



Restaurant Checkup

First Name		Last Name	
Business Name		Email Address	

SCORING

Healthy = Meeting standards consistently

Okay = Haphazard compliance

Sick = Not occurring in the business

N/A = Not applicable

*Check the column that is best describes your business.

The Basics	Healthy	Okay	Sick	N/A
1. Your business is making money.				
2. You are paying your bills on time - especially invoices with discounts.				
3. Your vendors and suppliers are shipping you with terms.				
4. You are current with your taxes, permits, and licenses.				
5. Your business is trending up overall since you opened.				
6. Your business is trending up compared to last year. (comp #'s)				
7. You comply with all Health Department Standards.				
8. You have an effective and consistent customer service plan in place.				
9. You work beside your employees to help them succeed in their job				
Finance	Healthy	Okay	Sick	N/A
1. You reconcile your checking accounts.				
2. You are producing regular, consistently formatted statements. (income statement, balance sheet, sources and uses of funds)				
3. You operate with a rolling cash flow 12 - 18 months out.				
4. Your receivables are current.				
5. Shrinkage (bad debt, internal and external loss) is less than 2% of gross revenue.				
6. There is a sales plan in place				
7. Your lease is competitive.				
8. Your payroll is an acceptable percentage of sales.				
9. A basic ratio analysis corresponds favorably to industry benchmarks.				
10. You monitor and manage your Cost of Goods and Payroll according to business levels.				
Operations	Healthy	Okay	Sick	N/A
1. You always keep to your Posted Hours of Operation				
2. Vendors respond and deliver promptly and consistently and at convenient times.				
3. You match packing slips with purchase orders with invoices and check quality of goods.				
4. You have policies for damaged or spoiled supplies received from vendors.				
5. The process of ordering and delivering product is adequately controlled.				
6. Your system allows for orderly register "closings" at C.O.B.				
7. You make bank deposits daily.				
8. You record weather on your daily business summary report.				
9. You anticipate business needs and workloads based on weather predictions and/or seasonal variations.				

Supplies, Food and Produce	Healthy	Okay	Sick	N/A
1. You store your goods so they can be rotated and used in the order received.				
2. Portions are clearly defined, measured and controlled.				
3. All prep work is complete by open of business or prior to peak business hours.				
4. Prep work is done with attention to consistency and waste control.				
5. Storage areas are clean, orderly, and kept at proper temperature.				
6. Foods to be carried over are properly packaged, labeled and dated, and kept at proper temperature.				
7. Foods are disposed of properly in a timely fashion.				
8. You are able to anticipate quantities and usage and order so that supply levels are adequate to meet customer demands with a minimum of spoilage.				
Menus and Presentation	Healthy	Okay	Sick	N/A
1. Menus are clean, attractive, easy to read, and understandable.				
2. Lighting is adequate (or even enhancing).				
3. Display menus/signage are attractive, distinct, easy to read, and clearly priced.				
4. Cold/hot cases look full, fresh, and "ready for business."				
5. Cold/hot cases beverage and dispensers are maintained throughout the day to be ready at peak hours.				
6. Visible cooking areas are clean, orderly, and constantly maintained.				
7. These areas enhance the perception of your food.				
8. Food is attractively and appetizingly presented to the customer.				
Physical Plant - Front of House	Healthy	Okay	Sick	N/A
1. The front/entrance of the shop is clean and in good condition.				
2. Windows are clean.				
3. All light bulbs are working and interior is well lit.				
4. Window displays and signage are effective and in order.				
5. Furnishings and décor are clean and in good condition.				
6. Tabletops are clean.				
7. Utensils, napkins, and condiments are clean and readily accessible (whether on the table or at a central station).				
8. The floor is clean.				
9. The bathrooms are clean.				
10. The music is appropriate.				
11. Refuse containers are periodically emptied and wiped down.				
12. The shop opens daily "ready for business" regardless of your presence.				
Physical Plant - Back of the House	Healthy	Okay	Sick	N/A
13. All equipment works and is safe and in good condition.				
14. All prep stations are set up correctly and on time at the start of the day.				
15. All food and beverage prep areas are thoroughly cleaned at C.O.B.				
16. Floors are clean.				
17. Storage areas are neat, orderly, and clean.				
18. Cleaning supplies are properly stored.				
19. Water temperatures are appropriate.				
20. Food prep and utensil cleaning equipment is properly maintained.				
21. All aspects of operations could withstand a health dept. inspection.				
Personnel	Healthy	Okay	Sick	N/A
1. Staff is stable and turnover manageable.				
2. Employees clearly understand performance standards and friendly customer service.				
3. Operational policy and procedures are clearly stated.				
4. Employee discounts or purchase program are clearly defined.				
5. Employees have an understanding of "product knowledge", "selling techniques", and "use of downtime."				
6. Training is provided.				

7. Employees are properly groomed and attired.				
8. The compensation system incentivizes behavior.				
9. All behavior receives appropriate feedback, redirection, or reinforcement.				
10. You solicit and listen to employees' ideas and suggestions.				
11. You periodically "drop-in" on your day off to see if management is as good as it should be when you are not there.				
Customer Service	Healthy	Okay	Sick	N/A
1. You can describe your customer in detail in two or three sentences.				
2. Merchandising (purchasing, display, signage, pricing) policy (checks, credit card, return, exchange, credit), promotional, marketing, or replacement decisions are made from a customer service perspective.				
3. Your customers are greeted when they enter your establishment.				
4. Your employees answer the phone in a prescribed manner.				
5. Customers are thanked when they spend money with you.				
6. You have sat or eaten at every table in your establishment.				
7. You have had your restaurant "secret shopped."				
8. You have a "complimentary drink or menu item" budget.				
Marketing	Healthy	Okay	Sick	N/A
1. You have identified the most effective means of communicating with your customer. (Neighborhood, community, local, regional resources.)				
2. You capture customer information for mailing or direct contact.				
3. You contact customers on a regular basis.				
4. You have a marketing plan and a budget.				
Competition	Healthy	Okay	Sick	N/A
1. You patronize the competition.				
2. You are familiar with competitors' marketing, menu, pricing, and policy practices.				
3. You are beating the competition.				
4. You consider having "loss leaders" that are readily reorderable and might enhance customer loyalty.				
5. You understand where else a customer might spend the dollars that would be spent in your establishment. (substitute, complementary, or alternative products)				
Loss Prevention and Safety	Healthy	Okay	Sick	N/A
1. Shop and register keys are in management's possession at all times.				
2. Customer entry chimes (bell) work.				
3. Stockroom and office doors are closed and secure.				
4. Rear entrances are locked.				
5. You conduct regular inventory plus "spot check" inventory on costly goods.				
6. Emergency numbers are clearly posted in front and rear of shop.				
7. Fire extinguisher and first aid kit are in good order.				
8. Exits clear, exit signs and emergency lights are working.				
9. Bathrooms are monitored by staff.				
Technology	Healthy	Okay	Sick	N/A
1. You employ a computerized Point of Sale system that provides effective data and control.				
2. It integrates to accounting and inventory systems.				
3. It provides information for adequate and timely reordering.				
4. It captures customer information.				
5. You have a Website.				
6. You have done a "Technology Assessment" to determine appropriate technology applications and cost/benefit for your business.				