

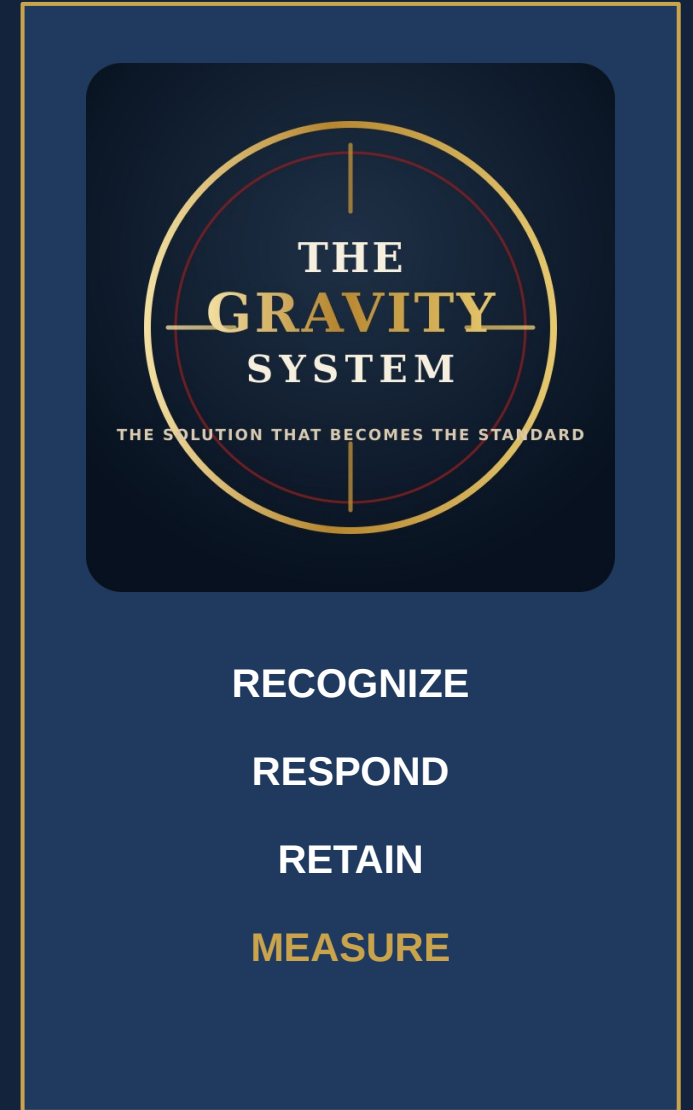
THE GRAVITY SYSTEM

Guest Relationship & Retention System

How to recognize guests, recover trust, retain relationships, manage outreach, and create accountable follow-through.

30 OPERATING TOOLS • 7 CONTROL AREAS • 1 MANAGEMENT RHYTHM

Published by Thomas Monroe Books | Author: Thomas Butler



Good hospitality is not enough if the memory disappears

	WITHOUT A SYSTEM	WITH THE GRAVITY SYSTEM
Guest knowledge	Lives with one employee	Becomes an approved, useful profile
Service recovery	Depends on who is working	Uses authority, deadlines, and closure
Outreach	Starts without permission control	Uses consent and suppression records
Loyalty	Relies on discounts	Measures return behavior and relationship value
Event leads	Sit in inboxes or notebooks	Receive an owner, next action, and status



One continuous loop turns guest moments into better operations



The system is complete only when a guest record produces a response, the response is verified, and the operating cause is corrected when needed.

Thirty tools organize the complete guest relationship cycle



-  Guest Records 6 tools
-  Service Recovery 6 tools
-  Retention 6 tools
-  Campaigns 4 tools

-  Online Reviews 2 tools
-  Event Leads 3 tools
-  Management 3 tools

Tool IDs GRV-R01 through GRV-R30

Use the same IDs in the manual, forms, workbook, training, and version control.



Clear ownership makes guest care accountable

SYSTEM OWNER	General Manager	Approves standards, access, retention, version control, and monthly review.
SHIFT OWNER	Manager on Duty	Opens cases, authorizes within limits, sets follow-up, and escalates.
FRONTLINE USER	Host / Server / Bartender	Recognizes appropriately, records facts, and immediately alerts management.
FUNCTION OWNER	Marketing / Event Sales	Uses approved audiences, suppression lists, leads, and result tracking.



Collect less data—and control it better

GUEST RELATIONSHIP & RETENTION SYSTEM | EDITABLE FORMS

DATA & PERMISSION | OPERATING TOOL

Guest Contact & Consent Record

Tool IDGRV-R01

OwnerManager

CategoryData & Permission

FrequencyAt capture and change

Purpose:

Guest contact information, channel permission, source, and withdrawal status.

GUEST AND SOURCE

Guest ID

Date captured

Source/location

Guest name

Captured by

CONTACT

Email

Preferred channel

Mobile number

Preferred contact time

PERMISSION

Email permission: Yes / No

Permission language/source

Opt-out date/reason

Text permission: Yes / No

Permission date

CONTROL

Record owner

Next review

Last verified

Notes

MANAGEMENT REVIEW

Reviewed by

Decision/action

Review date

Next review

Control note:

Use the approved version of GRV-R01. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

THE GRAVITY SYSTEM

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- USEFUL

Record facts that improve service or follow-through.
- PERMISSIONED

Track email and text permission separately; suppress opt-outs.
- LIMITED

Give access only to roles that need it for approved work.
- PROTECTED

Do not store payment credentials, passwords, or unnecessary sensitive data.
- DISPOSED

Archive or securely delete records under the company retention policy.

Allergy information belongs in the restaurant’s food-safety process; the guest profile may carry only the approved service alert.



A good profile helps the next employee deliver the same care

RECORD

- Preferred name and recognition level
- Observable seating and service preferences
- Approved occasions and dates
- Useful visit and engagement facts
- Owner and last-updated date

DO NOT RECORD

- Gossip, speculation, or personality judgments
- Information unrelated to hospitality
- Sensitive details without an approved need
- Promises the restaurant cannot consistently keep

GUEST RELATIONSHIP & RETENTION SYSTEM | EDITABLE FORMS

DATA & PERMISSION | OPERATING TOOL

Guest Profile & Preference Record

Tool ID	GRV-R02	Owner	Manager
Category	Data & Permission	Frequency	As learned or confirmed

Purpose: Recognition details that help the restaurant serve the guest more thoughtfully.

GUEST IDENTITY

Guest ID	_____	Guest name	_____
Home location	_____	Recognized by	_____

PREFERENCES

Seating/table	_____	Server	_____
Menu items	_____	Beverage	_____
Service pace	_____	Other approved preference	_____

RELATIONSHIP NOTES

What matters to this guest?	_____	Recognition cue	_____
Last meaningful interaction	_____	Next thoughtful action	_____

CONTROL

Source of information	_____	Confirmed date	_____
Record owner	_____	Do not record sensitive or speculative information	_____

MANAGEMENT REVIEW

Reviewed by	_____	Review date	_____
Decision/action	_____	Next review	_____

Control note: Use the approved version of GRV-R02. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

THE GRAVITY SYSTEM

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Recognition should feel natural—not surveilled

BEFORE	ARRIVAL	DURING	AFTER
Review today's reservations and approved recognition notes.	Use the preferred name only when confident and appropriate.	Apply one or two relevant preferences without announcing the record.	Update only useful changes and record follow-up commitments.

Recognition test

**Will this make the guest feel understood and welcomed
—or observed and exposed?**

Every material concern follows the same recovery sequence

GUEST RELATIONSHIP & RETENTION SYSTEM | EDITABLE FORMS

SERVICE RECOVERY | OPERATING TOOL

Guest Feedback & Concern Record

Tool IDGRV-R07

OwnerManager on Duty

CategoryService Recovery

FrequencyAt occurrence

Purpose: Facts, guest impact, response, ownership, and status for any material concern.

INCIDENT

Case ID

Location/channel

Reported to

Date/time

Guest ID/name

FACTS AND IMPACT

What happened?

Immediate safety or service risk

What did the guest experience?

Guest request

RESPONSE

Apology/acknowledgment

Manager response

Follow-up promised

Immediate correction

Recovery level

OWNERSHIP

Owner

Status

Due date

Escalation required

CLOSURE

Guest contacted

Return verified

Guest response

System correction

MANAGEMENT REVIEW

Reviewed by

Decision/action

Review date

Next review

Control note: Use the approved version of GRV-R07. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

THE GRAVITY SYSTEM

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- 1

STABILIZE

Address immediate safety or service risk.
- 2

LISTEN

Capture facts, impact, and the guest's request.
- 3

RESPOND

Acknowledge, correct, and authorize within limits.
- 4

PROMISE

Set the owner, next action, and due date.
- 5

VERIFY

Confirm contact, guest response, and return.
- 6

CORRECT

Fix the operational cause when a pattern exists.



Match authority to impact before the shift begins

SEVERITY	RESPONSE	AUTHORITY
LEVEL 1 LOW	Correct the immediate issue; sincere acknowledgment.	Shift manager within local policy
LEVEL 2 MODERATE	Replacement, modest recovery, and scheduled follow-up.	Manager on Duty within approved limits
LEVEL 3 HIGH	Significant guest impact, repeat concern, or larger remedy.	General Manager approval and direct follow-up
LEVEL 4 CRITICAL	Safety, legal, discrimination, media, or severe reputation risk.	Immediate GM escalation; owner/company response



A recovery is not closed when the item is comped

- | | | |
|---|--------------------------|--|
| ✓ | Guest contacted | The promised contact happened through an approved channel. |
| ✓ | Response captured | The guest's response is recorded factually. |
| ✓ | Promise completed | Every promised remedy or correction is complete. |
| ✓ | Return verified | The guest's return is confirmed when applicable. |
| ↻ | Pattern reviewed | The root cause is corrected or placed in the action log. |

Closed = verified completion, not manager intention.



Reactivation starts with eligibility—not a discount



A guest is not reactivated because a message was sent. Reactivation is verified when the relationship produces an appropriate return or renewed engagement.

Every campaign passes six controls before launch

1

PURPOSE

Clear objective and eligible audience

2

PERMISSION

Approved channel and recorded basis

3

DISCLOSURE

Accurate sender, subject, identity, and required address

4

SUPPRESSION

Opt-outs and exclusions applied before send

5

OFFER

Accurate terms, economics, and expiration

6

RESULT

Delivery, response, redemption, revenue, and cost



Earn honest reviews—and respond without exposing the guest

REQUEST

- Invite eligible guests neutrally
- Do not target only likely positive reviewers
- Do not condition incentives on a positive review
- Follow each platform's rules
- Track the request without pressuring the guest

RESPOND

- Respond promptly and factually
- Acknowledge the experience without debating
- Do not reveal private guest or employee details
- Move case specifics to a private channel
- Escalate safety, legal, or reputation risk

**The purpose of the review process is trustworthy feedback and responsible response
—not rating manipulation.**



Every qualified event inquiry needs a next action

GUEST RELATIONSHIP & RETENTION SYSTEM | EDITABLE FORMS

EVENTS & LEADS | OPERATING TOOL

Private Dining Lead Form

Tool IDGRV-R25

OwnerSales/Event Owner

CategoryEvents & Leads

FrequencyAt inquiry

Purpose:

Contact, occasion, date, guest count, budget, needs, next step, and permission status.

LEAD

Lead ID

Organization

Permission

Contact name

Phone/email

Source

EVENT

Occasion

Guest count

Space

Preferred date/time

Budget/range

Food/beverage needs

NEXT STEP

Owner

Site visit/call

Status

Response deadline

Proposal due

OUTCOME

Booked/lost

Lost reason

Estimated/actual value

Future follow-up

MANAGEMENT REVIEW

Reviewed by

Decision/action

Review date

Next review

Control note:

Use the approved version of GRV-R25. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

THE GRAVITY SYSTEM

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- 1

INQUIRY

Contact, source, occasion, date, count, budget
- 2

QUALIFY

Fit, space, food and beverage needs, decision process
- 3

ADVANCE

Owner, response deadline, site visit, proposal due
- 4

DECIDE

Booked, tentative, lost, or future follow-up
- 5

LEARN

Value, lost reason, and post-event relationship

Open lead + no next action = unmanaged revenue risk.



Daily, weekly, and monthly reviews do different work

DAILY	WEEKLY	MONTHLY
Recognize arrivals	Review open recovery and overdue action	Review retention scorecard
Open and assign recovery cases	Check lapsed guests and campaigns	Compare patterns and causes
Apply opt-outs and lead deadlines	Advance event leads	Audit data quality and permissions
Escalate safety or reputation risk	Assign corrective action	Set targets and system changes

The weekly guest relationship meeting should end with named owners, due dates, and a documented next review.

The workbook summarizes the system without replacing judgment

1	THE GRAVITY GUEST RELATIONSHIP DASHBOARD																									
2																										
3	Version 1.0 A management control panel for recognition, recovery, retention, campaigns, and event leads																									
4																										
5																										
6	TOTAL GUEST PROFILES								PERMISSIONED EMAIL								PERMISSIONED TEXT									
7	0								0								0									
8																										
9																										
10	VISITS — LAST 30 DAYS								OPEN RECOVERY CASES								RECOVERY CLOSURE RATE									
11	0								0								0%									
12																										
13																										
14	RETURNED AFTER RECOVERY								LAPSED GUESTS								REACTIVATED GUESTS									
15	0								0								0									
16																										
17																										
18	OPEN EVENT LEADS								OPEN ACTIONS								OVERDUE ACTIONS									
19	0								0								0									
20																										
21																										
22																										
23	HOW TO READ THIS DASHBOARD																									
24																										
25	Enter operating data only on the yellow input sheets. Review this page in the weekly guest relationship meeting. Zero is a valid starting value—not a failure. Use the Metric Definitions sheet before changing any formula or target.																									
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LIVE KPIs

- Guest profiles and permissions
- Visits in the last 30 days
- Open recovery and closure rate
- Returned and reactivated guests
- Open event leads
- Open and overdue actions

Yellow sheets capture facts.
The dashboard reveals the pattern.



Install control first—then expand use and accountability

DAYS 1–30

CONTROL

- Assign owner and access
- Approve consent and retention rules
- Load only approved data
- Train guest records and recovery
- Establish baseline

DAYS 31–60

OPERATE

- Use all daily workflows
- Launch weekly review
- Begin reactivation and campaigns
- Control review and event leads
- Coach incomplete records

DAYS 61–90

IMPROVE

- Audit quality and permissions
- Review patterns and metrics
- Verify corrective actions
- Set practical targets
- Approve Version 1.1 changes

Advance by demonstrated use and review quality—not because the calendar moved.



Each file has one job—and one approved version

MANUAL	DOCX + PDF	Customize policy; distribute the approved operating guide.
30 FORMS	DOCX + PDF	Edit masters; print or complete the controlled working forms.
WORKBOOK	XLSX	Enter operating facts and review formula-driven management KPIs.
TRAINING	PPTX	Teach managers the full operating method and rollout.

Control standard

Approve → date → distribute → archive → remove outdated active copies → train material revisions



**Remember the guest.
Keep the promise.
Improve the operation.**

**BEGIN WITH FIVE
ACTIONS**

- Assign the system owner
- Approve permission and privacy controls
- Train profiles and recovery first
- Hold the first weekly review
- Use evidence to improve the operation

