

SMALL RESTAURANT/FOOD SERVICE CHECKUP

Business: _____

Owner/Mgr: _____

Date: _____

© Casey Willson www.mdsbdc.umd.edu
"statewide services"

Scoring:

Place the score you feel most reflects your business next to each point. Total each section individually and again at the end for an overall score. Contact the Alexandria SBDC and let us know in which areas you need assistance.

H: Healthy = meeting standards consistently
S: Sick = not occurring in the business

OK: Okay = unsystematic compliance

The Basics	H	OK	S
	(5)	(3)	(0)

- ___ Your business is making money.
- ___ You are paying your bills on time - especially invoices with discounts.
- ___ Your vendors and suppliers are shipping you with terms.
- ___ You are current with your taxes, permits, and licenses.
- ___ Your business is trending up overall since you opened.
- ___ Your business is trending up compared to last year. (comp #'s)
- ___ You comply with all Health Department Standards.
- ___ You have an effective and consistent customer service plan in place.
- ___ You work beside your employees to help them succeed in their job.
- ___ **Subtotal = The Basics**
45 = Healthy as a Horse!

Finance	H	OK	S
	(3)	(1)	(0)

- ___ You reconcile your checking accounts.
- ___ You are producing regular, consistently formatted statements. (income statement, balance sheet, sources and uses of funds)
- ___ You operate with a rolling cash flow 12–18 months out.
- ___ Your receivables are current.
- ___ Shrinkage (bad debt, internal and external loss) is less than 2% of gross revenue.
- ___ There is a sales plan in place.
- ___ Your lease is competitive.
- ___ Your payroll is an acceptable percentage of sales.

- ___ A basic ratio analysis corresponds favorably to industry benchmarks.
- ___ You monitor and manage your Cost of Goods and Payroll according to business levels.
- ___ **Subtotal = Finance**
30 = Fit as a Fiddle!

Operations **H** **OK** **S**
 (2) **(1)** **(0)**

- ___ You always keep to your posted Hours of Operation.
- ___ Vendors respond and deliver promptly and consistently and at convenient times.
- ___ You match packing slips with purchase orders with invoices and check quality of goods.
- ___ You have policies for damaged or spoiled supplies received from vendors.
- ___ Is food rung up when ordered or when served?
Your system allows for orderly register "closings" at C.O.B.
- ___ The process of ordering and delivering product is adequately controlled.
- ___ You make bank deposits daily.
- ___ You record weather on your daily business summary report.
- ___ You anticipate business needs and workloads based on weather predictions and/or seasonal variations.
- ___ **Subtotal = Operations**
18 = Clean Bill of Health!

Supplies, Food & Produce **H** **OK** **S**
 (2) **(1)** **(0)**

- ___ You store your goods so they can be rotated and used in the order received.
- ___ Portions are clearly defined, measured and controlled.
- ___ All prep work complete by open of business or prior to peak business hours.
- ___ Prep work is done with attention to consistency and waste control.
- ___ Storage areas are clean, orderly, and kept at proper temperature.
- ___ Foods to be carried over are properly packaged, labeled and dated, and kept at proper temperature.
- ___ Foods are disposed of properly in a timely fashion.
- ___ You are able to anticipate quantities and usage and order so that supply levels are adequate to meet customer demands with minimum spoilage.
- ___ **Subtotal = Supplies, Food & Produce**
16 = Feelin' Good!

Menus & Presentation **H** **OK** **S**
 (2) **(1)** **(0)**

- Menus are clean, attractive, easy to read, and understandable.
- Lighting is adequate (or even enhancing).
- Display menus/signage are attractive, distinct, easy to read, and clearly priced.
- Cold/hot cases look full, fresh, and "ready for business."
- Cold/hot cases beverage dispensers are maintained throughout the day to be ready at peak hours.
- Visible cooking areas are clean, orderly, and constantly maintained.
- These areas enhance the perception of your food.
- Food is attractively and appetizingly presented to the customer.
- Subtotal = Menus & Presentation**
16 = Strong as an Ox!

Physical Plant

"Front of the House" **H** **OK** **S**
 (2) **(1)** **(0)**

- The front/entrance of the shop is clean and in good condition.
- Windows are clean.
- All light bulbs are working and interior is well lit.
- Window displays and signage are effective and in order.
- Furnishings and décor are clean and in good condition.
- Tabletops are clean.
- Utensils, napkins, and condiments are clean and readily accessible (whether on the table or at a central station)
- The floor is clean.
- The bathrooms are clean.
- The music is appropriate.
- Refuse containers are periodically emptied and wiped down.
- The shop opens daily "ready for business" regardless of your presence.
- Total = "Front of the House"**
24 = Lookin' Good!

Customer Service	H	OK	S
	(3)	(1)	(0)

- You can describe your customer in detail in two or three sentences.
- Merchandising* (purchasing, display, signage, pricing) *policy* (checks, credit card, refund), *promotional, marketing, and replacement* decisions are made from a customer service perspective.
- You have a "complimentary drink or menu item" budget.
- Your customers are greeted when they enter your shop.
- Your employees answer the phone in a prescribed manner.
- Customers are thanked when they spend money with you.
- You have sat or eaten at every table in your shop.
- You have had your restaurant "secret shopped."
- Subtotal = Customer Service**
24 = Bright Eyed and Bushy Tailed!

Marketing	H	OK	S
	(2)	(1)	(0)

- You have identified the most effective means of communicating with your customer. (Neighborhood, community, local, regional resources.)
- You capture customer information for mailing or direct contact.
- You contact customers on a regular basis.
- You have a marketing plan and a budget.
- Total = Marketing**
8 = Sitting on Top of the World!

Competition	H	OK	S
	(2)	(1)	(0)

- You patronize the competition.
- You are familiar with competitors' marketing, menu, pricing, and policy practices.
- You are beating the competition.
- You consider having "loss leaders" that are readily reorderable and might enhance customer loyalty.
- You understand where else a customer might spend the dollars spent in your shop. (substitute, complementary, or alternative products)
- Subtotal = Competition**
10 = In Fighting Shape!

