Time to review again:

6. Manager Notes

Why was this the right decision?

What should the next manager watch?

Cut Decision Sign-Off

Decision Made By: _____

Date: _____

Time: _____

Signature: _____

WHEN NOT TO CUT STAFF

Purpose

The purpose of this section is to help managers understand when cutting labor would be risky or harmful. Sometimes labor looks high, but the shift still needs coverage. A manager must know when to hold labor to protect the restaurant.

Why It Matters

Cutting too early can create bigger problems than the labor savings are worth.

A manager may save one hour of labor but lose control of the shift.

A poor cut decision can cause:

- Slow service
- Long ticket times
- Bar delays
- Dirty tables
- Weak guest recovery
- Employees overwhelmed
- Dish backup
- Poor food quality
- Missed side work
- Weak closing work
- Late closing
- Guest complaints
- Lost sales
- Bad reviews
- Lower morale

A manager should never cut labor blindly.

The labor number matters, but the guest experience matters too.

The question is not only:

Can we cut someone?

The better question is:

Can we cut someone and still operate correctly?

If the answer is no, the manager should wait.

When to Use This Tool

Use this section:

- Before cutting during uncertain volume
- Before cutting during dinner
- Before cutting during weekends
- Before cutting during events
- When reservations remain
- When the kitchen is behind
- When bar is behind
- When dish is behind
- When service is already weak
- When closing workload is heavy
- When training managers on cut decisions

Manager Instructions

Use the checklist below before deciding not to cut or before delaying a cut.

This page helps managers justify keeping labor when it is operationally necessary.

If labor is kept, the manager should write why.

A manager should be able to explain both cutting and not cutting.

WHEN NOT TO CUT STAFF CHECKLIST

Restaurant Name: _____

Date: _____

Shift: _____

Manager Completing Review: _____

1. Do Not Cut If Guest Demand Is Still Active

Check all that apply:

- ☐ Guests are still arriving steadily
- ☐ There is a wait list
- ☐ Large party is expected
- ☐ Reservations remain
- ☐ Bar is still busy
- ☐ To-go or carryout is still active
- ☐ Tables are not turning smoothly
- ☐ Servers are still carrying full sections
- ☐ Host stand still needs support
- ☐ Guest recovery is needed
- ☐ Other: _____

Notes:

2. Do Not Cut If Kitchen or Bar Is Behind

Check all that apply:

- ☐ Ticket times are high
- ☐ Food is waiting too long
- ☐ Expo is overwhelmed
- ☐ Grill is behind
- ☐ Fry is behind
- ☐ Sauté is behind
- ☐ Pantry / salad is behind
- ☐ Pizza / specialty station is behind
- ☐ Prep is running short
- ☐ Bar drinks are slow
- ☐ Service bar is behind
- ☐ Bar needs restocking
- ☐ Dish is behind
- ☐ Other: _____

Notes:

3. Do Not Cut If Cleanliness or Closing Will Suffer

Check all that apply:

- ☐ Tables are not being cleaned quickly
- ☐ Dining room is not maintained
- ☐ Restrooms need attention
- ☐ Server stations are not stocked
- ☐ Bar is messy or behind
- ☐ Dish area is backed up
- ☐ Kitchen stations need cleaning
- ☐ Trash needs to be handled
- ☐ Closing work is already behind
- ☐ Side work is not complete

☐ Remaining team cannot complete close properly

☐ Other: _____

Notes:

4. Do Not Cut If Remaining Team Is Too Weak

Check all that apply:

☐ Remaining employees are new

☐ Remaining employees are not cross-trained

☐ Remaining employees cannot cover key stations

☐ Strong employee is needed for rush recovery

☐ Manager would be forced into a station too long

☐ Training employee still needs support

☐ Closing team would be too weak

☐ Kitchen leadership would be too weak

☐ FOH leadership would be too weak

☐ Other: _____

Notes:

5. Cut Delay Decision

Cut should be delayed because:

☐ Guest volume is still active

☐ Kitchen is not stable

☐ Bar is not stable

☐ Dish is not stable

☐ Cleanliness is not controlled

☐ Closing work would suffer

☐ Remaining team is not strong enough

☐ Manager needs more time to observe sales pace

☐ Other: _____

Cut delayed until:

What must improve before cutting?

Who may be cut later if conditions improve?

6. Manager Explanation

Why is keeping labor the correct decision right now?

What is the risk if staff is cut too early?

How will the manager continue watching labor?

Do Not Cut Sign-Off

Decision Made By: _____

Date: _____

Time: _____

Signature: _____

FOH CUT DECISION FORM

Purpose

The purpose of this section is to help managers make better front-of-house cut decisions.

FOH cuts affect guest service, table flow, seating, refills, drinks, side work, cleanliness, and closing.

Managers should review the dining room before cutting FOH staff.

Why It Matters

Cutting FOH too early can hurt the guest experience quickly.

If a server, host, busser, runner, or support employee is cut too soon, the remaining team may become overwhelmed.

Tables may sit dirty.

Guests may wait longer.

Servers may carry too many tables.

Food may sit in the window.

Refills may be missed.

Side work may not be completed.

Closing may take longer.

But keeping FOH too long can waste labor if guest volume is low and side work is complete.

The manager must balance service and labor.

When to Use This Tool

Use this section:

Before cutting servers

Before cutting hosts

Before cutting bussers

Before cutting runners

Before cutting expo

Before cutting to-go support

During slow FOH shifts

After lunch rush

After dinner rush

When FOH labor is high

When managers need cut decision accountability

Manager Instructions

Use this form before cutting FOH staff.

Review guest flow, sections, side work, table cleanliness, support needs, and remaining team strength.

Do not cut FOH only because one employee asks to leave.

Cut based on business need.

FOH CUT DECISION FORM

Restaurant Name: _____

Date: _____

Shift: _____

Manager Completing Form: _____

1. FOH Shift Status

Current Guest Count: _____

Current Open Tables: _____

Guests Waiting?

Yes / No / Not Sure

Reservations Remaining?

Yes / No / Not Sure

Large Parties Remaining?

Yes / No / Not Sure

Bar Guests Affecting FOH?

Yes / No / Not Sure

To-Go Volume Active?

Yes / No / Not Sure

Dining Room Status:

☐ Controlled

☐ Busy

☐ Slowing Down

☐ Unstable

☐ Not Sure

2. FOH Positions Currently Working

Check all that apply:

☐ Host

☐ Server

☐ Busser

☐ Food runner

☐ Expo

☐ To-go

☐ Bartender helping FOH

☐ Floor lead

☐ Manager on floor

☐ Other: _____

Employees currently working FOH:

3. FOH Readiness Before Cut

Before cutting, confirm:

☐ Tables are under control

☐ Guests are being greeted quickly

☐ Server sections are manageable

☐ Refills are controlled

☐ Food is not sitting in window

☐ Table maintenance is controlled

☐ Restrooms have been checked

☐ Server stations are stocked

☐ Side work is assigned

☐ Side work is complete or manageable

- ☐ Remaining staff can handle service
- ☐ Closing work will still be protected

4. Employee Considered for Cut

Employee Name: _____

Position: _____

Scheduled Out-Time: _____

Proposed Cut Time: _____

Reason for Cut:

Side Work Required Before Leaving:

Can remaining FOH team handle the shift?

Yes / No / Not Sure

Will guest service be protected?

Yes / No / Not Sure

Will closing work be protected?

Yes / No / Not Sure

5. FOH Cut Decision

Decision:

- ☐ Cut approved
- ☐ Cut delayed
- ☐ Do not cut
- ☐ Reassign employee first
- ☐ Review again later

Reason:

If cut is delayed, review again at:

If employee is reassigned, new task or position:

6. FOH Manager Notes

What must the manager watch after this cut?

- ☐ Guest wait
- ☐ Server sections
- ☐ Table maintenance
- ☐ Refills
- ☐ Food running
- ☐ Host stand
- ☐ To-go
- ☐ Bar drinks
- ☐ Restrooms
- ☐ Side work
- ☐ Closing work
- ☐ Other: _____

Notes:

FOH Cut Sign-Off

Decision Made By: _____

Date: _____

Time: _____

Signature: _____

BOH CUT DECISION FORM

Purpose

The purpose of this section is to help managers make better back-of-house cut decisions. BOH cuts affect ticket times, food quality, prep, dish flow, station cleanliness, and closing work. Kitchen labor should be cut carefully.

Why It Matters

Cutting BOH too early can create serious problems.

The kitchen may fall behind.

Ticket times may rise.

Food quality may drop.

Line cooks may have to cover too many stations.

Prep may run short.

Dish may fall behind.

Closing may take too long.

Managers may have to leave the floor to rescue the kitchen.

At the same time, keeping BOH too long can waste labor if volume is low, stations are stocked, and closing work is controlled.

The manager must understand kitchen status before cutting BOH labor.

A kitchen cut should never be made without checking the line, prep, dish, and closing workload.

When to Use This Tool

Use this section:

Before cutting line cooks

Before cutting prep

Before cutting dish

Before cutting kitchen support

After lunch rush

After dinner rush

During slow kitchen periods

When BOH labor is high

When kitchen cuts have caused problems before

During kitchen manager training

Manager Instructions

Use this form before cutting BOH staff.

Review ticket volume, open checks, station readiness, prep status, dish flow, and closing work.

Do not cut a kitchen employee only because the dining room looks slow.

The kitchen may still be recovering.

BOH CUT DECISION FORM

Restaurant Name: _____

Date: _____

Shift: _____

Manager Completing Form: _____

1. Kitchen Shift Status

Current Open Food Tickets: _____

Ticket Times:

- ☐ Controlled
- ☐ Slightly High
- ☐ High
- ☐ Not Sure

Kitchen Volume:

- ☐ Slow
- ☐ Steady
- ☐ Busy
- ☐ Recovering From Rush
- ☐ Not Sure

Prep Status:

- ☐ Ready
- ☐ Low
- ☐ Behind
- ☐ Not Checked

Dish Status:

- ☐ Controlled
- ☐ Behind
- ☐ Critical
- ☐ Not Checked

Closing Workload:

- ☐ Light
- ☐ Normal
- ☐ Heavy
- ☐ Not Sure

2. BOH Positions Currently Working

Check all that apply:

- ☐ Grill
- ☐ Fry
- ☐ Sauté
- ☐ Pantry / salad
- ☐ Pizza / specialty station
- ☐ Kitchen expo
- ☐ Prep
- ☐ Dish
- ☐ Kitchen lead
- ☐ Closing cook
- ☐ Other: _____

Employees currently working BOH:

3. BOH Readiness Before Cut

Before cutting, confirm:

- ☐ Ticket times are controlled
- ☐ Rush has slowed
- ☐ No large orders are pending
- ☐ Stations are stocked
- ☐ Prep is not dangerously low
- ☐ Dish is controlled
- ☐ Kitchen tools are available
- ☐ Remaining cooks can cover stations
- ☐ Food quality will be protected
- ☐ Closing work is assigned
- ☐ Closing work is manageable
- ☐ Kitchen lead agrees with decision
- ☐ Manager has checked kitchen directly

4. Employee Considered for Cut

Employee Name: _____

Position: _____

Scheduled Out-Time: _____

Proposed Cut Time: _____

Reason for Cut:

Station or Work Required Before Leaving:

Can remaining BOH team handle the shift?

Yes / No / Not Sure

Will ticket times be protected?

Yes / No / Not Sure

Will food quality be protected?

Yes / No / Not Sure

Will dish or closing work be protected?

Yes / No / Not Sure

5. BOH Cut Decision

Decision:

- ☐ Cut approved
- ☐ Cut delayed
- ☐ Do not cut
- ☐ Reassign employee first
- ☐ Review again later

Reason:

If cut is delayed, review again at:

If employee is reassigned, new task or position:

6. BOH Manager Notes

What must the manager watch after this cut?

- ☐ Ticket times
- ☐ Food quality
- ☐ Grill
- ☐ Fry

- ☐ Sauté
- ☐ Pantry / salad
- ☐ Pizza / specialty station
- ☐ Prep levels
- ☐ Dish flow
- ☐ Kitchen cleanliness
- ☐ Closing work
- ☐ Other: _____

Notes:

BOH Cut Sign-Off

Decision Made By: _____

Date: _____

Time: _____

Signature: _____

Kitchen Lead Review: _____

BAR CUT DECISION FORM

Purpose

The purpose of this section is to help managers make better bar cut decisions.

Bar cuts affect guest experience, service bar speed, dining room drink service, bar cleanliness, stocking, and closing.

The bar should not be cut without reviewing both bar guests and service bar demand.

Why It Matters

A bar can look slow from a distance while still producing a high number of drinks for the dining room.

If the manager cuts bar support too early, servers may wait longer for drinks, guests may receive slower service, and bartenders may fall behind on stocking and closing.

A poor bar cut can affect:

Dining room service

Bar guests

Drink speed

Sales

Guest satisfaction

Cleanliness

Responsible service control

Closing work

Bar labor must be controlled, but not blindly.

The manager should review actual bar demand before making a cut.

When to Use This Tool

Use this section:

Before cutting bartenders

Before cutting service bartender

Before cutting barback

Before cutting cocktail server

After happy hour

After dinner rush

During slow bar shifts

When bar labor is high

When servers wait too long for drinks

When bar closing work is weak

Manager Instructions

Use this form before cutting bar staff.

Review bar guest count, service bar tickets, dining room drink volume, stocking, cleanliness, and closing work.

Do not cut bar support only because bar seats look empty.

Check the full bar workload.

BAR CUT DECISION FORM

Restaurant Name: _____

Date: _____

Shift: _____

Manager Completing Form: _____

1. Bar Shift Status

Current Bar Guests: _____

Service Bar Demand:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Not Sure

Dining Room Drink Volume:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Not Sure

Bar Ticket Times:

- ☐ Controlled
- ☐ Slightly Slow
- ☐ Slow
- ☐ Not Sure

Bar Stocking Status:

- ☐ Stocked
- ☐ Needs Restock
- ☐ Behind
- ☐ Not Checked

Bar Closing Workload:

- ☐ Light
- ☐ Normal
- ☐ Heavy
- ☐ Not Sure

2. Bar Positions Currently Working

Check all that apply:

- ☐ Bartender
- ☐ Service bartender
- ☐ Barback
- ☐ Cocktail server
- ☐ Bar lead
- ☐ Manager support
- ☐ Other: _____

Employees currently working bar:

3. Bar Readiness Before Cut

Before cutting, confirm:

- ☐ Bar guests are controlled
- ☐ Service bar is controlled
- ☐ Servers are not waiting too long for drinks
- ☐ Glassware is available
- ☐ Ice is stocked
- ☐ Garnishes are stocked

- ☐ Liquor, beer, wine, and mixers are stocked
- ☐ Bar top is clean
- ☐ Bar dishes are controlled
- ☐ Responsible service can still be monitored
- ☐ Remaining bartender can handle demand
- ☐ Closing work will still be protected

4. Employee Considered for Cut

Employee Name: _____

Position: _____

Scheduled Out-Time: _____

Proposed Cut Time: _____

Reason for Cut:

Bar Work Required Before Leaving:

Can remaining bar team handle the shift?

Yes / No / Not Sure

Will service bar be protected?

Yes / No / Not Sure

Will bar guests be protected?

Yes / No / Not Sure

Will closing work be protected?

Yes / No / Not Sure

5. Bar Cut Decision

Decision:

- ☐ Cut approved
- ☐ Cut delayed
- ☐ Do not cut
- ☐ Reassign employee first
- ☐ Review again later

Reason:

If cut is delayed, review again at:

If employee is reassigned, new task or position:

6. Bar Manager Notes

What must the manager watch after this cut?

- ☐ Bar guests
- ☐ Service bar tickets
- ☐ Server drink wait time
- ☐ Glassware
- ☐ Ice
- ☐ Stocking
- ☐ Responsible service
- ☐ Bar cleanliness
- ☐ Closing work
- ☐ Other: _____

Notes:

Bar Cut Sign-Off

Decision Made By: _____

Date: _____

Time: _____

Signature: _____

MANAGER LABOR DECISION LOG

Purpose

The purpose of this section is to help managers document labor decisions during the shift.

A decision log creates accountability.

It helps the restaurant review what happened, why the decision was made, and whether the result was good or bad.

Why It Matters

Managers make labor decisions every day.

They cut employees.

They keep employees.

They call employees in.

They send employees home.

They move employees to different positions.

They delay cuts.

They cover positions themselves.

If these decisions are not documented, the restaurant may not learn from them.

A labor decision log helps identify:

Strong manager decisions

Poor manager decisions

Repeated mistakes

Missed cut opportunities

Cuts made too early

Cuts made too late

Call-in decisions that helped

Call-in decisions that wasted labor

Coverage gaps

Training needs

A good manager can explain the decision.

A strong restaurant reviews the decision.

When to Use This Tool

Use this section:

During every shift

When labor percent is high

When cuts are made

When cuts are delayed

When employees are called in

When employees stay late

When managers need accountability

During weekly labor meetings

During manager coaching

Manager Instructions

Use this log during or after the shift.

Record each major labor decision.

Do not only record bad decisions.

Good decisions should also be documented so managers can repeat them.

MANAGER LABOR DECISION LOG

Restaurant Name: _____

Date: _____

Shift: _____

Manager: _____

Labor Target: _____

Labor Decision Entry 1

Time of Decision: _____

Decision Type:

- ☐ Cut employee
- ☐ Delayed cut
- ☐ Did not cut
- ☐ Called employee in
- ☐ Sent employee home
- ☐ Moved employee to another position
- ☐ Manager covered position
- ☐ Approved late stay
- ☐ Other: _____

Employee or Position Involved: _____

Reason for Decision: _____

Expected Labor Impact: _____

Expected Guest Impact: _____

Result of Decision:

- ☐ Helped labor
- ☐ Hurt labor
- ☐ Protected service
- ☐ Hurt service
- ☐ No major impact
- ☐ Needs review

Notes:

Labor Decision Entry 2

Time of Decision: _____

Decision Type:

- ☐ Cut employee
- ☐ Delayed cut
- ☐ Did not cut
- ☐ Called employee in
- ☐ Sent employee home
- ☐ Moved employee to another position
- ☐ Manager covered position
- ☐ Approved late stay
- ☐ Other: _____

Employee or Position Involved: _____

Reason for Decision: _____

Expected Labor Impact:

Expected Guest Impact:

Result of Decision:

- ☐ Helped labor
- ☐ Hurt labor
- ☐ Protected service
- ☐ Hurt service
- ☐ No major impact
- ☐ Needs review

Notes:

Labor Decision Entry 3

Time of Decision: _____

Decision Type:

- ☐ Cut employee
- ☐ Delayed cut
- ☐ Did not cut
- ☐ Called employee in
- ☐ Sent employee home
- ☐ Moved employee to another position
- ☐ Manager covered position
- ☐ Approved late stay
- ☐ Other: _____

Employee or Position Involved:

Reason for Decision:

Expected Labor Impact:

Expected Guest Impact:

Result of Decision:

- ☐ Helped labor
- ☐ Hurt labor
- ☐ Protected service
- ☐ Hurt service
- ☐ No major impact
- ☐ Needs review

Notes:

Shift Labor Decision Summary

Best labor decision made this shift:

Decision that needs review:

Was labor controlled well?

Yes / No / Partly / Not Sure

Did guest experience remain protected?

Yes / No / Partly / Not Sure

What should the next manager know?

Labor Decision Log Sign-Off

Completed By: _____

Date: _____

Signature: _____

Reviewed By: _____

Date Reviewed: _____

Signature: _____

GUEST IMPACT REVIEW

Purpose

The purpose of this section is to help managers review whether labor cuts affected the guest experience.

Labor decisions should not be judged only by the labor number.

They should also be judged by what happened to the guest.

Why It Matters

A cut decision can look good on a labor report but still hurt the restaurant.

If the restaurant saves labor but loses guests, slows service, lowers food quality, or creates complaints, the decision may not be worth repeating.

Guest impact review helps managers understand the true result of a labor decision.

It helps answer:

Did the cut protect labor?

Did the cut hurt service?

Did ticket times increase?

Did drinks slow down?

Did the dining room stay clean?

Did guests complain?

Did employees become overwhelmed?

Did closing work suffer?

Should the decision be repeated?

The goal is not to avoid cuts.

The goal is to make better cuts.

When to Use This Tool

Use this section:

After labor cuts

After slow shifts

After high-volume shifts with cuts

When guest complaints happen after cuts

When service slows after cuts

When managers disagree about cut decisions

During weekly labor meetings

During manager coaching

Manager Instructions

Use this review after the shift or during the next manager meeting.

Compare the labor decision to the guest experience.

If guest experience suffered, identify what should change next time.

GUEST IMPACT REVIEW AFTER LABOR CUT

Restaurant Name: _____

Date: _____

Shift: _____

Manager Completing Review: _____

Cut Decision Reviewed: _____

1. Labor Cut Summary

Employee or Position Cut:

Time Cut:

Reason for Cut:

Labor Goal:

- ☐ Reduce labor percent
- ☐ Reduce standing-around time
- ☐ Adjust to lower sales
- ☐ Improve productivity
- ☐ Correct overstaffing
- ☐ Other: _____

Was the labor goal achieved?

Yes / No / Partly / Not Sure

Explain:

2. Guest Service Review

After the cut, did service change?

Yes / No / Not Sure

Check all that apply:

- ☐ Greeting slowed down
- ☐ Seating slowed down
- ☐ Server sections became too large
- ☐ Refills were missed
- ☐ Table maintenance weakened
- ☐ Food running slowed down
- ☐ Bar drinks slowed down
- ☐ To-go slowed down
- ☐ Manager had to recover guests
- ☐ No service issue noticed
- ☐ Other: _____

Service notes:

3. Kitchen and Bar Review

After the cut, did kitchen or bar performance change?

Yes / No / Not Sure

Check all that apply:

- ☐ Ticket times increased
- ☐ Food quality dropped
- ☐ Expo became overwhelmed

- ☐ Line cooks became overloaded
- ☐ Prep ran short
- ☐ Dish fell behind
- ☐ Service bar slowed down
- ☐ Bar guests waited longer
- ☐ No kitchen or bar issue noticed
- ☐ Other: _____

Kitchen and bar notes:

4. Cleanliness and Closing Review

After the cut, did cleanliness or closing work suffer?

Yes / No / Not Sure

Check all that apply:

- ☐ Tables stayed dirty too long
- ☐ Dining room cleanliness dropped
- ☐ Restrooms were not checked
- ☐ Server stations were not stocked
- ☐ Bar closing work fell behind
- ☐ Kitchen closing work fell behind
- ☐ Dish closing work fell behind
- ☐ Trash or floors were missed
- ☐ Team stayed too late to finish close
- ☐ No cleanliness or closing issue noticed
- ☐ Other: _____

Cleanliness and closing notes:

5. Employee Impact Review

After the cut, did employees become overwhelmed?

Yes / No / Not Sure

Check all that apply:

- ☐ Servers overwhelmed
- ☐ Hosts overwhelmed
- ☐ Bartenders overwhelmed
- ☐ Cooks overwhelmed
- ☐ Dish overwhelmed
- ☐ Manager had to cover too much
- ☐ Strong employee carried too much workload
- ☐ New employee lacked support
- ☐ Team handled the cut well
- ☐ Other: _____

Employee impact notes:

6. Guest Complaint Review

Were there guest complaints after the cut?

Yes / No / Not Sure

If yes, describe:

Were there visible guest experience problems without complaints?

Yes / No / Not Sure

If yes, describe:

Did the manager need to comp, discount, remake, apologize, or recover a guest?

Yes / No / Not Sure

Explain:

7. Final Decision Review

Was the cut decision correct?

- ☐ Yes
- ☐ No
- ☐ Partly
- ☐ Not Sure

Why?

Should this cut be repeated in a similar situation?

Yes / No / Only With Changes

Explain:

What should be done differently next time?

Who needs follow-up?

Follow-up date:

Guest Impact Review Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

PART 6 FINAL REVIEW

MANAGER CUT DECISION SYSTEM

This final review should be completed after Part 6 has been finished.

The manager should now understand:

When to cut staff

When not to cut staff

How to review FOH cuts

How to review BOH cuts

How to review bar cuts

How to document labor decisions

How to review guest impact after cuts

How to protect labor without damaging service

Manager Knowledge Check

1. Why should managers not cut staff only because labor is high?

2. What should be reviewed before cutting FOH staff?

3. What should be reviewed before cutting BOH staff?

4. What should be reviewed before cutting bar staff?

5. Why is it sometimes correct not to cut staff?

6. Why should labor decisions be documented?

7. What guest impact should managers review after a cut?

8. What is the biggest cut decision mistake this restaurant needs to improve?

PART 6 MANAGER ACTION PLAN

The biggest cut decision issue I need to improve is:

The reason this issue matters is:

The first action I will take is:

The second action I will take is:

The third action I will take is:

I will review my progress on this date:

Manager Name: _____

Manager Signature: _____

Reviewing Manager: _____

Date: _____

PART 6 COMPLETION SIGN-OFF

Part 6: Manager Cut Decision System has been reviewed and completed.

Manager Name: _____

Position: _____

Restaurant: _____

Date Completed: _____

Manager Signature: _____

Reviewing Manager Signature: _____

Notes:

COMPLETED EXAMPLE: LABOR CUT DECISION REVIEW

Shift: Friday Dinner Forecasted Sales: \$7,000 Actual Pace at 8:00 p.m.: \$6,850

Decision: Keep dish and one food runner through the final rush; cut one server after section consolidation and completed side work.

Reason: Ticket times remained stable, the dining room had open tables, and the bar still had active volume. Dish pressure was high, so the dishwasher was not cut.

Guest impact: No increase in wait times, ticket times, or complaints. Closing work was completed on schedule.

Labor result: The decision saved 2.5 labor hours without weakening service or closing standards.

Follow-up: Use the same decision checkpoints on comparable Friday shifts, but confirm reservations, bar volume, and dish pressure before repeating the cut.

Reviewed by: Taylor Morgan Date: August 8

PART 7

PRODUCTIVITY AND PERFORMANCE TRACKING

Labor control is not only about how many people are scheduled.

It is also about what employees produce while they are on the clock.

A restaurant can have the correct number of people scheduled and still lose labor control if employees are not productive, stations are not organized, side work is not completed, or managers allow low urgency during slow periods.

Part 7 helps managers review productivity and performance as part of labor control.

This part helps managers answer:

Are employees producing enough value for the hours being used?

Are stations operating efficiently?

Is side work being completed correctly?

Are employees moving with urgency?

Is speed improving or getting worse?

Is quality being protected?

Is labor being wasted because of poor habits?

Is the issue a staffing problem, a training problem, or a productivity problem?

A restaurant should not solve every problem by adding more labor.

Sometimes the restaurant needs more people.

Sometimes it needs better training.

Sometimes it needs better placement.

Sometimes it needs better accountability.

Sometimes it needs stronger productivity from the people already scheduled.

Managers must learn the difference.

EMPLOYEE PRODUCTIVITY REVIEW

Purpose

The purpose of this section is to help managers review individual employee productivity.

Employee productivity means how effectively an employee uses their scheduled time to support the restaurant.

A productive employee stays focused, completes assigned work, supports the shift, helps the team, protects standards, and uses time well.

Why It Matters

Labor hours only help the restaurant when they produce results.

If an employee is on the clock but not working with purpose, the restaurant is paying labor without getting enough value in return.

Low productivity can show up as:

Standing around

Moving slowly

Avoiding side work

Needing constant direction

Taking too long to complete tasks

Leaving work for the next shift

Poor station setup

Weak closing work

Low urgency during rush

Poor teamwork

Repeated reminders from managers

Productivity review helps managers identify whether a labor problem is caused by too many hours or by weak performance during the hours already scheduled.

A manager should not automatically add staff if the real issue is that the current staff is not productive.

When to Use This Tool

Use this section:

During weekly manager review

When labor percent is high

When employees are standing around

When side work is not getting completed

When a shift feels staffed but still struggles

When one employee repeatedly slows the team down

When managers are deciding who should receive more hours

When reviewing employee accountability

When coaching employees on performance

Manager Instructions

Use this review to evaluate one employee at a time.

Be fair and specific.

Do not use this page to attack an employee.

Use it to identify work habits, training needs, coaching needs, and schedule decisions.

If the employee needs coaching, write down what must improve and when it will be reviewed again.

EMPLOYEE PRODUCTIVITY REVIEW

Restaurant Name: _____

Employee Name: _____

Position: _____

Review Period: _____

Manager Completing Review: _____

Date: _____

1. Productivity Rating

Overall productivity rating:

- ☐ Excellent
- ☐ Good
- ☐ Average
- ☐ Needs Improvement
- ☐ Poor

Reason for rating:

2. Work Habits Review

Check all that apply:

- ☐ Arrives on time
- ☐ Starts work quickly
- ☐ Stays focused
- ☐ Works with urgency
- ☐ Completes assigned tasks
- ☐ Helps without being asked
- ☐ Keeps station organized
- ☐ Supports teammates
- ☐ Uses slow time productively
- ☐ Completes side work
- ☐ Completes closing duties
- ☐ Follows manager direction
- ☐ Needs repeated reminders
- ☐ Moves slowly
- ☐ Avoids side work
- ☐ Stands around too often
- ☐ Distracts other employees
- ☐ Leaves work unfinished
- ☐ Other: _____

Notes:

3. Position Performance Review

Primary position worked during review period:

Does employee perform this position effectively?

Yes / No / Sometimes / Not Sure

Explain:

Does employee need additional training?

Yes / No / Not Sure

If yes, what training is needed?

Can employee handle this position during a busy shift?

Yes / No / Sometimes / Not Sure

Can employee handle this position during a slow shift without losing focus?

Yes / No / Sometimes / Not Sure

4. Labor Value Review

Does this employee produce enough value for the labor hours scheduled?

Yes / No / Sometimes / Needs Review

Explain:

Is this employee being scheduled in the right position?

Yes / No / Needs Review

If no, where may they be more effective?

Should this employee receive more hours, fewer hours, or the same hours?

- ☐ More hours
- ☐ Fewer hours
- ☐ Same hours
- ☐ Needs coaching first
- ☐ Needs training first

Reason:

5. Manager Coaching Notes

What does this employee do well?

What must improve?

What specific behavior should the manager coach?

What support or training will be provided?

6. Follow-Up Plan

Action needed:

- ☐ Praise and continue current schedule
- ☐ Coach employee
- ☐ Retrain employee
- ☐ Adjust position
- ☐ Adjust hours
- ☐ Pair with stronger employee
- ☐ Review again before next schedule
- ☐ Other: _____

Manager assigned to follow up:

Follow-up date:

Expected improvement:

Employee Productivity Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

Employee Signature, if used by restaurant: _____

STATION PRODUCTIVITY TRACKER

Purpose

The purpose of this section is to help managers review productivity by station.

A station may be staffed, but that does not mean the station is productive.

Station productivity shows whether the position is producing the results needed for the labor being used.

Why It Matters

Some labor problems are station problems.

A station may be slow because:

The wrong employee is assigned

The employee is not trained

The station is poorly stocked

The setup is inefficient

The station is overloaded

The station is underused

The manager is not checking it

Prep is missing

Tools are missing

Communication is weak

Standards are unclear

If a station is not productive, adding another person may not fix the real issue.

The manager needs to know whether the problem is labor amount, employee skill, station setup, prep, equipment, or accountability.

Station productivity tracking helps managers improve performance before the next schedule is built.

When to Use This Tool

Use this section:

During shift review

When one station repeatedly falls behind

When labor is high but output is weak

When ticket times are slow

When prep runs short

When dish falls behind

When side work is missed

When deciding whether a station needs more labor

When reviewing employee placement

During manager meetings

Manager Instructions

Use this tracker to review one station at a time.

Choose the station that caused the most concern during the shift or week.

Review whether the station had the right employee, correct setup, enough tools, enough prep, clear assignments, and proper manager follow-up.

STATION PRODUCTIVITY TRACKER

Restaurant Name: _____

Station Reviewed: _____

Date or Week Reviewed: _____

Manager Completing Tracker: _____

1. Station Information

Department:

☐ **FOH**

☐ **BOH**

☐ Bar

☐ Prep

☐ Dish

☐ Management

☐ Other: _____

Daypart Reviewed:

☐ Opening

☐ Lunch

☐ Afternoon

☐ Dinner

☐ Late Night

☐ Closing

Employee Assigned to Station:

Was this the right employee for the station?

Yes / No / Not Sure

Explain:

2. Station Readiness Review

Before the shift, was the station ready?

Yes / No / Partly / Not Sure

Check all that apply:

☐ Station was stocked

☐ Station was clean

☐ Tools were available

☐ Prep was ready

☐ Equipment was working

☐ Employee knew assignment

☐ Manager checked station

☐ Station was not stocked

☐ Station was disorganized

☐ Tools were missing

☐ Prep was missing

☐ Equipment issue existed

☐ Employee was unclear on assignment

☐ Manager did not check station

☐ Other: _____

Station readiness notes:

3. Station Performance Review

How did the station perform?

- ☐ Excellent
- ☐ Good
- ☐ Average
- ☐ Needs Improvement
- ☐ Poor

What worked well?

What slowed the station down?

Did the station keep up with volume?

Yes / No / Partly / Not Sure

Did the station affect another department?

Yes / No / Not Sure

If yes, explain:

4. Labor Use Review

Was the station overstaffed, understaffed, or correctly staffed?

- ☐ Overstaffed
- ☐ Understaffed
- ☐ Correctly Staffed
- ☐ Not Sure

Explain:

Was productivity strong enough for the labor used?

Yes / No / Partly / Not Sure

Explain:

Should labor for this station change next schedule?

Yes / No / Needs Review

If yes, what should change?

5. Station Problem Cause

What caused the station issue?

Check all that apply:

- ☐ Employee skill issue
- ☐ Employee urgency issue
- ☐ Training issue
- ☐ Station setup issue
- ☐ Prep issue
- ☐ Tool or equipment issue
- ☐ Schedule issue
- ☐ Too much volume
- ☐ Too little labor
- ☐ Too much labor with low productivity
- ☐ Poor communication

- ☐ Manager did not follow up
- ☐ Side work was not completed
- ☐ Closing work was weak
- ☐ Other: _____

Main cause: _____

6. Station Correction Plan

Correction needed:

- ☐ Retrain employee
- ☐ Move employee to different station
- ☐ Add support during peak period
- ☐ Reduce labor during slow period
- ☐ Improve station setup
- ☐ Improve prep levels
- ☐ Repair or replace tool/equipment
- ☐ Improve manager check-in
- ☐ Create clearer assignment
- ☐ Update checklist or SOP
- ☐ Other: _____

Specific correction: _____

Person responsible: _____

Follow-up date: _____

Station Productivity Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

SIDE WORK COMPLETION TRACKER

Purpose

The purpose of this section is to help managers track side work completion.

Side work is part of labor productivity.

If employees are on the clock, side work should be assigned, completed, checked, and signed off.

Why It Matters

Side work protects the next shift.

It also protects cleanliness, organization, service speed, and closing standards.

When side work is missed, the restaurant may experience:

Unstocked stations

Dirty work areas

Weak opening setup

Weak closing work

Slow service

Manager frustration

Employee conflict

Longer labor hours later

Repeated complaints between shifts

Side work problems often become labor problems.

If employees stay on the clock but side work is not completed, labor is being wasted.

If employees are cut before side work is complete, the remaining team may be overloaded.

Managers must use side work as part of the labor decision process.

When to Use This Tool

Use this section:

During every shift

Before cutting employees

Before closing employees leave

When side work is repeatedly missed

When shifts blame each other

When stations are not stocked

When closing labor runs late

When employees stand around

When managers need better accountability

Manager Instructions

Use this tracker to assign side work, verify completion, and document manager check-off.

Do not only ask, "Did you do your side work?"

Check the work.

A side work tracker is only useful if managers verify the result.

SIDE WORK COMPLETION TRACKER

Restaurant Name: _____

Date: _____

Shift: _____

Manager Completing Tracker: _____

1. FOH Side Work

Employee Name: _____

Position: _____

Assigned Side Work:

Completed?

Yes / No / Partly

Manager Checked?

Yes / No

Correction Needed:

Manager Initials: _____

Employee Name: _____

Position: _____

Assigned Side Work:

Completed?

Yes / No / Partly

Manager Checked?

Yes / No

Correction Needed:

Manager Initials: _____

Employee Name: _____

Position: _____

Assigned Side Work:

Completed?

Yes / No / Partly

Manager Checked?

Yes / No

Correction Needed:

Manager Initials: _____

2. BOH Side Work

Employee Name: _____

Position: _____

Assigned Side Work:

Completed?

Yes / No / Partly

Manager Checked?

Yes / No

Correction Needed:

Manager Initials: _____

Employee Name: _____

Position: _____

Assigned Side Work:

Completed?

Yes / No / Partly

Manager Checked?

Yes / No

Correction Needed:

Manager Initials: _____

Employee Name: _____

Position: _____

Assigned Side Work:

Completed?

Yes / No / Partly

Manager Checked?

Yes / No

Correction Needed:

Manager Initials: _____

3. Bar Side Work

Employee Name: _____

Position: _____

Assigned Side Work:

Completed?

Yes / No / Partly

Manager Checked?

Yes / No

Correction Needed:

Manager Initials: _____

Employee Name: _____

Position: _____

Assigned Side Work:

Completed?

Yes / No / Partly

Manager Checked?

Yes / No

Correction Needed:

Manager Initials: _____

4. Dish / Utility Side Work

Employee Name: _____

Position: _____

Assigned Side Work:

Completed?

Yes / No / Partly

Manager Checked?

Yes / No

Correction Needed:

Manager Initials: _____

5. Side Work Problem Review

Was any side work missed?

Yes / No

If yes, what was missed?

Why was it missed?

- ☐ Employee did not complete it
- ☐ Employee was cut too early
- ☐ Manager did not assign it
- ☐ Manager did not check it
- ☐ Shift was too busy
- ☐ Side work list was unclear
- ☐ Employee did not know standard
- ☐ Other: _____

What needs to change?

6. Labor Connection Review

Did side work affect labor?

Yes / No / Not Sure

Check all that apply:

- ☐ Employees stayed late to finish side work
- ☐ Remaining team had to finish someone else's work
- ☐ Next shift started behind
- ☐ Closing took longer
- ☐ Manager had to correct work
- ☐ Labor was wasted because work was not productive
- ☐ No labor impact noticed
- ☐ Other: _____

Notes:

Side Work Completion Sign-Off

All required side work completed?

Yes / No / Approved With Notes

Manager Name: _____

Date: _____

Signature: _____

Notes:

SPEED AND QUALITY REVIEW

Purpose

The purpose of this section is to help managers review both speed and quality.

Labor productivity is not only about working fast.

Employees must work fast enough to support the shift and carefully enough to protect standards.

A restaurant should not sacrifice quality for speed or use quality as an excuse for low urgency.

Why It Matters

Speed and quality must work together.

If the team is fast but sloppy, guests receive poor food, poor drinks, poor service, or poor cleanliness.

If the team is careful but too slow, guests wait too long and sales may suffer.

Managers must watch both sides.

Speed problems may appear as:

Slow ticket times

Slow drinks

Slow seating

Slow table turns

Slow dish recovery

Slow prep production

Slow closing

Quality problems may appear as:

Food mistakes

Incorrect portions

Poor plate presentation

Wrong orders

Dirty tables

Unstocked stations

Poor guest communication

Incomplete side work

Weak closing standards

A good manager reviews whether the team is moving with urgency and protecting standards at the same time.

When to Use This Tool

Use this section:

After busy shifts

After guest complaints

When ticket times are high

When food quality drops

When employees are rushing and making mistakes

When employees are moving too slowly

When service speed is weak

When closing takes too long

During manager coaching

During employee productivity review

Manager Instructions

Use this review after a shift or during weekly manager review.

Choose one department, station, or employee group to review.

Identify whether the main problem was speed, quality, or both.

Then assign a correction.

SPEED AND QUALITY REVIEW

Restaurant Name: _____

Date or Week Reviewed: _____

Department or Station Reviewed: _____

Manager Completing Review: _____

1. Review Area

Area reviewed:

- ☐ FOH service
- ☐ Host stand
- ☐ Bar
- ☐ Service bar
- ☐ Kitchen line
- ☐ Expo
- ☐ Prep
- ☐ Dish
- ☐ Closing
- ☐ Side work
- ☐ Management
- ☐ Other: _____

Shift reviewed:

- ☐ Opening
- ☐ Lunch
- ☐ Afternoon
- ☐ Dinner
- ☐ Late Night
- ☐ Closing

2. Speed Review

Speed rating:

- ☐ Excellent
- ☐ Good
- ☐ Average
- ☐ Needs Improvement
- ☐ Poor

Where was speed strong?

Where was speed weak?

What caused the speed issue?

- ☐ Not enough labor
- ☐ Too much volume
- ☐ Weak employee urgency
- ☐ Training issue
- ☐ Station setup issue
- ☐ Prep issue
- ☐ Equipment issue
- ☐ Poor communication
- ☐ Manager did not redirect team
- ☐ Employee placement issue
- ☐ Other: _____

Notes:

3. Quality Review

Quality rating:

- ☐ Excellent
- ☐ Good
- ☐ Average
- ☐ Needs Improvement
- ☐ Poor

Where was quality strong?

Where was quality weak?

What caused the quality issue?

- ☐ Rushing
- ☐ Lack of training
- ☐ Poor standards
- ☐ Poor communication
- ☐ Station not stocked
- ☐ Employee not focused
- ☐ Manager did not check
- ☐ Too much volume
- ☐ Wrong employee placement
- ☐ Other: _____

Notes:

4. Speed and Quality Balance

Which statement best describes the issue?

- ☐ Speed was strong and quality was strong
- ☐ Speed was strong but quality suffered
- ☐ Quality was strong but speed was too slow
- ☐ Both speed and quality need improvement
- ☐ Issue was isolated to one station or employee
- ☐ Not enough information

Explain:

5. Guest and Labor Impact

Did speed or quality affect guest experience?

Yes / No / Not Sure

Explain:

Did speed or quality affect labor?

Yes / No / Not Sure

Check all that apply:

- ☐ Employees stayed late
- ☐ Manager had to add labor
- ☐ Manager could not cut

- ☐ Rework caused wasted labor
- ☐ Slow work increased labor hours
- ☐ Mistakes required remakes
- ☐ Weak closing increased labor
- ☐ No labor impact noticed
- ☐ Other: _____

Notes: _____

6. Correction Plan

Correction needed:

- ☐ Coach employee urgency
- ☐ Coach quality standard
- ☐ Retrain station
- ☐ Improve prep
- ☐ Improve setup
- ☐ Adjust staffing
- ☐ Adjust employee placement
- ☐ Improve manager check-ins
- ☐ Update checklist or SOP
- ☐ Other: _____

Specific correction: _____

Person responsible: _____

Follow-up date: _____

Speed and Quality Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

LABOR WASTE REVIEW

Purpose

The purpose of this section is to help managers identify wasted labor.

Labor waste happens when paid labor time is used without enough value to the restaurant.

It can happen during slow periods, weak shifts, poor closings, bad scheduling, or low productivity.

Why It Matters

Labor waste can quietly damage profit.

It may not feel serious in the moment, but repeated wasted hours add up.

Labor waste may happen when:

Employees stand around

Employees stay after work is complete

Side work is stretched out

Too many people are scheduled

Start times are too early

Cut decisions are too late

Employees move slowly

Managers fail to redirect staff

Prep is overproduced

Employees repeat work because it was done wrong

Closing takes longer than needed

Managers call in labor without clear need

Labor waste should be reviewed without blaming the team first.

Managers should ask:

Was the schedule wrong?

Was the employee unproductive?

Was the manager slow to cut?

Was the work unclear?

Was the station disorganized?

Was training missing?

Was there a better decision available?

The goal is to reduce waste and improve the next labor plan.

When to Use This Tool

Use this section:

When labor percent is high

When employees are standing around

After slow shifts

After late closings

When side work takes too long

When prep labor is too high

When manager cut decisions are weak

When reviewing weekly labor

When coaching managers

Manager Instructions

Use this review to identify where labor was wasted.

Be specific.

Do not write "labor was bad."

Write what happened, who was involved, why it happened, and what will change.

LABOR WASTE REVIEW

Restaurant Name: _____

Date or Week Reviewed: _____

Manager Completing Review: _____

1. Labor Waste Area

Where did labor waste happen?

☐ **FOH**

☐ **BOH**

☐ Bar

☐ Prep

☐ Dish

☐ Management

☐ Closing

☐ Whole Restaurant

☐ Other: _____

Shift or daypart:

☐ Opening

☐ Lunch

☐ Afternoon

☐ Dinner

☐ Late Night

☐ Closing

Employee or position involved:

2. Type of Labor Waste

Check all that apply:

☐ Employees standing around

☐ Employees stayed after work was complete

☐ Cut was made too late

☐ Start time was too early

☐ Too many employees scheduled

☐ Too many support positions scheduled

☐ Too many trainees scheduled

☐ Side work took too long

☐ Closing took too long

☐ Prep was overproduced

☐ Work had to be redone

☐ Employee was unproductive

☐ Manager did not redirect employee

☐ Manager did not watch labor

☐ Extra employee was called in unnecessarily

☐ Other: _____

Describe what happened:

3. Cause Review

What caused the labor waste?

☐ Poor schedule planning

☐ Poor sales forecast

- ☐ Slow shift
- ☐ Weak cut decision
- ☐ Employee productivity issue
- ☐ Training issue
- ☐ No clear side work assignment
- ☐ Manager did not follow up
- ☐ Employee placement issue
- ☐ Station setup issue
- ☐ Prep planning issue
- ☐ Closing checklist issue
- ☐ Other: _____

Main cause: _____

4. Estimated Labor Waste

Estimated wasted time: _____

Estimated number of employees affected: _____

Estimated labor dollars, if known: \$ _____

Was this preventable?

Yes / No / Partly / Not Sure

Explain: _____

5. Correction Plan

What should change next time?

- ☐ Adjust schedule
- ☐ Change start time
- ☐ Change cut time
- ☐ Coach employee
- ☐ Coach manager
- ☐ Clarify side work
- ☐ Improve closing checklist
- ☐ Improve prep plan
- ☐ Reduce support labor
- ☐ Improve productivity expectations
- ☐ Review sales forecast
- ☐ Other: _____

Specific correction: _____

Person responsible: _____

Follow-up date: _____

Labor Waste Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

REPEATED STAFFING ISSUE FORM

Purpose

The purpose of this section is to help managers track staffing issues that happen more than once.

A repeated staffing issue should not be treated like a surprise every week.

If the same problem keeps happening, the restaurant needs a correction plan.

Why It Matters

Some staffing problems repeat because they are never fully solved.

Examples include:

Every Friday dish falls behind

Every Sunday lunch is understaffed

Closing always takes too long

The bar is always short on weekends

Prep always runs behind before dinner

The same employee always calls out

The same station always needs help

The same manager cuts too late

The same manager cuts too early

The same employees stand around during slow shifts

Repeated issues are valuable because they show the restaurant where the system is weak.

A repeated staffing issue may require:

Schedule adjustment

Hiring

Cross-training

Employee coaching

Manager coaching

Different start times

Different cut times

Better prep planning

Better side work accountability

Better shift leadership

The purpose of this form is to stop the same problem from becoming normal.

When to Use This Tool

Use this section:

When a staffing issue happens more than once

During weekly manager meetings

During labor review

When schedule problems repeat

When one department is always short

When one shift always struggles

When one employee creates repeated problems

When creating a 30-day improvement plan

Manager Instructions

Use this form when a staffing issue has happened repeatedly.

Identify the pattern, not just the most recent incident.

Assign a correction and follow-up date.

A repeated issue should always have an owner.

REPEATED STAFFING ISSUE FORM

Restaurant Name: _____

Issue Reviewed: _____

Manager Completing Form: _____

Date: _____

1. Issue Description

Describe the repeated staffing issue:

How many times has this happened?

When does it usually happen?

- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday
- ☐ Sunday
- ☐ Opening
- ☐ Lunch
- ☐ Afternoon
- ☐ Dinner
- ☐ Late Night
- ☐ Closing
- ☐ Weekend
- ☐ Event
- ☐ Other: _____

2. Area Affected

Which area is affected?

☐ **FOH**

☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management
- ☐ Whole Restaurant
- ☐ Other: _____

Position affected:

Employees involved, if any:

Managers involved, if any:

3. Pattern Review

What pattern is showing?

- ☐ Same shift struggles
- ☐ Same position is short

- ☐ Same employee issue repeats
- ☐ Same manager decision repeats
- ☐ Same daypart is overstaffed
- ☐ Same daypart is understaffed
- ☐ Same station falls behind
- ☐ Same closing issue repeats
- ☐ Same call-out issue repeats
- ☐ Same productivity issue repeats
- ☐ Other: _____

Explain the pattern:

4. Root Cause Review

What is most likely causing the repeated issue?

- ☐ Schedule is wrong
- ☐ Sales forecast is wrong
- ☐ Not enough employees trained
- ☐ Not enough employees hired
- ☐ Employee reliability issue
- ☐ Employee productivity issue
- ☐ Manager decision issue
- ☐ Weak cross-training
- ☐ Weak prep planning
- ☐ Weak dish coverage
- ☐ Weak bar coverage
- ☐ Weak closing system
- ☐ Poor employee placement
- ☐ Other: _____

Main cause:

5. Impact Review

What does this repeated issue affect?

- ☐ Labor percent
- ☐ Guest service
- ☐ Ticket times
- ☐ Food quality
- ☐ Bar speed
- ☐ Table maintenance
- ☐ Cleanliness
- ☐ Prep readiness
- ☐ Dish flow
- ☐ Closing labor
- ☐ Employee morale
- ☐ Manager control
- ☐ Sales
- ☐ Other: _____

Describe impact:

6. Correction Plan

Correction needed:

- ☐ Change schedule

- ☐ Add coverage
- ☐ Reduce coverage
- ☐ Change start time
- ☐ Change cut time
- ☐ Cross-train employee
- ☐ Hire for position
- ☐ Coach employee
- ☐ Coach manager
- ☐ Improve station setup
- ☐ Improve prep plan
- ☐ Improve side work system
- ☐ Improve closing checklist
- ☐ Review accountability
- ☐ Other: _____

Specific correction:

Person responsible:

Due date:

7. Follow-Up Review

Follow-up date:

What result should improve?

How will the manager know the issue is fixed?

What happens if the issue repeats again?

Repeated Staffing Issue Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

Reviewing Manager or Owner: _____

Date: _____

Signature: _____

PART 7 FINAL REVIEW

PRODUCTIVITY AND PERFORMANCE TRACKING

This final review should be completed after Part 7 has been finished.

The manager should now understand:

How to review employee productivity

How to review station productivity

How to track side work completion

How to review speed and quality

How to identify labor waste

How to document repeated staffing issues

How to tell the difference between a staffing problem and a productivity problem

Manager Knowledge Check

1. Why is productivity part of labor control?

2. What does employee productivity show?

3. Why should station productivity be reviewed?

4. How can missed side work create labor problems?

5. Why must managers review both speed and quality?

6. What are examples of labor waste?

7. Why should repeated staffing issues be documented?

8. What is the biggest productivity issue this restaurant needs to improve?

PART 7 MANAGER ACTION PLAN

The biggest productivity or performance issue I need to improve is:

The reason this issue matters is:

The first action I will take is:

The second action I will take is:

The third action I will take is:

I will review my progress on this date:

Manager Name: _____

Manager Signature: _____

Reviewing Manager: _____

Date: _____

PART 7 COMPLETION SIGN-OFF

Part 7: Productivity and Performance Tracking has been reviewed and completed.

Manager Name: _____

Position: _____

Restaurant: _____

Date Completed: _____

Manager Signature: _____

Reviewing Manager Signature: _____

Notes:

PART 8

HIRING NEEDS AND STAFFING GAP REVIEW

Labor control is not only about cutting hours.

It is also about having the right people available to schedule.

A restaurant cannot build a strong schedule if it does not have enough trained employees, enough reliable employees, enough cross-trained employees, or enough coverage for key positions.

Sometimes labor is high because the restaurant is overstaffed.

Sometimes labor is high because the restaurant is understaffed in the wrong places.

Sometimes managers overuse the same strong employees because there are not enough trained backups.

Sometimes overtime happens because one position does not have enough coverage.

Sometimes poor guest service happens because the restaurant is short on the wrong station.

Part 8 helps managers identify where the restaurant has staffing gaps, position shortages, cross-training needs, hiring priorities, new hire planning needs, and retention risks.

The goal is to connect labor control to staffing strategy.

A manager should know:

Which positions are short

Which positions have no backup

Which shifts are too dependent on one employee

Which departments need hiring

Which employees need cross-training

Which new hires need a coverage plan

Which strong employees are at risk of burnout

Which staffing gaps are hurting labor control

A schedule is only as strong as the team available to fill it.

STAFFING GAP WORKSHEET

Purpose

The purpose of this section is to help managers identify staffing gaps before they become repeated schedule problems.

A staffing gap means the restaurant does not have enough reliable, trained, or available employees to cover a position, shift, station, or daypart correctly.

Why It Matters

Staffing gaps create labor problems that managers may try to solve the wrong way.

If the restaurant is short on trained cooks, managers may overwork the few strong cooks they have.

If the restaurant is short on dish coverage, closing may run late.

If the restaurant is short on hosts, servers may lose time managing the door.

If the restaurant is short on prep, line cooks may leave stations during service.

If the restaurant is short on managers, shifts may lose control.

Staffing gaps can cause:

Overtime

Poor schedule balance

Overloaded strong employees

Weak shifts

Call-out problems

Slow service

Long ticket times

Late closing

Higher labor from poor productivity

Manager stress

Employee burnout

Guest complaints

A staffing gap should not be treated as a surprise every week.

It should be identified, written down, and corrected.

When to Use This Tool

Use this section:

Before writing the schedule

During weekly labor review

When the same shift keeps struggling

When overtime keeps happening

When strong employees are overloaded

When one position has no backup

When call-outs create major problems

When hiring decisions need to be made

When cross-training priorities are being set

When planning seasonal staffing

Manager Instructions

Use this worksheet to identify where the restaurant is short.

Be specific.

Do not only write "we need people."

Write which department, which position, which shift, which daypart, and what kind of employee is needed.

The more specific the staffing gap, the easier it is to fix.

STAFFING GAP WORKSHEET

Restaurant Name: _____

Date: _____

Manager Completing Worksheet: _____

Review Period: _____

1. Current Staffing Status

Overall staffing level:

- ☐ Fully staffed
- ☐ Mostly staffed
- ☐ Short in one area
- ☐ Short in multiple areas
- ☐ Critically short
- ☐ Not sure

Explain:

2. Department Staffing Review

FOH Staffing

FOH staffing level:

- ☐ Strong
- ☐ Adequate
- ☐ Weak
- ☐ Critically short
- ☐ Not sure

FOH positions short:

- ☐ Host
- ☐ Server
- ☐ Busser
- ☐ Runner
- ☐ Expo
- ☐ To-go
- ☐ Floor lead
- ☐ Other: _____

FOH staffing notes:

BOH Staffing

BOH staffing level:

- ☐ Strong
- ☐ Adequate
- ☐ Weak
- ☐ Critically short
- ☐ Not sure

BOH positions short:

- ☐ Grill
- ☐ Fry
- ☐ Sauté
- ☐ Pantry / salad
- ☐ Pizza / specialty station
- ☐ Prep
- ☐ Dish

☐ Kitchen lead

☐ Other: _____

BOH staffing notes:

Bar Staffing

Bar staffing level:

☐ Strong

☐ Adequate

☐ Weak

☐ Critically short

☐ Not sure

Bar positions short:

☐ Bartender

☐ Service bartender

☐ Barback

☐ Cocktail server

☐ Bar lead

☐ Other: _____

Bar staffing notes:

Manager Staffing

Manager staffing level:

☐ Strong

☐ Adequate

☐ Weak

☐ Critically short

☐ Not sure

Manager coverage short:

☐ Opening manager

☐ Lunch manager

☐ Dinner manager

☐ Closing manager

☐ Kitchen manager or lead

☐ Floor manager or lead

☐ Bar manager or lead

☐ Other: _____

Manager staffing notes:

3. Shift Staffing Gap Review

Which shifts are hardest to staff?

☐ Monday opening

☐ Monday lunch

☐ Monday dinner

☐ Tuesday opening

☐ Tuesday lunch

☐ Tuesday dinner

☐ Wednesday opening

☐ Wednesday lunch

☐ Wednesday dinner

☐ Thursday opening

- ☐ Thursday lunch
- ☐ Thursday dinner
- ☐ Friday opening
- ☐ Friday lunch
- ☐ Friday dinner
- ☐ Saturday opening
- ☐ Saturday lunch
- ☐ Saturday dinner
- ☐ Sunday opening
- ☐ Sunday lunch
- ☐ Sunday dinner
- ☐ Closing shifts
- ☐ Weekend shifts
- ☐ Holiday shifts
- ☐ Other: _____

Most difficult shift to cover:

Why?

4. Staffing Gap Cause Review

What is causing the staffing gap?

Check all that apply:

- ☐ Not enough applicants
- ☐ Not enough trained employees
- ☐ Not enough reliable employees
- ☐ Not enough cross-training
- ☐ High turnover
- ☐ Employees unavailable during needed shifts
- ☐ Too many time-off requests
- ☐ Too many call-outs
- ☐ Weak hiring pipeline
- ☐ Poor training follow-up
- ☐ Strong employees overloaded
- ☐ Low employee morale
- ☐ Schedule does not match employee availability
- ☐ Position is difficult to hire for
- ☐ Manager coverage is weak
- ☐ Other: _____

Main cause:

5. Staffing Gap Impact

What is this gap affecting?

- ☐ Labor percent
- ☐ Overtime
- ☐ Schedule quality
- ☐ Guest service
- ☐ Ticket times
- ☐ Food quality
- ☐ Bar speed
- ☐ Dish flow
- ☐ Prep readiness
- ☐ Closing work

- ☐ Cleanliness
- ☐ Employee morale
- ☐ Manager control
- ☐ Training
- ☐ Sales
- ☐ Other: _____

Describe the impact:

6. Staffing Gap Correction Plan

What needs to happen?

- ☐ Hire for position
- ☐ Cross-train current employee
- ☐ Retrain current employee
- ☐ Adjust schedule
- ☐ Adjust availability expectations
- ☐ Build backup coverage
- ☐ Reduce overtime risk
- ☐ Improve retention
- ☐ Coach unreliable employee
- ☐ Create training plan
- ☐ Promote or develop lead
- ☐ Other: _____

Specific correction:

Person responsible:

Due date:

Follow-up date:

Staffing Gap Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

POSITION SHORTAGE TRACKER

Purpose

The purpose of this section is to help managers track specific position shortages.

A restaurant may not be short everywhere.

It may be short in one key position that affects the entire schedule.

This tracker helps managers identify exactly which positions need attention.

Why It Matters

A position shortage can create major labor problems.

If only one person can work grill, the schedule becomes fragile.

If only one person can close dish, closing becomes risky.

If only one bartender can handle Saturday night, the bar becomes dependent on one person.

If only one manager can run dinner, manager coverage becomes weak.

A position shortage may force managers to:

Schedule overtime

Overuse strong employees

Schedule weak employees in positions they are not ready for

Leave positions uncovered

Add extra support labor

Delay cuts

Call employees in at the last minute

Run poor shifts

Tracking position shortages helps the restaurant decide where to hire, train, cross-train, and schedule differently.

When to Use This Tool

Use this section:

Before schedule writing

During hiring planning

During cross-training planning

When one position is always short

When overtime keeps happening in one role

When call-outs hurt the shift badly

When managers rely too much on one employee

When building a staffing improvement plan

Manager Instructions

Use this tracker to review one position at a time.

Write the position, current number of trained employees, number of reliable employees, coverage risk, and correction plan.

Do not count an employee as fully available if they are not trained, not reliable, or not available for the needed shifts.

POSITION SHORTAGE TRACKER

Restaurant Name: _____

Manager Completing Tracker: _____

Date: _____

Review Period: _____

Position Shortage Entry 1

Position Reviewed: _____

Department: _____

☐ **FOH**

☐ **BOH**

☐ Bar

☐ Prep

☐ Dish

☐ Management

☐ Other: _____

Number of fully trained employees: _____

Number of reliable employees: _____

Number of employees in training: _____

Number of backups available: _____

Is this position short?

Yes / No / Some Shifts / Not Sure

Shifts most affected:

Risk level:

☐ Low

☐ Medium

☐ High

☐ Critical

What happens when this position is short?

Correction needed:

☐ Hire

☐ Cross-train

☐ Retrain

☐ Adjust schedule

☐ Develop backup

☐ Coach reliability

☐ Other: _____

Action plan:

Person responsible:

Follow-up date:

Position Shortage Entry 2

Position Reviewed: _____

Department: _____

☐ **FOH**☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Number of fully trained employees: _____

Number of reliable employees: _____

Number of employees in training: _____

Number of backups available: _____

Is this position short?

Yes / No / Some Shifts / Not Sure

Shifts most affected:

Risk level:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

What happens when this position is short?

Correction needed:

- ☐ Hire
- ☐ Cross-train
- ☐ Retrain
- ☐ Adjust schedule
- ☐ Develop backup
- ☐ Coach reliability
- ☐ Other: _____

Action plan:

Person responsible:

Follow-up date:

Position Shortage Entry 3

Position Reviewed: _____

Department:

☐ **FOH**☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Number of fully trained employees: _____

Number of reliable employees: _____

Number of employees in training: _____

Number of backups available: _____

Is this position short?

Yes / No / Some Shifts / Not Sure

Shifts most affected:

Risk level:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

What happens when this position is short?

Correction needed:

- ☐ Hire
- ☐ Cross-train
- ☐ Retrain
- ☐ Adjust schedule
- ☐ Develop backup
- ☐ Coach reliability
- ☐ Other: _____

Action plan:

Person responsible:

Follow-up date:

Position Shortage Summary

Most critical position shortage:

Why?

Position shortage causing the most labor cost:

Why?

Position shortage causing the most service risk:

Why?

Position shortage that should be fixed first:

Reason:

Position Shortage Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

CROSS-TRAINING NEEDS REVIEW

Purpose

The purpose of this section is to help managers identify cross-training needs.

Cross-training helps the restaurant build schedule flexibility, reduce call-out damage, cover gaps, and protect labor control.

A cross-training need exists when the restaurant depends too heavily on too few people for a position, station, or shift.

Why It Matters

Cross-training can reduce labor problems without always hiring more people.

If employees can safely and effectively cover more than one position, managers have more options.

Cross-training can help:

Cover call-outs

Reduce overtime

Protect key shifts

Build backups

Improve employee value

Support promotions

Improve teamwork

Reduce schedule stress

Protect guest experience

However, cross-training must be done correctly.

Managers should not throw untrained employees into stations just because coverage is short.

Cross-training should be planned, trained, observed, and approved.

A backup employee should not be treated as fully certified until they can perform the position correctly.

When to Use This Tool

Use this section:

When one position has no backup

When call-outs hurt the shift

When overtime happens because of limited coverage

When employees want more responsibility

When managers are building training plans

When hiring is difficult

When schedule flexibility is weak

When planning promotions

During manager staffing review

Manager Instructions

Use this review to identify which positions need more backup coverage.

Then select employees who may be good candidates for cross-training.

Choose carefully.

The best cross-training candidate is not always the employee who wants more hours. It is the employee who can protect standards in the new position.

CROSS-TRAINING NEEDS REVIEW

Restaurant Name: _____

Manager Completing Review: _____

Date: _____

Review Period: _____

1. Cross-Training Need Identification

Which positions need more cross-training coverage?

- ☐ Host
- ☐ Server
- ☐ Busser
- ☐ Runner
- ☐ Expo
- ☐ To-go
- ☐ Bartender
- ☐ Barback
- ☐ Grill
- ☐ Fry
- ☐ Sauté
- ☐ Pantry / salad
- ☐ Pizza / specialty station
- ☐ Prep
- ☐ Dish
- ☐ Kitchen lead
- ☐ Floor lead
- ☐ Closing lead
- ☐ Other: _____

Highest priority cross-training need:

Why?

2. Current Backup Coverage Review

Position reviewed: _____

Current primary employees:

Current backup employees:

Are backups strong enough for busy shifts?

Yes / No / Some / Not Sure

Are backups strong enough for slow shifts?

Yes / No / Some / Not Sure

Are backups certified or just familiar with the position?

- ☐ Certified
- ☐ Familiar
- ☐ In training
- ☐ Not sure

Notes:

3. Cross-Training Candidate Review

Employee Name: _____

Current Position: _____

Position to Cross-Train Into: _____

Reason this employee is a good candidate:

Concerns:

Training needed:

Trainer assigned:

Target start date: _____

Target completion date: _____

Employee Name: _____

Current Position: _____

Position to Cross-Train Into: _____

Reason this employee is a good candidate:

Concerns:

Training needed:

Trainer assigned:

Target start date: _____

Target completion date: _____

Employee Name: _____

Current Position: _____

Position to Cross-Train Into: _____

Reason this employee is a good candidate:

Concerns:

Training needed:

Trainer assigned:

Target start date: _____

Target completion date: _____

4. Cross-Training Rules

Before using an employee as backup coverage, confirm:

- ☐ Employee has been trained on the position

- ☐ Employee understands the standards
- ☐ Employee has practiced during a controlled shift
- ☐ Employee has been observed by manager or trainer
- ☐ Employee can perform safely and correctly
- ☐ Employee can protect guest experience
- ☐ Employee can protect quality standards
- ☐ Employee knows when to ask for help
- ☐ Manager has approved backup status
- ☐ Training status has been documented

5. Cross-Training Action Plan

Position to cross-train first:

Employee assigned:

Trainer assigned:

Training start date:

Review date:

How will success be measured?

What schedule gap should this training help solve?

Cross-Training Needs Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

HIRING PRIORITY PLANNER

Purpose

The purpose of this section is to help managers decide which positions should be hired first.

Not every open position has the same urgency.

A hiring priority planner helps managers focus on the positions that have the greatest impact on labor, service, sales, and operations.

Why It Matters

Hiring without priorities can waste time.

A restaurant may hire for a lower-risk position while ignoring the position that is hurting the schedule every week.

Strong hiring priorities help the restaurant decide:

Which position is most urgent

Which shift needs help most

Which department is at highest risk

Which gap is causing overtime

Which gap is hurting guest experience

Which gap is burning out strong employees

Which role needs immediate attention

A hiring priority should be based on business need, not only on who applies first.

The restaurant needs to know what kind of employee it is trying to find.

When to Use This Tool

Use this section:

Before posting job ads

Before interviewing

During staffing meetings

When multiple positions are short

When labor problems continue

When overtime is high

When turnover increases

When managers are unsure who to hire next

When building a 30-day staffing plan

Manager Instructions

Use this planner to rank hiring needs.

Look at each open or weak position.

Consider schedule impact, guest impact, labor impact, training time, urgency, and available backups.

Then choose the top hiring priority.

HIRING PRIORITY PLANNER

Restaurant Name: _____

Manager Completing Planner: _____

Date: _____

Review Period: _____

1. Current Hiring Needs

Positions currently needing applicants:

- ☐ Host
- ☐ Server
- ☐ Busser
- ☐ Runner
- ☐ Expo
- ☐ To-go
- ☐ Bartender
- ☐ Barback
- ☐ Grill cook
- ☐ Fry cook
- ☐ Sauté cook
- ☐ Pantry / salad
- ☐ Pizza / specialty station
- ☐ Prep cook
- ☐ Dishwasher
- ☐ Kitchen lead
- ☐ Floor lead
- ☐ Manager
- ☐ Other: _____

Most urgent position:

Why?

2. Hiring Need Entry 1

Position Needed: _____

Department:

☐ **FOH**

☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Shifts needed:

Full-time, part-time, or either?

- ☐ Full-time
- ☐ Part-time
- ☐ Either

Urgency level:

- ☐ Low
- ☐ Medium
- ☐ High

☐ Critical

Why is this hire needed?

What problem will this hire solve?

What happens if this position is not filled?

Training time expected:

Manager responsible for hiring follow-up:

3. Hiring Need Entry 2Position Needed:

Department:

☐ **FOH**☐ **BOH**☐ Bar☐ Prep☐ Dish☐ Management☐ Other:

Shifts needed:

Full-time, part-time, or either?

☐ Full-time☐ Part-time☐ Either

Urgency level:

☐ Low☐ Medium☐ High☐ Critical

Why is this hire needed?

What problem will this hire solve?

What happens if this position is not filled?

Training time expected:

Manager responsible for hiring follow-up:

4. Hiring Need Entry 3Position Needed:

Department:

☐ **FOH**

☐ **BOH**

☐ Bar

☐ Prep

☐ Dish

☐ Management

☐ Other: _____

Shifts needed:

Full-time, part-time, or either?

☐ Full-time

☐ Part-time

☐ Either

Urgency level:

☐ Low

☐ Medium

☐ High

☐ Critical

Why is this hire needed?

What problem will this hire solve?

What happens if this position is not filled?

Training time expected:

Manager responsible for hiring follow-up:

5. Hiring Priority Ranking

Priority 1:

Reason:

Priority 2:

Reason:

Priority 3:

Reason:

6. Hiring Follow-Up Plan

Who will post or update the job opening?

Date job opening should be posted or reviewed:

Who will screen applicants?

Who will conduct interviews?

Who will approve hiring decisions?

Target hire date:

Notes:

Hiring Priority Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

Owner or General Manager Approval: _____

Date: _____

Signature: _____

NEW HIRE COVERAGE PLAN

Purpose

The purpose of this section is to help managers plan how a new hire will be added to the schedule without weakening the shift. A new hire can help solve staffing problems, but only if training and coverage are planned correctly.

Why It Matters

Hiring someone does not immediately fix a staffing gap.

A new hire needs training, support, observation, and time to build skill.

If managers schedule new hires without a plan, the shift may become weaker instead of stronger.

Poor new hire scheduling can cause:

Slow service

Food mistakes

Training frustration

Overloaded trainers

Poor guest experience

Weak productivity

New hire discouragement

Manager stress

Labor increase without immediate return

A new hire coverage plan helps managers decide:

When the new hire should train

Who will train them

Which shifts are safe for training

Which shifts are too busy for early training

When the new hire can work with support

When the new hire can work independently

How the new hire will help close the staffing gap

A new hire should not be thrown into a position just because the schedule is short.

When to Use This Tool

Use this section:

When a new employee is hired

Before adding a new hire to the schedule

Before training begins

When filling a staffing gap

When new hires keep failing

When trainers are overloaded

When managers need better onboarding control

When labor increases due to training

Manager Instructions

Use this plan before the new hire's first shift.

Connect the new hire to the staffing gap they are meant to help solve.

Assign a trainer.

Choose training shifts carefully.

Avoid placing new hires in high-pressure shifts before they are ready.

NEW HIRE COVERAGE PLAN

Restaurant Name: _____

New Hire Name: _____

Position Hired For: _____

Start Date: _____

Manager Completing Plan: _____

1. Hiring Purpose

Why was this employee hired?

- ☐ Replace employee who left
- ☐ Fill position shortage
- ☐ Add weekend coverage
- ☐ Add closing coverage
- ☐ Add prep coverage
- ☐ Add dish coverage
- ☐ Add bar coverage
- ☐ Reduce overtime
- ☐ Build backup coverage
- ☐ Seasonal staffing
- ☐ Other: _____

Specific staffing gap this hire should help solve:

2. Training Coverage Plan

Trainer Assigned: _____

Backup Trainer: _____

Training Start Date: _____

Expected Training Completion Date: _____

Training shifts planned:

Shifts to avoid during early training:

Reason:

3. New Hire Schedule Plan

Week 1 Schedule Plan:

Goal for Week 1:

Week 2 Schedule Plan:

Goal for Week 2:

Week 3 Schedule Plan:

Goal for Week 3:

4. Support Needed

New hire will need support with:

- ☐ Menu knowledge
- ☐ POS or order entry
- ☐ Service steps
- ☐ Guest communication
- ☐ Station setup
- ☐ Prep standards
- ☐ Food safety basics
- ☐ Bar procedures
- ☐ Dish procedures
- ☐ Side work
- ☐ Closing duties
- ☐ Speed
- ☐ Quality
- ☐ Team communication
- ☐ Other: _____

Support plan:

5. Schedule Risk Review

Will this new hire affect labor percent during training?

Yes / No / Not Sure

Explain:

Which shifts are safe for training?

Which shifts need stronger support because of this new hire?

When can this new hire begin helping fill the staffing gap?

What must be true before they work independently?

6. New Hire Progress Review

Date of first review:

Is new hire progressing as expected?

Yes / No / Partly / Not Sure

What is going well?

What needs improvement?

Does the training plan need adjustment?

Yes / No / Not Sure

If yes, what should change?

New Hire Coverage Sign-Off

Plan Completed By: _____

Position: _____

Date: _____

Signature: _____

Trainer Review: _____

Date: _____

Signature: _____

RETENTION RISK REVIEW

Purpose

The purpose of this section is to help managers identify employees who may be at risk of leaving, burning out, becoming disengaged, or reducing availability.

Retention affects labor control.

Keeping strong employees is often less expensive and more effective than constantly replacing them.

Why It Matters

Turnover creates labor problems.

When employees leave, the restaurant loses skill, experience, schedule stability, training investment, and team confidence.

Turnover can lead to:

More hiring needs

More training labor

More weak shifts

More overtime

More manager stress

More inconsistent service

More pressure on strong employees

More schedule gaps

A strong employee leaving can create a bigger labor problem than managers expected.

Retention risk should be reviewed before the employee quits, not after.

Managers should pay attention to signs such as:

Reduced availability

Frustration

Burnout

Lower productivity

Repeated complaints

Feeling overlooked

Too many difficult shifts

Too many closing shifts

Lack of growth

Schedule dissatisfaction

Poor communication with managers

Strong employees being overused

Retention is part of labor control because stable staffing creates stronger schedules.

When to Use This Tool

Use this section:

During monthly staffing review

When turnover increases

When strong employees seem frustrated

When employees reduce availability

When call-outs increase

When morale feels weak

When one employee is carrying too much

When building a retention plan

When deciding who needs manager attention

Manager Instructions

Use this review carefully and professionally.

This is not a gossip page.

It is a manager planning tool.

Identify employees who may need support, recognition, schedule adjustment, coaching, growth opportunity, or conversation.

Do not make assumptions without follow-up.

RETENTION RISK REVIEW

Restaurant Name: _____

Manager Completing Review: _____

Date: _____

Review Period: _____

1. Overall Retention Review

Current turnover concern:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical
- ☐ Not sure

Explain:

Which department has the highest retention risk?

☐ **FOH**

☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management
- ☐ Not sure

Why?

2. Employee Retention Risk Entry 1

Employee Name: _____

Position: _____

Risk level:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical
- ☐ Not sure

Possible risk signs:

- ☐ Reduced availability
- ☐ Increased call-outs
- ☐ Lower urgency
- ☐ Frustration
- ☐ Burnout
- ☐ Schedule complaints
- ☐ Conflict with team
- ☐ Conflict with manager
- ☐ Feels overlooked
- ☐ Wants more hours
- ☐ Wants fewer hours
- ☐ Wants different position
- ☐ Strong employee overloaded
- ☐ Other: _____

Notes:

What follow-up is needed?

Manager assigned:

Follow-up date:

3. Employee Retention Risk Entry 2

Employee Name: _____

Position: _____

Risk level:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical
- ☐ Not sure

Possible risk signs:

- ☐ Reduced availability
- ☐ Increased call-outs
- ☐ Lower urgency
- ☐ Frustration
- ☐ Burnout
- ☐ Schedule complaints
- ☐ Conflict with team
- ☐ Conflict with manager
- ☐ Feels overlooked
- ☐ Wants more hours
- ☐ Wants fewer hours
- ☐ Wants different position
- ☐ Strong employee overloaded
- ☐ Other: _____

Notes:

What follow-up is needed?

Manager assigned:

Follow-up date:

4. Employee Retention Risk Entry 3

Employee Name: _____

Position: _____

Risk level:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical
- ☐ Not sure

Possible risk signs:

- ☐ Reduced availability
- ☐ Increased call-outs
- ☐ Lower urgency
- ☐ Frustration
- ☐ Burnout
- ☐ Schedule complaints
- ☐ Conflict with team
- ☐ Conflict with manager
- ☐ Feels overlooked
- ☐ Wants more hours
- ☐ Wants fewer hours
- ☐ Wants different position
- ☐ Strong employee overloaded
- ☐ Other: _____

Notes:

What follow-up is needed?

Manager assigned:

Follow-up date:

5. Retention Cause Review

What may be causing retention risk?

Check all that apply:

- ☐ Schedule problems
- ☐ Too few hours
- ☐ Too many hours
- ☐ Too many difficult shifts
- ☐ Too many closing shifts
- ☐ Lack of training
- ☐ Lack of growth
- ☐ Lack of recognition
- ☐ Poor communication
- ☐ Weak management follow-up
- ☐ Employee conflict
- ☐ Burnout
- ☐ Pay concerns to discuss with ownership or approved leadership
- ☐ Personal availability changes
- ☐ Other: _____

Main retention concern:

6. Retention Action Plan

What action should managers take?

- ☐ Have check-in conversation
- ☐ Review schedule balance
- ☐ Review availability
- ☐ Offer training opportunity
- ☐ Offer cross-training opportunity
- ☐ Recognize strong performance
- ☐ Reduce overload
- ☐ Adjust position if appropriate
- ☐ Coach manager communication

- ☐ Review team conflict
- ☐ Discuss concern with owner or GM
- ☐ Other: _____

Specific action: _____

Person responsible: _____

Follow-up date: _____

7. Labor Control Connection

How could losing this employee affect labor control?

- ☐ Create schedule gap
- ☐ Increase overtime
- ☐ Increase training labor
- ☐ Weaken guest service
- ☐ Weaken kitchen coverage
- ☐ Weaken bar coverage
- ☐ Weaken prep coverage
- ☐ Weaken dish coverage
- ☐ Weaken closing coverage
- ☐ Reduce cross-training flexibility
- ☐ Increase manager stress
- ☐ Other: _____

Notes: _____

Retention Risk Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

Reviewing Manager or Owner: _____

Date: _____

Signature: _____

PART 8 FINAL REVIEW

HIRING NEEDS AND STAFFING GAP REVIEW

This final review should be completed after Part 8 has been finished.

The manager should now understand:

How to identify staffing gaps

How to track position shortages

How to review cross-training needs

How to set hiring priorities

How to plan new hire coverage

How to identify retention risks

How staffing, hiring, retention, and labor control connect

Manager Knowledge Check

1. Why are staffing gaps part of labor control?

2. What is the difference between being short-staffed and having a position shortage?

3. Why does cross-training help labor control?

4. Why should hiring needs be ranked by priority?

5. Why does a new hire need a coverage plan?

6. Why is employee retention connected to labor control?

7. What is the biggest staffing gap in this restaurant right now?

8. What position should be the next hiring or cross-training priority?

PART 8 MANAGER ACTION PLAN

The biggest staffing or hiring issue I need to improve is:

The reason this issue matters is:

The first action I will take is:

The second action I will take is:

The third action I will take is:

I will review my progress on this date:

Manager Name: _____

Manager Signature: _____

Reviewing Manager: _____

Date: _____

PART 8 COMPLETION SIGN-OFF

Part 8: Hiring Needs and Staffing Gap Review has been reviewed and completed.

Manager Name: _____

Position: _____

Restaurant: _____

Date Completed: _____

Manager Signature: _____

Reviewing Manager Signature: _____

Notes:

PART 9

MANAGER ACCOUNTABILITY

Labor control does not improve unless managers are held accountable for the decisions they make.

A labor report alone does not fix labor.

A schedule alone does not fix labor.

A checklist alone does not fix labor.

Managers must review results, explain decisions, correct mistakes, and follow up.

Part 9 helps owners, general managers, assistant managers, kitchen managers, bar managers, floor managers, and shift leads turn labor control into a real management responsibility.

The goal is not to blame managers.

The goal is to create a system where managers know what is expected, review what happened, learn from decisions, and improve the next schedule or shift.

Manager accountability helps the restaurant answer:

Was the schedule reviewed before posting?

Did the manager understand the labor target?

Did the manager adjust labor during the shift?

Did the manager protect guest experience?

Did the manager cut too early or too late?

Did the manager document labor decisions?

Did the manager follow up on repeated issues?

Did the manager learn from last week's labor result?

Did the manager correct the next schedule?

Did the manager take ownership?

Labor control becomes stronger when managers stop treating labor as just a report number and start treating it as part of leadership.

WEEKLY LABOR MEETING FORM

Purpose

The purpose of this section is to give managers a structured form for weekly labor meetings.

A weekly labor meeting helps the management team review labor results, schedule quality, staffing issues, cut decisions, productivity, and corrections for the next week.

Why It Matters

Labor problems repeat when managers do not meet, review, and follow up.

A weekly labor meeting helps keep everyone focused on the same goals.

It creates a place to review:

Last week's sales

Last week's labor percent

Schedule accuracy

Department labor

Overstaffed shifts

Understaffed shifts

Cut decisions

Call-outs

Productivity issues

Staffing gaps

Manager decisions

Action items for next week

Without a weekly labor meeting, managers may keep repeating the same mistakes without realizing the pattern.

A short, consistent meeting can prevent larger labor problems later.

When to Use This Tool

Use this section:

Once per week

Before writing the next schedule

After weekly labor results are available

When labor percent is above target

When staffing problems repeat

When managers need stronger accountability

When ownership wants better labor follow-up

When preparing for a 30-day labor improvement plan

Manager Instructions

Use this form during the weekly labor meeting.

Complete the numbers before the meeting begins if possible.

Keep the meeting focused.

Do not let it become a complaint session.

Every issue discussed should lead to a decision, correction, or follow-up assignment.

WEEKLY LABOR MEETING FORM

Restaurant Name: _____

Meeting Date: _____

Week Reviewed: _____

Meeting Led By: _____

Managers Present:

1. Weekly Sales Review

Forecasted Weekly Sales: \$ _____

Actual Weekly Sales: \$ _____

Sales Difference: \$ _____

Sales Result:

- ☐ Above Forecast
- ☐ Below Forecast
- ☐ On Forecast
- ☐ Needs Review

Reason for sales result:

2. Weekly Labor Review

Labor Target Percent: _____

Actual Labor Percent: _____

Difference From Target: _____

Labor Result:

- ☐ Above Target
- ☐ Below Target
- ☐ On Target
- ☐ Needs Review

Total Labor Dollars: \$ _____

Major labor concern:

3. Best Labor Decision of the Week

Best labor decision made:

Manager involved:

Why was this decision strong?

Should this decision be repeated?

Yes / No / Only With Changes

Notes:

4. Weakest Labor Decision of the Week

Weakest labor decision made:

Manager involved:

What happened?

What was the result?

- ☐ Labor percent increased
- ☐ Guest service suffered
- ☐ Ticket times increased
- ☐ Food quality suffered
- ☐ Bar slowed down
- ☐ Dish fell behind
- ☐ Closing work suffered
- ☐ Employee morale suffered
- ☐ Sales were affected
- ☐ Other: _____

What should have happened instead?

5. Schedule Accuracy Review

Did the schedule match expected sales?

Yes / No / Partly / Not Sure

Explain:

Which day was scheduled best?

Why?

Which day was scheduled worst?

Why?

What must be changed before the next schedule is posted?

6. Department Labor Review

Department with strongest labor control:

☐ **FOH**

☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management

☐ Whole Restaurant

Why?

Department with weakest labor control:

☐ **FOH**

☐ **BOH**

☐ Bar

☐ Prep

☐ Dish

☐ Management

☐ Whole Restaurant

Why?

7. Overstaffing and Understaffing Review

Shifts that were overstaffed:

Cause:

Shifts that were understaffed:

Cause:

Which issue was more costly this week?

☐ Overstaffing

☐ Understaffing

☐ Both

☐ Not Sure

Explain:

8. Call-Out and Coverage Review

Number of call-outs this week: _____

Number of no-shows this week: _____

Position most affected:

Did call-outs affect labor?

Yes / No / Not Sure

Did call-outs affect guest experience?

Yes / No / Not Sure

Repeated employee attendance concerns:

Coverage plan needed:

9. Productivity Review

Did productivity affect labor this week?

Yes / No / Not Sure

If yes, where?

☐ **FOH**☐ **BOH**☐ Bar☐ Prep☐ Dish☐ Management☐ Closing☐ Other: _____

Productivity issue discussed:

Correction needed:

10. Staffing Gap Review

Did staffing gaps affect labor this week?

Yes / No / Not Sure

Positions needing coverage:

Cross-training needed:

Hiring priority:

11. Action Items for Next Week

Action Item 1:

Person Responsible: _____

Due Date: _____

Action Item 2:

Person Responsible: _____

Due Date: _____

Action Item 3:

Person Responsible: _____

Due Date: _____

Action Item 4:

Person Responsible: _____

Due Date: _____

Weekly Labor Meeting Sign-Off

Meeting Completed By: _____

Position: _____

Date: _____

Signature: _____

Owner or GM Review: _____

Date: _____

Signature: _____

MANAGER SCHEDULE REVIEW CHECKLIST

Purpose

The purpose of this section is to help leaders review whether a manager built a strong schedule.

This checklist can be used by an owner, general manager, assistant manager, or department head before approving a schedule.

Why It Matters

A schedule is one of the strongest signs of manager judgment.

A weak schedule creates problems all week.

A strong schedule shows that the manager understands labor, staffing, sales, coverage, employee placement, and guest experience.

Schedule review helps identify:

Whether the manager reviewed sales

Whether the manager planned by daypart

Whether key positions are covered

Whether labor target was considered

Whether overtime risk was reviewed

Whether staffing gaps were addressed

Whether employee availability was followed

Whether strong employees were placed correctly

Whether the schedule protects guest experience

A manager should be able to explain the schedule before it is posted.

When to Use This Tool

Use this section:

Before posting the schedule

When a new manager writes the schedule

When labor percent is repeatedly high

When schedule complaints increase

When the restaurant has repeated staffing gaps

When ownership wants schedule accountability

When coaching managers on labor control

Manager Instructions

Use this checklist to review schedule quality.

The goal is not only to approve or reject the schedule.

The goal is to teach managers how to think better before posting it.

If the schedule is approved with concerns, write down what must be watched during the week.

MANAGER SCHEDULE REVIEW CHECKLIST

Restaurant Name: _____

Schedule Week: _____

Schedule Written By: _____

Schedule Reviewed By: _____

Date Reviewed: _____

1. Sales Forecast Review

- ☐ Weekly sales forecast was reviewed
- ☐ Daily sales forecast was reviewed
- ☐ Prior week sales were reviewed
- ☐ Same week last year was reviewed when available
- ☐ Events were reviewed
- ☐ Reservations were reviewed
- ☐ Weather was reviewed
- ☐ Catering or large orders were reviewed
- ☐ Sales forecast appears realistic

Notes:

Score:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement
- ☐ Not Approved

2. Labor Target Review

- ☐ Labor target was reviewed
- ☐ Scheduled labor appears reasonable
- ☐ Slow dayparts were reviewed
- ☐ Peak dayparts were protected
- ☐ Overtime risk was reviewed
- ☐ Long shifts were reviewed
- ☐ Training labor was reviewed
- ☐ Manager labor was reviewed

Notes:

Score:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement
- ☐ Not Approved

3. Department Coverage Review

- ☐ FOH coverage is appropriate
- ☐ BOH coverage is appropriate
- ☐ Bar coverage is appropriate
- ☐ Prep coverage is appropriate
- ☐ Dish coverage is appropriate
- ☐ Manager coverage is appropriate
- ☐ Closing coverage is appropriate

Notes:

Score:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement
- ☐ Not Approved

4. Position Coverage Review

- ☐ Host coverage reviewed
- ☐ Server coverage reviewed
- ☐ Support staff coverage reviewed
- ☐ Bar coverage reviewed
- ☐ Line cook coverage reviewed
- ☐ Prep coverage reviewed
- ☐ Dish coverage reviewed
- ☐ Lead or manager coverage reviewed
- ☐ No key position is uncovered without approval

Notes:

Score:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement
- ☐ Not Approved

5. Employee Placement Review

- ☐ Strong employees placed during peak periods
- ☐ New employees scheduled with support
- ☐ Weak employees not grouped without leadership
- ☐ Employees placed in correct positions
- ☐ Cross-trained employees used wisely
- ☐ No employee is overloaded unfairly
- ☐ Schedule supports team morale where possible

Notes:

Score:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement
- ☐ Not Approved

6. Availability and Time-Off Review

- ☐ Approved availability followed
- ☐ Availability changes reviewed
- ☐ Approved time-off requests entered
- ☐ Pending time-off requests resolved or noted
- ☐ Time-off coverage gaps addressed
- ☐ Schedule conflicts reviewed

Notes:

Score:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement

☐ Not Approved

7. Risk Review

Known schedule risks:

- ☐ Possible overstaffing
- ☐ Possible understaffing
- ☐ Call-out risk
- ☐ Training risk
- ☐ Overtime risk
- ☐ Weak closing risk
- ☐ Weak kitchen risk
- ☐ Weak FOH risk
- ☐ Weak bar risk
- ☐ Weak dish risk
- ☐ Manager coverage risk
- ☐ Other: _____

Risk notes:

Backup plan:

8. Final Schedule Decision

Schedule status:

- ☐ Approved
- ☐ Approved With Changes
- ☐ Not Approved
- ☐ Needs Owner or GM Review

Required changes before posting:

Approved concerns to watch during week:

Schedule Review Sign-Off

Reviewed By: _____

Position: _____

Date: _____

Signature: _____

Manager Who Wrote Schedule: _____

Date: _____

Signature: _____

LABOR DECISION SCORECARD

Purpose

The purpose of this section is to help managers score labor decisions after a shift or week.

A scorecard makes labor accountability more objective.

It helps managers review whether labor decisions were timely, balanced, documented, and connected to guest experience.

Why It Matters

Managers may believe they controlled labor well because they cut staff.

But the real question is whether the decision was correct.

A manager may also believe labor was high because the shift was busy, but the review may show cuts were missed.

A labor decision scorecard helps review:

Whether the manager watched sales pace

Whether cuts were made on time

Whether cuts were delayed for valid reasons

Whether labor was protected

Whether service was protected

Whether side work was completed

Whether guest impact was reviewed

Whether decisions were documented

This helps managers improve decision-making without relying only on opinion.

When to Use This Tool

Use this section:

After a shift

During weekly labor meetings

When labor percent is high

When guest service suffered

When cut decisions are questioned

When coaching managers

When reviewing assistant manager performance

When building a 30-day improvement plan

Manager Instructions

Use the scorecard to rate manager labor decisions.

Be honest and specific.

This scorecard can be used as a coaching tool.

If a manager scores low, assign training, follow-up, or a specific labor improvement goal.

LABOR DECISION SCORECARD

Restaurant Name: _____

Manager Reviewed: _____

Shift or Week Reviewed: _____

Review Completed By: _____

Date: _____

Scoring Guide

Use the following scale:

5 = Excellent

4 = Good

3 = Acceptable

2 = Needs Improvement

1 = Poor

N/A = Not Applicable

1. Sales Awareness

Manager watched sales pace during the shift.

Score: 1 / 2 / 3 / 4 / 5 / N/A

Notes:

2. Labor Awareness

Manager knew the labor target and current labor concern.

Score: 1 / 2 / 3 / 4 / 5 / N/A

Notes:

3. Cut Timing

Manager made cuts at the correct time.

Score: 1 / 2 / 3 / 4 / 5 / N/A

Notes:

4. Cut Judgment

Manager cut the correct position or employee.

Score: 1 / 2 / 3 / 4 / 5 / N/A

Notes:

5. Guest Experience Protection

Manager protected guest service, food quality, bar speed, cleanliness, and closing standards.

Score: 1 / 2 / 3 / 4 / 5 / N/A

Notes:

6. Side Work and Closing Control

Manager made sure cuts did not leave side work or closing work unfinished.

Score: 1 / 2 / 3 / 4 / 5 / N/A

Notes:

7. Productivity Control

Manager redirected employees during slow time and reduced standing-around labor.

Score: 1 / 2 / 3 / 4 / 5 / N/A

Notes:

8. Staffing Adjustment

Manager adjusted the shift appropriately when volume changed, call-outs happened, or staffing needs changed.

Score: 1 / 2 / 3 / 4 / 5 / N/A

Notes:

9. Decision Documentation

Manager documented major labor decisions.

Score: 1 / 2 / 3 / 4 / 5 / N/A

Notes:

10. Follow-Up Ownership

Manager identified what should change next time.

Score: 1 / 2 / 3 / 4 / 5 / N/A

Notes:

Score Summary

Total Score: _____ out of _____

Overall Rating:

- ☐ Excellent
- ☐ Good
- ☐ Acceptable
- ☐ Needs Improvement
- ☐ Poor

Strongest labor decision area:

Area needing improvement:

Coaching Plan

Does this manager need labor coaching?

Yes / No / Not Sure

If yes, what coaching is needed?

Specific expectation before next review:

Follow-up date:

Labor Decision Scorecard Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

Manager Reviewed: _____

Date: _____

Signature: _____

LABOR MISTAKE REVIEW

Purpose

The purpose of this section is to help managers review labor mistakes without ignoring them or repeating them. A labor mistake should be documented, understood, corrected, and followed up on.

Why It Matters

Every restaurant makes labor mistakes.

The problem is not that a mistake happened.

The bigger problem is when the same mistake keeps happening because no one reviews it.

Labor mistakes may include:

Schedule written too heavy

Schedule written too light

Wrong employee placement

Missed time-off request

Overtime not caught

Cut made too early

Cut made too late

Employee kept too long

Call-out handled poorly

Side work ignored before cutting

Dish cut too early

Prep scheduled poorly

Manager coverage too weak

Labor report not reviewed

Mistakes become valuable only when managers learn from them.

This review helps turn the mistake into a correction plan.

When to Use This Tool

Use this section:

After a bad labor day

After a bad labor week

When a schedule mistake is found

When labor percent is above target

When guest service suffered because of labor

When a manager made a poor cut decision

When the same labor mistake repeats

During manager coaching

During labor meetings

Manager Instructions

Use this form to review one labor mistake at a time.

Be direct, but professional.

The goal is to correct the system, coach the manager, and prevent the mistake from happening again.

LABOR MISTAKE REVIEW FORM

Restaurant Name: _____

Date of Mistake: _____

Shift or Week Reviewed: _____

Manager Completing Review: _____

Manager Involved: _____

1. Mistake Identified

What labor mistake happened?

- ☐ Schedule too heavy
- ☐ Schedule too light
- ☐ Poor sales forecast
- ☐ Wrong employee placement
- ☐ Missed availability issue
- ☐ Missed time-off request
- ☐ Overtime risk ignored
- ☐ Cut made too early
- ☐ Cut made too late
- ☐ Employee kept too long
- ☐ Employee called in unnecessarily
- ☐ Call-out not handled correctly
- ☐ Dish cut too early
- ☐ Prep not scheduled correctly
- ☐ Bar support cut too early
- ☐ Manager coverage too weak
- ☐ Labor not reviewed
- ☐ Other: _____

Describe the mistake:

2. Cause Review

Why did the mistake happen?

- ☐ Manager did not review sales
- ☐ Manager did not review labor target
- ☐ Manager did not review coverage
- ☐ Manager did not check department status
- ☐ Manager did not use cut system
- ☐ Manager reacted too quickly
- ☐ Manager waited too long
- ☐ Manager did not communicate
- ☐ Manager did not document decision
- ☐ Schedule process was weak
- ☐ Training was missing
- ☐ Information was unavailable
- ☐ Employee issue affected decision
- ☐ Other: _____

Main cause:

3. Impact Review

What did the mistake affect?

- ☐ Labor percent

- ☐ Labor dollars
- ☐ Guest service
- ☐ Ticket times
- ☐ Food quality
- ☐ Bar service
- ☐ Dish flow
- ☐ Prep readiness
- ☐ Cleanliness
- ☐ Closing work
- ☐ Employee morale
- ☐ Manager control
- ☐ Sales
- ☐ Other: _____

Describe the impact:

4. Preventability Review

Was this mistake preventable?

Yes / No / Partly / Not Sure

Explain:

What should the manager have reviewed first?

What tool in this workbook could have helped?

5. Correction Plan

What must change?

- ☐ Schedule review process
- ☐ Sales forecast process
- ☐ Cut decision process
- ☐ Manager communication
- ☐ Side work verification
- ☐ Department check before cutting
- ☐ Labor tracking
- ☐ Employee placement
- ☐ Availability tracking
- ☐ Time-off tracking
- ☐ Overtime review
- ☐ Manager training
- ☐ Other: _____

Specific correction:

Person responsible:

Due date:

6. Follow-Up Requirement

Will this mistake be reviewed again?

Yes / No / Not Sure

Follow-up date:

How will the manager prove improvement?

What happens if the mistake repeats?

Labor Mistake Review Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

Manager Involved: _____

Date: _____

Signature: _____

MANAGER FOLLOW-UP LOG

Purpose

The purpose of this section is to help managers track follow-up assignments.

A labor issue is not fully handled until the follow-up is completed.

This log helps make sure action items do not disappear after the meeting ends.

Why It Matters

Many restaurants identify problems but fail to follow through.

A manager may say:

"We need to fix Friday night dish."

"We need to cross-train another grill cook."

"We need to watch overtime."

"We need to stop cutting barback too early."

"We need to coach closing managers."

But if no one owns the task, the problem repeats.

A follow-up log helps track:

What needs to be done

Who is responsible

When it is due

Whether it was completed

Whether the result improved

Manager accountability requires follow-up.

Without follow-up, labor meetings become conversations instead of corrections.

When to Use This Tool

Use this section:

After weekly labor meetings

After labor mistake reviews

After staffing gap reviews

After manager coaching

After schedule reviews

During 30-day improvement plans

When multiple action items are active

When ownership wants accountability tracking

Manager Instructions

Use this log to track open labor action items.

Review it weekly.

Do not erase incomplete items.

Carry them forward until they are completed, changed, or officially closed.

MANAGER FOLLOW-UP LOG

Restaurant Name: _____

Review Period: _____

Manager Maintaining Log: _____

Date Started: _____

Follow-Up Item 1

Issue or Task:

Assigned To:

Date Assigned:

Due Date:

Priority Level:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

Status:

- ☐ Not Started
- ☐ In Progress
- ☐ Completed
- ☐ Delayed
- ☐ Needs Review

Result or Notes:

Reviewed By:

Date Reviewed:

Follow-Up Item 2

Issue or Task:

Assigned To:

Date Assigned:

Due Date:

Priority Level:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

Status:

- ☐ Not Started
- ☐ In Progress

- ☐ Completed
- ☐ Delayed
- ☐ Needs Review

Result or Notes:

Reviewed By:

Date Reviewed:

Follow-Up Item 3

Issue or Task:

Assigned To:

Date Assigned:

Due Date:

Priority Level:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

Status:

- ☐ Not Started
- ☐ In Progress
- ☐ Completed
- ☐ Delayed
- ☐ Needs Review

Result or Notes:

Reviewed By:

Date Reviewed:

Follow-Up Item 4

Issue or Task:

Assigned To:

Date Assigned:

Due Date:

Priority Level:

- ☐ Low
- ☐ Medium
- ☐ High

☐ Critical

Status:

☐ Not Started

☐ In Progress

☐ Completed

☐ Delayed

☐ Needs Review

Result or Notes:

Reviewed By:

Date Reviewed:

Follow-Up Item 5

Issue or Task:

Assigned To:

Date Assigned:

Due Date:

Priority Level:

☐ Low

☐ Medium

☐ High

☐ Critical

Status:

☐ Not Started

☐ In Progress

☐ Completed

☐ Delayed

☐ Needs Review

Result or Notes:

Reviewed By:

Date Reviewed:

Follow-Up Summary

Most important open item:

Item most overdue:

Item completed successfully:

Item needing ownership or GM review:

Manager Follow-Up Log Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

30-DAY LABOR IMPROVEMENT PLAN

Purpose

The purpose of this section is to help managers build a focused 30-day plan to improve labor control.

A 30-day plan gives the restaurant a clear improvement target, specific actions, responsible managers, and weekly follow-up.

Why It Matters

Labor control does not improve by saying, "We need to do better."

Managers need a clear plan.

A 30-day labor improvement plan helps the team focus on the most important labor problems first.

It helps managers avoid trying to fix everything at once.

The plan should identify:

The main labor problem

The reason it matters

The target result

The actions needed

The managers responsible

The weekly check-ins

The proof of improvement

The final review

A strong 30-day plan should be practical.

It should focus on real changes managers can make.

Examples include:

Improve schedule review before posting

Reduce late cuts

Reduce overtime

Improve dish coverage

Improve prep scheduling

Improve Friday dinner staffing

Improve slow shift cuts

Improve manager labor decision documentation

Improve cross-training coverage

Reduce closing labor waste

A 30-day plan turns labor control into a measurable project.

When to Use This Tool

Use this section:

When labor percent is repeatedly high

When labor mistakes keep repeating

When managers need focused improvement

When ownership wants accountability

When schedule quality is weak

When cut decisions are poor

When staffing gaps hurt labor

When productivity problems affect labor

When starting a new labor control system

Manager Instructions

Choose one primary labor improvement goal for the next 30 days.

Do not choose too many goals.

The plan should be clear enough that managers know exactly what to do each week.

Review progress weekly.

At the end of 30 days, decide whether the issue improved, needs more time, or requires a different correction.

30-DAY LABOR IMPROVEMENT PLAN

Restaurant Name: _____

Plan Start Date: _____

Plan End Date: _____

Manager Responsible: _____

Owner or GM Reviewing: _____

1. Main Labor Problem

What is the main labor problem this plan will address?

- ☐ Labor percent too high
- ☐ Schedule too heavy
- ☐ Schedule too light
- ☐ Poor cut decisions
- ☐ Late cuts
- ☐ Early cuts hurting service
- ☐ Overtime
- ☐ Department labor problem
- ☐ Shift labor problem
- ☐ Daypart labor problem
- ☐ Productivity problem
- ☐ Staffing gap
- ☐ Closing labor problem
- ☐ Prep labor problem
- ☐ Dish labor problem
- ☐ Manager accountability problem
- ☐ Other: _____

Describe the problem:

2. Why This Problem Matters

This problem affects:

- ☐ Profit
- ☐ Labor percent
- ☐ Guest service
- ☐ Food quality
- ☐ Ticket times
- ☐ Bar speed
- ☐ Cleanliness
- ☐ Closing work
- ☐ Employee morale
- ☐ Manager control
- ☐ Sales
- ☐ Owner confidence
- ☐ Other: _____

Explain why this must improve:

3. Target Result

Current labor result or problem level:

Target result after 30 days:

How success will be measured:

- ☐ Lower labor percent
- ☐ Fewer late cuts
- ☐ Fewer early cuts
- ☐ Less overtime
- ☐ Better schedule review
- ☐ Better department labor
- ☐ Better shift coverage
- ☐ Better side work completion
- ☐ Better productivity
- ☐ Fewer repeated staffing issues
- ☐ Better manager documentation
- ☐ Better guest experience
- ☐ Other: _____

Measurement notes:

4. Action Plan

Action 1:

Person Responsible: _____

Due Date: _____

Action 2:

Person Responsible: _____

Due Date: _____

Action 3:

Person Responsible: _____

Due Date: _____

Action 4:

Person Responsible: _____

Due Date: _____

Action 5:

Person Responsible: _____

Due Date: _____

5. Weekly Check-In 1

Date: _____

What improved this week?

What did not improve?

Action needed before next week:

Reviewed By: _____

6. Weekly Check-In 2

Date: _____

What improved this week?

What did not improve?

Action needed before next week:

Reviewed By: _____

7. Weekly Check-In 3

Date: _____

What improved this week?

What did not improve?

Action needed before next week:

Reviewed By: _____

8. Weekly Check-In 4

Date: _____

What improved this week?

What did not improve?

Action needed before final review:

Reviewed By: _____

9. Final 30-Day Review

Was the target result achieved?

- ☐ Yes
- ☐ No
- ☐ Partly
- ☐ Needs More Time

What improved?

What still needs work?

What should continue for the next 30 days?

Does a new 30-day plan need to be created?

Yes / No / Not Sure

New focus area, if needed:

30-Day Labor Improvement Plan Sign-Off

Manager Responsible: _____

Date: _____

Signature: _____

Owner or GM Review: _____

Date: _____

Signature: _____

PART 9 FINAL REVIEW

MANAGER ACCOUNTABILITY

This final review should be completed after Part 9 has been finished.

The manager should now understand:

How to run a weekly labor meeting

How to review a manager's schedule before posting

How to score labor decisions

How to review labor mistakes

How to track follow-up assignments

How to build a 30-day labor improvement plan

How manager accountability connects to labor control

Manager Knowledge Check

1. Why does labor control require manager accountability?

2. Why should the management team hold a weekly labor meeting?

3. What should be reviewed before approving a manager's schedule?

4. Why should labor decisions be scored or reviewed?

5. Why should labor mistakes be documented?

6. Why is follow-up important after a labor meeting?

7. What should a 30-day labor improvement plan focus on?

8. What manager accountability issue needs the most improvement in this restaurant?

PART 9 MANAGER ACTION PLAN

The biggest manager accountability issue I need to improve is:

The reason this issue matters is:

The first action I will take is:

The second action I will take is:

The third action I will take is:

I will review my progress on this date:

Manager Name: _____

Manager Signature: _____

Reviewing Manager: _____

Date: _____

PART 9 COMPLETION SIGN-OFF

Part 9: Manager Accountability has been reviewed and completed.

Manager Name: _____

Position: _____

Restaurant: _____

Date Completed: _____

Manager Signature: _____

Reviewing Manager Signature: _____

Notes:

PART 10

FINAL LABOR CONTROL SYSTEM

A workbook only matters if it becomes a system.

The forms, trackers, reviews, and checklists in this workbook are designed to help managers build a repeatable labor control routine.

Part 10 brings the full workbook together.

This final part helps the restaurant organize the labor control system, set up a binder, create a weekly routine, build a 30-day implementation plan, and complete a final labor control checklist.

The goal is to make labor control part of normal restaurant management.

Not something managers only discuss when labor is bad.

Not something owners only review after payroll is too high.

Not something shift leads only think about when the schedule is short.

Labor control should be part of the weekly rhythm of the restaurant.

The strongest restaurants do not control labor once.

They control it every week.

They review it every day.

They adjust it every shift.

They improve it every schedule.

LABOR CONTROL BINDER SETUP

Purpose

The purpose of this section is to help managers organize the labor control system into a usable binder or digital folder.

A labor control system should be easy to find, easy to use, and easy to review.

If the forms are scattered, the system will not last.

Why It Matters

Restaurants move fast.

Managers do not always have time to search for forms, notes, old schedules, labor reports, or follow-up logs.

A labor control binder gives the team one place to keep:

Labor targets

Schedule planning pages

Sales forecasts

Weekly schedules

Labor trackers

Cut decision forms

Call-out records

Staffing gap reviews

Manager accountability forms

Meeting notes

30-day improvement plans

Follow-up logs

A binder creates structure.

It helps managers stay consistent.

It also gives owners and general managers a clear place to review labor decisions.

The binder can be physical, digital, or both.

What matters is that the system is organized and used.

When to Use This Tool

Use this section:

When starting this workbook

When building a labor control binder

When organizing manager documents

When training managers

When ownership wants better accountability

When labor review documents are scattered

When beginning a 30-day labor improvement plan

When setting up a weekly labor routine

Manager Instructions

Use the setup checklist below to create a labor control binder.

Create sections that match the restaurant's routine.

Keep the binder simple enough that managers will actually use it.

Do not overcomplicate the system.

A useful binder is better than a perfect binder that no one opens.

LABOR CONTROL BINDER SETUP CHECKLIST

Restaurant Name: _____

Binder Setup Date: _____

Manager Setting Up Binder: _____

Owner or GM Reviewing: _____

1. Binder Type

Labor control system will be kept as:

- ☐ Physical binder
- ☐ Digital folder
- ☐ Both physical and digital
- ☐ Other: _____

Location of physical binder:

Location of digital folder:

Who has access?

2. Recommended Binder Sections

Set up sections for:

- ☐ Labor targets and setup pages
- ☐ Weekly schedule planning
- ☐ Sales forecasts
- ☐ Posted schedules
- ☐ Daily labor percent trackers
- ☐ Weekly labor percent trackers
- ☐ Labor by department reviews
- ☐ Labor by shift reviews
- ☐ Cut decision forms
- ☐ Call-out coverage forms
- ☐ Productivity reviews
- ☐ Staffing gap reviews
- ☐ Hiring priority plans
- ☐ Manager accountability forms
- ☐ Weekly labor meeting forms
- ☐ 30-day labor improvement plans
- ☐ Follow-up logs
- ☐ Notes pages
- ☐ Other: _____

3. Forms to Copy or Print

Make copies of the following forms:

- ☐ Weekly Schedule Planning Page
- ☐ Sales Forecast Worksheet
- ☐ Staffing Needs by Daypart Worksheet
- ☐ Position-by-Position Schedule Planner
- ☐ Employee Availability Tracker
- ☐ Time-Off Request Tracker
- ☐ Schedule Conflict Review
- ☐ Manager Schedule Approval Checklist
- ☐ Daily Labor Percent Tracker
- ☐ Weekly Labor Percent Tracker
- ☐ Labor by Department Review

- ☐ Labor by Shift Review
- ☐ Labor Problem Diagnosis Page
- ☐ Opening Coverage Planner
- ☐ Lunch Coverage Planner
- ☐ Dinner Coverage Planner
- ☐ Weekend Coverage Planner
- ☐ Emergency Call-Out Coverage Planner
- ☐ When to Cut Staff Checklist
- ☐ When Not to Cut Staff Checklist
- ☐ FOH Cut Decision Form
- ☐ BOH Cut Decision Form
- ☐ Bar Cut Decision Form
- ☐ Manager Labor Decision Log
- ☐ Guest Impact Review
- ☐ Employee Productivity Review
- ☐ Station Productivity Tracker
- ☐ Side Work Completion Tracker
- ☐ Labor Waste Review
- ☐ Staffing Gap Worksheet
- ☐ Position Shortage Tracker
- ☐ Cross-Training Needs Review
- ☐ Hiring Priority Planner
- ☐ New Hire Coverage Plan
- ☐ Retention Risk Review
- ☐ Weekly Labor Meeting Form
- ☐ Labor Decision Scorecard
- ☐ Labor Mistake Review Form
- ☐ Manager Follow-Up Log
- ☐ 30-Day Labor Improvement Plan

4. Binder Responsibility

Manager responsible for updating binder:

Backup manager responsible:

Who reviews binder weekly?

Who reviews binder monthly?

Where completed forms should be filed:

How long completed forms should be kept according to company policy:

5. Binder Use Rules

Check each rule once approved:

- ☐ Forms must be completed honestly
- ☐ Completed forms must be filed in the correct section
- ☐ Labor problems must include a correction plan
- ☐ Follow-up items must have an owner
- ☐ Weekly labor meetings must be documented
- ☐ Schedule approval must happen before posting
- ☐ Cut decisions should be documented when they affect labor or service
- ☐ Repeated issues must be reviewed, not ignored
- ☐ Binder must be reviewed before writing the next schedule
- ☐ Binder must be kept professional and organized

6. Binder Setup Notes

Notes:

Binder Setup Sign-Off

Binder setup completed by: _____

Date: _____

Signature: _____

Owner or GM Review: _____

Date: _____

Signature: _____

WEEKLY LABOR ROUTINE

Purpose

The purpose of this section is to help managers create a repeatable weekly labor routine.

Labor control should not depend on memory.

A weekly routine helps managers know what to review, when to review it, and who is responsible.

Why It Matters

Labor control gets weaker when managers only react.

A weekly routine helps the restaurant stay ahead of problems.

Instead of waiting for labor to be bad, managers review the schedule, sales, staffing, coverage, productivity, and decisions throughout the week.

A strong weekly labor routine helps managers:

- Prepare before writing the schedule

- Build schedules from facts

- Review labor daily

- Make better cut decisions

- Track staffing problems

- Discuss results weekly

- Assign follow-up

- Improve the next schedule

The goal is consistency.

A manager should not have to guess what labor review happens each week.

The routine should be clear.

When to Use This Tool

Use this section:

- When starting a labor control system

- Before training scheduling managers

- When labor meetings are inconsistent

- When labor reports are not being reviewed

- When managers need a weekly structure

- When ownership wants stronger accountability

- When building manager habits

Manager Instructions

Use this weekly routine as a starting point.

Adjust the day names if the restaurant's schedule week is different.

Assign responsibility to specific managers.

The routine should be simple enough to follow every week.

WEEKLY LABOR ROUTINE WORKSHEET

Restaurant Name: _____

Schedule Week Begins On: _____

Schedule Week Ends On: _____

Schedule Posted On: _____

Manager Responsible for Schedule: _____

Manager Responsible for Labor Review: _____

Manager Responsible for Weekly Meeting: _____

1. Before Writing the Schedule

Complete before the schedule is drafted.

Tasks:

- ☐ Review last week's sales
- ☐ Review last week's labor percent
- ☐ Review daily labor results
- ☐ Review labor by department
- ☐ Review labor by shift or daypart
- ☐ Review overstaffed shifts
- ☐ Review understaffed shifts
- ☐ Review call-outs and no-shows
- ☐ Review time-off requests
- ☐ Review employee availability
- ☐ Review staffing gaps
- ☐ Review cross-training needs
- ☐ Review events, holidays, reservations, weather, and sales factors
- ☐ Review manager coverage needs
- ☐ Review overtime risk

Manager responsible: _____

Date completed: _____

Notes:

2. While Writing the Schedule

Complete while building the schedule.

Tasks:

- ☐ Build schedule from expected sales
- ☐ Review each daypart
- ☐ Review each department
- ☐ Review each position
- ☐ Place strong employees during peak periods
- ☐ Avoid grouping weak employees without support
- ☐ Schedule new employees with support
- ☐ Protect prep coverage
- ☐ Protect dish coverage
- ☐ Protect bar coverage
- ☐ Protect manager coverage
- ☐ Review opening coverage
- ☐ Review lunch coverage
- ☐ Review dinner coverage
- ☐ Review weekend coverage
- ☐ Review closing coverage
- ☐ Review slow shift cut opportunities

- ☐ Review labor target

Manager responsible:

Date completed:

Notes:

3. Before Posting the Schedule

Complete before schedule is posted.

Tasks:

- ☐ Complete schedule conflict review
- ☐ Complete manager schedule approval checklist
- ☐ Check time-off requests
- ☐ Check availability
- ☐ Check overtime risk
- ☐ Check position coverage
- ☐ Check department coverage
- ☐ Check manager coverage
- ☐ Check training shifts
- ☐ Check high-risk shifts
- ☐ Confirm schedule can be explained
- ☐ Get required approval before posting

Manager responsible:

Date completed:

Schedule approved by:

Notes:

4. During the Week

Complete throughout the operating week.

Tasks:

- ☐ Review sales pace daily
- ☐ Review labor percent daily
- ☐ Watch cut opportunities
- ☐ Document major labor decisions
- ☐ Track call-outs
- ☐ Track employees staying late
- ☐ Track guest impact from labor decisions
- ☐ Track productivity concerns
- ☐ Track missed side work
- ☐ Track repeated staffing problems
- ☐ Watch overtime risk
- ☐ Follow up with managers when needed

Manager responsible:

Daily review time:

Notes:

5. After the Week Ends

Complete after final weekly labor numbers are available.

Tasks:

- ☐ Complete weekly labor percent tracker
- ☐ Review labor by department
- ☐ Review labor by shift
- ☐ Review sales versus labor
- ☐ Diagnose labor problems
- ☐ Review schedule accuracy
- ☐ Review best and weakest labor decisions
- ☐ Review staffing gaps
- ☐ Review hiring priorities
- ☐ Review retention risk
- ☐ Prepare weekly labor meeting notes
- ☐ Assign follow-up action items

Manager responsible:

Date completed:

Notes:

Weekly Labor Routine Sign-Off

Routine reviewed by: _____

Position: _____

Date: _____

Signature: _____

Owner or GM Review: _____

Date: _____

Signature: _____

30-DAY IMPLEMENTATION PLAN

Purpose

The purpose of this section is to help restaurants implement this workbook over 30 days.

A full labor control system may feel overwhelming if managers try to use every page at once.

A 30-day implementation plan helps the restaurant start in stages.

Why It Matters

The best system is the one managers actually use.

If the restaurant introduces too much at once, managers may stop using the workbook.

A 30-day implementation plan creates a realistic rollout.

The restaurant can begin with the most important tools first, then add more forms and reviews as managers build the habit.

The goal is progress, not perfection.

The first 30 days should focus on:

Setting up the binder

Reviewing labor targets

Building the weekly routine

Improving schedule approval

Tracking daily labor

Holding weekly labor meetings

Documenting cut decisions

Identifying staffing gaps

Creating follow-up accountability

After 30 days, the restaurant should have a stronger labor control rhythm.

When to Use This Tool

Use this section:

When starting the workbook

When training the management team

When labor control has been inconsistent

When ownership wants a structured rollout

When managers need a simple start

When building a labor control binder

When preparing for a 30-day labor improvement plan

Manager Instructions

Use this plan as the rollout schedule for the workbook.

Assign responsibilities.

Do not skip the weekly check-ins.

At the end of 30 days, review what improved and what still needs work.

30-DAY IMPLEMENTATION PLAN

Restaurant Name: _____

Implementation Start Date: _____

Implementation End Date: _____

Manager Leading Implementation: _____

Owner or GM Reviewing: _____

WEEK 1: SET UP AND BASELINE REVIEW

Goal

The goal of Week 1 is to set up the labor control system and understand the current labor situation.

Week 1 Tasks

- ☐ Set up labor control binder or digital folder
- ☐ Complete Workbook Setup Page
- ☐ Complete Current Labor System Review
- ☐ Review current labor targets
- ☐ Review last week's sales
- ☐ Review last week's labor percent
- ☐ Identify biggest current labor problem
- ☐ Identify biggest scheduling problem
- ☐ Identify biggest staffing gap
- ☐ Decide who owns weekly labor review
- ☐ Schedule first weekly labor meeting
- ☐ Choose first forms managers will use daily

Week 1 Forms to Use

- ☐ Current Labor System Review
- ☐ Labor Control Reflection Worksheet
- ☐ Weekly Labor Percent Tracker
- ☐ Labor Problem Diagnosis Page
- ☐ Staffing Gap Worksheet
- ☐ Manager Follow-Up Log

Week 1 Review Questions

What did we learn about our current labor system?

What is the biggest labor problem right now?

What form helped the most this week?

What needs to be clearer for managers?

Week 1 Sign-Off

Completed By: _____

Date: _____

Signature: _____

WEEK 2: SCHEDULE REVIEW AND DAILY LABOR TRACKING

Goal

The goal of Week 2 is to improve how the schedule is built and begin reviewing labor daily.

Week 2 Tasks

- ☐ Complete Weekly Schedule Planning Page before writing schedule
- ☐ Complete Sales Forecast Worksheet
- ☐ Review staffing needs by daypart
- ☐ Review position coverage
- ☐ Review employee availability
- ☐ Review time-off requests
- ☐ Complete schedule conflict review
- ☐ Complete manager schedule approval checklist
- ☐ Start daily labor percent tracking
- ☐ Review daily labor notes with managers
- ☐ Identify one schedule adjustment for next week

Week 2 Forms to Use

- ☐ Weekly Schedule Planning Page
- ☐ Sales Forecast Worksheet
- ☐ Staffing Needs by Daypart Worksheet
- ☐ Position-by-Position Schedule Planner
- ☐ Schedule Conflict Review
- ☐ Manager Schedule Approval Checklist
- ☐ Daily Labor Percent Tracker

Week 2 Review Questions

Did the schedule match expected sales better this week?

Were any conflicts caught before posting?

What daily labor pattern appeared?

What should change in next week's schedule?

Week 2 Sign-Off

Completed By: _____

Date: _____

Signature: _____

WEEK 3: CUT DECISIONS AND PRODUCTIVITY REVIEW

Goal

The goal of Week 3 is to improve cut decisions and review whether employees and stations are producing enough value.

Week 3 Tasks

- ☐ Use When to Cut Staff Checklist during slow shifts
- ☐ Use When Not to Cut Staff Checklist when cuts are risky
- ☐ Complete FOH, BOH, or Bar Cut Decision Form when needed
- ☐ Start Manager Labor Decision Log
- ☐ Review guest impact after major cuts
- ☐ Complete at least one Employee Productivity Review

- ☐ Complete at least one Station Productivity Tracker
- ☐ Review side work completion before cuts
- ☐ Identify one labor waste issue
- ☐ Assign follow-up for repeated productivity problems

Week 3 Forms to Use

- ☐ When to Cut Staff Checklist
- ☐ When Not to Cut Staff Checklist
- ☐ FOH Cut Decision Form
- ☐ BOH Cut Decision Form
- ☐ Bar Cut Decision Form
- ☐ Manager Labor Decision Log
- ☐ Guest Impact Review
- ☐ Employee Productivity Review
- ☐ Station Productivity Tracker
- ☐ Labor Waste Review

Week 3 Review Questions

Were cuts made better this week?

Did any cut hurt guest experience?

What productivity issue affected labor?

What labor waste should be corrected?

Week 3 Sign-Off

Completed By: _____

Date: _____

Signature: _____

WEEK 4: STAFFING GAPS AND MANAGER ACCOUNTABILITY

Goal

The goal of Week 4 is to connect labor control to staffing, hiring, retention, and manager accountability.

Week 4 Tasks

- ☐ Complete Staffing Gap Worksheet
- ☐ Complete Position Shortage Tracker
- ☐ Complete Cross-Training Needs Review
- ☐ Complete Hiring Priority Planner
- ☐ Review new hire coverage needs
- ☐ Complete Retention Risk Review
- ☐ Hold weekly labor meeting
- ☐ Complete Labor Decision Scorecard for at least one manager or shift
- ☐ Complete Labor Mistake Review if needed
- ☐ Update Manager Follow-Up Log
- ☐ Create 30-Day Labor Improvement Plan for next month

Week 4 Forms to Use

- ☐ Staffing Gap Worksheet
- ☐ Position Shortage Tracker
- ☐ Cross-Training Needs Review
- ☐ Hiring Priority Planner
- ☐ Retention Risk Review
- ☐ Weekly Labor Meeting Form
- ☐ Labor Decision Scorecard
- ☐ Labor Mistake Review Form
- ☐ Manager Follow-Up Log
- ☐ 30-Day Labor Improvement Plan

Week 4 Review Questions

What staffing gap is hurting labor control most?

What is the next hiring or cross-training priority?

Which manager accountability issue needs attention?

What should be the focus for the next 30 days?

Week 4 Sign-Off

Completed By: _____

Date: _____

Signature: _____

FINAL 30-DAY IMPLEMENTATION REVIEW

Was the labor control system used consistently?

Yes / No / Partly / Not Sure

What improved during the first 30 days?

What did not improve?

Which forms were most useful?

Which forms need more manager training?

What should continue every week?

What should be the next labor improvement focus?

30-Day Implementation Sign-Off

Implementation reviewed by: _____

Position: _____

Date: _____

Signature: _____

Owner or GM Review: _____

Date: _____

Signature: _____

ADDITIONAL TOOL: MONTHLY LABOR REVIEW DASHBOARD

Purpose

This tool helps managers and owners review four weeks of labor performance in one place.

Why It Matters

Daily and weekly labor reviews help managers make short-term corrections. A monthly dashboard helps the leadership team see larger patterns, repeated problems, best-performing weeks, worst-performing weeks, staffing gaps, productivity issues, and manager accountability trends.

Manager Instructions

Complete this dashboard at the end of each month or every four-week period. Use it to choose the next 30-day labor improvement focus.

MONTHLY LABOR REVIEW DASHBOARD

Restaurant Name: _____

Month Reviewed: _____

Manager Completing Dashboard: _____

Week	Sales	Labor \$	Labor %	Target %	Best Shift	Worst Shift	Main Issue
Week 1	\$ _____	\$ _____	_____%	_____%	_____	_____	_____
Week 2	\$ _____	\$ _____	_____%	_____%	_____	_____	_____
Week 3	\$ _____	\$ _____	_____%	_____%	_____	_____	_____
Week 4	\$ _____	\$ _____	_____%	_____%	_____	_____	_____
Monthly Total / Avg	\$ _____	\$ _____	_____%	_____%	_____	_____	_____

Monthly Pattern Review

Best labor result this month:

Worst labor result this month:

Repeated schedule problem:

Repeated staffing gap:

Repeated productivity issue:

Manager accountability concern:

Hiring or cross-training priority:

Next 30-Day Labor Improvement Focus

Primary focus for next month:

Reason this focus matters:

Manager responsible:

First action to take:

Follow-up date:

Monthly Dashboard Sign-Off

Reviewed By: _____

Owner or GM Review: _____

Date: _____

Signature: _____

FINAL LABOR CONTROL CHECKLIST

Purpose

The purpose of this section is to give managers a final checklist for the complete labor control system.

This checklist helps confirm that the restaurant has a full process for planning, tracking, reviewing, correcting, and following up on labor.

Why It Matters

A labor control system has several parts.

If one part is missing, the system becomes weaker.

For example:

A schedule without sales review is a guess.

A labor report without follow-up is just a number.

A cut decision without guest review can damage service.

A staffing gap without hiring or cross-training action will repeat.

A meeting without assignments does not create accountability.

The final checklist helps managers make sure the whole system is working together.

When to Use This Tool

Use this section:

At the end of the workbook

After the first 30 days

During monthly labor review

During manager training

When ownership reviews the labor system

When labor problems continue

Before rebuilding the labor process

Manager Instructions

Complete this checklist honestly.

Do not mark an item complete unless it is actually happening.

Any item marked "Needs Improvement" should be added to the Manager Follow-Up Log or a 30-Day Labor Improvement Plan.

FINAL LABOR CONTROL CHECKLIST

Restaurant Name: _____

Date Completed: _____

Manager Completing Checklist: _____

Owner or GM Reviewing: _____

1. Labor Foundation

- ☐ Managers understand why labor control matters
- ☐ Managers understand labor percent
- ☐ Managers understand labor dollars versus labor percent
- ☐ Managers review labor with sales
- ☐ Managers understand overstaffing
- ☐ Managers understand understaffing
- ☐ Managers understand labor should not hurt guest experience

Status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement

Notes:

2. Staffing Position Planning

- ☐ FOH positions are reviewed
- ☐ BOH positions are reviewed
- ☐ Bar positions are reviewed
- ☐ Prep coverage is reviewed
- ☐ Dish coverage is reviewed
- ☐ Manager coverage is reviewed
- ☐ Cross-training coverage is reviewed

Status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement

Notes:

3. Weekly Schedule Building

- ☐ Weekly schedule planning page is used
- ☐ Sales forecast is reviewed
- ☐ Daypart staffing is reviewed
- ☐ Position coverage is reviewed
- ☐ Availability is reviewed
- ☐ Time-off requests are reviewed
- ☐ Schedule conflicts are reviewed
- ☐ Schedule is approved before posting

Status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement

Notes:

4. Labor Tracking

- ☐ Daily labor percent is tracked
- ☐ Weekly labor percent is reviewed
- ☐ Labor by department is reviewed
- ☐ Labor by shift is reviewed
- ☐ Labor by daypart is reviewed
- ☐ Sales versus labor is reviewed
- ☐ Labor problems are diagnosed

Status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement

Notes:

5. Shift Coverage Planning

- ☐ Opening coverage is planned
- ☐ Lunch coverage is planned
- ☐ Dinner coverage is planned
- ☐ Weekend coverage is planned
- ☐ Event coverage is planned
- ☐ Slow shift coverage is planned
- ☐ Emergency call-out coverage is reviewed

Status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement

Notes:

6. Cut Decision System

- ☐ Managers know when to cut staff
- ☐ Managers know when not to cut staff
- ☐ FOH cuts are reviewed
- ☐ BOH cuts are reviewed
- ☐ Bar cuts are reviewed
- ☐ Labor decisions are documented
- ☐ Guest impact is reviewed after major cuts

Status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement

Notes:

7. Productivity and Performance

- ☐ Employee productivity is reviewed
- ☐ Station productivity is reviewed
- ☐ Side work completion is tracked
- ☐ Speed and quality are reviewed
- ☐ Labor waste is identified
- ☐ Repeated staffing issues are documented

Status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement

Notes:

8. Hiring and Staffing Gaps

- ☐ Staffing gaps are identified
- ☐ Position shortages are tracked
- ☐ Cross-training needs are reviewed
- ☐ Hiring priorities are clear
- ☐ New hire coverage is planned
- ☐ Retention risk is reviewed

Status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement

Notes:

9. Manager Accountability

- ☐ Weekly labor meetings are held
- ☐ Manager schedules are reviewed
- ☐ Labor decisions are scored or reviewed
- ☐ Labor mistakes are documented
- ☐ Follow-up items are assigned
- ☐ 30-day improvement plans are used when needed

Status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement

Notes:

10. System Consistency

- ☐ Labor control binder is organized
- ☐ Forms are available to managers
- ☐ Managers know which forms to use
- ☐ Completed forms are reviewed
- ☐ Follow-up items are tracked
- ☐ Labor routine happens every week
- ☐ Ownership or GM reviews labor system regularly

Status:

- ☐ Strong
- ☐ Acceptable
- ☐ Needs Improvement

Notes:

Final Labor System Rating

Overall labor control system rating:

- ☐ Excellent
- ☐ Good
- ☐ Average
- ☐ Needs Improvement
- ☐ Poor

Biggest strength of the system:

Biggest weakness of the system:

Most important next improvement:

Person responsible:

Due date:

Final Labor Control Checklist Sign-Off

Completed By: _____

Position: _____

Date: _____

Signature: _____

Owner or GM Review: _____

Date: _____

Signature: _____

MANAGER QUICK REFERENCE PAGE

Purpose

The purpose of this page is to give managers a simple labor control reference they can review quickly. This page summarizes the most important labor control questions in the workbook.

MANAGER QUICK REFERENCE PAGE

Before writing the schedule, ask:

Did we review last week's sales?
Did we review last week's labor?
Did we review sales forecast?
Did we review events, weather, reservations, and holidays?
Did we review employee availability?
Did we review time-off requests?
Did we review position coverage?
Did we review manager coverage?
Did we review overtime risk?

Before posting the schedule, ask:

Does this schedule match expected sales?
Are the strongest employees placed during peak periods?
Are new employees scheduled with support?
Are all key positions covered?
Are any shifts overstaffed?
Are any shifts understaffed?
Are any employees scheduled outside availability?
Are time-off requests handled?
Can the manager explain this schedule?

During the shift, ask:

Are sales above or below forecast?
Is labor above or below target?
Are employees productive?
Is anyone standing around?
Can anyone be cut safely?
Would cutting hurt guest experience?
Are side work and stations controlled?
Is the kitchen stable?
Is the bar stable?
Is dish stable?
Will closing be protected?

Before cutting staff, ask:

Is the rush over?
Are guests still arriving?
Are reservations still coming?
Are sections manageable?
Are ticket times controlled?
Is bar service controlled?
Is dish caught up?
Is side work complete or assigned?
Can the remaining team handle the shift?
Will the guest still be protected?

After the week ends, ask:

Did labor meet target?

Did sales match forecast?

Which day was best?

Which day was worst?

Which department caused labor problems?

Which shift caused labor problems?

Which manager made strong decisions?

Which manager needs follow-up?

What staffing gap affected labor?

What must change next schedule?

FINAL MANAGER COMMITMENT

Labor control is not one decision.

It is a habit.

It is built through planning, tracking, reviewing, correcting, and following up.

A manager who controls labor well does not simply cut hours.

A manager who controls labor well understands the business.

They understand sales.

They understand staffing.

They understand guest flow.

They understand team strength.

They understand when to cut.

They understand when not to cut.

They understand that labor decisions affect people, profit, service, quality, cleanliness, and morale.

The goal of this workbook is to help managers build better habits.

Better planning.

Better schedules.

Better cut decisions.

Better labor tracking.

Better staffing reviews.

Better accountability.

Better results.

Labor control should never be careless.

Labor control should be smart, fair, practical, and consistent.

A restaurant that manages labor well gives itself a better chance to protect profit, protect guests, protect employees, and protect the future of the business.

FINAL MANAGER COMMITMENT PAGE

I understand that labor control is a management responsibility.

I understand that a schedule is a labor plan, not just a list of names.

I understand that labor percent must be reviewed with sales, guest experience, staffing, productivity, and manager decisions.

I understand that cutting labor too aggressively can damage service, food quality, cleanliness, morale, and sales.

I understand that keeping too much labor without purpose can damage profit and productivity.

I understand that strong labor control requires planning before the schedule, attention during the shift, review after the week, and follow-up before the next schedule.

I agree to use the tools in this workbook honestly and consistently to improve labor control, protect the guest experience, support the team, and strengthen the restaurant.

Manager Name: _____

Position: _____

Restaurant: _____

Date: _____

Manager Signature: _____

Reviewing Manager or Owner: _____

Signature: _____

LABOR-CONTROL MANAGER CERTIFICATION ASSESSMENT

Purpose

This assessment verifies that a manager can explain labor concepts, calculate core metrics, build and review a schedule, make responsible labor decisions, and protect guest experience while controlling cost.

Certification Standard

- ☐ Total possible score: 100 points
- ☐ Recommended passing score: 85 points
- ☐ Calculation section must score at least 80%
- ☐ Practical demonstration section must score at least 80%
- ☐ The reviewing leader may require retraining even when the total score passes if a safety, legal, payroll, confidentiality, or guest-protection standard is misunderstood.

Manager Name: _____

Position: _____ Restaurant: _____

Assessment Date: _____ Reviewer: _____

PART A - KNOWLEDGE CHECK (20 POINTS)

1. What is the strongest reason to review labor percent with sales?

- ☐ A. Labor dollars never matter
- ☐ B. The same labor dollars can produce different labor percentages at different sales levels
- ☐ C. Sales eliminate the need for a schedule
- ☐ D. Labor percent measures food cost

2. What should happen before names are placed on the weekly schedule?

- ☐ A. Copy last week's schedule
- ☐ B. Review expected sales, position needs, availability, time off, and labor targets
- ☐ C. Ask only who wants hours
- ☐ D. Post the schedule immediately

3. Which statement best describes good labor control?

- ☐ A. Always schedule the fewest people possible
- ☐ B. Protect the right coverage for sales and standards while controlling unnecessary labor
- ☐ C. Cut every support position first
- ☐ D. Ignore guest impact if labor improves

4. A positive actual-minus-scheduled labor-dollar variance means:

- ☐ A. Actual labor was over the schedule
- ☐ B. Actual labor was under the schedule
- ☐ C. Sales were exactly on forecast
- ☐ D. No review is needed

5. Which item is an appropriate reason to delay a cut?

- ☐ A. Dish pressure is high and clean equipment is running short
- ☐ B. The manager does not want to communicate
- ☐ C. The schedule was never reviewed
- ☐ D. An employee wants to stay without work

6. Why should schedule revisions be documented?

- ☐ A. To create blame
- ☐ B. To explain why actual labor differed from the posted plan
- ☐ C. To replace payroll
- ☐ D. To avoid reviewing sales

7. Which action best reduces overtime risk?

- ☐ A. Wait until payroll closes
- ☐ B. Review projected hours before posting and before extending shifts
- ☐ C. Schedule every strong employee at maximum hours
- ☐ D. Ignore call-out replacements

8. Sales per labor hour measures:

- ☐ A. Sales produced for each labor hour
- ☐ B. Labor dollars per guest
- ☐ C. Food cost per item
- ☐ D. Number of managers on duty

9. Which record-handling practice is correct?

- ☐ A. Leave wage reports at the host stand
- ☐ B. Share coaching notes through personal group text
- ☐ C. Store completed records in an approved secured location
- ☐ D. Keep every draft indefinitely regardless of policy

10. What should a manager do after a poor labor week?

- ☐ A. Repeat the same schedule
- ☐ B. Diagnose the cause, assign a correction, and review the next schedule
- ☐ C. Cut all departments equally
- ☐ D. Blame sales without reviewing facts

PART B - CALCULATION ASSESSMENT (30 POINTS)

1. Sales are \$12,000 and labor dollars are \$3,000. Calculate labor percent.

Answer: _____ Work: _____

2. Forecasted sales are \$48,000 and the labor target is 24%. Calculate the labor-dollar budget.

Answer: _____ Work: _____

3. Sales are \$9,600 and 120 labor hours were used. Calculate sales per labor hour.

Answer: _____ Work: _____

4. Scheduled labor was \$2,250 and actual labor was \$2,475. Calculate the labor-dollar variance and identify whether it is over or under schedule.

Answer: _____ Work: _____

5. Forecasted sales were \$20,000 and actual sales were \$18,500. Calculate the sales forecast variance.

Answer: _____ Work: _____

6. Labor dollars were \$3,360 and guest count was 640. Calculate labor cost per guest.

Answer: _____ Work: _____

PART C - DECISION SCENARIOS (30 POINTS)

1. Friday dinner sales are on forecast. The dining room has open tables, but the bar and dish areas are still under pressure. Which labor decision would you make, and what checkpoints would you review first?

2. Sunday sales are 15% below forecast at 7:00 p.m. Two employees are projected to enter overtime, and closing work is current. Describe the best next steps.

3. A manager wants to cut the only dishwasher because labor percent is high. Plates and pans are already backing up. Explain the risk and propose a better decision.

4. The posted schedule was on budget, but actual labor finished \$600 over. List the records and questions you would review before deciding what caused the variance.

5. A strong employee is repeatedly scheduled for too many hours because no one else can cover the station. Identify the immediate schedule action and the longer-term staffing action.

PART D - PRACTICAL DEMONSTRATION (20 POINTS)

The reviewing leader observes the manager completing each task with actual or approved practice data.

Demonstration	Meets Standard	Needs Coaching	Score (0-4)
Builds a sales forecast and explains the assumptions	☐	☐	_____
Creates a labor-dollar budget from the approved target	☐	☐	_____
Builds or reviews a schedule by position and daypart	☐	☐	_____
Identifies overtime, conflict, and coverage risks before posting	☐	☐	_____
Explains an actual labor variance and assigns a specific correction	☐	☐	_____

Reviewer Observations:

REVIEWER ANSWER KEY & SCORING GUIDE

Part A Answer Key

1-B, 2-B, 3-B, 4-A, 5-A, 6-B, 7-B, 8-A, 9-C, 10-B

Part B Calculation Key

1. $\$3,000 \div \$12,000 \times 100 = 25\%$
2. $\$48,000 \times 24\% = \$11,520$
3. $\$9,600 \div 120 = \80 sales per labor hour
4. $\$2,475 - \$2,250 = +\$225$; actual labor was \$225 over schedule
5. $\$18,500 - \$20,000 = -\$1,500$; actual sales were \$1,500 below forecast
6. $\$3,360 \div 640 = \5.25 labor cost per guest

Part C Scenario Rubric

Award up to 6 points per response: 2 points for identifying the correct facts and checkpoints, 2 points for protecting guests and operational standards, and 2 points for a specific documented labor action and follow-up. Answers should show judgment rather than automatic cutting.

Part D Practical Rubric

Score each demonstration from 0 to 4: 4 = accurate and independent; 3 = accurate with minor prompting; 2 = partially correct and needs coaching; 1 = major misunderstanding; 0 = not demonstrated or unsafe/unacceptable decision.

MANAGER CERTIFICATION RECORD

Manager Name: _____

Assessment Date: _____ Reviewer: _____

Part A Knowledge Score: _____ / 20

Part B Calculation Score: _____ / 30 Calculation Percentage: _____%

Part C Scenario Score: _____ / 30

Part D Practical Score: _____ / 20 Practical Percentage: _____%

TOTAL SCORE: _____ / 100

Certification Decision

☐ Certified

☐ Certified with required follow-up

☐ Not yet certified - retraining required

Required retraining or follow-up:

Follow-Up Date: _____ Reassessment Date: _____

Manager Signature: _____ Date: _____

Reviewing Leader Signature: _____ Date: _____

Owner / General Manager Approval: _____ Date: _____

NOTES PAGES

Use the following pages for additional labor notes, weekly observations, manager meeting notes, schedule corrections, staffing concerns, or follow-up reminders.

NOTES PAGE 1

Date: _____

Topic: _____

Notes: _____

Action Needed: _____

Person Responsible: _____

Follow-Up Date: _____

NOTES PAGE 2

Date: _____

Topic: _____

Notes: _____

Action Needed: _____

Person Responsible: _____

Follow-Up Date: _____

NOTES PAGE 3

Date: _____

Topic: _____

Notes: _____

Action Needed: _____

Person Responsible: _____

Follow-Up Date: _____

NOTES PAGE 4

Date: _____

Topic: _____

Notes: _____

Action Needed: _____

Person Responsible: _____

Follow-Up Date: _____

NOTES PAGE 5

Date: _____

Topic: _____

Notes: _____

Action Needed: _____

Person Responsible: _____

Follow-Up Date: _____

FINAL WORKBOOK COMPLETION PAGE

The Restaurant Manager's Toolkit
Labor Control & Scheduling Planner
has been reviewed and completed.

Restaurant Name: _____

Manager Name: _____

Position: _____

Date Completed: _____

Primary Labor Improvement Goal After Completing Workbook:

Most Important Schedule Improvement Needed:

Most Important Staffing Improvement Needed:

Most Important Manager Accountability Improvement Needed:

Manager Signature: _____

Reviewing Manager or Owner: _____

Signature: _____

Date: _____

END OF WORKBOOK



THE GRAVITY RESTAURANT LEADERSHIP SYSTEM

THE FOUNDING YEAR

USE IT. TEST IT. TELL US THE TRUTH.

Published by Thomas Monroe Books

THE FOUNDING YEAR PROMISE

Every finished digital Gravity System product released on [ThomasMonroeBooks.com](https://thomasmonroebooks.com) is free through **October 1, 2027**. No purchase, donation, registration, or positive review is required. Physical supplies, if offered later, remain optional.

WHY THIS YEAR EXISTS

Gravity is being released into real restaurant work so owners, managers, trainers, and team leaders can help prove what is useful, what is unclear, and what should improve next.

Free access is not a request for praise. It is an invitation to use the material honestly and report what actually happened.

THE FEEDBACK THAT HELPS MOST

- What you used and the problem you were trying to solve
- What worked well in actual restaurant conditions
- What felt confusing, repetitive, incomplete, or impractical
- What changed after the tool, book, or system 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.



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Please do not include guest, employee, financial, or other confidential information.



Always use the current version. Product updates and revision notes are posted at thomasmonroebooks.com/releases.

HOW THE FOUNDING YEAR IMPROVES THE SYSTEM

1

USE

Apply the current product in real restaurant work.

2

REPORT

Share the result, the friction, and what is missing.

3

IMPROVE

Gravity uses the evidence to strengthen the next revision.