

SERVICE PLANNING & HANDOFF PACK

Shift planning, service interfaces, handoff standards, queue/constraint diagnosis, recovery authority, and guest-friction controls.

INCLUDED TOOLS

- One-Page Shift Plan Framework
- Service Interface Map & Handoff Standards
- Queue, Constraint & Pressure Diagnostic
- Recovery Authority & Guest-Friction Builder

Use with the current approved book for context and implementation guidance. Print or replenish only the tools the restaurant will actually use. Physical Fulfillment remains optional; digital access and self-printing remain available.

One-Page Shift Plan Framework

The one-page shift plan is a decision record, not a replacement for the schedule, reservation book, prep sheet, station checklist, or manager log. Complete it after reviewing those sources and before transferring the operating plan to the team.

Use the framework at the level appropriate to the concept. The plan should remain short enough to use during service and complete enough that another qualified manager can understand the reason for the major decisions.

CONTROL AREA	DECISION TO RECORD
Shift identity	Date, daypart, manager, weather/event context, and comparison period.
Demand range	Low, expected, and high covers or sales; arrival waves; channels; likely complexity.
Commitments	Large parties, timing promises, accessibility needs, allergies, events, and protected tables.
Capacity	Controlling station, known limits, delayed capacity, backup access, and unavailable capacity.
People	Assignments, skill mix, training placements, breaks, relief, call-out controls, and verification roles.
Readiness	Material product, equipment, safety, sanitation, cash/POS, and facility exceptions.
Service priorities	One or two observable behaviors required to protect the guest promise tonight.
Triggers	Signal, threshold, authorized action, communicator, decision owner, and next review.
Leadership position	Where the manager begins, what the manager watches, and planned checkpoints.
Carryover	Open item, owner, next action, due point, affected shift, and closure method.

Service Interface Map and Handoff Standards

Service fails at boundaries as often as it fails inside a station. This map helps a restaurant define what must move across the most common full-service interfaces. It is not a substitute for local SOPs. Use it to identify missing ownership, duplicate communication, and high-consequence transfers that currently depend on memory.

For each interface, adapt the required information, channel, acknowledgment, and escalation to the concept. The standard is complete when the sender knows what must be transferred, the receiver knows what ownership begins, and both know what condition requires management or specialized escalation.

INTERFACE	MINIMUM HANDOFF STANDARD
Host -> Server	Table/party identity; reservation or wait promise; accessibility or timing information; known special requests; seating time; assigned ownership. Server or approved backup acknowledges the table. Escalate when the table cannot be responsibly absorbed or a promise cannot be met.
Server -> Bar	Drink/order information; modifiers; priority only when justified by an approved guest-recovery or safety need; service-well pickup path. Questioned or missing tickets follow one method instead of repeated verbal interruption.
Server -> Kitchen	Accurate item and modifier information; allergy/dietary path where applicable; course or timing information; special instructions allowed by standard. High-consequence modifications use closed-loop confirmation.
Kitchen -> Expo	Ticket status; completed components; delays; 86/product changes; quality exceptions; remakes; timing conditions. Expo receives the current production truth and owns release according to the local standard.

INTERFACE	MINIMUM HANDOFF STANDARD
Expo -> Runner/Server	Correct table/seat or delivery destination; complete order/course; modifier or allergy awareness where required; release priority; any guest-recovery timing. Receiver takes physical ownership of the food.
Server -> Guest Recovery Owner	Exact guest concern; what has already been acknowledged or promised; current food/drink/check status; requested or approved correction; timing. Guest should not need to retell the entire event.
Busser/Service -> Dish	Dirty-ware flow; priority shortages such as plates, glassware, utensils, or pans; separation requirements; landing-space condition. Dish communicates when return capacity becomes the constraint.
Station Lead -> Manager	Readiness exception; current consequence; temporary control; requested authority or resource; due/review point. Manager confirms whether the station may continue, restrict, or stop work.
Manager -> Manager	Current demand and constraint; staffing and breaks; guest promises; product/equipment restrictions; cash/POS issues; serious safety/people matters; open corrective actions; next review point. Incoming manager acknowledges ownership.

INTERFACE AUDIT

Observe one busy service and mark every moment work changes hands. For each material transfer, ask whether the receiving person knew the current condition without searching, guessing, or asking the guest to repeat information. Select the two weakest interfaces and correct those before adding more forms elsewhere.

Queue, Constraint, and Pressure Diagnostic

The restaurant cannot manage what it cannot see waiting. This diagnostic separates guest queues, production queues, and corrective queues, then connects them to the station or resource currently limiting the system. Use it during observation, manager training, or a post-shift review.

A queue is work that has entered but is not complete. A constraint is the current condition that limits how quickly the connected system can responsibly complete work. The oldest or loudest queue is not automatically the constraint. Find the point that controls throughput or threatens the protected standard.

CONTROL AREA	DIAGNOSTIC QUESTIONS
Entrance / waitlist	How many parties are waiting, how old is the longest promise, what reservation wave is approaching, and is the host team able to acknowledge and update every guest? If not, is the constraint table availability, reset, host attention, or downstream capacity?
Server sections	How many tables are newly seated, ordering, food pending, in recovery, or paying? Is one section carrying more stage-complexity than another? Is support reducing the real load or only adding bodies?
Bar / service well	How old are drink tickets? Are completed drinks waiting for pickup? Is glassware, ice, garnish, draft, espresso, or one complex build controlling the queue?
Kitchen stations	Which station has the oldest work and which station determines complete-ticket release? Is the issue menu mix, cook skill, equipment, prep, modifier load, firing sequence, or a wave created elsewhere?
Expo / window	Is food waiting for missing components, verification, runners, space, or table readiness? Are remakes consuming capacity? Is conversation or unclear priority interrupting the release path?

CONTROL AREA	DIAGNOSTIC QUESTIONS
Bus / reset	Are tables waiting to be cleared or reset? Is the issue staffing, travel distance, dish return, missing supplies, large-party teardown, or an unclear zone assignment?
Dish	Where is the queue: scrape/sort, rack build, machine, clean landing, or return to stations? Which clean item is becoming the operating constraint?
Off-premise	What scheduled online, delivery, catering, phone, or private-event work is consuming shared production? Does the dining room look calmer than the production load actually is?
Guest recovery	How many unresolved guest promises exist? Who owns each one? Which require food, manager time, payment correction, or follow-up that competes with normal service?
Corrective / carryover	What safety, equipment, cash, product, training, or people issue remains open? Has it moved from a shift problem into a recurring corrective queue that needs higher ownership?

CONSTRAINT STATEMENT

Train managers to state the current constraint in one sentence: "Our current constraint is clean dinner-plate return; expo has food ready faster than dish can restore the plate buffer." The statement should identify the limiting condition, not merely the department that feels busy. Update it when the system changes.

FIRST RESPONSE TEST

Before adding labor or restricting demand, ask which action would increase responsible throughput at the constraint without damaging a nonnegotiable standard elsewhere. If the proposed action does not change the constraint, it may be helpful work but it is not the primary pressure response.

Recovery Authority and Guest-Friction Builder

Recovery is faster and fairer when employees know the limit of their authority before a guest is upset. Build local recovery rules from the restaurant's service promise, financial controls, safety obligations, conduct standards, and management structure. Do not copy example dollar limits from another concept without approval.

SITUATION	AUTHORITY QUESTIONS TO DEFINE
Incorrect side / minor item error	May the server replace it immediately? Does it require POS correction? When must the kitchen or manager be notified? What proves the guest received the correction?
Incorrect entree / remake	Who authorizes the refire? Who owns timing and guest communication? What compensation, if any, requires manager approval? How is the corrected item verified before return?
Extended delay	What time/condition triggers manager involvement? What may the server promise? What recovery options are approved? Who verifies the table after the delayed item arrives?
Allergy / safety concern	What requires immediate stop, isolation, manager/chef involvement, incident documentation, or refusal to serve? Recovery authority never overrides safety procedure.
Disputed charge / payment problem	Who can void, adjust, refund, or reopen? What evidence and manager approval are required? What happens when the payment system itself is the failure?
Guest conduct toward employee	When does the manager take over? What behavior triggers a boundary, removal, security, or emergency response? Employees should not be required to absorb harassment or threats as hospitality.
Repeated complaint / compensation pattern	What history may be reviewed? Who decides whether another adjustment is appropriate? How are privacy, fairness, and fraud concerns handled?

SITUATION	AUTHORITY QUESTIONS TO DEFINE
Promise requiring follow-up	Who records the exact promise, guest contact path where approved, due point, and closure? How does the promise survive a shift or manager change?

GUEST-FRICTION MAP

JOURNEY POINT	LOOK FOR
Arrival	Guest searches for where to go; no acknowledgment; conflicting reservation information; unclear line/wait process.
Quoted wait	False precision; no update when condition changes; host forced to defend a manager decision alone.
Seating handoff	Guest seated but not accepted by server; special information lost; table appears invisible.
Ordering	Menu or allergy questions require repeated searching; modifiers unclear; guest repeats information.
Production wait	No one owns the update; delay is discovered only after the guest asks; internal blame reaches the table.
Course / delivery	Incomplete table; wrong seat/item; missing tools/condiments; guest must flag what the system should have caught.
Recovery	Guest retells the event; multiple employees promise different solutions; no visible owner.
Payment	Check or device delay; disputed charge; guest searches for server/manager; payment problem outlasts the meal.
Departure	No closing acknowledgment; unresolved promise leaves with guest; accessibility or exit need is ignored.

Use the map on a real guest journey. Fix the friction that occurs most often or carries the greatest consequence before adding ornamental hospitality gestures elsewhere.