

Plan 12: Daily Sales and Operating-Factor Review

30-DAY OUTCOME Create a searchable institutional memory connecting sales and labor results with weather, events, school schedules, promotions, traffic, and operating conditions.

Control	Plan Requirement
Plan owner	_____
Start and end dates	_____ to _____
Baseline period	_____
Primary shift/daypart	_____
Supporting roles	_____

Measures and targets

Measure	Baseline	Day-30 Target	Actual
Daily records completed	_____	_____	_____
Sales and guest variance versus forecast	_____	_____	_____
YTD and comparable-day variance	_____	_____	_____
Forecast error and bias	_____	_____	_____
Event records captured	_____	_____	_____
Labor-hour variance	_____	_____	_____

Recommended target boundaries

- Complete 95% or more of daily records
- Record every known material operating factor
- Produce a weekly comparable-day learning summary
- Use documented lessons in the next forecast and labor plan

Likely causes to test—not assume

- Sales are recorded without context
- Event knowledge remains in one manager's memory
- Days cannot be searched by event or condition
- Late-discovered factors cannot be added
- Forecast accuracy is not measured

Minimum operating standard

- Record sales, guests, labor, weather, events, promotions, school dates, outages, and material conditions

- Allow authorized later edits with date, editor, and reason
- Tag recurring events consistently
- Compare forecast, actual, variance, cause, and lesson

Training requirements

- Daily record completion
- Event and factor tagging
- Comparable-day search
- Forecast error and bias

The 30-Day Action Calendar

Day	Phase	Required Action
1	Measure	Define required daily fields and controlled event tags
2	Measure	Enter or import at least 14 prior comparable days
3	Measure	Record weekday/weekend, weather, school, event, promotion, traffic, and operating notes
4	Measure	Establish YTD and comparable-day calculations
5	Measure	Set the daily completion deadline and owner
6	Define	Share baseline findings with managers and confirm no coaching began early
7	Define	Approve the target, definitions, and data owner
8	Define	Train managers on objective notes and consistent tags
9	Define	Practice searching one recurring event across years
10	Define	Create forecast, actual, variance, cause, and lesson fields
11	Train/Pilot	Define authorized later-edit and audit-note rules
12	Train/Pilot	Use the record to prepare the next seven-day labor forecast
13	Train/Pilot	Observe the pilot without rescuing every difficulty
14	Train/Pilot	Revise the standard only when evidence supports the change
15	Train/Pilot	Confirm every affected employee received training
16	Execute	Complete the record every day
17	Execute	Review forecast error and bias at least twice

Day	Phase	Required Action
18	Execute	Add late-discovered factors with an edit reason
19	Execute	Compare one event with last year's weekday, weather, and sales
20	Execute	Translate findings into labor and prep adjustments
21	Execute	Hold a ten-minute mid-plan review with assigned owners
22	Execute	Document exceptions, causes, and corrective actions
23	Execute	Recheck the highest-risk handoff
24	Stress-Test	Audit completeness and tag consistency
25	Stress-Test	Review the strongest and weakest forecast days
26	Stress-Test	Confirm search works for festivals, car shows, parades, school dates, and weather
27	Stress-Test	Publish the first monthly intelligence summary
28	Verify/Hold	Lock daily entry, weekly review, and monthly pattern analysis
29	Verify/Hold	Obtain employee feedback on usability
30	Verify/Hold	Assign the ongoing report owner

Weekly Review Record

Review	Result	Primary Cause	Decision / Owner	Due
Day 7				
Day 14				
Day 21				
Day 27				
Day 30				

Day-30 Verification

- Was the baseline measured consistently? ☐ Yes ☐ No
- Was the standard trained and observed? ☐ Yes ☐ No
- Did the primary metric improve? ☐ Yes ☐ No
- Were safety, quality, hospitality, and fairness protected? ☐ Yes ☐ No
- Decision: ☐ Standardize ☐ Extend controlled test ☐ Redesign ☐ Stop

Sustainment rule: Complete the record daily, review comparable history weekly, and update recurring-event intelligence after every occurrence.

Manager verification: _____ Date: _____ Next review: _____