

Plan 12: Daily Sales and Operating-Factor Review

60-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-60 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 60-Day Guided Action Calendar

Day	Phase	Required Action
1	Learn/Measure	Define required daily fields and controlled event tags
2	Learn/Measure	Review the completed step with the plan owner; clarify questions and document what was learned
3	Learn/Measure	Enter or import at least 14 prior comparable days
4	Learn/Measure	Repeat the step on a second representative shift or sample before accepting the result
5	Learn/Measure	Record weekday/weekend, weather, school, event, promotion, traffic, and operating notes
6	Learn/Measure	Explain the purpose to the affected employees and confirm understanding in plain language
7	Learn/Measure	Establish YTD and comparable-day calculations
8	Learn/Measure	Observe the process without taking over; record where additional instruction is needed
9	Learn/Measure	Set the daily completion deadline and owner
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	Train managers on objective notes and

Day	Phase	Required Action
		consistent tags
16	Define/Prepare	Repeat the step on a second representative shift or sample before accepting the result
17	Define/Prepare	Practice searching one recurring event across years
18	Define/Prepare	Explain the purpose to the affected employees and confirm understanding in plain language
19	Define/Prepare	Create forecast, actual, variance, cause, and lesson fields
20	Define/Prepare	Observe the process without taking over; record where additional instruction is needed
21	Train/Practice	Define authorized later-edit and audit-note rules
22	Train/Practice	Coach one identified gap, allow another attempt, and document the evidence of improvement
23	Train/Practice	Use the record to prepare the next seven-day labor forecast
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	Complete the record every day
32	Guided Execution	Observe the process without taking over; record where additional instruction is needed
33	Guided Execution	Review forecast error and bias at least twice
34	Guided Execution	Coach one identified gap, allow another attempt, and document the evidence of improvement
35	Guided Execution	Add late-discovered factors with an edit reason

Day	Phase	Required Action
36	Guided Execution	Check the result against safety, quality, hospitality, fairness, and workload boundaries
37	Guided Execution	Compare one event with last year's weekday, weather, and sales
38	Guided Execution	Review the completed step with the plan owner; clarify questions and document what was learned
39	Guided Execution	Translate findings into labor and prep adjustments
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	Audit completeness and tag consistency
48	Stress-Test	Check the result against safety, quality, hospitality, fairness, and workload boundaries
49	Stress-Test	Review the strongest and weakest forecast days
50	Stress-Test	Review the completed step with the plan owner; clarify questions and document what was learned
51	Stress-Test	Confirm search works for festivals, car shows, parades, school dates, and weather
52	Stress-Test	Repeat the step on a second representative shift or sample before accepting the result
53	Stress-Test	Publish the first monthly intelligence summary
54	Stress-Test	Explain the purpose to the affected employees and confirm understanding in plain language
55	Verify/Hold	Lock daily entry, weekly review, and monthly pattern analysis
56	Verify/Hold	Observe the process without taking over; record where additional instruction is

Day	Phase	Required Action
		needed
57	Verify/Hold	Obtain employee feedback on usability
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: Complete the record daily, review comparable history weekly, and update recurring-event intelligence after every occurrence.

Manager verification: _____ Date: _____ Next review: _____