

Sales Intelligence & Forecasting

Use yesterday's evidence to forecast tomorrow's demand—and schedule the labor required to deliver it.

Record → Explain → Compare → Forecast → Staff → Review → Preserve

Why this system exists

- Sales history without context cannot explain what will happen next.
- Local demand is shaped by weather, school, events, traffic, promotions, capacity, and operating execution.
- Experienced managers often know these patterns—but the knowledge disappears unless it is recorded.
- The system turns daily observations into a durable forecasting advantage.

The system becomes smarter with every completed day

More evidence

Each day adds a tested combination of sales, guests, weather, calendar conditions, promotions, disruptions, and labor.

Better matches

The comparable-day library grows, making it easier to find prior days that truly resemble the day being forecast.

Calibrated judgment

Forecast accuracy and bias show which assumptions deserve more—or less—weight over time.

The seven-stage operating loop



- The loop ends only after the lesson is preserved for the next comparable day and the next year.

Begin with controlled definitions

One sales number

Adopt a written net-sales definition, cutoff, tax treatment, and exclusion policy.

One guest count

Use the same guest-count source and method every day; document system changes.

One labor definition

Specify which paid hours count as productive labor and how salaried management is treated.

The Daily Sales Intelligence Journal is the memory

- Record net sales, guest count, average check, and labor hours.
- Capture weather severity and timing—not just “rain.”
- Document school status, local events, parade days, pay cycles, traffic, construction, promotions, and catering.
- Edit any prior day when a governing factor is learned later.
- Use the Daily Revision Log to preserve the prior understanding, new evidence, editor, approval, and forecast/labor impact.
- End with the observed effect and the lesson a manager should know next year.

Choose comparable days by demand pattern—not date alone

Match

Weekday, seasonal position, school/calendar status, weather, events, promotion, hours, and capacity.

Score

Use the controlled scoring sheet, then assign a reasoned weight to each selected day.

Exclude

Remove unrepeatable disruptions unless the same disruption is expected again.

Build the forecast in visible layers

- Start with the weighted comparable-day baseline.
- Add recent trend and price/mix adjustments without double counting.
- Apply weather, event/calendar, promotion, capacity, and known-sales adjustments separately.
- Publish low, most-likely, and high outcomes with a confidence level.
- Write the primary assumption and secure approval.

Confidence expresses evidence quality

High

Strong comparables, stable operations, and known demand drivers. Default range: $\pm 5\%$.

Medium

Useful history with meaningful uncertainty or mixed signals. Default range: $\pm 10\%$.

Low

Weak history, unusual conditions, or a new operating pattern. Default range: $\pm 20\%$.

Forecast by daypart and channel

- Split demand into opening/prep, breakfast, lunch, afternoon, dinner, late night, and closing as applicable.
- Forecast sales and guests by daypart.
- Separate dine-in, takeout, delivery, catering, and other material channels.
- Use reservation, order, event, and delivery timing to place workload where it occurs.
- A correct daily total can still create a bad schedule if the hours are placed at the wrong times.

Labor hours come from multiple workload tests

Sales workload

Forecast sales ÷ target sales per labor hour (SPLH).

Guest workload

Forecast guests ÷ target guests per labor hour (GPLH).

Coverage workload

Minimum role coverage plus fixed, opening, closing, prep, receiving, cleaning, training, and event work.

The labor recommendation uses the strongest justified requirement

Sales-based hours

Guest-based hours

Minimum coverage

MAX

+ fixed work + event workload + documented adjustment

= RECOMMENDED LABOR HOURS

Guardrails come before productivity

- Never schedule below legal, safety, food-safety, security, or minimum-role requirements.
- Do not let higher average check disguise the guest workload.
- Include breaks, setup, closing, cleaning, receiving, training, and handoffs.
- Document every manager adjustment so later review can distinguish judgment from error.
- Use the system to improve deployment—not to justify unsafe understaffing.

Translate demand into production and prep

- Convert forecast guests and mix into expected item or category units.
- Subtract usable on-hand inventory and account for yield.
- Calculate prep quantities, labor minutes, start times, and owners.
- Add catering, event, and channel-specific production separately.
- Review waste, stockouts, and service failures after the day to improve the next forecast.

Year-to-date analysis deserves a stronger role

Normalize

Compare equal trading days and explain closures, shifted weekdays, and calendar distortions.

Bridge

Separate sales change into guest count, average check, price/mix, channel, and disruption effects.

Project

Show remaining sales to goal, required daily run rate, and likely year-end outcome.

Forecast accuracy creates the learning signal

- Dollar variance shows operating impact.
- Percent error makes large and small days comparable.
- Absolute percent error measures accuracy without misses canceling one another.
- Bias reveals a habit of optimism or conservatism.
- Labor variance separates forecast quality from schedule execution.
- Root-cause review changes future assumptions—not historical results.

Search recurring events across every prior year

- Use one consistent event name for the annual car show, festival, Watermelon Parade, and every other recurring local driver.
- Filter Event History by event, year, weekday/weekend, temperature, rain, event timing, attendance, traffic, sales, guests, or labor.
- Compare the actual occurrence date and weekday—not merely the same calendar date last year.
- Preserve weather timing and observed demand effects so rainy, cold, weekday, and weekend occurrences can be compared correctly.
- Carry the result into the annual intelligence calendar and next year's planning action.

Management cadence keeps the system alive

Daily

Record facts, close variances, and preserve the lesson.

Weekly

Approve the next 14 days, labor demand, production implications, risks, and opportunities.

Monthly / quarterly

Review YTD, accuracy, bias, driver performance, structural changes, and labor standards.

Annual

Archive the year and publish the next annual intelligence calendar.

Implementation: first 90 days

- Week 1 — adopt definitions, ownership, labor targets, minimum coverage, and access controls.
- Week 2 — begin the journal and build school, event, promotion, weather, and disruption history.
- Week 3 — approve comparable days and publish the first documented 14-day forecast.
- Week 4 — activate labor demand, daypart deployment, production translation, and variance review.
- Day 60 — calibrate weights and labor standards from actual results.
- Day 90 — verify adoption, close gaps, and lock the management cadence.

A forecast is a documented operating decision

Record the truth.

Explain the drivers.

Plan the demand and labor.

Review the miss.

Preserve the lesson.

The longer the system is used with discipline, the more accurately it can recognize local patterns—and the less the business depends on one person's memory.