

 Sample deliverable

Sample owner report and action register

Sample only. Lantern Row Kitchen is fictional. Every name and number is invented to show the format, not a client result, testimonial or forecast.

This is the kind of report an owner receives each month: the concern in the owner's words, the records we reviewed and what was missing, what we found, the priorities we agreed, and one action register that names who does what by when.

Owner reporting is part of every package (from \$2,500 a month). Your proposal sets the scope, the people doing the work and the reporting schedule.

Restaurant	Report	Period reviewed	Issued	Prepared by
Lantern Row Kitchen (fictional), one location, 60 seats	Month 1 owner report	September 1 to 28 ILLUSTRATIVE	October 2. Statuses are as of this date	ChallengerOps, reviewed before release

The concern

In the owner's words: "Labor feels high on slow nights, the closing list gets skipped, and Friday guests complain about waiting for the check."

Information reviewed

Every report names its sources and periods. When a record is missing, the report says so instead of filling the gap.

SOURCE	PERIOD	AVAILABILITY	NOTE
Point of sale sales summary by day and daypart	Four weeks, September 1 to 28	Available	Exported by the owner
Schedules and time clock records	Same four weeks	Available	Scheduled and clocked hours compared by shift
Hourly pay rates from the payroll provider	Rates in effect in September	Available	Used only to estimate hourly labor cost by night
Closing checklists	28 nights	Partial	11 of 28 nights were saved ILLUSTRATIVE
Guest complaint log	Same four weeks	Available	Kept by the general manager
Food and beverage invoices	September	Missing	Not provided yet. No food cost figure is estimated in this report

Findings

Labor on slow nights. Monday to Wednesday dinners averaged \$3,100 in sales and \$1,050 in labor, about 34 percent. Thursday to Sunday averaged \$6,400 and \$1,720, about 27 percent. **ILLUSTRATIVE**

How it is calculated: labor is clocked hours on those dinner shifts times each person's hourly rate, divided by net sales for the same nights. It excludes salaried managers, payroll taxes and benefits, so total labor cost is higher than shown. Sources: point of sale summary, time clock records and hourly rates, September 1 to 28.

Closing shifts run long. On Monday to Wednesday, clocked closing hours ran past the schedule on most nights, usually by 30 to 45 minutes. **ILLUSTRATIVE**

Source: schedules compared with time clock records. This is a record of hours, not a pay or compliance review.

Closing checklist gaps. 11 of 28 closing checklists were saved. On 6 of those 11, the walk in temperature line was blank. **ILLUSTRATIVE**

Source: saved closing checklists. The other 17 nights have no record, so nothing is assumed about them.

Friday check wait. 5 of 9 logged complaints were about waiting for the check on Friday evenings.

ILLUSTRATIVE

Source: guest complaint log kept by the general manager.

Food cost not reviewed. Invoices were not available, so this report makes no food cost statement.

Next step: action 6 in the register.

Priorities agreed for next month

1. **Match Monday to Wednesday staffing to the sales pattern.** The general manager drafts the option; the owner decides.
2. **Make the closing checklist a nightly record.** Saved every night and reviewed the next morning.
3. **Shorten the Friday check wait.** One person owns check presentation during the busiest two hours.

Action register

The recommended actions in one list, each with a responsible person, a due date, a status and the evidence that will show it is done. Statuses are as of the October 2 issue date. Decisions on schedules, pay, hiring and spending stay with the owner.

#	ACTION	RESPONSIBLE	DUE	STATUS	EVIDENCE AND NEXT STEP
1	Draft a Monday to Wednesday schedule option that ends one closing shift earlier	Jordan, general manager	Oct 7	In progress	Draft goes to the owner with sales by hour for those nights
2	Decide whether to use the schedule option	Owner	Oct 9	Waiting on owner	The decision and its start date are recorded here
3	Save the closing checklist every night; the general manager reviews it the next morning	Sam, closing lead; Jordan	Started Oct 1	In progress	Saved checklists are counted in the next report
4	Record the walk in temperature reading on every close. If a reading cannot be taken or is out of range, follow the restaurant's food safety procedure: record the reason and the corrective action taken, and tell the manager on duty that night	Sam, closing lead; manager on duty for exceptions	Every close	In progress	Missing readings and exceptions are listed by date in the next report, with the corrective action and who was told
5	Assign one server to present checks from 8 to 10 pm on Fridays	Jordan, general manager	Oct 11	Open	Review the complaint log after two Fridays
6	Share September food and beverage invoices	Owner	Oct 14	Open	Needed before any cost commentary
7	Prepare the Month 2 owner report	ChallengerOps	Oct 31	Planned	Covers the actions above and any new findings

Decisions needed from the owner

1. Use the Monday to Wednesday schedule option or keep the current schedule (action 2).
2. Share September invoices so food cost can be reviewed (action 6).

What a report like this does and does not do

It records what the available records show and what was agreed. It does not guarantee sales, profit, staffing outcomes or inspection results, and it is not legal, tax, payroll or accounting advice. Your actual report uses your records, names its sources and periods, and is reviewed before you receive it.