

Plan 5: Labor-Hours Forecasting

60-DAY OUTCOME Convert forecasted sales, guests, workload, events, and service standards into defensible labor-hour requirements.

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

Measures and targets

Measure	Baseline	Day-60 Target	Actual
Forecasted versus actual sales	_____	_____	_____
Forecasted versus actual guests	_____	_____	_____
Scheduled versus required hours	_____	_____	_____
Actual sales per labor hour	_____	_____	_____
Labor percentage	_____	_____	_____
Coverage failures and excess-hour incidents	_____	_____	_____

Recommended target boundaries

- Establish a written labor-demand model for every daypart
- Reduce forecast-to-actual labor-hour error over the baseline
- Keep service-critical positions protected
- Document all major forecast adjustments and causes

Likely causes to test—not assume

- Scheduling from habit
- Using sales alone without workload or guest count
- Ignoring events, weather, school, and promotions
- No separation of fixed and variable labor
- No forecast-error review

Minimum operating standard

- Begin with historical comparable days
- Adjust for events, weather, promotions, reservations, and known changes

- Calculate fixed opening/closing work separately from volume-driven hours
- Record forecast, decision, actual result, and lesson

Training requirements

- Comparable-day selection
- Sales and guest forecasting
- Fixed versus variable labor
- Forecast error and bias

The 60-Day Guided Action Calendar

Day	Phase	Required Action
1	Learn/Measure	Collect four to eight comparable weeks of sales, guests, and hours
2	Learn/Measure	Review the completed step with the plan owner; clarify questions and document what was learned
3	Learn/Measure	Separate opening, service, and closing hours
4	Learn/Measure	Repeat the step on a second representative shift or sample before accepting the result
5	Learn/Measure	Identify fixed tasks and volume-driven positions
6	Learn/Measure	Explain the purpose to the affected employees and confirm understanding in plain language
7	Learn/Measure	Record known events and operating factors
8	Learn/Measure	Observe the process without taking over; record where additional instruction is needed
9	Learn/Measure	Build the first daypart labor-demand baseline
10	Learn/Measure	Coach one identified gap, allow another attempt, and document the evidence of improvement
11	Define/Prepare	Share baseline findings with managers and confirm no coaching began early
12	Define/Prepare	Check the result against safety, quality, hospitality, fairness, and workload boundaries
13	Define/Prepare	Approve the target, definitions, and data owner
14	Define/Prepare	Review the completed step with the plan owner; clarify questions and document what was learned
15	Define/Prepare	Define staffing floors and productivity ranges
16	Define/Prepare	Repeat the step on a second representative

Day	Phase	Required Action
		shift or sample before accepting the result
17	Define/Prepare	Train managers to document forecast assumptions
18	Define/Prepare	Explain the purpose to the affected employees and confirm understanding in plain language
19	Define/Prepare	Create the next seven-day sales, guest, and labor forecast
20	Define/Prepare	Observe the process without taking over; record where additional instruction is needed
21	Train/Practice	Compare schedule hours with calculated need
22	Train/Practice	Coach one identified gap, allow another attempt, and document the evidence of improvement
23	Train/Practice	Approve changes using service-risk checks
24	Train/Practice	Check the result against safety, quality, hospitality, fairness, and workload boundaries
25	Train/Practice	Observe the pilot without rescuing every difficulty
26	Train/Practice	Review the completed step with the plan owner; clarify questions and document what was learned
27	Train/Practice	Revise the standard only when evidence supports the change
28	Train/Practice	Repeat the step on a second representative shift or sample before accepting the result
29	Train/Practice	Confirm every affected employee received training
30	Train/Practice	Explain the purpose to the affected employees and confirm understanding in plain language
31	Guided Execution	Record actual results daily
32	Guided Execution	Observe the process without taking over; record where additional instruction is needed
33	Guided Execution	Calculate forecast error and direction of bias
34	Guided Execution	Coach one identified gap, allow another attempt, and document the evidence of improvement
35	Guided Execution	Adjust for weather, events, reservations, and local patterns
36	Guided Execution	Check the result against safety, quality, hospitality, fairness, and workload boundaries

Day	Phase	Required Action
37	Guided Execution	Correct recurring overstaffing or understaffing periods
38	Guided Execution	Review the completed step with the plan owner; clarify questions and document what was learned
39	Guided Execution	Produce the second seven-day forecast using lessons learned
40	Guided Execution	Repeat the step on a second representative shift or sample before accepting the result
41	Guided Execution	Hold a ten-minute mid-plan review with assigned owners
42	Guided Execution	Explain the purpose to the affected employees and confirm understanding in plain language
43	Guided Execution	Document exceptions, causes, and corrective actions
44	Guided Execution	Observe the process without taking over; record where additional instruction is needed
45	Guided Execution	Recheck the highest-risk handoff
46	Guided Execution	Coach one identified gap, allow another attempt, and document the evidence of improvement
47	Stress-Test	Test the model through a full schedule cycle
48	Stress-Test	Check the result against safety, quality, hospitality, fairness, and workload boundaries
49	Stress-Test	Review service results alongside labor results
50	Stress-Test	Review the completed step with the plan owner; clarify questions and document what was learned
51	Stress-Test	Document where sales-per-hour measures are misleading
52	Stress-Test	Repeat the step on a second representative shift or sample before accepting the result
53	Stress-Test	Finalize daypart ranges and adjustment rules
54	Stress-Test	Explain the purpose to the affected employees and confirm understanding in plain language
55	Verify/Hold	Publish the weekly forecast and post-shift learning rhythm
56	Verify/Hold	Observe the process without taking over; record where additional instruction is needed
57	Verify/Hold	Obtain employee feedback on usability

Day	Phase	Required Action
58	Verify/Hold	Coach one identified gap, allow another attempt, and document the evidence of improvement
59	Verify/Hold	Assign the ongoing report owner
60	Verify/Hold	Check the result against safety, quality, hospitality, fairness, and workload boundaries

Weekly Review Record

Review	Result	Primary Cause	Decision / Owner	Due
Day 10				
Day 20				
Day 30				
Day 40				
Day 50				
Day 60				

Day-60 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: Forecast seven days ahead, update 48 and 24 hours ahead, and review error and bias every week.

Manager verification: _____ Date: _____ Next review: _____