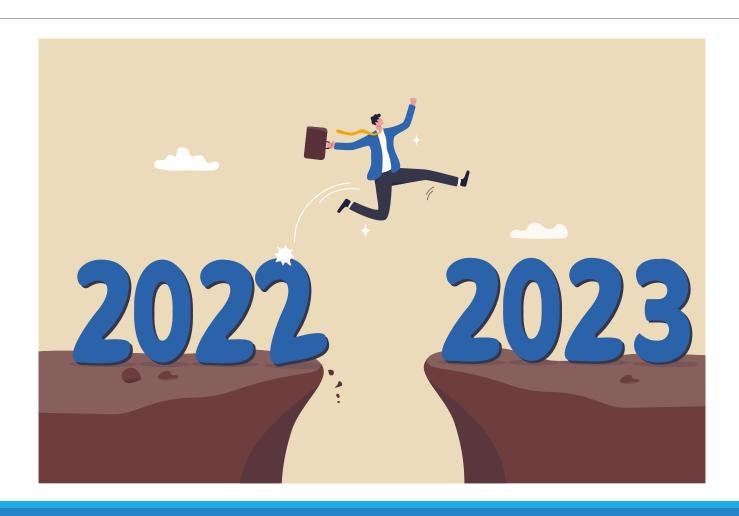


MISE EN PLACE FOR THE BUSINESS How to Start the New Year Right

Taking the leap...jumping into 2023!



SETTING GOALS TO ACHIEVE STRATEGIC GROWTH

Are you working really hard but feeling like you're not getting anywhere?

Do you often set goals and then forget about them?

How does your organization set goals to achieve your vision?

Develop or pick a framework that works for your company.

Set Specific Goals.
Create a Roadmap.
Track Progress.
Measure Success.

ANATOMY OF THE OKR FRAMEWORK







OBJECTIVES

KEY RESULTS

INITIATIVES

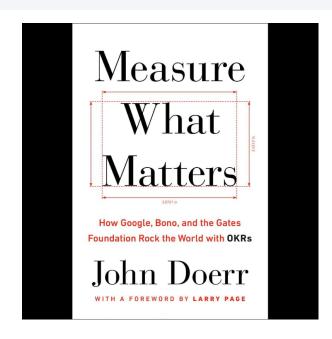
Goals that inspire and set direction

Steps that measure progress towards an objective Tasks required to drive progress of key results

Where do I need to go?

How do I know I'm getting there?

What will I do to get there?





BUDGETING



Establish a standard for how you keep your P&L's and do not deviate. Having month to month and year to year date to analyze and apply to future budgets is invaluable.

Start with REVENUE

- Growth year or consolidation year?
- Run a P&L by month for the last year.
- Budget conservative and try to beat it.
- Come up with your three revenue scenarios for a slow, medium and busy month.

Next are DIRECT EXPENSES or COST OF GOODS SOLD

- These are your costs that fluctuate based on revenue.
- Labor and salaries. Hourly vs salary.
- Use your historic Cost of Goods Sold percentages. For example, food cost 25%

OVERHEAD

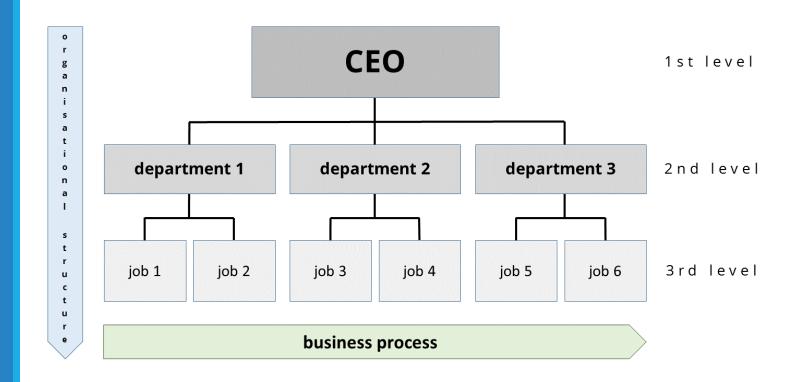
- These costs should be predictable, rent, utilities, benefits, etc.
- Some overhead costs will track payroll like Workman's Comp and Employer taxes.

MANAGEMENT STRUCTURE

Do you have a clear organizational structure?

Define management roles to clearly outline responsibilities to avoid confusion with staff.

Create incentive plans for top management personnel. Work with them to set parameters and monitor weekly/monthly.





STANDARDIZE MEETINGS

Our two biggest complaints from staff are: "We need better communication!"

And

"We have too many meetings!"

Organize your meetings to ensure you are covering exactly what needs to be discussed.

Determine who organizes and leads each meeting and who needs to be present.

Develop a specific agenda for each meeting to keep the meeting on track.

SCHAFFER

Meeting Rythm

Name	Fequency	Responsible to Organize	Attendees	Materials	Purpose Determine the décor design direction for event to instruct rentals, pack list and on site logistics.	
Production	At least once per event	Event Coordinator	Salesperson Coordinator Event Chef Creative Director	Production Meeting Checklist Contract BEO Any additional event docs		
ВЕО	Every Tuesday	Director of Events	Salesperson Coordinator Culinary Mgmt Creative Director Operations	Agenda - BEO Contract BEO Any additional event docs		
The 8:40	Monday morning at 8:40am	Vice President	All Mgmt	Agenda-8:40	Get updates on individual scorecards, chart progress on issues solutions, decide next steps.	
Biz Dev	Every two weeks	Director of Sales	Operations Director Ownership Sales People	Agenda-Biz Dev Mtg Biz Dev Journals	Review last weeks outreach and determine this weeks targets.	
Sales & Coordination	Every Monday and Thursday	Director of Sales	Director of Sales Coordinators Sales People	Agenda-Sales & Coordination	Review recent events Cover a PPP	
Marketing	First and third weeks of month	Vice President	Sales Operations Ownership	Agenda-Marketing Annual Marketing Plan MMR	Determine and execute the Marketing Roadmap.	
Culinary	Second Week each month	Chef	Culinary Mgmt Operations Director Ownership	Agenda-Culinary Mtg	Review culinary operations, financials, staffing and menu development.	
1 2 1's	Monthly	Individual Manager	Individual Manager Vice President *Ownership & Director	Agenda-Monthly 121s	Discuss ongoing professional development.	
PIC meeting	Quarterly	Ownership	All Mgmt	Agenda-PIC	Discuss company direction, Rocks, financials, culture, workflow, etc.	
Productivity	Quarterly	Operations	All Mgmt	Agenda-Productivity Mtg Weekly timetrackers	Discuss results of weekly time trackers, what have you improved and what will you try next?	



STANDARDIZE REPORTS

"Too much paperwork!"

Ensure that you are generating every report that is necessary and none that are not.

List each report with who is responsible, how often and where it goes.

Having many of these reports at hand will save a lot of time when it comes to gathering documents for tax season, Workman's Comp and Liability audits and any conversation with a banker.



Reporting Rythm

Report				Person			
Payroll Register Gross and net payroll RifPayroll Erika A Every two weeks Wednesday of payroll week Dropbox Payroll Summary Payroll breakdown for General Payroll Carleger entry HeRPayroll Erika A Every two weeks Friday of payroll week Dropbox Payroll GL Report Detail on infractions of # meal break rules and cost HRPayroll Erika A Every two weeks Friday of payroll week Dropbox Poetali on all Overtime and expense for hourly employees HRPayroll Erika A Every two weeks Friday of payroll week Dropbox Poetali on all Overtime and expense for hourly employees HRPayroll Erika A Every Week Monday by End of Day Charlie Joe Seth Lex Dropbox Poetali on all Overtime and expense for hourly employees HRPayroll Erika A Every Week Monday by End of Day Charlie Joe Seth Lex Dropbox Poetali on all Overtime and expense for hourly employees HRPayroll Erika A As necessary Friday following the event Charlie Dropbox Poetali on all Overtime and expense for various Erika A As necessary Friday following the event Charlie Dropbox Poetal Travel Labor Formal count of full time employees for various Erika A As necessary Friday following the event Charlie Dropbox Poetal Travel Labor HRPayroll Erika A As necessary Friday following the event Charlie Dropbox Poetal Travel Labor HRPayroll Erika A As necessary Friday following the event Charlie Dropbox Poetal Travel Labor HRPayroll Erika A As necessary Friday following the event Charlie Dropbox Poetal Travel Labor HRPayroll Erika A As necessary Friday following the event Charlie Dropbox Poetal Travel Labor HRPayroll Erika A Quarterly Every pay period and quarterly Poetal Travel Labor HRPayroll Erika A Quarterly First week of Feb. May, Aug. Nov Dropbox Poetal Travel Every HRPayroll Erika A Quarterly First week of Feb. May, Aug. Nov Dropbox Poetal Travel Every HRPayroll Erika A Quarterly First week of	Report	Content	Department	Responsible	Frequency	Due Date	Distributed to
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Revised 9-28-22



MARKETING



Strategic:

- Are there opportunities in our existing markets?
 - New Venues, RFP's
- Are there new markets we want to enter?
- How do we continue (hopefully) to differentiate ourselves in the market?
- SWOT Analysis Strengths, Weakness, Opportunity, Threats
- Marketing In-House VS Agency



MARKETING





Tactical:

- What awards do we want to submit for and what is required?
 - ICA CATIE AWARDS
 - Local Opportunities Chamber of Commerce
- Holiday Gifts for Clients
- Newsletter Email Marketing PR
- Social Media & Content Creation
- Participating in Local Events Chef Competitions, Local News Segment, Community Service
- How do we communicate with Clients
 - Capability Decks Do you have one?
 - Seasonal Offerings
- Website Making Updates Time for a refresh?



JANUARY PROJECTS





Admin/Finance:

- Clean up your payroll for better reporting and cost analysis
- Benefits & Insurance Renewals Start shopping

Operations:

- Building Maintenance Schedule service and get your team involved!
- Warehouse & Kitchen Cleaning/Organization
- Fleet Maintenance cleaning, service, graphics wraps

Get up to date with certifications & training:

- Serve Safe Training
- Harassment Training
- Alcohol Service Training
- First Responder training



JANUARY PROJECTS



Sales:

- Following up with top 2022 clients
- Brainstorming & reaching out to new prospects
- Evaluating top venues and focusing attention
- Soliciting 5-Star reviews from past (happy) clients

Culinary:

- Evaluating vendors & suppliers
- Revising menus removing losers and adding new items
- Updating pricing food costing, recipe building
- Training culinary team, improving skills





CONTACT INFORMATION

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SCHAFFER

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