

THE GRAVITY RESTAURANT LEADERSHIP SYSTEM



The Gravity Guest Relationship and Retention System

Thirty editable, print-ready operating tools for restaurant guest relationships.

FORMS AND TEMPLATES LIBRARY

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How to Use This Forms Library

Customize restaurant names, roles, authority levels, timing, and platform references before approval. Keep one controlled editable master, distribute approved working versions, and connect active records to the digital workbook.

1. Select the required tool by GRV-R ID.
2. Customize the standard and required fields.
3. Approve the official version and remove conflicting drafts.
4. Train the owner, user, and reviewer.
5. Complete the record where the work occurs.
6. Review the evidence and assign action.

PRIVACY Do not use these forms to collect payment-card numbers, government identification numbers, passwords, medical diagnoses, rumors, or unrelated personal information.

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Guest Contact & Consent Record

Tool ID	GRV-R01	Owner	Manager
Category	Data & Permission	Frequency	At capture and change

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

GUEST AND SOURCE

Guest ID	_____	Guest name	_____
Date captured	_____	Captured by	_____
Source/location	_____		

CONTACT

Email	_____	Mobile number	_____
Preferred channel	_____	Preferred contact time	_____

PERMISSION

Email permission:	_____	Text permission:	_____
Yes / No	_____	Yes / No	_____
Permission language/source	_____	Permission date	_____
Opt-out date/reason	_____		

CONTROL

Record owner	_____	Last verified	_____
Next review	_____	Notes	_____

MANAGEMENT REVIEW

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

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

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.

RECOGNITION | OPERATING TOOL

Regular Guest Recognition List

Tool ID	GRV-R03	Owner	GM
Category	Recognition	Frequency	Weekly

Purpose: A current list of regular guests and the approved recognition cues employees may use.

REGULAR GUEST

Guest ID	_____	Guest name	_____
Typical visit pattern	_____	Recognition cue	_____

APPROVED SERVICE NOTES

Preferred seating	_____	Common order	_____
Team members who know the guest	_____	Current relationship owner	_____

FOLLOW-UP

Last visit	_____	Next expected visit	_____
Action needed	_____	Status	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R03. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

RECOGNITION | OPERATING TOOL

VIP Guest Management Log

Tool ID	GRV-R04	Owner	GM/Owner
Category	Recognition	Frequency	As needed

Purpose: High-value or high-impact guest relationships requiring deliberate ownership and follow-up.

RELATIONSHIP

Guest ID	_____	Guest/organization	_____
Relationship reason	_____	Owner	_____

CURRENT CONTEXT

Last visit/contact	_____	Known preferences	_____
Open commitment	_____	Risk or opportunity	_____

NEXT ACTION

Action	_____	Owner	_____
Due date	_____	Verification	_____

REVIEW

Outcome	_____	Next review date	_____
Leadership notes	_____		

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R04. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

RECOGNITION | OPERATING TOOL

Special Occasion Calendar

Tool ID	GRV-R05	Owner	Manager
Category	Recognition	Frequency	Weekly

Purpose: Permissioned birthdays, anniversaries, milestones, and planned hospitality touches.

OCCASION

Guest ID	_____	Guest name	_____
Occasion type	_____	Occasion date	_____
Permission confirmed	_____		

HOSPITALITY PLAN

Recognition level	_____	Approved offer/touch	_____
Assigned owner	_____	Preparation date	_____

RESULT

Completed	_____	Guest response	_____
Follow-up	_____	Next year review	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R05. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

RECOGNITION | OPERATING TOOL

Dietary Preference & Allergy Note

Tool ID	GRV-R06	Owner	Manager
Category	Recognition	Frequency	At disclosure and each visit

Purpose: Guest-provided dietary information with a required point-of-service verification reminder.

GUEST-PROVIDED INFORMATION

Guest ID	_____	Guest name	_____
Dietary preference	_____	Allergen named by guest	_____
Date provided	_____		

VISIT VERIFICATION

Visit date	_____	Order/item	_____
Server verification	_____	Manager verification	_____
Kitchen communication completed	_____		

IMPORTANT

Reconfirm every visit	_____	Follow the restaurant allergy SOP	_____
Do not promise zero risk	_____	Record only guest-provided facts	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R06. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

SERVICE RECOVERY | OPERATING TOOL

Guest Feedback & Concern Record

Tool ID	GRV-R07	Owner	Manager on Duty
Category	Service Recovery	Frequency	At occurrence

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

INCIDENT

Case ID	_____	Date/time	_____
Location/channel	_____	Guest ID/name	_____
Reported to	_____		

FACTS AND IMPACT

What happened?	_____	What did the guest experience?	_____
Immediate safety or service risk	_____	Guest request	_____

RESPONSE

Apology/acknowledgment	_____	Immediate correction	_____
Manager response	_____	Recovery level	_____
Follow-up promised	_____		

OWNERSHIP

Owner	_____	Due date	_____
Status	_____	Escalation required	_____

CLOSURE

Guest contacted	_____	Guest response	_____
Return verified	_____	System correction	_____

MANAGEMENT REVIEW

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

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

Service Recovery Decision Matrix

Tool ID	GRV-R08	Owner	GM
Category	Service Recovery	Frequency	Quarterly review

Purpose: Consistent response levels based on severity, impact, and authority.

LEVEL 1 - INCONVENIENCE

Examples		Expected response	
Authorized roles		Maximum recovery	

LEVEL 2 - MATERIAL FAILURE

Examples		Expected response	
Authorized roles		Maximum recovery	

LEVEL 3 - SEVERE/SAFETY/REPUTATION

Examples		Immediate escalation	
Authorized roles		Required documentation	

APPROVAL

Owner approval		Effective date	
Review date		Version	

MANAGEMENT REVIEW

Reviewed by		Review date	
Decision/action		Next review	

Control note: Use the approved version of GRV-R08. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

Guest Recovery Authorization Guide

Tool ID	GRV-R09	Owner	Owner/GM
Category	Service Recovery	Frequency	Quarterly review

Purpose: Clear recovery limits by role so managers can act quickly without uncontrolled discounting.

ROLE AUTHORITY

Role	_____	May apologize/correct	_____
May replace item	_____	May discount	_____
May comp	_____	Maximum value	_____
Escalation point	_____		

GUARDRAILS

No compensation without case ID	_____	No repeated offer without review	_____
No promise outside authority	_____	Document guest impact and action	_____

APPROVAL

Owner/GM	_____	Effective date	_____
Review date	_____	Version	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R09. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

SERVICE RECOVERY | OPERATING TOOL

Recovery Action Record

Tool ID	GRV-R10	Owner	Manager on Duty
Category	Service Recovery	Frequency	At occurrence

Purpose: Compensation, correction, coaching, and immediate actions taken for a guest concern.

RECOVERY

Case ID	_____	Guest ID/name	_____
Date	_____	Manager	_____
Severity	_____		

ACTION TAKEN

Operational correction	_____	Compensation/offer	_____
Value	_____	Reason	_____
Approval level	_____		

INTERNAL CORRECTION

Employee coaching	_____	SOP/process correction	_____
Maintenance/vendor action	_____	Owner	_____
Due date	_____		

RESULT

Guest response	_____	Follow-up needed	_____
Status	_____		

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R10. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

Recovery Follow-Up Tracker

Tool ID	GRV-R11	Owner	Assigned Manager
Category	Service Recovery	Frequency	Daily until closed

Purpose: Follow-up commitments, attempts, guest response, return status, and closure.

CASE

Case ID	_____	Guest	_____
Owner	_____	Follow-up deadline	_____
Preferred channel	_____		

ATTEMPTS

Attempt 1 date/result	_____	Attempt 2 date/result	_____
Attempt 3 date/result	_____		

CLOSURE

Guest reached	_____	Resolution accepted	_____
Return planned	_____	Return verified	_____
Closed by/date	_____		

LEARNING

What must change?	_____	Corrective action ID	_____
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MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R11. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

Repeat Concern Pattern Log

Tool ID	GRV-R12	Owner	GM
Category	Service Recovery	Frequency	Weekly

Purpose: Recurring complaint themes that require a system correction instead of repeated apologies.

PATTERN

Theme	_____	First observed	_____
	_____		_____
Cases reviewed	_____	Frequency	_____
	_____		_____
Affected shift/station	_____		

DIAGNOSIS

Likely source	_____	Evidence	_____
	_____		_____
Training/process/ leadership/system issue	_____	Risk level	_____
	_____		_____

CORRECTION

Action ID	_____	Owner	_____
	_____		_____
Due date	_____	Verification	_____
	_____		_____
Next review	_____		

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R12. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

RETENTION | OPERATING TOOL

Visit & Engagement Log

Tool ID	GRV-R13	Owner	Manager
Category	Retention	Frequency	At visit or contact

Purpose: Permissioned visit, interaction, recognition, and follow-up history.

ENGAGEMENT

Visit/interaction date	_____	Guest ID	_____
Channel/location	_____	Visit type	_____
Manager	_____		

RECOGNITION

Preference used	_____	Meaningful interaction	_____
Concern/recovery case	_____	Offer/campaign	_____

NEXT STEP

Follow-up needed	_____	Owner	_____
Due date	_____	Outcome	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R13. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

RETENTION | OPERATING TOOL

Lapsed Guest Identification List

Tool ID	GRV-R14	Owner	CRM Owner
Category	Retention	Frequency	Monthly

Purpose: Guests whose visit pattern has materially declined based on a defined threshold.

LAPSED GUEST

Guest ID	_____	Guest name	_____
Typical frequency	_____	Last visit	_____
Days since visit	_____	Threshold	_____

ELIGIBILITY

Contact permission current	_____	Open complaint	_____
Prior recovery	_____	Do-not-contact status	_____

DECISION

Reactivation priority	_____	Owner	_____
Next action	_____	Due date	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R14. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

RETENTION | OPERATING TOOL

Guest Reactivation Planner

Tool ID	GRV-R15	Owner	CRM Owner
Category	Retention	Frequency	Monthly

Purpose: A respectful reason, channel, offer, owner, and follow-up plan for re-engagement.

GUEST AND REASON

Guest ID	_____	Why the guest matters	_____
Evidence of lapse	_____	Possible reason	_____

PLAN

Approved channel	_____	Message purpose	_____
Offer/recognition	_____	Owner	_____
Send date	_____		

GUARDRAILS

Permission verified	_____	Suppression checked	_____
No sensitive inference	_____	No pressure language	_____

RESULT

Response	_____	Return date	_____
Offer redeemed	_____	Next decision	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R15. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

RETENTION | OPERATING TOOL

Guest Return Verification Log

Tool ID	GRV-R16	Owner	Manager
Category	Retention	Frequency	At return

Purpose: Evidence that recovered or reactivated guests returned and how the next experience went.

RETURN

Guest ID	_____	Related case/campaign	_____
Return date	_____	Location	_____
Recognized by	_____		

EXPERIENCE

What went well?	_____	Any concern?	_____
Manager contact	_____	Guest response	_____

VERIFICATION

Relationship restored	_____	Additional action	_____
Owner	_____	Closure date	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R16. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

RETENTION | OPERATING TOOL

Loyalty Offer Planning Worksheet

Tool ID	GRV-R17	Owner	GM/Marketing Owner
Category	Retention	Frequency	Per offer

Purpose: Purpose, audience, value, guardrails, cost, dates, and approval for an offer.

OFFER PURPOSE

Offer name	_____	Business objective	_____
Guest segment	_____	Reason this is appropriate	_____

ECONOMICS

Offer value	_____	Expected cost	_____
Redemption cap	_____	Minimum spend	_____
Budget owner	_____		

RULES

Start/end	_____	Locations	_____
Exclusions	_____	Approval	_____
Staff training	_____		

MEASUREMENT

Primary KPI	_____	Secondary KPI	_____
Review date	_____	Stop/change rule	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R17. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

RETENTION | OPERATING TOOL

Loyalty Offer Redemption Tracker

Tool ID	GRV-R18	Owner	Marketing Owner
Category	Retention	Frequency	Per campaign

Purpose: Redemption, sales, guest response, cost, and repeat-visit outcome.

OFFER

Offer/campaign ID	_____	Guest ID	_____
Issue date	_____	Expiration	_____
Channel	_____		

REDEMPTION

Redeemed date	_____	Check/sales	_____
Discount cost	_____	Manager	_____
Guest response	_____		

OUTCOME

Return visit	_____	Incremental value observation	_____
Continue/change/stop	_____	Notes	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R18. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

Campaign Planning Brief

Tool ID	GRV-R19	Owner	Marketing Owner
Category	Campaigns	Frequency	Per campaign

Purpose: Objective, audience, message, channel, consent rule, offer, owner, and measurement plan.

CAMPAIGN BRIEF

Campaign ID/name	_____	Objective	_____
Audience	_____	Owner	_____
Approved dates	_____		

MESSAGE

Guest value	_____	Primary message	_____
Call to action	_____	Offer	_____
Channel	_____		

PERMISSION AND RISK

Consent source	_____	Suppression check	_____
Opt-out method	_____	Review/approval	_____

MEASUREMENT

Sent	_____	Response goal	_____
Redemption goal	_____	Revenue goal	_____
Decision date	_____		

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R19. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

Campaign Calendar

Tool ID	GRV-R20	Owner	Marketing Owner
Category	Campaigns	Frequency	Monthly

Purpose: Approved send dates, channels, segments, owners, and review dates.

CALENDAR ENTRY

Campaign ID	_____	Campaign name	_____
Audience	_____	Channel	_____
Send/start date	_____	End date	_____
Owner	_____	Status	_____

READINESS

Copy approved	_____	Audience approved	_____
Suppression checked	_____	Staff informed	_____
Tracking ready	_____		

REVIEW

Results due	_____	Decision owner	_____
Next action	_____		

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R20. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

Campaign Contact & Suppression List

Tool ID	GRV-R21	Owner	CRM Owner
Category	Campaigns	Frequency	Before every send

Purpose: Eligible contacts and required exclusions based on consent, opt-out, and channel preference.

CONTACT ELIGIBILITY

Guest ID	_____	Campaign ID	_____
Channel	_____	Permission verified	_____
Permission date	_____		

SUPPRESSION CHECKS

Opted out	_____	Do not contact	_____
Open severe concern	_____	Frequency cap reached	_____
Wrong/invalid contact	_____		

FINAL DECISION

Eligible: Yes / No	_____	Reviewed by	_____
Review date	_____	Reason excluded	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R21. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

CAMPAIGNS | OPERATING TOOL

Campaign Results Tracker

Tool ID	GRV-R22	Owner	Marketing Owner
Category	Campaigns	Frequency	Per campaign

Purpose: Sent, delivered, opened, clicked, redeemed, revenue, cost, and next decision.

CAMPAIGN

Campaign ID/name	_____	Channel	_____
Audience	_____	Start/end	_____
Owner	_____		

RESULTS

Sent	_____	Delivered	_____
Opened/engaged	_____	Clicked/responded	_____
Redeemed	_____	Revenue	_____
Offer cost	_____	Other cost	_____

ANALYSIS

What worked?	_____	What failed?	_____
Guest feedback	_____	Continue/change/stop	_____
Next test	_____		

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R22. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

Review Request Log

Tool ID GRV-R23
Category Online Reviews

Owner Manager
Frequency As approved

Purpose: Neutral review requests sent to actual guests without selecting only likely positive reviewers.

REQUEST

Request ID	_____	Guest/visit reference	_____
Request date	_____	Channel	_____
Sent by	_____		

FAIRNESS CHECK

Actual guest/experience verified	_____	All eligible guests treated consistently	_____
No positive-review condition	_____	Platform rules reviewed	_____
Incentive disclosed if allowed	_____		

OUTCOME

Review posted	_____	Platform	_____
Rating optional	_____	Response needed	_____
Notes	_____		

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R23. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

ONLINE REVIEWS | OPERATING TOOL

Online Review Response & Escalation Log

Tool ID	GRV-R24	Owner	GM
Category	Online Reviews	Frequency	Daily

Purpose: Response status, issue severity, owner, offline recovery, and system action.

REVIEW

Review ID	_____	Platform	_____
Date	_____	Guest name/handle	_____
Rating	_____	Issue theme	_____

RESPONSE

Severity	_____	Public response owner	_____
Response deadline	_____	Response posted	_____
Offline contact offered	_____		

RECOVERY AND ESCALATION

Case ID	_____	Guest contacted	_____
Escalated to	_____	System action	_____
Status	_____		

CLOSE

Resolved	_____	Follow-up	_____
Closed by/date	_____		

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R24. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

Private Dining Lead Form

Tool ID GRV-R25
Category Events & Leads

Owner Sales/Event Owner
Frequency At inquiry

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

LEAD

Lead ID	_____	Contact name	_____
	_____		_____
Organization	_____	Phone/email	_____
	_____		_____
Permission	_____	Source	_____
	_____		_____

EVENT

Occasion	_____	Preferred date/time	_____
	_____		_____
Guest count	_____	Budget/range	_____
	_____		_____
Space	_____	Food/beverage needs	_____
	_____		_____

NEXT STEP

Owner	_____	Response deadline	_____
	_____		_____
Site visit/call	_____	Proposal due	_____
	_____		_____
Status	_____		_____
	_____		_____

OUTCOME

Booked/lost	_____	Estimated/actual value	_____
	_____		_____
Lost reason	_____	Future follow-up	_____
	_____		_____

MANAGEMENT REVIEW

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

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

Catering Inquiry Tracker

Tool ID	GRV-R26	Owner	Sales/Event Owner
Category	Events & Leads	Frequency	At inquiry

Purpose: Catering requirements, quote status, follow-up, outcome, and lost-reason evidence.

INQUIRY

Lead ID	_____	Contact	_____
Event date	_____	Guest count	_____
Delivery/pickup	_____	Location	_____

REQUIREMENTS

Menu	_____	Dietary needs	_____
Equipment/service	_____	Budget	_____
Timing	_____		

SALES PROCESS

Owner	_____	Quote date	_____
Follow-up dates	_____	Deposit/status	_____
Decision deadline	_____		

OUTCOME

Booked/lost	_____	Value	_____
Lost reason	_____	Post-event follow-up	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R26. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

Large-Party Follow-Up Log

Tool ID GRV-R27
Category Events & Leads

Owner Manager/Event Owner
Frequency Per event

Purpose: Pre-event confirmations, post-event feedback, recovery, and future booking opportunity.

PARTY

Event/lead ID	_____	Host	_____
Date/time	_____	Guest count	_____
Manager	_____	Service team	_____

PRE-EVENT

Final count confirmed	_____	Menu confirmed	_____
Allergy needs confirmed	_____	Payment/deposit confirmed	_____
Special details communicated	_____		

POST-EVENT

Host contacted	_____	Feedback	_____
Concern/case ID	_____	Future occasion	_____
Next follow-up	_____		

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R27. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

MANAGEMENT CONTROL | OPERATING TOOL

Weekly Guest Relationship Review

Tool ID	GRV-R28	Owner	GM
Category	Management Control	Frequency	Weekly

Purpose: A structured review of recovery, recognition, reactivation, reviews, campaigns, and open actions.

WEEK

Week ending	_____	Meeting owner	_____
Attendees	_____	Prior actions reviewed	_____

REVIEW

New/open recovery cases	_____	Overdue follow-up	_____
Repeat concern themes	_____	Regular/VIP changes	_____
Lapsed guests	_____	Campaign status	_____
Reviews	_____	Event leads	_____

DECISIONS

Decision 1/owner/due	_____	Decision 2/owner/due	_____
Decision 3/owner/due	_____		

VERIFICATION

Next meeting	_____	Records updated	_____
Escalations sent	_____		

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R28. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

Monthly Guest Retention Scorecard

Tool ID	GRV-R29	Owner	GM/Owner
Category	Management Control	Frequency	Monthly

Purpose: A monthly view of guest growth, return behavior, recovery, campaigns, reviews, and lead conversion.

MONTH

Month	_____	Location	_____
Prepared by	_____	Review date	_____

GUEST BASE

Active profiles	_____	New permissioned contacts	_____
Opt-outs	_____	Repeat visits	_____
Lapsed guests	_____	Reactivated guests	_____

RECOVERY

Cases opened	_____	Cases closed	_____
Average close time	_____	Returned after recovery	_____
Repeat concern themes	_____		

GROWTH

Campaigns	_____	Redemptions	_____
Campaign revenue	_____	Event leads	_____
Booked events	_____	Review response completion	_____

DECISIONS

Strongest result	_____	Primary risk	_____
Next-month priority	_____	Owner	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R29. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.

Guest Relationship Corrective Action Log

Tool ID	GRV-R30	Owner	GM
Category	Management Control	Frequency	Weekly

Purpose: The owner, due date, evidence, verification, and closure of guest-system improvements.

ACTION

Action ID	_____	Source/case	_____
Problem	_____	Root cause category	_____
Risk	_____		

ASSIGNMENT

Required correction	_____	Owner	_____
Assigned date	_____	Due date	_____
Resources/approval	_____		

VERIFICATION

Evidence required	_____	Verified by	_____
Verification date	_____	Result	_____

CLOSURE

Closed/reopened	_____	System document changed	_____
Training completed	_____	Next review	_____

MANAGEMENT REVIEW

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

Control note: Use the approved version of GRV-R30. Protect guest information, record facts, and follow applicable permission, platform, and legal requirements.