



**Private Club  
Performance Management**



**Food Service  
Management  
on the Go**

**Ed Rehkopf**

Copyright 2011  
Ed Rehkopf

For internal use only at the purchasing club or organization.  
Materials purchased from the Private Club Performance Management website are for the exclusive use of the purchaser, individually or as an organization, and may not be reproduced, copied, distributed, or resold to others, individually or collectively, outside the purchasing organization.

#### Disclaimer

All information in purchased documents is provided for guidance only. Private Club Performance Management makes no legal representation as to their accuracy or efficacy. Purchasers should always review personnel and financial matters with their professional legal and financial advisors.



# Private Club Performance Management

## Food Service Management on the Go

### *Topical Index*

- |   |  |  |
|---|--|--|
| 01 A Culture of Discipline                        | 47 Steps to Continual Process Improvement            | 92 Prohibited Interview Questions                                |
| 02 Expectations for Food Service Managers – 1     | 48 Establishing Standards                            | 93 Reference Checking  |
| 03 Expectations for Food Service Managers – 2     | 49 Standards, Policies & Procedures                  | 94 Screen for Success  |
| 04 Expectations for Food Service Managers – 3     | 50 Sample Standards, Policies & Procedures           | 95 New Hire Onboarding   |
| 05 Basic Service Issues – 1                       | 51 Basic F&B Policies                                | 96 New Hire Orientations   |
| 06 Basic Service Issues – 2                       | 52 Responsible Alcohol Service – 1                   | 97 Job Descriptions  |
| 07 The Challenges of Food Service – 1             | 53 Responsible Alcohol Service – 2                   | 98 Passively Creating a Hostile Work Environment                 |
| 08 The Challenges of Food Service – 2             | 54 Cost of Goods Sold                                | 99 Give Them More than Just a Paycheck                           |
| 09 The Challenges of Food Service – 3             | 55 Cost of Goods Sold Analysis                       | 100 Steps to Lower Employee Turnover                             |
| 10 The Challenges of Food Service – 4             | 56 Labor Cost  | 101 The Shift Log  |
| 11 Food Service Disciplines – 1                   | 57 Labor Cost Control Strategies – 1                 | 102 Training   |
| 12 Food Service Disciplines – 2                   | 58 Labor Cost Control Strategies – 2                 | 103 Types of Training  |
| 13 Details and Quality                            | 59 Steps to Payroll Cost Control – 1                 | 104 Etiquette Training   |
| 14 The Service Profession                         | 60 Steps to Payroll Cost Control – 2                 | 105 Training Requirements and Principles                         |
| 15 A Service Attitude                             | 61 Budgeting   | 106 Initial and Ongoing Training                                 |
| 16 Get Your Employees to Think Like a GM          | 62 Benchmarking – 1                                  | 107 Training Curriculum by Position                              |
| 17 Employee Empowerment                           | 63 Benchmarking – 2                                  | 108 Training on the Go   |
| 18 The Necessities for Empowerment                | 64 Twelve Reasons to Benchmark – 1                   | 109 Training of the Go – A Direct Line to Restaurant Profits – 1 |
| 19 Implementing Employee Empowerment              | 65 Twelve Reasons to Benchmark – 2                   | 110 Training of the Go – A Direct Line to Restaurant Profits – 2 |
| 20 The Many Ways to Kill Employee Empowerment – 1 | 66 Three Essential F&B Benchmarks                    | 111 Your Operation’s Mental Environment                          |
| 21 The Many Ways to Kill Employee Empowerment – 2 | 67 Benchmarking and Budgeting                        | 112 F&B Marketing  |
| 22 Selling with Knowledge and Enthusiasm          | 68 Formal Forecasting                                | 113 Special Occasions  |
| 23 The Pre-Shift Meeting                          | 69 The Discipline of Reports                         | 114 Making Any Day a Special Occasion                            |
| 24 Suggesting Improves Average Check – 1          | 70 Essential F&B Reports                             | 115 Romancing Your Members                                       |
| 25 Suggesting Improves Average Check – 2          | 71 Tools to Beat Budget – Real Time Accounting       | 116 Touch Points   |
| 26 Suggestive Selling – 1                         | 72 Tools to Beat Budget – The Program                | 117 Rules of Engagement  |
| 27 Suggestive Selling – 2                         | 73 Monthly Review of Financial Statements            | 118 Give “Em What They Want                                      |
| 28 Suggestive Selling – 3                         | 74 Purchasing  | 119 Teaching the Subtleties of Service                           |
| 29 Suggestive Selling – Alcoholic Beverages       | 75 Receiving   | 120 Wow Factor – 1   |
| 30 Sample Menu Item Selling Sheet                 | 76 Expense Coding                                    | 121 Wow Factor – 2   |
| 31 Dining Service Tips – 1                        | 77 Expense Coding Tips                               | 122 Safety   |
| 32 Dining Service Tips – 2                        | 78 Invoice Payment Certification                     | 123 Safety Matters – The Heimlich Maneuver                       |
| 33 Engaging Members with Confidence               | 79 Storerooms and Par Stocks                         | 124 Fire Safety Training   |
| 34 Service Recovery                               | 80 Inventories                                       | 125 Emergency Evacuation Drills                                  |
| 35 Sample Service Issue Resolution Form           | 81 Food Sales Analysis                               | 126 Emergency Evacuation Simulations                             |
| 36 Defense and Offense – 1                        | 82 Culinary R&D                                      | 127 Make It Sparkle!   |
| 37 Defense and Offense – 2                        | 83 Beverage Cart Service Tips                        | 128 Personal Productivity – 1                                    |
| 38 Are Your Service Apologies at Risk ?           | 84 A System Solution to Beverage Cart Losses         | 129 Personal Productivity – 2                                    |
| 39 Get the Best from Your Service Team            | 85 The Value of a Super Service Employee             | 130 Time Management  |
| 40 Expectations for Catering Director             | 86 How to Attract and Retain Super Service Employees | 131 Delegation   |
| 41 Organization for Catering Operation            | 87 Why the Wrong People Are Hired                    | 132 Managing Dining Flow – 1                                     |
| 42 Improve Your Catering Operation – 1            | 88 The Damage Done by the Wrong People               | 133 Managing Dining Flow – 2                                     |
| 43 Improve Your Catering Operation – 2            | 89 Disciplined Hiring                                | 134 Managing Dining Flow – 3                                     |
| 44 Mining the Gold in Catering                    | 90 Departmental Staffing Guides                      | 135 Handshakes and High Fives                                    |
| 45 Showtime                                       | 91 Exempt and Non-Exempt Positions                   | 136 The Grand Theory   |
| 46 Continual Process Improvement                  |  | 137 Mastering the ABCs   |
|   |  | 138 Profitable Food Service by the Numbers                       |
|   |  | 139 Additional Resources   |



**Private Club  
Performance  
Management**

## **Food Service Management on the Go**

### ***Introduction***

Club operations face a challenging training burden if they are to deliver the high levels of service expected by their members. Yet with tight budgets how can managers meet their training obligations while controlling costs since every hour of training is a payroll hour for each employee being trained? Add to this the difficulty of getting all your employees together at one time for formal, consistently-presented training sessions.

The answer to these challenges is to build your training programs around the “on the go” concept where ongoing training material is formatted in brief – no more than five to ten minute – modules. In every shift, in every department, there are spare moments, time when employees have finished their shift preparations, time when employees are socializing among themselves or awaiting instructions from supervisors. Since you’re already paying for this time, plan on putting it to good use.

In every department there are hundreds of operational details that employees must learn and remind themselves with some frequency. This is true in all areas of the club operation. All that is necessary is for the department head to outline training requirements in brief doses and format them so they can be pulled out at a moment’s notice for either group-led or individual instruction.

With today’s ability to find anything on the Internet with just a few keywords and keystrokes, all the information you need to teach your employees values, etiquette, product knowledge, safety, security, sanitation, HR requirements, responsible beverage service, or how to operate or maintain any piece of equipment is readily available. You just need to format it for easy use.

Private Club Performance Management has developed a variety of On the Go Training programs for leadership, values, service, food and beverage, human resources, accounting, and safety. These offer a proven model of how easy it is to format material and train your employees to increase their knowledge, skills, abilities, and service techniques. For examples, check out the Training on the Go material on the [PCPM Marketplace](#) store.



**Private Club  
Performance  
Management**

## **Food Service Management on the Go**

### ***Tips for Use***

One of the major motivations in creating the Food Service Management on the Go material is the desire to provide managers and supervisors tools to improve their understanding and application of food service management disciplines and skills.

As with any other tool, Food Service Management on the Go is only as effective as the effort put into it by a class leader and/or student. Each sheet provides the “take away” from the lesson. Comprehension can be improved by asking students to explain terms or points in their own words, offer examples from their own experience, or illustrate points with real or imagined scenarios. The key is to get the students to think deeply about each topic and connect it with their own experience and the context of their management function.

The Food Service Management on the Go material can be used in group-led discussions for ongoing training of managers to reinforce management disciplines or they can be used for an individual who wants to work through the entire program in sequence to upgrade skills and knowledge. They are also an excellent way for a newly-hired manager to bring herself “up to speed” on the disciplines of the organization.

**Teachable Moments**



#01

## *A Culture of Discipline*

Arguably the greatest business book to appear in the last quarter century is Jim Collins' *Good to Great, Why Some Companies Make the Leap . . . and Others Don't*. In preparation for the book, the author and his research team identified and examined 11 publicly traded companies that significantly outperformed their competitors for a period of 15 or more years to find out what made them so successful. The findings were sometimes surprising, often at odds with conventional wisdom, but definitive in that they were based on empirical evidence, not business theory.

One of the findings is that all *Good to Great* companies had a culture of discipline. Quoting from the book:

*"Much of the answer to the question of 'good to great' lies in the **discipline** to do whatever it takes to become the best within carefully selected arenas and then seek continual improvement in these. It's really just that simple."*

*"A culture of discipline is not just about action. It is about **getting disciplined people who engage in disciplined thought and who then take disciplined action.**"*

Most of us recognize that our business is not rocket science. The basics of what we do are well-known to any food service professional. What makes our jobs so challenging is the sheer volume of things that must be attended to daily in a detail- and people-intensive business.

Unless a club operation is well-organized and its managers highly disciplined, it operates in a state of barely-controlled chaos interspersed with periods of downtime. The challenge for all is to transition quickly from storm to calm back to storm while remaining focused on long term goals, ongoing projects, and continual process improvement. The solution is to organize the operation so that most things happen routinely and that managers at all levels be highly disciplined in approaching their duties and efforts to improve the operation.

**Discussion Points:** What exactly does it mean to be disciplined? Let us define discipline as "an approach to work characterized by regimen, rigor, and training in accordance with generally accepted rules or best practices." List and discuss some management disciplines that are useful in a food service operation.

**Take Away:** The complexity and pace of food service operations require that managers be highly disciplined in their personal, professional, and work habits.



**#02**

## ***Expectations for Food Service Managers – 1***

It's important that managers have a clear understanding of what's expected of them. Here are basic expectations for the club's food and beverage managers:

- 1. Menu Design.** Experience shows that while club members want a kitchen capable of fine dining, on a day in, day out basis, they prefer traditional club fare, well-prepared with fresh, made-from-scratch ingredients. While menu design is a creative and complex task of infinite possibilities and permutations, it must be balanced by cost consciousness, kitchen capabilities, production and volume considerations, ingredient availability, and adequacy of storage. Here are basic requirements that underpin any menu:
  - **Need to limit master ingredient list.** A well-designed menu will be engineered to meet all recipe requirements with a reasonably limited ingredient list.
  - **Daily specials** to provide variety to standard menus and to take advantage of seasonal products and reduced product pricing opportunities.
  - **Menu rotation.** There is good variety with a quarterly change of 35-50% of menu items to match the season and take advantage of seasonally-fresh product.
- 2. Cost monitoring.** Given the price volatility in meat, seafood, produce, and dairy products, the chef should re-cost key menu items on a monthly basis and more often in times of extraordinary volatility. This time-consuming task can be made easier by designing an Excel spreadsheet with menu item costing sheets linked to a master ingredient pricing sheet. By updating the pricing on the master ingredient list, all menu item costs will automatically re-calculate, thereby allowing the chef to easily re-price menu items to maintain appropriate margins
- 3. Accurate and timely inventories** ensure accurate computation of cost of goods sold. Poorly conducted inventories result in wide fluctuations in food and beverage cost of goods from month to month. The following five disciplines will greatly aid in improving inventory counts and the cost of goods calculations:
  - Written inventory procedures and proper training of those who conduct inventories.
  - Checklists of all stock storage from bulk locations to close-at-hand pantries and refrigerators.
  - Well-organized food and beverage storage areas to facilitate inventories.
  - Weekly inventories of high-cost items such as meat, seafood, and alcoholic beverages. The cost and ease of pilfering makes these items too attractive to rely on monthly inventories. When monitored on a weekly basis, comparisons can be made to sales to spot potential problems.
  - Prompt analysis and investigation of out-of-line food and beverage costs using a [Cost of Goods Sold Analysis Checklist, PCPM Form 244](#).

**Take Away:** Food service managers are expected to know and execute the basics of their business in a highly disciplined way.



## #03

### *Expectations for Food Service Managers – 2*

4. **Benchmarking** of key data to include:
- **Food and beverage sales.** Average check and counts of entrees sold, as well as appetizers, deserts, specialty dinner drinks, wines by the glass, bottles of wine, espressos and cappuccinos, and any other items that represent suggested “upsells” to the basic meal. This information serves as a baseline and incentive for training staff to suggest. It also permits tracking progress in any efforts to improve the average check.
  - **Labor hours and cost.** As the single largest expense in food service operations, payroll must bear the closest scrutiny. Disciplined action on this information will reduce pay costs and help in forecasting costs in future periods.
  - **Monthly menu sales mix.** Analysis of menu selections help to better understand member preferences, assists in designing new menus, and helps to understand the impact of member selections on food costs; for instance, how a high volume of low margin sales can increase cost of goods sold.
  - **Inventory numbers and cost of goods sold.** Comparison month to month in a spreadsheet will help you spot adverse trends or problems.
5. **Consistent food production.** Members expect offerings to taste the same regardless of who in the kitchen has the night off, and profitability depends on consistent production techniques. There are three basic disciplines to ensure this happens:
- **Standardized Recipes.** Not only must there be standardized recipes, but all staff – sous chefs, line cooks, prep staff – must be thoroughly trained to follow those recipes. Further, the chef must repeatedly check to ensure that the recipes are being followed. What gets checked gets done!
  - **Portion Control.** A correct measure of portions is the key cost control requirement. Unmeasured portions, particularly of costly food items such as meats and seafood, can quickly erase the margins of any menu item. Again, training and vigilance are key requirements to ensure correct portion control.
  - **Consistent Plate Presentation.** Without training and ongoing supervision of how items are plated, cooks “freelance” as they go. Given that quality food is a visual treat as well as temptations to taste and aroma, pleasing plate presentations are an important part of the overall dining experience. As an added reminder and visual cue, the chef can use a digital camera to photograph, and color print each menu item’s desired presentation. Prominently posted on the walls of the kitchen, these serve as a constant reminder of how each item should look.
6. **Professionalism** – both front and back of house. Slipshod operations are the result of a lack of standards. Without standards no one is held accountable, and details are not attended to. A food service operation without professionalism is a free-for-all. These are basic requirements:
- **Proper staff attire and personal hygiene.**
  - **Focus on organization, cleanliness, and sanitation.** Everyone “cleans as they go.”
  - **Clean, presentable menus, always.**
  - **Pre-shift meetings with front of house staff and kitchen representative every shift.**

**Take Away:** Food service managers are expected to know and execute the basics of their business in a highly disciplined way.





#04

## *Expectations for Food Service Managers – 3*

7. **Thorough staff training.** There are just too many details to leave any aspect of food service to chance or oral history, so training is a must. These are basic requirements:
- Food production techniques for kitchen staff.
  - Sanitation and safety training for both front and back of house staffs.
  - Training for front of house staff:
    - ❖ Club etiquette and service ethic.
    - ❖ Club organizational values.
    - ❖ Food and beverage knowledge.
    - ❖ Service techniques.
    - ❖ Menu, wine, beer, liqueur, and liquor brand familiarization. They can't sell what you don't know!
    - ❖ Point of sale system.
8. Engagement with members. Probably the most important of all requirements:
- Key service touch points, challenging situations, and service recovery for front of house staff.
  - Chef or sous chef visit to dining room during meal hours.
9. **Coordinate food and beverage activities.** Schedule events with the activities director who is responsible for the club's master event and activities schedule.

Staff who take the time and make the effort to establish these disciplines will find that, once implemented, an operation runs more smoothly, margins are protected, decisions are more self-evident, staff are more engaged, and members are thrilled to have a food service operation that is professional, well-run, high quality, and profitable.

**Take Away:** The complexity and pace of food service operations requires that managers be highly disciplined in their personal, professional, and work habits.



**#05**

## ***Basic Service Issues – 1***

There are certain basic service issues common to most clubs.

- **Maintain Decorum.** Clubs typically develop an atmosphere reflects its membership. Whether formal or casual, the attitudes and behaviors of members will establish an appropriate decorum for the club in general and various areas of the club in particular. Employees need to be aware of and maintain this decorum.
- **Avoid Familiarity.** Many members live a casual, relaxed lifestyle, and they naturally carry this casualness into their interactions with club employees. Some members ask employees to call them by their first names and enjoy joking and exchanging banter with employees. This, however, can create a potential minefield for employees.
- **Avoid Sensitive Topics and Language.** Club employees should always avoid engaging in or responding to conversations with members on sensitive or controversial subjects such as religion, ethnicity, politics, discussions of other members, and off-colored jokes.
- **Enforce Club Rules.** Each club has rules for its members to follow such as dress code, proper golf course etiquette, ready play, prohibition of personal food and drink on the golf course or in pool areas, etc. When members do not follow the rules, it is up to employees to enforce them. Often the infraction is unintentional, and the member simply needs a reminder. In some cases, it may be best to make an exception in the immediate case to avoid embarrassment, but the member should always be educated in the process to avoid future problems. When informing members of rule violations, it is always helpful to offer an alternative to the member, for instance, seating inappropriately dressed members in the bar to eat instead of the dining room.
- **Offer Special Touches.** There are small, yet special touches that demonstrate the club's commitment to service. Special touches should be devised for all areas of the operation.
- **Meet Service Requests.** All employees will make every effort to meet the special requests of members. Going the extra mile to provide service will always impress members and their guests.
- **Satisfy High Maintenance Members.** Employees should understand that there will always be “high maintenance” members. Satisfying their higher expectations is part of the cost of doing business and the ultimate challenge of service. So, employees should not dwell on the more demanding few; rather, they must recognize each request or complaint as legitimate and focus on the solution.

**Discussion Points:** Discuss the above service issues most relevant to your operation. How can they create difficulties for both the employee and the club as a whole? In discussing each, offer appropriate ways to handle emerging issues. By sharing success stories and failures with each other, employees gain a better understanding of how to handle any and all situations.

**Take Away:** Employees should be aware of all the service issues associated with their club.



#06

## Basic Service Issues – 2

There are certain basic service issues common to most clubs.

- **Know your Club.** Every dining room has good seats and bad seats. The good seats are near the fireplace in winter, overlooking the verandah in summer, or a booth for quiet, intimate dining. Conversely, there are bad tables under air conditioning vents, near pantry and exterior doors, or in the moment, near a large party of young children. You should be aware of the good, the bad, and the ugly of the club and seat members according to the best available seating.
- **Know Member Names.** Members want to be recognized and acknowledged at their club. Such personalized service is one of the reasons they join. Strive to learn names and at every opportunity address members as Mr., Mrs., Ms., Doctor, General, etc., as appropriate.
- **Know Member Habits.** Employees should make every effort to learn the habits of members, particularly those who use the club frequently. Whether it's Dr. Jones liking his martinis dry and straight up, or Mrs. Smith's inability to tolerate dairy products or Mr. Martin always having a Courvoisier after his meal, these tidbits of information, when followed up on by employees, provide a higher level of service and a personal touch that is always appreciated.
- **Reinforce Club Value.** It is through the daily casual conversation with members that employees build value. Most members pay dues monthly or quarterly, so the club must reinforce to them that their money is well spent. Talk about the upcoming club activities and events, tell them about exciting new offerings in the dining room, talk about items of interest that will help them see the benefits of being a member at their club.
- **Maintain Club Appeal.** One way to ensure that the club is appealing to members is to pretend you are the member. Each time you arrive at work, view the club and its facilities as if you were a new member or were entertaining guests. Look from top to bottom and see if anything is out of place, dirty, or in need of repair. Then take action to report or fix it.
- **Establish WOW Factors.** Recognize that what excites and astounds today will be old news tomorrow. For the club and its employees to continually provide the unexpected service touches that wow members, you must challenge yourselves to brainstorm and plan for ways to continually impress. You should never leave good impressions to chance.

**Discussion Points:** Discuss the above service issues most relevant to your operation. How can ignoring them create difficulties for both the employee and the club as a whole? In discussing each topic, find appropriate ways to meet each requirement. By sharing success stories and failures with each other, employees gain a better understanding of how to handle any and all situations.

**Take Away:** Employees should be aware of all the service issues associated with their club.



#07

## *The Challenges of Food Service – 1*

The most complex, difficult, and demanding area of club operations is food service. Here's why:

**Detail Intensive.** Every aspect of food and beverage service is detail intensive. Every recipe for each food item or drink requires the exact amount of a variety of ingredients. Each food or beverage item is served on or in its own special plate, bowl, ramekin, or glass. Every cook and bartender must know how to prepare and present the various items on the menu. Servers must know the daily specials, what ingredients are in various dishes, and how to suggestively an appetizer, bottle of wine, or dessert. Servers must also know how to set tables, how to present and open a bottle of wine, how to prepare and serve a cup of tea, and what brands of beverages are available from the bar.

The detail that must be mastered by prep workers and servers contributes to a challenging training burden. Newly hired servers often do not become comfortable in their surroundings for months.

**People Intensive.** Food and beverage preparation and service takes a lot of people. The higher the level of quality, the more people it takes. Very little of the work in a kitchen or in service has been mechanized. While pre-prepared food products can reduce preparation time, they are seldom used in quality clubs. While point-of-sale systems have helped speed communication from the front and the back of house, multiple courses still must be plated by hand and carried to the dining room. All soiled dishes, flatware, and glassware must be cleared and taken to the dishwash station for cleaning and sanitizing. Pots, pans, and cooking utensils must be cleaned and returned to the cooking line. Large amounts of refuse and garbage must be collected, bagged, removed, and properly disposed. Kitchens and all equipment must be thoroughly cleaned and sanitized each day.

**Knowledge Intensive.** Food and beverage knowledge is an accumulation of information as old as recorded history. Cooking techniques and food products from around the world, along with special proprietary recipes and processes make for an endless body of knowledge. In fine dining establishments with diverse menus, a wide range of food and cooking techniques must be mastered. These establishments will also have a large stock of liquors, wines, beers, and liqueurs, all of which complement specific foods. For the curious and conscientious food and beverage employee, it can be a lifetime of learning.

**Manufacturing Plant with Customers on the Premises.** A food service operation is a manufacturing plant. It receives raw products in the form of food and beverage stocks and transforms them on the premises into a saleable product – a menu item or cocktail. But what distinguishes food and beverage operations from other manufacturing plants is that the end user of the product comes to the “factory” to purchase and consume the goods. Satisfaction or dissatisfaction is immediate and can create challenging moments for staff.

**Discussion Points:** Any hospitality professional will tell you that food service is hard. Discuss your operation's most challenging circumstances. How can you and your staff be highly disciplined in meeting them?

**Take Away:** Food service is challenging for a variety of reasons.



#08

## *The Challenges of Food Service – 2*

**Determination of Quality is Subjective.** With most manufactured goods, the quality standard or specification is pre-determined, and the customers purchase it based on experience or reputation. If satisfied, they continue to buy the product. The manufacturer may periodically issue a “new, improved” version, but these changes generally fall within the range of customers’ expectations.

In food service, on the other hand, the determination of quality is highly individualistic. Two people at the same table may order the same meal prepared at the same time by the same staff, but one loves his and the other doesn’t. This great variety in individual tastes becomes a continuing challenge to prepare exciting, innovative menus that appeal to a broad spectrum of tastes.

Sometimes a member may think that the preparation is wrong when in kitchen terms, it’s correct, as with the desired “doneness” of steaks. Each choice has a certain internal temperature associated with it, but it may not be the same as on the grill at home. What the member calls medium may be medium rare in a restaurant, and not all establishments are the same, depending on the training the prep cooks receive.

**Small Margins for Error in Preparation.** Many cooked or mixed items have a very small margin for error. If the wrong quantity of baking powder is put in a batch of biscuits, the results can be disappointing. The same applies to cooking time and temperature. One moment of inattention can ruin a custard or sauce. Customers are quite specific in wanting their “good” experiences duplicated. Preparing menu items within the parameters of recipes and customer desires is a continual challenge.

**Food Service is Time Sensitive.** Every item on a menu has a different cooking or prep time, yet all items for a table must be prepared so as to be served at one time. This requires the prep staff to make constant judgments about when to “fire” a specific item. In addition to the varying prep times for different items, most diners have an expectation of prompt service with little delay between courses. Lastly, food is expected to arrive at tableside both fresh and hot. An item that sits under a heat lamp can be overcooked and unappetizing. So, the kitchen staff that is so impacted by time relies on servers to pick up food promptly and get it to the table quickly. If the server only served one table this would be easy, but wait stations can include many tables, all at different points in their meal service.

**Food Service has Many Complementary Components .** By its very complexity, food service has many complementary components. A meal can include many courses – before dinner drinks, appetizers, soup, salad, entrée, dessert, wines to accompany each course, after dinner drinks, coffee or tea, and liqueurs. The various components come from different sources – the bar, the kitchen, the pantry, and the wine cellar. The server must coordinate all the various components to ensure that each arrives at the appropriate time during the meal service.

**Discussion Points:** Imagine a meal which requires complex, time-sensitive preparation and service. Discuss both the challenges and the options for success.

**Take Away:** Food service is challenging for a variety of reasons.



#09

## *The Challenges of Food Service – 3*

Teachable Moments

**Food Service Offers Many Choices.** While clubs establish set menus and offer set accompaniments to their menu, diners still have a wide array of choices. Examples of choices include domestic and imported beers and wines; wines from California or Australia, red and white wines; sparkling wines, dessert wines, fortified wines; choices of salad dressing; regular or decaffeinated coffee; various teas, bottled water, brand name sparkling water; choice of vegetables, choice of starch, a variety of condiments; and on and on. Many clubs will cook items to order for members under certain circumstances. Each choice adds complexity to purchasing, storing, preparing, pricing, and serving.

**Customers have Different Expectations.** Just as every customer has his or her own sense of taste; many customers have a different set of expectations from the dining establishment. Some want a quiet and relaxing meal in an unhurried setting, others want to eat quickly to get on to something else, some want to feed the family as inexpensively as possible, others want a particular menu item, others want seafood, or fresh salads, steaks, special meal deals, or low fat or low carb meals. While many eating establishments try to limit the customers' expectations by appealing to a limited niche of the market, clubs don't have that luxury. They are expected to be all things to all members.

**Volatile Business Levels** – by the minute, hour, day, week, and season. The à la carte portion of a food and beverage operation is highly volatile. Despite the best efforts of management to forecast levels of business based upon experience, the number of meals served on any given day and at any meal period can fluctuate widely. This volatility makes it difficult to order and prepare appropriate levels of food and beverage stock and creates an ongoing challenge for scheduling staff.

Within the same meal period, business levels can vary from moment to moment. Sudden rushes of diners arriving at the same time can significantly impact the smooth flow of food preparation and service. A large party arriving unannounced, or earlier or later than its scheduled reservation, can also impact the operation. Food service operations frequently get “slammed.” Fortunately, food service employees seem to have an “overdrive” they can kick into when necessary. The constant flux in business levels and the resultant challenges creates an environment that often borders on controlled chaos. All these factors contribute to high stress levels in a busy food service operation. Those employees who thrive in this environment are often “adrenaline junkies” – people who enjoy the stress and flux of a rapidly changing environment.

**Business Levels Impacted by External Influences.** Business levels in a food and beverage operation are often influenced by external factors. The decision of a member to dine is often made in conjunction with other activities such as conducting business, shopping, recreating, entertaining, or socializing. Planning special occasions and events, unexpected visitors and house guests, spur of the moment decisions to forego preparing a meal, and, of course, weather – all influence an unplanned stop at the club. While a well-run food service operation will attempt to forecast business levels based on experience and a known calendar of events, the level of business for any given meal period is subject to a variety of factors outside the control of management.

**Discussion Points:** Individually, each challenge is easily manageable, but many challenges can happen simultaneously, requiring organization and discipline to handle. Pose a scenario which would significantly challenge your operation and then brainstorm “game plans.”

**Take Away:** Food service challenges are unpredictable.



## #10

### *The Challenges of Food Service – 4*

In Food Service, preparing individually and as a team is key.

**Preparation is Key – *Mis en Place*.** Given the high levels of volatility and unpredictability in food service, the key to successful operations is thorough preparation. This fact was not lost on the early French chefs who pioneered modern food service management techniques. The French phrase *mis en place*, meaning “everything in place,” encompasses the ideal of having all ingredients ready to go so that all that remains is to combine and cook them. The concept of *mis en place* has naturally been extended to all areas of food preparation and service so that all employees – cooks, servers, bartenders, etc. – have completed all necessary preparations and are ready to handle whatever level of business they encounter.

**Teamwork and Timing are Essential.** Teamwork is critical because there are two distinctly different groups of employees involved in food service – those who take the orders and serve the food and those who prepare the food. The servers must ensure proper communication to the kitchen of all orders: accompaniment alternatives, special requests, and temperature variations. The kitchen staff must ensure all items for a table are prepared according to the order and at the same time. Without close cooperation and teamwork, the system will break down resulting in poor food quality and service. The fact that the work environments for the two staffs are radically different usually means that employees in the two different areas tend to have different personality types and dispositions. “Front” and “back” of house employees must also understand that these designations are assigned according to work area, not “chain of command.” A dishwasher is just as important to your team as the shift hostess!

Just as timing is critical to executing a basketball play, timing is an ever-present issue in food service. The efforts of the two staffs must be well-coordinated and the timing only comes about from training and experience. Spend a few moments watching a busy food service operation and you’ll be amazed at the pace and interplay of all the participants. It can make sports look like child’s play.

**Fast-Paced, Physical Jobs.** Food service jobs are typically fast-paced and physically demanding. Prep staff, bartenders, and servers are on their feet for their entire shift. Carrying food stocks and trays of food requires strength and agility. The hot environment of the kitchen can sap a person’s strength. Servers must negotiate the industrial environment of the kitchen and the show environment of the dining room. Eating establishments frequently get “slammed” with unexpected levels of business, creating a blistering pace. One “no show” server can seriously impact the quality and efficiency of service.

**Need to be Friendly, Courteous, and Accommodating under Pressure.** In the midst of this stressful, controlled chaos, all must remain cool, collected, and provide a friendly, courteous, and accommodating attitude to members. Clearly this requires people of uncommon temperament, ability, and personality. While clubs make great efforts to train food service employees, to a great degree, the calm and outgoing personalities necessary for success in this business must be developed consistently across all staff.

**Discussion Points:** Consider and list some of the disciplines required by food service teams to deal with the many challenges they face.

**Take Away:** Food service is challenging for a variety of reasons.



#11

## *Food Service Disciplines – 1*

While creativity and innovation are hallmarks of an outstanding culinary experience, it is a daily focus on the basics that makes a foodservice operation profitable. The following 10 disciplines are taught in every hospitality program, but it's the daily application of these that makes a difference in your team's ability to meet every challenge:

- 1. Standardized and costed recipes.** Recipes for every menu item, both à la carte and catered, must be standardized and costed. This discipline ensures consistency of product and ongoing profitability. Given the volatility of some ingredients, recipe costing should be reviewed on a periodic basis.
- 2. Pricing based on known cost structure.** The standard method of pricing is to take the cost of each menu item and multiply it by an appropriate multiplier to cover the cost of labor, other expenses, and overhead. For instance, a 2½ times multiplier should yield a 40% food cost; a 3 times multiplier yields a 33% food cost. This simple formula is all well and good, but if your revenues are below projections and/or your payroll cost or overhead are higher than expected, you may still lose money. Given the interplay of revenues, pricing, volume of business, and cost structure, these numbers must be tracked closely and reviewed frequently.
- 3. Portion control.** Standardized recipes are costed based upon specific portion sizes. If untrained or poorly supervised employees serve larger than costed portions, your profitability will literally be eaten up. Costly meat and seafood products should be weighed to ensure correct portion size. Ladles of specific sizes should be used to plate specific menu items. Pies, cakes, and other baked desserts should be cut and served using templates to ensure the correct number of portions are realized. Cooks and pantry workers must be trained to prepare and serve specified portion sizes. The discipline of measuring alcoholic beverage portions is critical to profitability in bar operations.
- 4. Labor control.** Labor, both front of house and in the kitchen, is the single largest expense in a foodservice operation; it is also a continuing challenge to control. Electronic timekeeping systems make it easier for supervisors to verify hours worked, but regardless of the system used, supervisors must monitor payroll hours daily. Close monitoring of employee hours will reduce overtime and milking the clock, while allowing daily comparison of payroll costs to revenues. Front of house supervisors should also keep a daily log that notes revenues, meals served, payroll hours, and a subjective evaluation of the smoothness of service. Such an evaluation of each meal period will enable supervisors to better schedule staff.
- 5. Benchmarking revenues and expenses.** Benchmarking is the act of measuring and analyzing operating performance. In a food service operation, there are many things to benchmark, such as meals served and average check per meal period by day of week; payroll hours by position, by meal period, or day; and beer, wine, liquor sold per meal period and day of week. When tracked over time, these statistics become the baseline to project and monitor future performance, stock requirements, and staffing needs. Benchmarks also allow measurement of member reaction to foodservice initiatives such as new menus or pricing. Most importantly, benchmarking makes supervisors more knowledgeable about their operations. Such knowledge translates to improved operations and bottom lines.

**Take Away:** As with so much else in the hospitality industry, it the daily performance and measurement of well-known basics that are the foundation for success.





#12

## Food Service Disciplines – 2

Other disciplines that must be maintained and measured for success include the following:

6. **Routine and consistent inventories.** Inventories are critical to monitor stock levels, avoid shortages, control pilferage, and determine cost of goods sold. Inventories can also be time consuming and inconvenient for hard working chefs. Inventories sometimes get delegated to poorly trained subordinates who miss or miscount key items. Sloppy inventories contribute to erratic cost of goods sold. Poorly organized storerooms contribute to sloppy inventories. Keys to accurate inventories include well-organized storage areas; knowledgeable individuals conducting inventories; routine and timely inventories; and organized receiving documents, invoices, and credit slips. Delegating counts is acceptable if employees are trained. However, having the same employee conduct all inventories without spot-checking and oversight will invite problems.
7. **Suggesting training for employees.** Service employees who are trained in the techniques of suggesting can improve the average check and bottom line. Whenever a new menu is put in place, all servers should be provided [Menu Item Selling Sheets, PCPM Form 484](#), that give key information about each entrée to include cooking method, ingredients, time of preparation, and enticing descriptors to help sell each item. Just as standardized recipes are important in the kitchen for consistency of product, selling sheets provide the service staff with the knowledge and information they need to suggest the product. In addition to entrees, special training should be given for the suggesting appetizers, desserts, wines, and specialty alcoholic beverages. The time spent providing servers with the information and confidence to suggest food and beverage items will yield consistently higher average checks.
8. **Continual feedback to employees.** Every month's budgeted food sales is made up of how many meals are sold and how much each member spends on average for a meal. By breaking projections down into meal and average check totals, then posting daily targets prominently in the pantry, provides servers with goals that connect their daily efforts to profitability. By comparing month-to-date actual meal counts and average checks to projected totals, employees are given a day-by-day incentive. People are competitive by nature and this technique will become a powerful inducement to servers. The same technique can be applied to appetizers, desserts, and bottles of wine sold.
9. **Forecasting and scheduling.** By tracking revenue and patronage benchmarks and keeping a daily log of staffing, supervisors can develop a routine system of forecasting business levels. While some level of volatility can always be expected, the act of forecasting, when formally done and evaluated after the fact, will assist in maintaining member service while controlling labor cost.
10. **Member feedback.** While some members are vocal with their opinions, many are not. Foodservice supervisors should make it easy for members to provide feedback. Member comment cards should be readily available, periodic surveys should be conducted, revenue benchmarks should be analyzed to measure member reaction to offerings and initiatives, and employees should be trained to routinely report comments made or overheard to supervisors.

**Take Away:** As with so much else in the club industry, it the daily discipline of well-known basics that are the foundation for success.



#13

## *Details and Quality*

It cannot be overstated that food service operations are detail-intensive businesses. There are literally hundreds, if not thousands, of details that must be attended to daily to provide the high levels of quality that members expect. It's also understood that the management team is incapable of checking each detail every day. So, what are the necessary strategies to achieve the requisite levels of quality?

- Ultimately a robust program of [employee empowerment](#) will encourage employees to think like managers, be aware of the manifold necessities of quality and service, be ever alert for problems and issues, and demonstrate the ownership required to correct problems wherever and whenever they find them.
- **Thorough communication of [values](#), [standards](#), and [expectations](#)** to employees so they understand what, why, and how things must be done.
- [Comprehensive initial and ongoing training](#) ensures employees have all the necessary knowledge, skills, and appropriate attitudes to render consistently high-quality service.
- [Detailed organizational systems and processes](#) to allow the operation to function efficiently. When things happen consistently and routinely in all areas of the club, employees have the time and the inclination to focus on quality. When everything is always disorganized or dysfunctional, employees find it difficult to care.
- **Consistent [service-based leadership](#)** requires managers to provide employees with all the necessary tools, training, resources, engagement, and ongoing support necessary to do their jobs efficiently and effortlessly. The underlying premise of such leadership is the ultimate value of people in any endeavor and the need to serve all constituencies, but particularly the employees who render service directly to members. Such a leadership approach creates and sustains the strong bonds of personal pride and team effort.

While creating the necessary club environment to provide each of the above requirements is neither rapidly nor easily accomplished, it ultimately is the **ONLY** way to build enduring quality in a service organization.

**Take Away:** You must build the underlying foundation for success in the detail-intensive club and food service business.



#14

## The Service Profession

*One of my first line supervisors was a banquet manager at a large metropolitan hotel. Ben was older, had a large family, and was a proud and loving father. Despite his busy life, he always had time for his guests and his large banquet staff, whom he treated like family.*

*Though he supervised over fifty people, he not only knew us all by name, but he was aware of our individual circumstances – if we were students, where we lived, what we did in our spare time. By taking the time to know each of us as individuals, he was able to connect with us in ways few other managers could.*

*For over a year, I watched him deal with guests, hotel management, and a large, boisterous, and diverse staff. He made those of us who worked for him understand that service is not just a part-time pursuit – it's a way of life. It was obvious that Ben was universally respected by all who knew him. I had seen him greet many dignitaries and celebrities by name and was even amazed to see a U.S. Senator stop by to say hello to him.*

*When Ben died a couple of years ago, more than three hundred people attended his funeral. He was eulogized with warmth, humor, and emotion. The clear lesson I learned from this great man was that the love he put into service was returned to him a hundred-fold.*

Today, many of the conventions that marked social intercourse in the past are seen as outmoded. Yet civility, good manners, and a desire to be of service to others remain important qualities of life. This is particularly so in situations where you are seeking the goodwill of others.

The need to attract and retain customers has given rise to the term "service profession" to classify those who work in jobs whose primary purpose is to serve customers. But what does it mean to be in the "service profession"? A traditional approach would be to consider those who work in a service profession as servants. For the time they are being served, customers are temporarily one's superiors and should be deferred to as a sign of respect.

The word "servant" does not sit well with some. Other titles such as "associate," "server," "wait staff," "host," or "assistant" are widely used to denote service employees. Whether these titles convey the appropriate attitude required for quality service is open to debate, and ultimately that debate is immaterial.

Service employees are people who choose to serve others as a means of earning a living and building a life. What they are called is unimportant so long as they are imbued with a strong service ethic – the desire to creatively help and serve. This desire is never inconsistent with the desire to improve one's practical options in life.

Establishing and maintaining this ethic is the shared responsibility of the club and the supervisor. The club establishes its standards of service, but it is up to the supervisor to teach and inspire employees in their individual pursuits of success.

Service standards are much more than just the technical aspects of delivering service; they encompass employees' attitudes and sensitivity to the needs and desires of members, as well as their own desires for future success. Teaching these more abstract and nuanced standards to employees is at the heart of establishing a strong service ethic.

**Take Away:** A service ethic is a set of moral principles or values that define the level and quality of service we wish to provide.



**#15**

## ***A Service Attitude***

While each person brings his or her own attitudes to the workplace, the club expects employees to be indoctrinated into a culture of absolute dedication to quality and the needs of the member.

Your emphasis as a leader and all the training focus for your employees is on learning how to say YES to members. If this attitude is kept foremost in mind, it will help you and your employees handle any unusual requests or difficult situations with members. This indoctrination is the ongoing responsibility of leaders at every level and can best be accomplished by your wholehearted support, daily reinforcement, and personal example.

Equally important, this attitude should characterize your work team's relationships with fellow employees – their internal customers. Everyone who works for the club is a member of a team trying to accomplish the same mission. Cheerful and complete cooperation with one another makes work easier, more meaningful, and fun. Every team members' first thought when approached by a customer, external or internal, should be "How can I help this person; how can I be of service?"

Attitude is the major determinant of success in any endeavor. Our thoughts color everything we do. Each person has a filter through which all sense perceptions pass. Since the conscious mind can only process so much information, perceptions are screened and only those supporting our belief system, biases, and views are accepted. All others are rejected. Stated another way – since our brains interpret sensory information to support what we already believe – WE ARE WHAT WE THINK!

If you believe yourself to be a failure, misunderstood, or mistreated, you will seek every piece of evidence to support this belief. If you are optimistic and determined to succeed, you will select every perception that supports that determination and optimism. The process is self-reinforcing and reciprocal. If your thoughts tend to the negative, you will see only the negative. If a person is a liar, he or she will assume that everyone lies and will go through life never trusting anyone.

The implication is that you create the world you want through your thoughts. People who are upbeat and look for the good in everything know that, while they cannot control events, THEY CAN CONTROL THEIR REACTIONS TO THOSE EVENTS! Simply put, you can make whatever you want of any situation.

Attitudes are clearly infectious, and you owe it to others to be as positive and cheerful as possible. One defeatist, grumbling, negative attitude can ruin the day for many others. The sad thing is that you allow the negative person to do this. When one considers the uproar in society over the danger to people's bodies from toxins, poor nutrition, and stress, it is surprising that we aren't just as adamant about the threat to our psychological health from passive bad attitudes.

Don't tolerate employees' bad moods. Confront them; shock them back into an acceptable frame of mind. The requirement must be:

**"Be of Good Cheer or Don't Be Here!"**

As a leader you are responsible for building morale within your team. Protect your employees from people with negative attitudes and sour moods. Don't permit one employee to drag down an entire operation. Confront, counsel, and, if necessary, discharge the employee.

**Take Away:** One's attitude is a major determinant of success in all one does.



**#16**

## ***Get Your Employees to Think Like a GM***

Imagine a club operation where all the employees think like the general manager. Imagine what the operation would be like when 100% of the staff is focused on the details of the operation. Imagine the impact on the bottom line if the entire management and service team are dedicated to maximizing revenues and controlling costs.

Most club managers say that such an operation can never exist – that it’s as unlikely as peace in the Mideast =. Yet the path to that dream is based on one simple premise – getting all employees to view their club through the eyes of the general manager – that is to think and act like the general manager in all they do.

Since the “dream” is to get employees to think and act like the general manager, they must be trained intensively to understand the full dimensions of their jobs, including the nuances of service as well as the techniques of their position. They must understand how their daily functioning impacts and impresses members; they must think outside the limits of their job descriptions to recognize that service entails an all-encompassing responsibility, regardless of position or function. They must know that they can take the initiative to solve problems knowing that they’ll have the full support of their leaders.

The military has long recognized the importance of soldiers taking the initiative to exploit battlefield opportunities. In the flux of combat, commanders know that their initial orders cannot cover all possibilities. To overcome this deficiency and to imbue their fighters with the confidence to act as the situation dictates, the military includes a statement of “the commander’s intent” in its field orders.

Professor Milan Vego of the U.S. Naval War College says, “The main purpose of the intent is to provide a framework for freedom to act.” He goes on to say, “The intent should allow the subordinate . . . to exercise the highest degree of initiative in case the original order no longer applies, or unexpected opportunities arise.”

In the highly fluid world of club operations, managers can take a lesson from the military and ensure that their employees fully understand their “intent” – the desired outcome in all service situations. The way to do it is to spell out the club’s organizational values, to provide expectations for their performance, and to empower them to make decisions as any situation dictates. Willing, committed, and empowered employees will make a world of difference in delivering remarkable service to your members.

**Take Away:** Without empowerment, an organization will never be a service leader.



#17

## *Employee Empowerment*

What are empowered employees and how can they help your club in meeting its mission and vision? In the simplest terms **empowered employees are viewed as full-fledged partners in your quest for high standards of quality and service.**

Instead of the traditional view that employees are easily replaceable elements in an organization, people who must be trained to do narrow, well-defined tasks and who must be closely watched and supervised at all times, the concept of empowerment says that today's more educated and sometimes more sophisticated employees **need and want to contribute more to their employer and workplace.** Yet many businesses marginalize their employees by refusing to listen to them and by failing to let them contribute to the enterprise in any meaningful way.

A few companies have truly embraced the concept of empowerment and have discovered the immense power and synergy that can be unleashed when employees participate more fully in their operations. Any employee at a Ritz-Carlton hotel can spend up to \$2,000 a day per guest to solve problems and not just to satisfy their guests, but to wow them with outside-the-box service.

Yet it takes more than waving a magic wand over employees' heads and telling them they can spend money to solve problems to reap the benefits of employee empowerment. Like any complex and detail-intensive issue, establishing a culture of empowerment for employees requires [service-based leadership](#), careful planning, well-defined policies, and effective training.

In reviewing club operations, there are three principal areas where empowered employees can contribute significantly to improved performance:

1. Resolving member service issues.
2. Helping improve work processes as part of [continual process improvement](#).
3. Taking on certain delegated management functions.

**Discussion Points:** Brainstorm with your fellow managers how your club might institute a formal process of employee empowerment to resolve member service issues. What steps should be taken? What obstacles would prevent you from doing it? How can these obstacles be overcome?

**Take Away:** John Tschohl, founder of the Quality Service Institute, said, *"Empowerment is the most critical skill an employee can master, and a company can drive in order to lure and keep customers."*



#18

## *The Necessities for Empowerment*

What is necessary for a club to provide employee empowerment?

First and foremost, strong leadership is an absolute necessity. Leaders must:

- Embrace the principles of service-based leadership.
- Be open with their employees.
- Be trusting and trusted.
- Be secure in themselves, their position, and their knowledge, not threatened by knowledgeable employees or those who show initiative.
- Be willing to share praise and shoulder blame.
- Be good communicators.
- Intrinsically understand and value the important role of line employees in the organization.
- Place a positive emphasis on problem discovery and solution.
- Allow their employees to demonstrate initiative and innovation, while giving them the “freedom to fail” without repercussions.

Secondly, the necessary disciplines and systems must be established to continually review work processes while involving employees. It’s also important that procedures be in place to keep the general manager and department heads fully informed of any resulting changes.

Next, the club must be committed to and deliver extensive, ongoing training to its employees. Untrained employees cause confusion, and the resulting chaos will drive good employees away.

Employees must also be recognized for their accomplishments and contributions. This recognition will further cement the partnership.

There must be opportunities for employees to grow personally and professionally. When employees know that the club is also committed to their advancement, they will more willingly participate in making it successful.

Lastly, employees must respect their leaders and willingly follow them. They will only do this when they see their leaders’ passion for excellence and personal commitment to success. There can be no substitute for this example.

**Take Away:** It takes time and effort to establish a culture of empowerment at a club, but the resulting improvement in operations, efficiency, and service levels make it well worth the effort.



#19

## *Implementing Employee Empowerment*

There are three areas where empowered employees can contribute to improved club operations.

**Resolving member issues.** Employees who deal most directly with members on a day-to-day basis are in the best position to solve service issues and resolve member complaints before they escalate into larger issues. Unfortunately, in some clubs, employees are viewed as the first line of defense in saying “no” to members. Only when the member gets sufficiently upset and demands to see the manager, can the problem be solved. Yet this approach sends two very wrong messages – one to the member that says we don’t trust you and we don’t mind wasting more of your time as you explain the problem again to a manager; and the other to employees that says that we won’t let you say “yes,” but we, the managers, often will, thereby contradicting you and making you look incompetent.

Since the bottom line in all our dealings with members is to say “yes,” there is no reason to put either the member or the employee in this situation. A far better solution is to provide useful guidance to employees and give them both the responsibility and resources to solve service issues. A good start would be to allow employees to decide on their own how to resolve any issue by “spending” up to a certain amount to fix the problem – either by “comping” a meal, sending a token of apology, or doing something special for the member.

Without a doubt the cost is insignificant compared to the loss of member goodwill and patronage and is a small price to pay if a lesson can be learned or a work process improved. And herein is the important point, every time employees use their authority and spend money to solve a problem, they must fill out a [Service Issue Resolution, PCPM Form 180](#), explaining in detail what went wrong and what could be done differently in the future.

**Helping Improve Work Processes.** Part of your club’s culture should be to foster a process of continual improvement in all aspects of your operations. This means that you should review systems, standards, policies, procedures, programming, training, and work processes to continually improve the way you do business and provide service. While managers typically have broad industry experience and the big picture of what is necessary to succeed, it is employees who are most closely connected with the member and the details of service. Who, then, would be in a better position to recommend improved work processes?

As we have often said before, the devil is in the detail. When you make a commitment to involve your employees in designing and improving work processes, they become energized by the involvement and look for more and more ways to contribute. The more involved they become in contributing to the success of the organization, the more responsibility they will assume for ensuring that success.

**Taking on Delegated Functions.** As empowered employees take on more responsibility, managers can select individuals, who show both the motivation and aptitude, to take on some of the management functions of the organization. An excellent example is provided again by the Ritz-Carlton Company. They select and train certain individuals to conduct initial screening interviews with prospective employees. These empowered employees relish the task and see themselves as gatekeepers in maintaining the company’s high hiring standards. They get paid slightly more for their additional duty, derive prestige in being given this important task, and can develop their own resumes to include this higher-level experience.

**Take Away:** When employees gain more confidence in their abilities to resolve issues and management continually improves work processes based upon reports of problems, a culture of quality service will gain momentum.





#20

## *The Many Ways to Kill Empowerment – 1*

There are a variety of ways to destroy employee empowerment; and none of them are caused by employees. If your employees do not feel empowered, look no further than your leadership and the way you interact with your staff. In searching for reasons empowerment isn't working, focus on the following:

1. **You are only paying lip service to empowerment.** Without your sincere commitment to your employees and their success, they will recognize your "empowerment" as a sham and will become more cynical and disaffected the more you try to encourage their empowerment.
2. **You don't really understand what empowerment is.** If you fail to realize that empowerment begins and ends with your leadership, if you think that empowerment is something your employees must create, then expecting your employees to act in empowered ways is nonsensical.
3. **You haven't provided the "big picture" context** of what your organization is trying to achieve. Your employees need to understand how their contribution furthers the basic aims of the club.
4. **You've failed to give your employees the information and training** they need to understand the context and scope of their empowerment. When you ask them to take on additional responsibilities as empowered employees, they need to understand why and what the benefits are to them as well as to you and the club. They will need examples of what empowered behavior is. Lastly, they will need to know that they will not be blamed or punished for making mistakes.
5. **You have failed to give your employees guidelines for empowerment.** To feel confident in taking empowered action, employees must understand the limits of their authority to act. Ensuring they understand these limits is critical to success. You may have to explain, reiterate, and clarify these limits multiple times before your employees truly feel comfortable with the new behaviors you are asking of them.
6. **You've given them guidelines, but then micromanage them.** Maybe you've done a good job of defining limits, but if you then turn around and give them detailed instructions of how to handle every situation, they will quickly understand that they are not "empowered" and that you will continue to make all the decisions, no matter how trivial.

**Take Away:** When employees gain more confidence in their abilities to resolve issues and management continually improves work processes based upon reports of problems, a culture of quality service will gain momentum.



#21

## *The Many Ways to Kill Empowerment – 2*

In searching for reasons empowerment isn't working, focus on the following:

7. **You second guess the decisions** you've authorized your employees to make. After giving your employees the guidelines to make empowered decisions, you second guess and criticize decisions they make. There is a big difference between criticizing their initiative and brainstorming alternate solutions to a situation. Put yourself in their shoes; how long would you put up with this before throwing in the towel on employee empowerment?
8. **You have failed to give feedback** on how your empowered employees are doing. Feedback, particularly in the early period of empowerment, is critical so that employees understand by constant discussion and explanation what they are doing right and what can be improved. Once they achieve a critical mass of understanding, they will feel more and more confident of their actions, will need less guidance, and will be looking for more and more ways to contribute.
9. Once you've given employees the authority to act, **you fail to take further responsibility** for their actions. The idea of empowerment is not to give your employees your duties and responsibilities and then wash your hands of them. You can delegate authority, but not responsibility. You are still responsible for the performance of your team. You must stay engaged and take full responsibility for any errors your empowered employees make and problems they create. When this happens, you must not blame them; rather you must accept responsibility yourself. There is always more you could have done to ensure that they understood and correctly applied their empowerment.
10. **You fail to remove barriers to their empowerment.** Telling employees that they are empowered, but not giving them the tools, training, and support they need, will quickly end your experiment in empowerment. Telling employees that they can "spend" up to \$100 per member per day to solve service problems is all well and good, but you also must work with the accounting office to devise an efficient process to do this.
11. **You have failed to recognize and show appreciation** for your employees' empowered actions. Employee empowerment means you have asked your employees to take on additional responsibilities. Ultimately, empowered employees will make your job easier and allow you to focus on other issues. For this reason alone, you should be grateful to your employees and show your appreciation for what they are doing.
12. **You have failed to value your employees.** Without the most basic sense that they are valued and recognized as partners in your efforts to provide quality service to members, they will recognize that your program of empowerment is just a way to manipulate them. People who think they are being manipulated are resentful and will be unresponsive to your continued exhortations to be empowered.

**Take Away:** When employees gain more confidence in their abilities to resolve issues and management continually improves work processes based upon reports of problems, a culture of quality service will gain momentum.



#22

## *Selling with Knowledge and Enthusiasm*

Some years ago, my boss and I were on a trip to Nevada to visit our newest club. During the visit, we had an opportunity to eat at a cozy Italian restaurant by the name of Luciano's. While the food was great, it was the service that blew me away. Let me tell you why.

After we were greeted and seated, our waiter, a middle-aged man, approached the table. He immediately sensed our good mood and engaged us in pleasant and humorous banter. While presenting the menu, he described the daily specials in a graphic and mouth-watering way with excellent Italian pronunciation and ended by saying we should try the mussels as they just came in fresh that afternoon. Of course, we bit and ordered a couple of dozen steamed in wine, garlic, and butter. After taking our dinner order, he suggested a wonderful Chianti that was the perfect complement to the meal.

As I observed our waiter, he moved from table to table with a wonderful ease, engaging the patrons in conversation, suggesting appetizers, entrees, and wines. He seemed to wait on every table and was supported by a crew of young assistants. He was so good at what he did and seemed to know so much about the restaurant's offerings that I assumed he must be the owner. Certainly, he took a proprietary interest in every table, and his many tempting suggestions probably boosted every check by 30-40% – what better way for an owner to ensure his restaurant's success!

After dinner, he again worked his magic by suggesting and describing the fresh, made-from-scratch Cannoli. His *coup de grâce* was to suggest Limoncello as an accompaniment for the dessert. Thankfully, my boss was picking up the check!

As we left, I complimented him on his service and asked his name. It turned out he was Irish and was a waiter, not the owner. I was stunned, not just that an Irishman could be so Italian, but that he was so effective based upon his knowledge of the restaurant's offerings and his obvious interest in and enthusiasm for the food.

**Discussion Points:** Discuss the story above and the things the server did right to make the meal memorable. What things does your service team do that have the same effect? Share stories and successes with your team so that they can learn from each other's experiences.

**Take Away:** The more your team knows about your club's menus and the food and beverage offered, the better able they are to enhance members' enjoyment of their meal. Their knowledge and enthusiasm can make all the difference.



#23

## *The Pre-Shift Meeting*

Some ask, “Is a pre-shift meeting really necessary?” Compare a pre-shift meeting with the habits of professional athletes whose jobs require peak performance, both individually and as a team, in an environment where “winning isn’t everything, it’s the only thing!” Without fail, these athletes huddle for a few moments before every game to remind themselves of their commitment to each other and their mission to win. In the service business the game is every day, every shift, and the need for success is just as important. So yes, a pre-shift meeting is an absolute necessity for every club department, but particularly in the food and beverage operation.

Here are some of the things that can be covered in a food and beverage pre-shift meeting:

**Proper Dress and Grooming.** Is everyone in proper dress or uniform? Do they have the right footwear and their nametags? Does everyone meet the club’s grooming standards? These basic standards are critical to a professional operation. What gets checked gets done!

**Reservations.** Who’s coming in for dinner tonight? Do you know their likes, dislikes, and preferences? Have they made any special requests? Is it a celebratory occasion? Double check the member database and see if the meal could be for a birthday or anniversary.

**Special Parties.** Are there special parties scheduled for tonight in the dining room? Have they made any special requests? Do they have a limited or set menu?

**Daily Specials.** What are tonight’s specials? Go over the [Menu Item Selling Sheets, PCPM Form 484](#), for those items. Will the chef do a tasting and explain items and recipes? Cover any wine pairings with specials. Are there special appetizers, desserts, specialty drinks, wines by the glass, wines by the bottle? Review pricing for these, which POS key to ring them on, and discuss ways to suggest.

**Review Pronunciation** of any unfamiliar or foreign food terms or product names.

**Upcoming Club Events.** Review details of events such as Sunday Brunch, Fine Dining Nights, Wine Tastings, Luau at the pool, etc., so that servers can provide information and promote to diners if asked.

**Review Daily Sales Targets** so everyone knows if the club is on track to meet budget. Review any ongoing contests or sales incentives.

**Kudos, Recognition, and Complaints.** Review any positive feedback to celebrate successes and extraordinary service by individual servers. Cover any complaints received with lessons learned or to brainstorm solutions.

**Membership Familiarization.** Include a short, ongoing review of members’ preferences and special occasions. Show pictures, if available. If data is reviewed incrementally each day, over time, servers will have a greater familiarity with the full membership. Cover information on new members.

**Basic Service Focus.** Cover any items servers should focus on such as getting member numbers on charge slips, quick pick up of hot items from the line, not over stacking the dishwash station, etc. By focusing on one basic item each day, servers are continually reminded of the basics of the business.

**Questions, Comments, Feedback.** Servers should always be made to feel comfortable in asking questions, making suggestions, and providing feedback from their serving experiences.

**Take Away:** The pre-shift meeting is an essential discipline in meeting standards, training staff, and reviewing dining options.



#24

## *Suggesting Improves Average Check – 1*

Every food professional knows that the primary way to increase revenues short of increasing the number of customers is by increasing the average check. This is particularly important in the club business where each club has a finite number of members and cannot attract the wider audience of the general public. So, how does one go about suggesting to enhance the members' dining experience while increasing the average check?

If you consider most menus, diners have a choice of appetizers, entrees, desserts, wines, and specialty alcoholic drinks. Most go out to eat with a particular entrée in mind. What they have not thought about, and will not think about until they sit at the table is, what might go well with their entrée? Here is the opportunity to suggest and increase the average check! The server can "sell" members on the idea that this or that accompaniment will add to their dining experience.

But as any veteran salesperson knows, you can't sell what you don't know! Given that clubs hire bright, outgoing, but often young and inexperienced people to work as servers, how do you give them the necessary knowledge to suggest the chef's offerings? Further, recognize that food and beverage is an inexhaustible body of knowledge not easily mastered in a lifetime of concerted learning. While this presents a challenge, it is not insurmountable with a little organization and effort. The following steps, if implemented and persistently practiced, are guaranteed to increase your club's revenues through higher check averages while giving members a richer dining experience.

- **Benchmarking.** Break your revenue projections for food and beverage down into volume and average sale. For example, if you know from history that your average check for dinner is \$18.53, you can divide your projected revenue for dinner for a given period by the average check to see how many dinners you will have to sell. If your budget is \$25,000 for February, then you must have 1,349 dinners to reach your goal. You can further break down the goals into weekly or daily targets. By benchmarking your appetizer, dessert, wine, and specialty drink sales, you can likewise determine the current average sale for each and compute a target figure for the number of how many you must sell in a given period. If you've not previously benchmarked, your first few months' targets may not be very accurate or realistic, but you can adjust them as you gain experience.
- **Establish Realistic Goals and Track Results.** Use your benchmark numbers to establish goals for future operating periods for appetizers, desserts, wines, and specialty drinks. Post those goals prominently in the pantry or other central location for your servers to see. Break your monthly goals for each category into daily goals. Then challenge your servers to surpass those daily goals. Every day post the previous day and the month-to-date results so every server can monitor their progress toward the goal.

**Take Away:** The more servers know about the menu offerings and dining benchmarks, the better able they are to suggest, and increase the average check. Unless you have a staff of knowledgeable "foodies," they need to be taught about the food and beverages you offer.



#25

## *Suggesting Improves Average Check – 2*

- **Teach Servers to Suggest.** Use your pre-shift meetings (you should always have a pre-shift meeting!) to continually train your servers about the food and beverage products you offer. This means appetizer and dessert tastings; teaching them about wines, liqueurs, and spirits in general; and introducing them to those that you carry in particular. Equipped with this knowledge they will be far more comfortable in suggesting accompaniments to members. Coach them to use their new knowledge to suggest and sell!
- **Provide Servers with Product Knowledge.** Use [Menu Item Selling Sheets, PCPM Form 484](#), prepared by the chef to educate servers about all items on the menu. These selling sheets should include ingredients; flavorings (herbs and spices); cooking times; portion sizes; special distinguishing characteristics such as vegetarian, organic, farm fresh, kosher, heart healthy; country or locale of origin; presence of dairy products or possible allergens such as peanut oil, shellfish, etc.; method of preparation (e.g., sautéed, pan fried, roasted, deep fried, etc.); types and preparations of sauces; and any other pertinent information of interest. Lastly, the chef should include his or her suggested wine accompaniment for appetizers, entrees, and desserts. Servers should also be coached as to the timing and the best tone and manner to deliver “suggestions.”
- **Continue Tracking Daily Sales against Goals.** Design contests or offer prizes to those who improve the average check the most. At minimum publicly recognize those who upsell the most.
- **Continue Benchmarking Your Sales.** Not only is this historical data helpful in setting goals and projecting future business, but the detailed benchmarks you keep this year will help you budget your sales for next year. Lastly, there will be a clear record of the progress you’ve made in increasing sales – certainly, a nice thing to have when you meet with your supervisor at your next performance review.

Charles A. Coonradt, in his wonderful book, *The Game of Work*, explained how people will work incredibly hard for no compensation to lower their golf handicap, beat their best time in a 10k race or improve their bowling average. The same desire to improve oneself or improve one’s performance can be demonstrated at work if people simply get measurable feedback on their performance in a timely manner. The key to measurable feedback is knowing past performance (easily acquired in a business setting by benchmarking) and then setting challenging goals for future performance.

Increasing your average check is one of the easiest things a club can do to improve its food and beverage bottom line. The additional revenue helps overcome the high fixed cost in food operations and will bring more margin to the bottom line, all the while providing members with a richer and more enjoyable dining experience.

**Take Away:** Increasing your average check is one of the easiest things an operation can do to improve its food and beverage bottom line. The additional revenue helps overcome the high fixed cost in food operations and will bring more margin to the bottom line.



#26

## *Suggestive Selling – 1*

**Beverages.** Offering beverages is the usual way to start a meal. In addition to offering non-alcoholic beverages such as water, tea, lemonade, and sodas, many diners will want an alcoholic beverage, so make sure your service team is prepared to suggest a wine, beer, or cocktail.

**Cocktails.** There are a host of creative cocktails for any taste and occasion. The heyday of cocktails was in the Forties and Fifties, but these retro drinks are making a comeback. Often, the person who would routinely order a Vodka and Tonic might be induced to try a refreshing Tom Collins, Sea Breeze, Banana Daiquiri, or other mixed drink. Have the bartender make suggestions to your servers. If they learn about a new cocktail each shift or week, in no time they'll have a large repertoire to suggest.

**Wine by the Glass.** Many diners who wouldn't want a full bottle of wine for either cost or consumption reasons, will want a glass of wine. In addition to house wines, many clubs offer upscale or premium wines by the glass. Make sure servers are familiar not only with what wines are available by the glass but are able to entice members by knowing about the wines, where they come from, what they go with, their flavorings and aromas, sweetness or dryness, and reputation for quality.

**Appetizers.** Appetizers are a great way to start a meal, usually taking less time to prepare, allowing diners to snack on something while thinking about what entrée they want, and they go well with cocktails or other beverages. As servers are taking drink orders, they should suggest appetizers to go with them. Another great way to sell appetizers is to offer a medley or sample of several appetizers that the entire table can share with their drinks.

**Soups and Salads.** Most clubs will offer a variety of soups and salads, with light, refreshing ones in hot weather and more hearty offerings in the winter. Many diners will opt for just a soup or salad or maybe a soup and salad combination. Often, if your soup, salad, and dressing offerings are creative, servers can interest diners in a soup or salad by creative descriptors and their wholehearted recommendation.

**Desserts.** Your club will offer a variety of desserts for those with a sweet tooth. Like appetizers they are often shared. Your service team should be prepared to tempt diners with mouthwatering descriptors, and they shouldn't forget everyone's often overlooked favorite – ice creams.

**Liqueurs.** Club bars carry a wide assortment of liqueurs that make wonderful after-dinner drinks. Many are world-famous for their proprietary flavorings and recipes, and have been around for decades, even centuries. They are great served neat, on the rocks, or even over a scoop of vanilla ice cream. Make a point of familiarizing your team with these; just make sure they pronounce the names properly.

**Cognac, Brandies, Ports** make great after-dinner beverages to savor over conversations. Familiarization with those your club carries and a timely recommendation after dinner with coffee may seal the deal.

**Espressos, Cappuccinos, Specialty Coffee Drinks.** Many clubs will offer specialty coffees and after dinner drinks made with coffee. Servers should suggest these to those diners who want to linger at the table in conversation.

**Sparkling Wines and Champagnes.** These wines are usually associated with celebratory occasions, so always be aware if someone is celebrating a birthday, anniversary, or other occasion.

**Take Away:** The more your team knows about the club's food and beverages, the better able they will be to make dining suggestions to members and guests.



#27

## *Suggestive Selling – 2*

Suggestive selling is a proven means of increasing dining room average checks and overall food revenues while providing members and guests with a richer, more enjoyable dining experience. Many diners will tell you that they enjoy and appreciate a knowledgeable server who can suggest additional or alternative accompaniments to their usual dining fare. Instead of another hum-drum meal in the club dining room with order takers, your service team's knowledge and enthusiasm for the food and beverages the club offers can help turn the meal into an evening to remember.

Here are five things they must do to confidently and enthusiastically suggest various food and beverage items:

- 1. Know the Menu and All Beverage Offerings.** They can't sell what they don't know. They must take it upon themselves to learn as much as they can about each menu item. Have the chef or food prep staff talk about the food, how it's prepared, what ingredients are in each item, and what their favorite items are. Do the same with the bartender. Make sure servers know the house and premium brands of liquor, as well as all the beers the club carries. Educate them about wines. Have them read and study bottle labels – often these have descriptors they can use to help describe wines or beers.
- 2. Pay Close Attention During Pre-Shift Meetings.** If the club is not using [Menu Item Selling Sheets, PCPM Form 484](#), and [Wine Selling Sheets, PCPM Form 485](#), start using them to better educate staff. Make sure they know everything about each menu item, so they can creatively describe them to diners.
- 3. Record and Rehearse.** Servers must take notes and ask questions. They must ask the chef for creative adjectives and descriptors for menu items and daily specials. They must take notes and create phrases to use when describing items. They must rehearse these so that they come easily to them when reciting specials at tableside.
- 4. Show Excitement and Enthusiasm when Describing Items.** Excitement and enthusiasm sells. Servers must put some enthusiasm into their descriptions by voice inflection and body language when presenting to members. They should, at all cost, avoid deadpan delivery and a monotone voice. They should practice their delivery with fellow team members. They should take their cue from professional broadcasters – note how they move their heads for emphasis and modulate their voices when delivering the news.
- 5. Be Prepared to Make Recommendations.** A diner will often ask, "What do you like?" Make sure your servers have several recommendations for appetizers, soups, entrees, and desserts, as well as beers and wines. Even if they haven't tasted all the items on the menu, they should ask other servers and the kitchen staff what they like best and then never hesitate to offer their recommendations. The worst answer they can give is "I don't know." It indicates a complete lack of interest in the club's food and their job as a server.

**Take Away:** The more your service team knows about the club's food and beverages, the better able they will be to make dining suggestions to members and guests.





#28

## *Suggestive Selling – 3*

Here are more tips to help your team sell suggestively:

**Proper Pronunciation.** Nothing identifies your staff as rookies more quickly than mis-pronouncing food and beverage terminology. Many wines, proprietary liqueurs, and cooking terms are European and in the language of origin. Pronouncing these names and terms properly marks servers as professional and inspires confidence in the diner when a recommendation is made. If servers are unfamiliar with a name or term, they should check with fellow servers or supervisors. Use smart phones to listen to the pronunciation of foreign terms.

**Selling is a Numbers Game.** Not every member your team suggests to will agree, but the more suggestions they make, the more members who will, particularly if the word gets out that servers are knowledgeable about food and beverage. Let's just say that one out of every ten members says "Yes." Let's also say that in a month your team serves 5,000 diners, so 500 say yes. Let's say the average increase in each diner's check is a conservative \$4 – that's \$2,000 in increased sales every month, or \$24,000 a year. Then let's say your team gets so good at suggesting that they get 2 out of 10 who say yes. You do the math; it's impressive!

**Suggesting is not Just about Numbers.** Suggesting additional and alternative choices to members is not just about making more money for the club; it's about enhancing diners' experiences by getting them to try new things, by exposing them to the richness and variety of culinary tradition. Most, if not all, diners appreciate the suggestions of knowledgeable, imaginative, and enthusiastic servers. Very few would ever be offended, and the reason any might probably has more to do with the individual server's methods and delivery than the fact that a suggestion was made.

**Never, Ever "Hard Sell."** If servers recognize that they're doing is providing members and guests with a richer dining experience, not selling cars on commission, they'll never offend diners by pushing too hard. Make a suggestion; if not accepted, move on. Servers will quickly learn who is open to suggestions and when someone is set on their own choices.

**Sensory Descriptions.** Servers must create a repertoire of menu description. Examples include "freshly made," "made-from-scratch," "farm fresh," "Chef's own," "fresh-baked," "locally grown," "just in today." "Refreshing" works for light, cool, summer fare; "hearty" fits for winter soups and chili, "tender" for steaks and chops, etc. The only requirement is that descriptors be accurate. Have them check with the kitchen about each item and then get creative.

**Geographical Descriptions.** Certain geographical regions are known for their products such as Wisconsin cheeses, Vermont maple syrup, Virginia hams, Chesapeake Bay oysters, Maine lobsters, Napa Valley wines, etc. When appropriate, let people know where their meal comes from. Even if a particular product is not famous, using its locale of origin gives it a cachet. If the chicken is free-range from Mr. Jones' Windsong Farm, they should describe it by name – "free-range Windsong Farm chicken."

**Don't Forget the Kids.** There are also opportunities to suggest to children, though the suggestion should be to the parents; many parents are particular about what their children eat. Also suggest other entrees besides those on the kid's menu. Serve smaller portions of regular entrees at a lower price; suggest specialty kid's non-alcoholic beverages, and, of course, desserts.

**Take Away:** The more your service team knows about the club's food and beverages, the better able they will be to make dining suggestions to members and guests.



#29

## *Suggestive Selling – Alcoholic Beverages*

Alcoholic beverages present a variety of suggesting opportunities:

**Know Your Premium Brands.** One of the easiest ways to increase the average check is to suggest premium brands of alcohol. Not only must servers know and correctly pronounce their names, but they should know what makes them special. Things to know include: the age, such as a 12-year-old scotch; proprietary flavorings; the ingredients (there are 10 in Bombay Sapphire gin); or quality of production and distillation such as Belvedere vodka's being distilled four times.

**Beers.** For many years, there was a great consolidation of local and regional breweries that resulted in a handful of dominant companies offering very similar products. In recent years, though, there has been an explosion of small, niche breweries offering well-crafted, artisanal beers of unique tastes and exceptional quality. The more your team knows about beer varieties, such as stouts, ales, lagers, and pilsners, and the specific brands you carry, either bottled or on tap, the better able they are to suggest a beer with a meal. When a diner asks what beers you carry, servers have a perfect opportunity to ask them whether they like a lightly flavored or more robust beer, and then suggest one of your premium brands. The key to success is knowledge. Servers should talk to your bartender for ideas, search online for information, or buy any one of recently published beer guides.

**Wines.** Wines present an almost infinite body of knowledge to truly master, but servers can start with the basics such as grape varieties, countries and locales of origin, wine terminology, and common wine descriptors. As with any other body of knowledge, they can start small, learning the basics, and then learn something new every day or week. Train you staff with [Wine Selling Sheets, PCPM Form 485](#).

**Wine Pairings.** Certain wines go best with different foods. The basic rules are:

- **Sparkling wine and Champagne** – appetizers, wild game, caviar, roasted almonds, oysters, and fruit;
- **Rosé wine** – ham, turkey, sausages, and pork;
- **White wine** – seafood, poultry, shellfish, veal, cream sauces, mild cheeses, and dishes such as salads;
- **Medium-bodied red wine** – pork, wild game, lamb, blackened fish or poultry, pâté, mild cheeses;
- **Full-bodied red wine** – steak, roast beef, blackened red meat, heavier dishes, mild to sharp cheeses;
- **Dessert wines** – fruits, pastries, simple desserts;
- **Dry sherry** – appetizers and soups;
- **Port and sweet sherry** – after dinner and with cheeses.

**Liqueurs.** There are many opportunities to suggest with liqueurs. Cordials are alcoholic beverages prepared by mixing and redistilling various spirits (brandy, whisky, rum, gin, or other spirits) with certain flavoring materials: fruits, flowers, herbs, seeds, barks, roots, peels, berries, juices, or other natural flavoring substances. Liqueurs differ from other spirits because they must contain at least 2½% sugar by weight. Most cordials contain up to 35% of a sweetening agent. Liqueurs can be consumed straight up, on the rocks, diluted with water, mixed with sparkling water as a spritzer, or served over ice cream. Make sure your team knows the major brands and flavorings of each.

**Cognac, Brandies, Sipping Whiskeys, Ports.** These make superb after dinner drinks and are best suggested when it's apparent that the diners are going to linger at the table over coffee or conversation. Make sure servers know what brands you carry and that they learn as much as they can about each.

**Take Away:** The more your service team knows about the club's food and beverages, the better able they will be to make dining suggestions to members and guests.



#30

Sample Menu Item Selling Sheet

Private Club Performance Management

Menu Item Selling Sheet

The Menu Item Selling Sheet is used to educate servers about menu items. The more information and knowledge servers have about the food and beverage items offered, the better able they are to suggest options and alternatives to customers, as well as to increase average checks.

Menu Item: *Wine Braised Veal Shanks*

Main Ingredients:

*Veal shanks, bacon, butter, onion, carrot, celery, garlic, white wine*

Flavorings (herbs and spices): *Garlic, bay, thyme, sage, salt and pepper, white wine*

Portion Size: *1 Veal Shank*

Cooking / Prep Time *10 minutes:*

Special Characteristics:  None  
 Vegetarian  Locally Grown  
 Organic  Heart Healthy  
 Kosher  Other: \_\_\_\_\_

Accompanying Sides:

*Garlic Mashed Red Potatoes  
Fresh Greens du Jour*

Possible Allergens:  None  
 Dairy  Gluten  
 Peanut Oil  MSG  
 Shellfish  Other: \_\_\_\_\_

Cooking Method:

Sautéed  Roasted  
 Pan Fried  Boiled  
 Deep Fried  Smoked  
 Steamed  Other: *Braised*

Product Origin:

Country: \_\_\_\_\_  
 State: *North Carolina*  
 Locale: *Creekside Farms*

Sauces:  None, or Main Ingredients: *Cooking reduction, flour, white wine*

Suggested Descriptors:

*Bone-in Richness of Flavor, Fall-off the Bone Tenderness,  
Melt-in-Your Mouth, Glazed with White Wine Reduction,  
Complex Flavorings of Braised Veal, Vegetables, and  
White Wine*

Suggested Wine Pairings:

*Cavalloto Barolo  
Chateaufneuf du Pape  
Any hearty red wine – Bordeaux, Cabernet, Merlot*

Suggested Appetizer(s):

*Gorgonzola and Pâté Medley*

Suggested Dessert(s):

*Drambuie Bread Pudding or Crème Brûlée*

Chef's Notes:

*Veal Shanks is a great opportunity to sell a bottle of hearty red wine!*

Server Notes:

Teachable Moments

Take Away: The more servers know about food and beverage, the more they can suggest.



#31

## *Dining Service Tips – 1*

**Station Cleanliness.** Even if others are responsible for cleaning the dining room, double check the floor, tables, and chairs to make sure they are clean for members and guests. Take action as necessary.

**Table Settings.** Double check your tables to make sure the previous shift set the tables properly and all settings are complete, tableware wiped down, glassware clean, napkins properly folded, salt and pepper shakers wiped down and full, sugar caddy clean and stocked, and any other table detail checked.

**Highchairs and Booster Seats.** Must be clean, sanitized, and ready to go during service.

**Work as a Team.** Servers can accomplish so much more when working as a team than they can individually. Think of your co-workers whenever you do something. If something needs to be done, just do it, regardless of who is supposed to do it.

**Clean Up Spills and Clean as You Go.** Spills must be cleaned up immediately as they present a slip and fall hazard. Keep your stations clean as you go. If you make a mess in the kitchen or pantry, clean it up.

**Use Serving Trays.** Use serving trays when carrying cocktails and beverages. This applies to alcoholic drinks, coffee, tea, and any other beverage where the glass or cup is not preset on the table. When serving beverages on tables without cloths, use a beverage napkin or coaster. Never touch the rim of a glass or cup.

**Learning Member Names.** Check reservations so you can match names with faces. Whenever members sign charge tickets, again reinforce your memory by matching names to faces.

**Critical Information.** Never approach a table without knowing daily specials, how they're prepared, and prices; appetizer(s) of the day; soup(s) of the day; wines by the glass; special desserts; specialty drinks; and any other detail of the day's offerings. Without this information you'll surely embarrass yourself.

**Carry Necessary Tools.** Always carry a pen, dup pad, daily notes from pre-shift meeting, wine key, and a clean service cloth. Matches are necessary for members who wish to step outside for a smoke and are used to light candles and sterno.

**Side Work.** Make sure you fully complete all necessary opening and closing side work. The idea is to be completely ready for any service need during the meal. Likewise, your closing duties will prepare the dining room for the next shift and ensure the cleanliness and sanitation of the dining room and pantry.

**Check Linen.** Make sure table linen does not have a "sour" smell. If so, replace it and notify your supervisor. Also ensure there is an adequate supply of clean linen to meet expected levels of business.

**Responsible Beverage Service.** It is against the law to serve underage individuals or to over-serve anyone. Be aware of anyone who is drinking heavily. Watch for slurred speech, inability to focus eyes, loss of motor skills, or blank expressions. Alert management to any potential problem.

**Condiments.** Before the meal period check any condiments that are served to tables in their original bottles to ensure bottles are clean. If not, wipe down with a clean damp cloth. This applies to various condiments such as ketchup, mustard, A-1 Sauce, hot sauces, etc.

**Dish Wash Station.** Do not over stack dish wash station. This will result in breakage and spills. Help out if possible or make your supervisor aware of the developing problem.

**Take Away:** Food service is detail-intensive. Remind your staff periodically of these details.



#32

## Dining Service Tips – 2

**Music.** Music is a pleasant accompaniment to any meal, but it can also be a source of irritation if played too loud or if the music is inappropriate to the crowd, the mood, or the occasion. Most clubs subscribe to a music service that provides a wide variety of music. Selecting the most appropriate music for meal periods is an important element of establishing ambience. Classical or contemporary jazz is often a good mix for evening meals, while lunch music can mix more popular, light, or classic rock. Regardless of selection, playing the music at an appropriate volume is of absolute importance. Managers should establish guidelines for musical selections for each meal period and stress that music is background for diners, not entertainment for servers.

**Lighting.** Setting the appropriate lighting level is another element of establishing ambience in a dining area. The lighting level will be determined by the time of day, outside weather, ambient light from the windows, the meal period, the mood you are trying to achieve, whether candles or votive lights are used on tables, and any ancillary lighting, such as wall sconces, etc. Most dining rooms are equipped with rheostat switches for their lights so that the lighting level can be adjusted. Check the lights before each meal period to make sure the lighting level is appropriate to the occasion.

**Sun Glare.** Many clubs have dramatic views from the dining room, sometimes overlooking the 18th green or a lake. While these views add much to the diners' experience, they can also be a source of irritation when the bright sun shines into their eyes. So, when the sun gets low, pay attention to whether it might be disturbing to diners. Close the blinds or drapes until the sun gets lower; then reopen them so members and guests can again enjoy the view. Your consideration will be greatly appreciated.

**Table Clearing.** While it's impossible to clear tables noiselessly, it is the hallmark of a quality club to clear conscientiously, taking the time and care to stack dishes quietly and remove soiled flatware purposefully instead of slinging it around. Whenever you clear a table, focus on what you're doing and be aware of the noise you are making. The care you take will enhance your members' dining experience.

**86'd Items.** When a menu item is "86'd," i.e., runs out of an item, servers must pass the as quickly as possible. There is nothing more disappointing to a diner who has ordered an item that is no longer available. Spreading the word allows a server to mention such items when taking orders.

**In the Weeds.** Getting "in the weeds" can happen anytime without warning no matter how prepared a server is. While experienced servers know how to kick into overdrive and dig themselves out, it's also important to let your supervisor and fellow servers know. While you may think they should be able to see when you need help, don't make this assumption. They're focusing on their own tasks and may not notice. Remember that we are all part of a team – and teammates are there to help. Usually, being in the weeds passes as quickly as it comes, and often all you need is a helping hand for just a few minutes.

**Be Alert.** Always keep an eye on your tables. You can usually tell if someone at a table needs something as they will be looking around or trying to get someone's attention. Check back with your tables frequently to see if everything is alright or if you may get them something else. Be sensitive, though, to diners who are engaged in deep discussion or are enjoying a romantic evening together. They may not appreciate constant interruptions. Always take your cue from the diners.

**Ordering by Memory.** It's impressive when a server takes orders by memory; certainly not everyone is able to do this. Usually, a server will not have the confidence to do this until she's been working at the club for awhile and is thoroughly familiar with all aspects of food service. If one is comfortable enough to try, start small by doing it with tables of two. Once your confidence is up, try it with larger tables.

**Take Away:** Food service is detail-intensive. Remind your staff periodically of these details.



#33

## Engaging Members with Confidence

Servers have intensive interaction with members. There are number of things they must do to ensure that they engage properly and successfully:

**Be Prepared.** No matter what their job is they must be prepared to meet, greet, and serve members professionally and efficiently. This requires that they be prepared for each encounter. Servers must know and efficiently execute all requirements of their positions and be thoroughly familiar with all food service techniques, as well as the food and beverages the establishment serves.

**Mental *Mise en Place*.** *Mise en place* is a French phrase defined as "putting in place." The phrase is used in a culinary sense to refer to organizing and arranging all ingredients that a cook will require to prepare menu items. In a broader sense it can be taken to mean that all food service employees, both front and back of house, have done all the work necessary to be prepared to serve food. But being prepared mentally is just as important as gathering all ingredients and completing all side work. Mental *mise en place* means that servers are familiar with all food and beverage products the club offers and have the right attitude and enthusiasm to deliver high levels of service to members.

**Smile and Desire to Help.** A winning smile and desire to help are bedrock requirements of service.

**Know the Names and Preferences of Members.** Knowing the names and preferences of members will further cement your relationship with them. As the theme song for the hit sitcom Cheers says, it's "A place where everybody knows your name."

**Stand Erect.** Posture and body language say a lot about employee confidence and service attitude. When interacting with members, they should stand confidently erect with head held high. Providing quality service is something they should be proud to do.

**Be Confident.** Members are not impressed by retiring, servile (submissive, subservient, fawning, obsequious, [look these words up in the dictionary]) people. They'd much rather interact with confident and competent individuals who take professional pride in what they do.

**Make and Keep Eye Contact.** Servers must make and keep eye contact while speaking with members. They are not impressed by shy, timid, and insecure employees.

**Speak Slowly, Distinctly, and Confidently.** When speaking with members, particularly when reciting daily specials, servers must speak slowly, distinctly, and with confidence. While they may refer to notes, they should not read them verbatim. By spending some time rehearsing the particulars of each special, they can describe them confidently while making eye contact with everyone at the table. Speaking too fast is a clear sign of nervousness and will often require members to ask servers to repeat what was said because they didn't understand.

**Gauge Level of Engagement.** Servers should always take their cue from members as to how much engagement they want. Servers should never presume familiarity no matter how often they've served a member before.

**Demonstrate Knowledge and Competency.** When servers demonstrate both knowledge and competence in all they do, they favorably impress those with whom they interact. This is true not only in the club business, but also in life.

**Take Away:** How employees engage with members will determine the quality of service and members' attitudes about the club and the service they receive.



**#34**

## ***Service Recovery***

Despite our best efforts, situations will inevitably arise when members are dissatisfied with service quality and/or products offered. Whether you feel the problem is legitimate or unwarranted is of no consequence. The member is not satisfied, and your only concern is changing the outcome by making a speedy and gracious recovery to the member's complete satisfaction.

To better aid you in making a recovery, PCPM has developed a Seven Step Process, which can be divided into two distinct phases. Steps 1 through 4 constitute the On-the-Spot Fix, while steps 5 through 7 make up the Long-Term Repair aimed at correcting the underlying cause of the service failure. When a member approaches you with a complaint or concern, here's what you do:

1. **Focus** – stop what you're doing and focus entirely on the member and what he is saying.
2. **Listen** – carefully listen to fully understand the nature of the problem. Recognize that the underlying problem is not always the one that is being brought to your attention; for example, the complaint may be about the food, but the real issue is slow service. Sometimes you must read between the lines or recognize the issue is larger or maybe different from the complaint.
3. **Apologize** – a sincere apology is absolutely necessary. The club as a whole and you personally are sorry for any service failure, so you should never be shy about or slow to fully apologize. After apologizing, tell the member what you are going to do to correct the problem. If the member still seems dissatisfied, inquire what might be done to make it right.
4. **Make It Right** – respond quickly, efficiently, and discreetly to avoid any possible embarrassment to the member.
5. **Assurance** – after the situation has been made right, approach the member when convenient and let him know that the matter will be addressed formally by management.
6. **Notification** – if the failure is serious enough or the member does not seem fully satisfied, notify your supervisor, department head, or manager on duty so she can also approach the member to discuss the situation and apologize.
7. **Report** – When you have time, but no later than the end of your shift, fill out a [Service Issue Resolution, PCPM Form 180](#), describing the problem, your assessment of the underlying cause, your efforts to recover, and the member's mood after recovery. This form is used to more formally address the problem and gives the F&B director, clubhouse manager, or general manager an opportunity to call the member to apologize again and discuss the issue further.

Unfortunately, in the club business, there will always be mistakes and failures, but what has gone wrong is done and is not nearly as important as what you do next.

**Discussion Points:** Consider the seven steps in the club's service recovery process and how a consistently applied recovery policy can defuse potentially damaging situations. Discuss service failures that you are familiar with and their outcomes. Point out the problems which could arise if any step is skipped.

**Take Away:** There will always be service problems in a club operation. The key in all such instances is the service recovery.



**#35**

**Sample Service Issue Resolution Form**

Private Club Performance Management

Service Issue Resolution

Name: *Jennifer Hansen* Department: *Food and Beverage*

Job Title: *Server*

Date/Time of Issue or Incident: *Sat, 8/16, 6:20 p.m.* Location: *Main Dining Room*

The Service Issue Resolution form is to be used to learn lessons from service issues involving customers. The form must be filled out anytime an employee uses his authorization to spend money to resolve an issue, whether by "comping" a meal or service, providing a token or apology, or doing something special for a customer. It may also be used anytime an employee witnesses a potential service problem or has an idea to improve service or service delivery.

Name(s) of Customer(s): *Mr. and Mrs. Robert Jones and two children*

Describe Service Issue or Incident:

*Mr. Jones ordered his NY Strip Steak rare. When Mr. Jones cut into his steak, it was cooked medium. In checking with the kitchen I discovered that John Thompson picked up the wrong plate and served Mr. Jones' steak to one of his tables. It took the kitchen ten minutes to prepare another steak. Mr. Jones was not happy since they were on their way to the movies.*

Continue on back if necessary

Contributing Factors to Issue or Incident:

*As busy as we were Saturday night, we did not have an expediter. At the time I picked up my order there must have been six other orders in the window. An expediter may have prevented the problem.*

Resolution of Issue or Incident:

*I "comped" Mr. Jones' meal and brought complimentary desserts for his children while he was finishing his dinner. I overheard Mr. Jones tell his wife that this was the second time in the past month that his steak had not been prepared as he ordered it.*

Recommend Follow-up Phone Call:  Yes  No by whom:  GM  Dining Room Manager

Suggested Process Improvement to Avoid Future Issues:

*In addition to an expediter on all busy nights, why don't we order some plastic markers to put into the steaks to indicate the degree of doneness? It might preclude servers picking up the wrong orders.*

Employee's Signature: *Jennifer Hansen* Date: *8/16/08*

Supervisor's Signature: *Michael Rienzi* Date: *8/17/08*

**Teachable Moments**

**Take Away:** Always learn from mistakes.





#36

## *Defense and Offense – 1*

Offense and defense are words of opposite meaning, yet often linked together. Their obvious meaning is demonstrated on the football field. One team attacks an area defended by another, trying to reach the goal. The purpose of the defense is to stop the attack, to defend their territory, to protect the goal. Though these terms have most often been applied to armies at war, they can also be used to describe less-physical competitions such as a game of chess. What characterizes each is a conflict or competition.

Two words derived from these terms are the adjectives offensive and defensive. The dictionary defines offensive as:

- Unpleasant or disagreeable to the senses; obnoxious, disgusting.
- Causing anger, resentment, giving offense; insulting.

Defensive means:

- Carried on for the purpose of defending against attack or danger.
- Having an attitude of defense.

Everyone has heard the phrase “a good offense is the best defense.” This idea is especially useful on battlefields, football fields, and even chessboards. By keeping your opponent off balance with relentless attacks, he has no time or resources to plan attacks against your positions. In this way your offense becomes your defense.

People have natural tendencies. Whether inborn or from longstanding habit, we express them without thinking. One such habit is the tendency to personally associate ourselves with that which we do. Just as the farmer has a proprietary interest in the fields he labors so hard to till and harvest, we identify with our organization or place of work. A corollary to this sense of association is the natural inclination to protect that which we consider our own or with which we are associated.

So, it is natural for us to feel pride in our work and place of employment. When someone attacks it with criticism, disparaging remarks, or complaints, the natural tendency is to defend it, to assume a defensive attitude. This is all well and good unless you depend upon that someone’s goodwill for your livelihood. When you work in the service industry, you literally cannot afford to become defensive.

When you become defensive, many things happen physiologically and psychologically. Adrenaline starts flowing; you tense up, ready to repel any further attack; your heartbeat and respiration quicken. Likewise, your mind races ahead to your next move or response so you don’t hear what is being said and you don’t focus on the moment. Subconsciously knowing that a good offense is the best defense you become antagonistic; you raise your voice; you develop an attitude; you become abrupt and huffy with the other person. At this point, without even knowing it, you have become offensive; that is by definition, “causing anger, resentment, giving offense; insulting.”

**Discussion Points:** Consider the points made above and how you naturally react to complaints. Recognize how offensive this is to someone with real or perceived concerns.

**Take Away:** Service employees cannot afford to be defensive when responding to member complaints.



#37

## *Defense and Offense – 2*

How can you avoid the natural tendency to become defensive? The first step is to be aware when you become defensive when criticized or listening to a member complaint. Notice the giveaways. Are you tense and nervous? Do your hands shake or your voice quaver? Do you feel a tightness in your chest? Do you raise your voice? Any of these symptoms reveal your defensiveness.

Realizing this, what can you do about it? First, understand two important things:

- Complaints are not usually directed at you, so don't take them personally. Allow some distance between yourself and the complaint. Not too much, though; you must show a sincere concern to resolve the problem.
- When a member complains, there is, in his mind, a problem. Whether we think there is a problem or not is immaterial. Furthermore, the problem is ours. When considered in this light, the member is doing us a favor by bringing it to our attention. We should be thankful instead of defensive.

In addition, there are some things you can do when confronted with a complaint.

- Where there is no conflict, there is no need for offense and defense. Don't allow a conflict to arise. Disarm the situation by cheerfully accepting our problem. Listen carefully to what the member is saying. Apologize sincerely for our shortcomings. If you can solve the problem, cheerfully and quickly do so. If you can't, get a manager who can.
- If you find yourself becoming nervous or defensive, take a deep breath. The inflow of oxygen will help quiet your system and the moment you take to breathe has a calming effect on your nerves.
- If you find yourself losing control, try to leave the room on some pretext. If you are a server, tactfully excuse yourself "to check with the kitchen." Once there, take a deep breath and get control of yourself. Try to put the member's anger into perspective. It's not the end of the world. Resolve to overcome that anger. Take another deep breath and go back to the member.
- Go on the offensive in a positive way. Take control of the situation. Ask pertinent questions about the problem. Take notes, as necessary. This taking ownership of the problem demonstrates a proprietary concern and a desire to correct the problem.
- While apologies must always be given, remember that easy apologies and facile excuses do not impress. Our actions speak louder than words.
- Be sincere. You should have a sincere desire to help any member with a need or concern. If you don't, you're in the wrong business.

Two things you must never do:

- Pass the buck or evade responsibility. You may not have created the problem, but now that it's been brought to your attention, you need to resolve it.
- Don't become defensive. It is not us against the members. We're on their team!

Responding to member complaints is one of the most difficult things we face in the service profession, but when we avoid becoming defensive, we often can create a turnaround situation where the problem is solved, and the member satisfied. There is no more satisfying situation in service.

**Take Away:** By being aware that there is never a need to be defensive when responding to a complaint, employees can handle it in a more positive way.



#38

## Are Your Service Apologies at Risk?

In *Service Recovery* we outlined a method by which club employees can make a gracious and effective recovery from any service failure. Step 3 of this process is the apology. We the club and you the employee are sorry for any service failure, so we should never be slow to apologize.

While it never occurred to me that employees should be taught how to apologize, I caught two items this past week – one on television and the other on the Internet – that made me realize that there are “apologies” and then there are “effective apologies.”

Here’s the detail: Laurie Puhn, a relationship mediator, appeared on a cable news network to critique the recent apology of Steve Jobs for problems with the newest Apple iPhone’s signal reception. In her comments, Ms. Puhn said that there are four elements to an effective apology:

1. Don’t minimize your failing or error. Make a big deal out of it – as it is to the unhappy member. Say something like, “Mrs. Smith, “I realize how much our slow service delayed you . . .”
2. Apologize for the inconvenience caused. “. . . I’m so sorry we have inconvenienced you and your guest.”
3. Offer something to make amends. “As a further apology, I won’t be charging you for your orders.”
4. Say that you hope to have the opportunity to re-earn their trust. “I hope you’ll come back after your tennis match so I can serve you properly.”

A few days later an Internet headline *The Perfect Apology – The ONE Word That Destroys It!* caught my eye. I followed the link to Kate Nasser’s The People-Skills Coach. Here’s what she had to say:

“As The People-Skills Coach, I start this post with the assumption that you are willing to take ownership of the impact your actions and words have on others. You are ready to deliver the perfect apology!

Well, the perfect apology is found in simple sincerity and the ONE word that destroys it is ... **IF**

- I am sorry **IF** I hurt you. **IF?** Do you own it or not? Do you care to rebuild my trust or not?
- I am sorry **IF** that came across as ... **IF?** You are aware that it came across badly so why waver?
- We are sorry **IF** we have not met your business needs. **IF?** We wouldn’t be discussing it otherwise.

Your intentions don’t matter much if a team member or a customer is offended by what you have said or done. Rebuild the trust with a sincere apology as soon as you are aware of his/her reaction.

Replace **IF** with **THAT** or **FOR** and see the difference.

- I am sorry **FOR** the impact this had on you.
- I am sorry **THAT** came across as ...
- We are sorry **THAT** we have not met your business needs. We will ...

Why does this little change make a big difference to others? Because it is clear that you are putting their needs ahead of your pride. Simple sincerity makes for the perfect apology.”

It’s clear from these two news items that apologies may not be the simple matter we’d imagined.

**Take Away:** Practice these apology skills with your service team so they come naturally when needed. Without practice there’s a good chance they’ll forget in the stress of the moment.



**#39**

## ***Get the Best from Your Service Team***

There has been much discussion in the business and popular press about the work ethic, attitudes, and commitment of younger employees and the challenges faced by employers in getting the best efforts from these workers. While there are certainly some markedly different societal and cultural trends in today's workforce, leadership skills are still the primary means of positively influencing employees to better performance.

W. Edwards Deming, American statistician, professor, author, lecturer, and consultant who made significant contributions to Japan's reputation for innovation and quality, famously said, "*The worker is not the problem. The problem is at the top! Management is the problem!*"

So, when you look for the reasons why you seem to be forever dealing with people problems and service issues, look to your management team's leadership and the way they interact with staff. Here are some of the basic things that can make all the difference in getting the best from your employees:

- The way you hire and onboard them.
- The organizational values you define for them.
- The culture of service you immerse them in – service not only to members, but to each other.
- The consistency of leadership provided to them throughout all departments of the operation.
- The example their leaders set for them in all they do – that all leaders are equally dedicated to the club's mission and focus on service.
- The way you establish and communicate your expectations to them.
- The quality of training you provide them.
- The fact that their leaders are continually engaged with them; that management is accessible, listens to their issues, concerns, and suggestions.
- The way that their leaders do not tolerate problem employees or bad attitudes that degrade the efforts of others.
- The ongoing recognition and positive reinforcement given them for superior performance.
- The fact that their leaders see them as integral to the success of the club and all it does.

Not one of the above requirements is anything more than common sense and represents the way all people would like to be treated in their jobs. But to ignore these basic needs condemns you, your management team, and your workplace to constant issues and problems, not the least of which is ongoing high levels of turnover and poor service execution.

**Take Away:** Given all the downsides inherent in poor leadership, why wouldn't you make the effort to provide a consistent application and example of leadership in your operation?



#40

## *Expectations for the Catering Director*

Catering is the most lucrative part of a club's food and beverage service since it adds revenue volume, economies of scale, and certainty to a very uncertain and volatile business. Having a disciplined and detail-oriented catering director to oversee the operation is the single most important contributor to success in catering. Not only must the club hire such a professional, but the general manager must clearly spell out his expectations for the catering director, such as:

**Conduct a market analysis** of the membership and the areas around the club to determine potential demand for catering and meeting services. This analysis should consider any restrictions the club has on accepting outside business, as well as identify and analyze any competition the club has for these services. This analysis should be reviewed and updated annually.

**Prepare an Annual Catering Sales Marketing Plan** and budget. This plan should identify target markets and how to best reach them, specific programs or campaigns to market club catering and meeting services, monthly sales goals, and measures and reports to track efforts.

**Prepare appropriate collateral materials** to support the catering marketing effort. These should include a proper presentation folder and brochure with lots of professional photographs of your club and venues; sample menus and price lists, room diagrams, planning checklist, planning worksheet, sample room set-ups, sample contract, and all club policies relating to catering. These materials tend to be expensive, but they are important selling tools in your catering business.

**Access membership demographics** for celebratory dates such as anniversaries and birthdays to be used to "sell" private functions and parties to club members. It is also important to "mine" the data of members' business ownership as these companies will be prime target markets for business meetings and events.

**Benchmark usage** of all venues to determine utilization rates with the aim of establishing policies and pricing strategies to maximize use and revenues of key dates and times.

**Benchmark activities** by type such as banquets (plated and seated), receptions (buffets, serving stations, passed trays), and coffee breaks. Track number of events, number of attendees, revenues, average revenue per event by type of event. This information can be used to budget, establish future period goals, and help establish policies and pricing to maximize revenues by type of event.

**Prepare a Weekly Catering Sales Report** for the General Manager to include catering event and revenues for the week, key benchmarks, prospecting efforts, call reports, and 60-day rolling forecast of upcoming events.

**Conduct after-event calls and surveys** of catering clients to determine level of satisfaction with event and service. The focus of such surveys is to capture future business while improving any areas of dissatisfaction.

**Take Away:** Like any other product or service, the catering function must stand head and shoulders above its competition and strive to improve quality, service, and standing among members and in the community.



#41

## *Organization of Catering Operation*

The Catering Director must organize the planning and execution of catering operations to include the one-time development of the following:

**Room diagrams for all venues:** Diagrams should be prepared for each venue with various set-ups to show prospective clients and as a guide to help club staff set up rooms for specific events. Diagrams must include dimensions, capacities with various set-ups, and occupancy limits; location of electrical outlets, lighting and sound controls, telephone jacks, HVAC controls; availability of Wi-Fi; availability of window shades and lighting controls to darken rooms; and a list of available audio/visual and computer equipment (usually available on contract with an outside firm).

**Menus and pricing for different meals and types of events,** including sit-down banquets; receptions with buffets, serving or carving stations, or passed trays; continental breakfasts; and meeting breaks. Experience has shown that a limited number of “packages” aid in the selling process and reduce the time investment in custom menu planning. This is not to say that the club won’t do custom planning, but anything that limits the up-front investment of planning time makes the operation more efficient and many clients prefer fewer decisions to more.

**Menus and pricing for different alcoholic beverage arrangements** such as open bars, cash bars, beer and wine service, cordial service, champagne service should be available before negotiations with clients.

**All catering policies** to include hosting policy, deposits, minimums, guarantee counts, cancellations and postponements, service charges, client decorations, entertainment, corkage and plating fees, client supplied food, donations, rentals, methods and timing of payments, fire safety, etc., must be determined, formalized, and printed, ready to provide to prospective clients.

A [Catering Contract, PCPM Form 226](#), must be carefully prepared that includes all the policies and stipulates who, if anyone, can authorize modification of the contract at the event. This is useful protection for the club when, in the flush of a great celebration, the client’s daughter tells the staff that she wants to keep the open bar going for another hour.

**Written policies and procedures must be on file for all the various meal, alcoholic beverage, and meeting set-ups.** This is used to train the banquet staff to a common standard for set-ups, preparation, execution, breakdown, and cleanup for events. This is a major one-time effort, but it will save the club hours in efficiency of operations, while providing consistent quality service to all clients.

[Training material](#) for catering staff covering all aspects of catering preparation, set-up, and service.

**Agreements with rental and special services firms** for tents, limousines, valet parking, audio-visual, telecommunications, computers, party favors, and decorations must be prearranged and periodically updated.

**Take Away:** A well-organized catering operation will improve one’s reputation while enhancing the bottom line.



**#42**

## ***Ideas to Improve your Catering Operation – 1***

### **Room and Space Diagrams Improve Communications and Save Time**

Every operating Department Head in the club should create room or space diagrams of their areas of the operations – whether it is the F&B manager, catering director, head golf professional, golf course superintendent, or facility manager. There are and will be many events, activities, and functions at the club where department heads will need to give specific instructions to their employees on how to properly set up a particular area – private dining room, banquet space, event lawn, golf cart staging area, or even locations on the golf course for beverage stations.

By having diagrams of all pertinent spaces, it will be much easier to draw out exactly where things are supposed to go. These diagrams can be drawn in Power Point or can be copied or scanned from blueprints. In start-up operations, the general manager should request that the architect provide 8½ x 11-inch diagrams of all club venues.

Having diagrams available to all managers will make everyone's job easier and save much time when it is most needed.

### **The Banquet Break Down Station**

A great deal of china and glassware breakage takes place after banquets when excessive amounts of cleared plateware and glasses are returned to the dish wash station all at once. For many clubs, the dishwash area is designed for the expected dining room traffic and is undersized for large and multiple banquet breakdowns.

As servers return more and more trays to the kitchen, the debris is piled higher and higher on the landing table while the dishwasher fights a losing battle to keep up with the load. Trays are balanced precariously on any available counter space and even the tops of garbage cans. The inevitable result of this crush is dumped trays and broken china and glassware.

Put just as much planning into the post banquet breakdown as goes into the front end and scheduling of banquets. At minimum assign an extra employee to "expedite" the dish wash landing area. In some cases, it's setting up a breakdown station in an out-of-the-way alcove or spare meeting room to serve as the organizing point for the banquet debris.

By setting up several folding banquet tables with buspans for flatware, racks for different sized glasses, and a dish scraping and stacking point, the post-banquet debris can be organized and held until the dishwash station clears. Multiple trash cans will also be needed for garbage, recyclables, and dumping of liquids. It's a good idea to put down a tarp or other protection for the carpet in the area you use.

The result of such planning and organization will greatly reduce breakage of expensive china and glassware and diminish any post-banquet chaos that is so hard on both kitchen and banquet employees.

**Take Away:** Organize your catering operation to be efficient and professional.



**#43**

## ***Ideas to Improve your Catering Operation – 2***

### **Protect Your Catering Operation from Low Guarantees and Last-Minute Scrambles**

Clubs have long required a guarantee for banquets to ensure that they get the appropriate revenue for the food ordered and prepared. But many clubs do not protect themselves from the cost-conscious host who gives an intentionally low guarantee to ensure he doesn't have to pay for unconsumed meals.

The problem is that when the function ends up with significantly more attendees than the club prepared for, the staff must scramble to set extra places and prepare additional food. This last-minute rush also impacts the club's smooth service delivery by distracting the staff when they should be attending to the guests.

The best way to get those hosts to give the most accurate guarantee is to establish a "premium" policy on parties exceeding the guarantee by more than 5%. It works like this: amend your catering contract to specify a policy of routinely preparing for five percent more than the guarantee. However, for every guest over 5%, charge a 20% premium.

While the premium charge is helpful to the event's bottom line, the extra charge is about getting the function host to give the club the most accurate guarantee possible – too few and he pays for unconsumed meals; too many and he pays a premium. The more accurate the guarantee, the smoother the event preparation and set up – and this helps the club execute more professionally.

### **Define Your Standards When Using Temp Employees**

A good number of clubs use temp services for food and beverage employees, particularly for their catering operation. It's a good way to provide enough staffing for periodic large events without maintaining a large core staff at the club. While the quality of temp service employees varies widely from agency to agency, it is usually only the best that survive for long. When your club uses a temp agency, there are four things you must do.

1. You need to write standards for dress, grooming, behavior, and expectations for the temp employees, and these should be part of your contract with the agency.
2. You need to prepare a list of specific work rules for the temps – where they should park, what door to enter, if they may use employee locker rooms, and a summary of all the general work rules you expect of your own employees. Again, these should be part of your contract.
3. When the temp employees report at the designated time, they should be given a worksheet that explains the event and timing, team and individual assignments, and instructions of who to contact and how to reach key event supervisors. Temps should also get a brief orientation to the facilities and an introduction to key staff. Give a [Catering Pre-Event Checklist, PCPM Form 472](#), to each employee, both club and temp.
4. After the event, the club supervisor in charge of the event should do a brief review of each temp employee – their attitude, work ethic, and performance. This is then provided to the temp service for action. In the worst-case scenario, it identifies temp workers you do not want to see again. Use the [Temporary Staff Evaluation, PCPM Form 471](#), for this purpose.

The use of temp employees does not relieve the club of its obligation to provide quality service. Take charge and set your standards. They're your members and guests; it's your function and your reputation on the line.

**Take Away:** Organize your catering operation to be efficient and professional.





**#44**

## ***There's Gold in Catering, but You Have to Mine It***

Catering can be the most lucrative food and beverage activity for a private club. This is so because of the economies of scale in serving a known number of guests a specific menu at a set time. Club operators with the appropriate facilities fully recognize the value of catered functions to boost revenues and net profit. Savvy club members recognize that a robust catering operation subsidizes the club's operation, relieving ever-escalating cost pressures, rising dues, and assessments.

Despite the many benefits of catered functions, how many managers put the necessary effort into this greatest of opportunities? With a little bit of effort, you can mine the vein of catering gold for your club. Here are some commonsense ways to exploit catering to your club's benefit.

- If your facilities and the opportunity are enough to justify the cost, hire a dedicated catering director to sell and service catered events.
- Establish a catering contract and policies to cover all aspects of the catering operation to include space utilization, minimums, guarantees, room charges, special service fees, room set ups, equipment rental fees, etc.
- In conjunction with your chef, design attractive catering menus, set pricing, and develop a catering sales packet.
- Develop a catering marketing plan to focus action and accountability on attracting business.
- View your catering space the same way a hotel views a room night, or an airline views a seat on a flight – as the most perishable product you have. If not used on a given day or evening, the revenue opportunity is lost forever!
- Benchmark your catering operation in detail. At minimum, track your space utilization rates and average revenue per function for each catering venue in your club. Break down your benchmarks into times with similar demand or usage such as weekday (Tues, Wed, Thurs) versus weekend (Fri, Sat, Sun). Track the utilization of your most lucrative venues such as your main ballroom for high end functions such as weddings and holiday parties. Compare year to year benchmarks to track progress and spot weaknesses. Use previous year benchmarks to set sales targets for future periods.
- Aggressively court your membership to use club facilities to hold or sponsor functions for their businesses or trade associations and promote the club as a venue for special occasions with families and friends.
- Ensure your staff recognizes the importance of catering to the success of the club so that the many "touch points" in planning and execution are seamless, efficient with "over the top" service.
- Ensure follow up to all events to guarantee complete satisfaction and continual process improvement.

Bank robber Willie Sutton said he targeted banks because "that's where the money was." Club managers need to target their catering operation for maximum use and efficiency for the same reason. Don't neglect catering gold for a lack of effort to fully "mine" the potential.



**#45**

## ***Showtime***

“Show Time” – The time at which a catered event is to start, or when guests start arriving for the event. More importantly, from the club’s perspective – the time when all set up must be completed and staff standing tall ready to “rock and roll.”

A great deal of planning and organization goes into the preparation every catered event at the club. The clubhouse manager or catering manager has already met with the event host, selected or designed menus, reserved space for the event, ensured that all necessary equipment, supplies, and beverages are on hand to support the event, and scheduled the staff necessary to carry it off.

The chef and his staff have planned the production of all food ensuring enough stock is on hand to meet the needs of the event. The food has been carefully prepared with great attention given to event timing to ensure that food is ready for service at its peak of flavor and freshness.

Guests are assembled, some coming many miles to attend the event. The host is understandably nervous that all go according to plan. Much planning and expense are on the line. Everything is ready.

How do you make sure you meet everyone’s expectations? Basically, there are four things you must do to meet the expectations of members and guest.

1. You must be organized in both your planning and execution of the event.
2. You and your staff must be well-trained to deliver high quality service in all aspects of the event.
3. You must work as a team. Kitchen and service staff must understand their respective responsibilities, execute them efficiently, be prepared for the unexpected, and help each other out whenever necessary.
4. You must have positive attitudes and a strong commitment to service. Your team should smile easily and often, and look for ways to be helpful to members, guests, and fellow employees.

The tables are set, the room decorated, and lights dimmed, the food ready to go, the music just right, the guests are beginning to arrive, looking forward to the occasion. The staff is prepared – standing by, ready to give remarkable service. The doors open. Here they come. It’s Showtime!

**Discussion Points:** Share your catering experiences, both good and bad, with your work team so that everyone can learn valuable lessons.

**Take Away:** The two keys to successful catered events are thorough and timely preparation and proper execution with outstanding service.



#46

## Continual Process Improvement

We do not live in a static world and our ability to continually evolve our business, products, and services to exceed the expectations of our members and guests is critical to our success.

Quoting again from Jim Collins' *Good to Great*:

*"Much of the answer to the question of 'good to great' lies in the discipline to do whatever it takes to become the best within carefully selected arenas and **then seek continual improvement** in these. It's really just that simple."*

Given the many details associated with managing a quality club, it is imperative that management commit to and promote a process of continual improvement in all areas of the operation. This requires a positive emphasis on problem discovery, a discipline of constant review, and an understanding that in quality service operations the devil is in the details. As more and more areas of the club's operations become systematized and routine, management at all levels, with the commitment and assistance of their empowered employees, must continually "peel the onion" to deeper and deeper layers of detail. Further, no detail must be viewed as too trivial to warrant management's attention and the establishment of standards and procedures to ensure it is attended to by the staff.

**Definition.** Continual Process Improvement is the discipline and methodology of constant review of all aspects of operations to include work processes, standards, policies, procedures, organizational systems, programming, training, and administration to ensure they attain a new level of performance that is superior to any previous level.

**Purpose.** The purpose of Continual Process Improvement is to constantly seek better ways of doing things – that is to improve the efficiency, effectiveness, and financial performance of the club while providing a quality of service and level of satisfaction that encourages greater use and enjoyment by members.

**Discussion Points:** Discuss the above material. What might it take to implement a system of Continual Process Improvement at your club? Discuss any potential obstacles and how they might be overcome.

**Take Away:** Continual Process Improvement is a necessary discipline for any operation aspiring to excellence.



#47

## *Steps to Continual Process Improvement*

The discipline of Continual Process Improvement requires that all managers and supervisors are focused on and committed to improving the performance of their club, department, or section at all times. It means that no manager or supervisor should be satisfied with the status quo but should constantly be looking for ways to improve.

In order to ensure the development of such a discipline in the club, the general manager must constantly remind subordinate managers of the need to improve and make improving existing operations a key component of subordinates' annual work plans. Further, the General Manager should continually enquire, "What are you doing today to improve your department or section?" When this level of interest is demonstrated by the general manager, subordinate managers and supervisors will understand the importance of continual process Improvement.

Continual Process Improvement does not happen by accident. There are a number of mutually reinforcing and integrated steps necessary for continual process improvement:

- **Well-defined existing processes, standards, policies, and procedures**
- **Continual emphasis on improvement**
- **Habitual methodologies** created to examine existing processes
- **Benchmarks to measure performance.**
- The leader's **will to make it happen.**
- The **follow through** to make changes.

**Discussion Points:** Discuss specific steps you might take to continually review your operation for improvements. Would a club improvement committee meeting regularly help formulate ideas for implementation? How about requiring each department head to submit 10 ideas for improving his or her operation? What role should the general manager play? At what step in the process above is your operation? How do you move forward? Identify three obstacles and problem solve.

**Take Away:** Continual process improvement is a necessary discipline for any operation aspiring to excellence.



#48

## *Establishing Standards*

Ultimately, the members of a club determine the desired standards for quality and service. In the case of member-owned clubs, it is the governing board that has this responsibility. The problem for board members, though, is that these individuals infrequently have the in-depth knowledge or experience of club operations to translate their desires into reality.

So, it is the general manager who, in consultation with the board, determines the desired quality and sets the standards. This is challenging in three ways. First, board members may have difficulty articulating their quality and service desires since the perception of quality is the culmination of a great number of operating details. Second, each individual member has his or her own expectations for quality, thereby making for an imprecise common standard. Third, boards change over time and the changing agenda of new boards may require changes in priorities and allocation of resources, which may ultimately impact standards.

The common wisdom in our industry is that the higher the standards of quality and service desired, the greater the cost of operations – most noticeably in payroll cost from higher staffing levels, extended hours of operation, more personal services, and more intensive training. While these are major factors, operating inefficiencies as a result of weak leadership, poor organization, excessive staff turnover, and inadequate training are also significant drivers of higher costs.

A further challenge arises from the need for management to consistently communicate operating standards to employees. Regardless of age, background, education, experience, training, personality, and habit, all employees must have a common understanding of what they must do in all service situations. This can come about only through clear standards, policies, and procedures consistently communicated to employees during onboarding and training. It is also essential that the training, particularly for values and service standards, be consistent across all operating departments. Consistent service levels are impossible when different department heads teach, model, and reinforce divergent values and standards to their respective staffs.

Lastly, while service-based leadership focuses largely on providing training, resources, and support for the staff, the concern for staff motivation and morale should not for a moment be mistaken to imply that standards are not demanding and devotion to those standards are paramount. Leaders must be fanatical in their focus on the established standards and attention to detail in all areas of the operation.

**Discussion Points:** Discuss the importance of standards. Why must they be consistent across all departments? How can they be consistently communicated to all employees? Why is it important that standards be in written form?

**Take Away:** Standards define the quality of club operations.



#49

Teachable Moments

## *Standards, Policies & Procedures*

The terms “standards,” “policies,” and “procedures” are used to describe the what, why, and how to’s of a club’s organization and work processes.

**Standards.** In the club industry the establishment of a standard is usually made by management based upon an understanding or expectation of what will satisfy or impress members. Standard can be a description of the desired outcome of a service or action or the manner in which it is performed, such as the approved way of presenting and opening a bottle of wine, or the correct way to fill out a form used for documenting personnel actions or the way to conduct month-end inventories. Standards set the level of professionalism required of management and operations.

Standards are established by the board or general manager as the acceptable model of performance by which members judge proficiency and professionalism. They apply not only to the daily performance of individual duties, but also to the way employees conduct themselves.

**Policies.** Policies and standards are so closely interwoven that it is often hard to tell them apart. Policies most often apply to those areas of the operation where there can be little or no leeway in how something is done, for instance in the area of human resources where so much is dictated by law and there is a need for correct action to avoid litigation. Policies apply to the area of accounting where exactness and consistency are necessary to ensure the accuracy, timeliness, and transparency of financial reporting and fiduciary responsibilities.

Policies can also apply to operations and are established to ensure the consistent and fair treatment of members; for instance, there might be a policy for giving refunds or making dining reservations. The need for policy here is to ensure that every member receives equal treatment and the same opportunity to use and enjoy the club and its amenities or services. Nothing will upset a member faster than believing he or she is not getting a fair shake from the club. While human resources and accounting policies must be stringently followed, operating policies tend to be more flexible to meet special or unusual circumstances and changing member needs.

**Procedures.** Procedures are the how to’s of performance. Sometimes they flow from standards and sometimes from policies, but in the end, they are instructions of how to do or complete a process, act, or functions. Whereas policies are often the reason why something is done, procedures are the detail of how it is done.

**Discussion Points:** Discuss the differences among standards, policies, and procedures? Why is it important to define standards? What are the consequences of not defining standards, policies, and procedures?

**Take Away:** Standards, policies, and procedures detail the way a club functions and provides service.



**#50**

## ***Sample Standards, Policies & Procedures***

Note the policies and procedures for taking a dining reservation below. Taken together they represent the standard of how to take a reservation and provide a description of the desired outcome of the process.

### **Policies:**

1. Reservations will be taken for all dining venues – casual dining, fine dining, and Sunday brunch.
2. Reservations will be taken no earlier than 60 days in advance of a requested date.
3. A la carte reservations will not normally be taken for parties of more than 12. When an exception is made for a party of more than 12, the Dining Room Manager and Chef will coordinate a set or limited menu for the party.
4. The Dining Room Manager is responsible for maintaining the reservation book for all venues.
5. Reservations may be made by calling 555-5555, from 8 a.m. to 9 p.m. Tuesday through Friday, and 11 a.m. to 9 p.m. Saturday and Sunday.
  - a) During normal office hours (8 a.m. to 5 p.m., Tuesday through Friday), reservation calls will be taken by the Receptionist.
  - b) During all other hours, reservations will be forwarded to the dining room where they will be taken by the dining room Host or Hostess.
  - c) Outside of normal reservation times, a voice mail message will inform members of the hours that reservations may be made. Member voice mail messages will be returned promptly during normal business hours.

### **Procedures:**

1. Answer the phone in three rings.
2. Use a pleasant tone of voice to communicate your desire to help.
3. Answer the phone with “Main dining room, this is (your name). How may I help you?” Note: It is important to get the name of the caller first, so that you may address him/her by name during the rest of the call.
4. If you must place the caller on hold, say “Mr./Mrs. (member name), may I place you on hold for a moment?”
  - a) If the answer is yes, say “Thank You” and place the caller on hold.
  - b) If the answer is no, continue with the call.
5. Obtain all necessary information: day/date of reservation, time, number in party, and member phone number.
6. Read back the information you have taken to ensure all information is accurate.
7. Thank the member for calling.

Standards, policies, and procedures form the bulk of the material that an employee must master to satisfactorily complete all their job functions, duties, and responsibilities and are the basic building blocks of a [Club Operations Plan](#). Without taking the time to define, explain, and clarify standards, policies, and procedures, how can management realistically know what it is that employees need to learn? Without well-defined standards, policies, and procedures, any attempt to train will be disorganized and inconsistent.



#51

## *Basic F&B Policies*

It is important to establish food and beverage policies to ensure that members receive consistent and equal treatment when dining at the club. These policies are an essential element of server and bartender training. The following is a basic, but by no means all-inclusive, list of policies that every club should consider:

**Reservations.** How far in advance do you take reservations for dining? How about for specialty nights and Sunday brunch? Do you have limitations on how far in advance you'll take reservations for special occasions such as Mothers' Day, Thanksgiving, etc.?

**Dining Room Seating.** Do you spell out that members with dining reservations have guaranteed seating for up until 30 minutes after their reservation time? Do you explain that while you will try to meet specific table requests, you cannot guarantee them? Do you specify that seating is first-come, first-served with reservations having priority and that seating is based on server and kitchen staffing, not apparent table availability?

**Separate Checks.** Do you have or need a policy for separate checks? While it's important to be as accommodating as possible, large parties asking for separate checks can create a real bottleneck during busy dining periods.

**Set or Limited Menu for Large Parties.** Attempting to serve large parties off regular club menus can create service problems. Do you have a policy to suggest set or limited menus to better serve your members? If so, what are the procedures for making the suggestion?

**Special Requests.** Clubs typically attempt to meet members' special requests, but are there any limitations as to when this can be done, for example, on busy Friday or Saturday nights?

**Methods of Payment.** Most clubs only allow member charges, but are there exceptions? If so, in what situations?

**Adjustments for Food & Beverage or Service Complaints.** Who can make an adjustment and what are the guidelines or limitations to such adjustments?

**Refusing Service.** Though usually rare in private clubs, who makes the decision to refuse service in case of an intoxicated member or guest? How about at a catered event?

**Children in the Bar.** Are children allowed to eat in the bar at any time? If so, under what circumstances?

**Exceptions to Policies.** Do you have a policy on when exceptions to all the above policies can be made and who can waive them? This is necessary because staff must always have flexibility to deal with unforeseen situations and meet member needs.

This representative list may or may not apply at any club, but the key point is that every food service operation needs to have well-thought out and defined policies for probable or recurring service issue for the benefit of both members and staff.

**Take Away:** Every club food service operation should carefully consider what policies it should implement to ensure the highest levels of service and food quality to its members and guests.





**#52**

## ***Responsible Alcohol Service – 1***

The serving of alcohol is a privilege that is granted by state and local authorities. Along with this privilege comes the duty to operate your business in a responsible manner. Abuse or neglect of this privilege could jeopardize the club's liquor license and public safety, as well as cause considerable liability for both the club and individual employees.

### **The Law:**

- It is against the law to serve alcohol to anyone under age 21.
- It is against the law to serve alcohol to the point of intoxication.
- It is against the law to serve alcohol to an intoxicated person.

### **Checking ID's:**

- To be safe, servers should request ID from anyone who looks under the age of 30 years old and orders alcohol.
- Accept only legal forms of ID.

### **Acceptable Forms of ID include:**

- Valid Driver's License with photo.
- Valid Passport.
- US Active Duty Military ID.
- Official personal ID card accompanied by another form of identification.

### **Things to Remember when Checking ID's:**

- Carefully look for any irregularities in the card's type, size, style, or color.
- Make sure to compare the physical description with that of the member or guest.
- Look for alterations in the ID such as cuts or erasures in the laminate by holding up the card to the light.
- Never accept an unfamiliar ID card.

### **Basic Practices:**

- Pace the member's drinking pattern.
- Monitor the number of drinks and behavior of each member.
- Avoid "stacking" drinks.
- Keep communication open with all coworkers about any potential situations.
- Never let a situation get out of hand before a manager is made aware of the problem.

**Take Away:** All food service employees must be familiar with the requirements of Responsible Alcohol Service.



**#53**

## ***Responsible Alcohol Service – 2***

**Cautionary Signs.** Be aware of the condition of members. An intoxicated person will usually display recognizable behavioral characteristics:

- Slurred or thick-tongued speech.
- Inability to focus eyes.
- Glassy, bloodshot eyes.
- Strong smell of alcohol on breath.
- A change in behavior such as impulsive aggression or loss of inhibition, becoming more/less talkative, or alternating silent/loud voice.
- Change in color of facial skin – turning pale or flushed.
- Loss of physical motor skills – staggering or stumbling when walking or spilling drinks or food.
- Use of abusive language, questioning the server's performance, using profanity, or bragging.
- Exaggerated emotional outbursts – crying or loud laughing.
- A blank or dazed facial expression.
- An obvious impairment of judgment.
- The individual is annoying other members.

**Taking Action:**

- If you feel that a member is intoxicated, you should inform the manager.
- Let the manager be the one to inform the member of the decision to not serve more alcoholic beverages.
- Do not attempt to reason with the member.
- Do not get "talked into" serving the intoxicated member "just one more drink."
- If you feel the member is belligerent or physically threatening, approach the member with another employee.
- If the person becomes belligerent or makes a scene, try to enlist the assistance sober, cooler-headed members of the party to defuse the situation. If the person continues to make a scene and refuses to quiet down, try to guide or lead him or her to a more private area of the club. Do not ask the person to leave the premises unless there is a sober individual to transport him or her home.
- Never attempt to physically detain a member on the premises.
- In extreme situations, police may only be called with the express permission of the general manager, clubhouse manager, or if the manager on the scene determines there is an immediate threat to the safety and security of members and employees.

**Take Away:** All food service employees must be familiar with the requirements of Responsible Alcohol Service.



#54

## *Cost of Goods Sold*

Cost of Goods Sold is the true cost of selling F&B items taking into account the cost of purchasing resale items or ingredients and the price charged members for those same items after all discounts and adjustments. Given that F&B items are purchased for resale at different times and different prices and those same items are then resold to members at different times and different prices, computing Cost of Goods Sold (CoGS) could be a complex matter.

Fortunately, Generally Accepted Accounting Principles allow for a far easier computation.

$$\text{CoGS} = \text{Beginning Period Inventory} + \text{Resale Purchases during the Period} \\ - \text{Ending Period Inventory} \pm \text{Adjustments \& Transfers}$$

If you stop and consider the logic behind this formula, it makes perfect sense that this computation will yield the actual cost of selling F&B items during any given period.

Finally, the actual cost (or value) of resale items sold is divided by the F&B sales for the period to determine what percentage of total sales was spent for those items purchased by members. Put another way, it represents the amount of cost for each dollar in F&B sales.

$$\text{Costs of Goods Sold \%} = \frac{\text{Cost of Goods Sold}}{\text{F\&B Sales for the Period}}$$

A quick method for following your Cost of Goods Sold is to assume that the beginning and ending inventories will be roughly equivalent. Thus, by simply tracking the amount of your resale purchases during a given accounting period and dividing that amount by your sales, you can have a quick check on the Cost of Goods Sold.

**Discussion Points:** The Cost of Goods Sold allows a manager of a food service operation to compute the cost of items sold and understand the contribution of sales to the department's bottom line. Review in detail the above formulas and how they provide accurate and easy-to-understand indicators of selling costs.

**Take Away:** Managers of food and beverage operations must know how the cost of goods sold is calculated and understand the variables that affect the computation.



#55

## *Cost of Goods Sold Analysis*

One of the major issues with tracking one's departmental Cost of Goods Sold is extreme variation from month to month. Often, a department will have an extraordinarily high Cost of Goods Sold % one month, followed by a low one the following month. The problem with such fluctuation is that it lulls the manager into a habit of waiting to see if out-of-line Cost of Goods Sold will come back in line the next period. The danger in this is that if the problem is related to pilferage or theft, the manager allows it to continue for some time before investigating or taking action.

Managers must take great pains to conduct accurate monthly inventories and thoroughly investigate any out-of-line Cost of Goods Sold as they happen. There are several tools to help managers do this. Cost of Goods Sold Analysis, [Accounting Policy A-1511](#), provides a detailed explanation of those factors that can contribute to out-of-line Cost of Goods Sold. Also, [Cost of Goods Analysis, PCPM Form 244](#), can be used as a checklist to try to find contributing factors. The simple act of benchmarking the dollar amounts of your inventories and your Cost of Goods Sold Percentage month to month on the Cost of Goods Analysis form will help you spot inventory problems.

Lastly, two [Accounting Policies](#), Monthly Resale Inventories – Food, Beverage, & Retail, A-4501, and Investigation of Inventory Discrepancies, A-4509, both give helpful tips to better organize your storerooms and conduct more accurate inventories.

**Discussion Points:** Discuss the importance of F&B managers understanding variations in their Cost of Goods Sold. What are some of the reasons a Cost of Goods Sold may be out-of-line? Review each of the policies and forms mentioned above so that managers understand the importance of tracking details of Cost of Goods Sold.

**Take Away:** Timely investigation and analysis of out-of-line Cost of Goods Sold will allow the manager to pinpoint the problem and identify possible theft or pilferage.



#56

## Labor Cost

Payroll and related expenses are typically the single largest expense in club operations. Of all the things a manager must do well, monitoring and controlling payroll costs is one of the most important. There are a number of factors that will determine a club's overall payroll cost. These include compensation cost, number of hours worked, amount of overtime, and benefit costs and payroll taxes.

**Compensation costs.** Salaries and wages constitute the greater portion of compensation costs. In any department there are typically one or two supervisors who are exempt from overtime or salaried while the rest of the staff are non-exempt, paid an hourly wage, and are subject to payment of overtime. While supervisors have control over rates of pay for hourly employees, there are some constraints such as minimum wage laws, local "living wage" laws, union contracts, prevailing wages, pay parity issues, and the department payroll budget.

**Hours Worked.** The number of hours worked by employees is directly dependent upon the work schedule a supervisor establishes for employees. While it may be natural to assume that the more staff you have scheduled for any shift, the better your service levels will be, experience has shown that being overstaffed can frequently lead to poorer service as boredom, lack of urgency, and lack of productivity permeate the workplace.

**Overtime.** Since overtime hours are 50% more expensive for the club than regular hours, supervisors must be vigilant in avoiding unnecessary overtime. The first and most important step in controlling overtime is to carefully monitor employee work hours on a daily and weekly basis. If you do this, you'll see in advance if any employee is on track to work more than forty hours in a week. In most cases, you'll be able to take corrective action to avoid the overtime.

**Benefit Costs and Payroll Taxes.** Eligibility for benefits is usually based upon employment categories. Full time employees usually receive full benefits, while part time and seasonal staff have more limited or no benefits. Establishing staffing guides (see *Teachable Moments #90*) for a department to not exceed a specific number of full-time positions will help control the extent of benefit costs.

While a supervisor has no control over the levels of payroll taxes, most of these costs are directly dependent on the amount of wages paid. Since total wages paid is dependent upon number of hours worked, supervisors will control taxes by keeping hours worked to the minimum consistent with quality expectations and standards.

**Discussion Points:** Discuss each of the elements of payroll cost and which of these managers have the most control over. What steps can a manager take to control his or her payroll costs?

**Take Away:** Payroll costs are the single largest expense in club operations and warrant management's close attention to control.



#57

## *Labor Cost Control Strategies – 1*

While there is no single answer to controlling labor costs, there are many different things that can be done to ease the task.

**Organization.** Making sure your department is organized is the most effective labor control strategy there is. When everybody knows what's going on and is well-trained to complete tasks quickly and efficiently with a minimum of hesitation, labor hours are saved every shift, every day.

**Forecast Scheduling.** Using various tools at your disposal, such as benchmarked levels of business, the schedule of club-sponsored events, and the catering forecast, supervisors should attempt to forecast their staffing needs at least one month out. The one-month horizon is important in that it allows time to contact, hire, and train the appropriate number of seasonal helpers.

**Seasonal Hires.** When business conditions dictate (i.e., when the forecast shows business levels increasing), supervisors should begin bringing in seasonal hires. They can be people whom you have already interviewed, hired, and trained such as former employees or employees previously hired specifically for seasonal work. Conversely, supervisors should also plan for the sudden deceleration as the busy season comes to an end. Intelligently managing both the expansion and reduction of staff results in significant payroll cost savings while maintaining expected service levels.

**Budget Time Off.** Clubs have fluctuations in business on a daily, weekly, and seasonal basis. These fluctuations can result in legitimate overtime. Having also said that we want to avoid overtime costs as much as possible, the same fluctuations in business that cause these costs can also help us balance them out. Using the concept of Budget Time Off, a supervisor can release employees early on a slow day. When the work is done, or business is slow, non-exempt employees are released early. This policy should be clearly explained at hiring.

**Cross Training.** In a small organization like a club, it does not make sense to have a large staff of specialists. Rather, managers should have a smaller staff of people who are cross-trained to cover multiple functions. Often, while one area of the club is slow, another is busy. Most cross training takes place within departments and allows a supervisor to deal with sickness and emergencies.

**Departmental Shares.** Another form of cross training is inter-departmental and results in departmental shares – employees who can work in two or more areas as the level of business requires. Departmental sharing requires close coordination and communication between department heads to ensure that the needs of both staffs are met, and combined overtime is avoided. Supervisors who are interested in exploring the possibility of departmental shares should pick departments whose scheduled workload is dissimilar to their own

**Discussion Points:** Discuss the strategies listed above most relevant to your operation. Have them point out obstacles to implementing and how those obstacles can be overcome.

**Take Away:** Because of the impact of payroll on the club's bottom line, systematic labor cost control strategies must be a part of each manager's efforts.



#58

## *Labor Cost Control Strategies – 2*

Controlling labor costs involves many different strategies that may work well at your club.

**Project Work.** When fluctuations in business create short-term lulls, supervisors who are concerned about keeping staff productively employed should assign project work. In a club operation, particularly one that has been busy, there are many things that are deferred in the rush of business. These deferred items, such as intensive cleaning, polishing the details, and straightening back of house areas, make excellent project work. Because you never know when business will suddenly slow down, supervisors should have a ready list of necessary project work. With this list at hand, it's a simple thing to assign the work whenever staff have excess time on their hands.

**Early Release.** Releasing staff early is self-explanatory and easy to do. It requires the will to do it, vigilance on the part of the supervisor, and a feel for the business. While there is always some risk involved that you may suddenly get busy and need the full staff, supervisors should take the risk, jump in themselves to help, and depend on the dedication and professionalism of remaining staff to rise to an unexpected occasion. Experienced supervisors know well-trained hospitality employees have an overdrive that they can kick into for short periods of time to get the job done.

**Layoffs.** As long-term busy periods wind down, supervisors are often faced with the difficult task of reducing staff. While no one enjoys laying off employees, it is much easier to do if the employees involved were hired seasonally and already know that their hours will be reduced, or they will be laid off when the busy season is over. Communicating openly at hiring and through the season makes this strategy less "personal" for supervisors and employees.

**Voluntary Leaves of Absence.** Before a supervisor considers staff layoffs, he should inquire if anyone on his staff wants to voluntarily leave. There may be a seasonal employee who for some reason wants to leave or a full or part time employee may want to take an unpaid leave of absence. While no one may be interested, it's always worth asking before another staff member is involuntarily laid off. This gesture also prepares employees for the reality of coming layoffs.

**Scheduling Vacations.** Full time employees often earn vacation time. Some employees, by virtue of their longevity, have substantial amounts of vacation to use each year. Supervisors should consult with these employees to schedule their vacations during slow times when the supervisor will not be forced to replace them on the schedule, thereby paying twice for the work to be accomplished.

**Discussion Points:** Regardless of what combination of strategies ultimately proves most helpful, continuing success depends upon a disciplined vigilance, attention to business levels, and scheduling daily with at least a monthly forecast horizon.

**Take Away:** Because of the impact of payroll on the club's bottom line, systematic labor cost control strategies must be a major part of each manager's efforts.



#59

## Steps to Payroll Cost Control – 1

Payroll is the largest expense in food and beverage operations. Coincidentally food and beverage is typically the department with the largest amount of overtime and employee turnover – both of which add significant cost to the operation.

So, how do conscientious F&B managers go about getting some control over that which eats up so much of their departmental income? Here are nine steps that will create a significant improvement in any F&B department's payroll expense and bottom line:

1. **Organization.** A well-organized operation is more efficient in both front-of-house and back-of-house. If the chef and dining room manager ensure work spaces are well-designed and well-organized with clear procedures for accomplishing all tasks; if storage areas are organized and properly stocked; if the kitchen staff has production sheets assigning daily tasks; if everyone knows what to do, how to do it, and when to do it – it doesn't take as much time to complete daily set up, food preparation, service, breakdown, and closing duties. A few hours saved daily amounts to a lot less payroll cost on a monthly and annual basis.

A key element in organization is written [standards, policies, and procedures](#) (SPPs) spelling out in detail how and why things are done. Not only does this put everybody on the same page when it comes to expectations and standards, but it also becomes the basis for consistent training material. Private Club Performance Management has created many food and beverage SPPs.

2. **Training.** The logical extension of good organization is the thorough training of all employees, both front- and back-of-house. Better trained employees are more efficient, require less direction, and complete tasks in less time.

While training can be costly in and of itself because each hour of training is an hour of payroll, PCPM strongly advocates the use of on the go training – a concept that uses spare moments during each shift to train and reinforce expectations to staff. Four PCPM programs – [Casual Dining Server Basic Training Manual](#), [Casual Dining Server Intermediate Training Manual](#), [Alcoholic Beverages on the Go](#), and [Service on the Go](#), provide the framework for much of what managers and service employees need to know.

3. **Staffing Guides.** Departmental staffing guides establish core staffing levels – that staffing necessary for year-round functioning (see *Teachable Moments #90*). Beyond the core staff are the seasonal employees brought onboard to handle business levels during busy periods. Since seasonal staff are not usually provided with benefits, there is a cost savings when core and seasonal staff needs are identified and utilized.
4. **Benchmarking.** Unless you measure your payroll cost every pay period, you cannot understand it. If you can't understand it, you can't improve it. Detailed benchmarking of payroll hours by employee position and type of hour (regular, overtime, vacation, holiday, sick/emergency) allows managers to see exactly where hours and payroll cost originate (see *Teachable Moments #62 and 63*).

By benchmarking cover counts (meals served) by meal period and day of week, week by week throughout the year, managers will have a much better understanding of weekly and seasonal business variations. This knowledge will help with the next step (see *Teachable Moment #60*).

**Take Away:** Continual application of basic disciplines will ensure the control of an operation's payroll costs.





#60

## Steps to Payroll Cost Control – 2

Here are additional steps that will create a significant improvement in any F&B department's payroll expense and bottom line:

- 5. Formal Forecasting.** By using historical benchmarks, as well as a knowledge of current trends and upcoming events, managers can schedule staff more accurately to handle expected levels of business. This coupled with a willingness of managers to jump in when unexpected rushes take place will minimize payroll costs while maintaining service levels.
- 6. Daily Review of Dining Flow and Service.** By keeping daily notes by meal period of forecasted and actual cover counts, staffing levels, smoothness of dining flow, and an estimation of service quality provided, managers are better able to adjust staffing levels during future meal periods for optimum service while identifying any issues that need to be addressed or improved.
- 7. Daily Review of Hours Worked.** By taking a few moments at the end of the shift or day to record and compare hours worked with scheduled hours, as well as to tally any overages and overtime hours, managers keep track of actual to budgeted cost daily and can intervene as necessary in real time to control costs.
- 8. Pinpoint and Understand Overtime Hours.** By closely monitoring overtime hours, managers can better understand why it was necessary and adjust scheduling to minimize it in the future. Without an understanding of what's causing overtime, there is no hope of addressing it.
- 9. Workweek and Payday.** By paying employees on a bi-weekly basis and establishing a workweek that runs from Friday to Thursday, a food service organization will have its usually busiest days (Friday and Saturday) early in the workweek, allowing managers to modify the work schedule of any employee who might be in danger of going over 40 hours because of extra hours worked on the weekend. If the workweek ends on Saturday or Sunday and business levels required employees to work longer shifts on those days, there is no opportunity to make adjustment before the end of the pay period, thereby increasing the chances of overtime payments.

Bi-weekly pay periods also allow the optimum benchmarking requirement of comparability because each pay period always contains two weekends (Fridays and Saturdays) instead of semi-monthly or monthly pay periods where there are odd numbers of these depending on the calendar. For more information, read the article [Why our Workweek and Pay Cycle?](#).

There is some effort involved in implementing steps 1 through 3 of this list. But these are usually one-time efforts requiring only ongoing tweaking to maintain.

Steps 4 through 8 require organization to set up the tracking and evaluation mechanisms. Using a spreadsheet program such as Microsoft Excel is the best way to go about doing this, as all the math is handled by the program. Once set up, all the manager has to do is establish and maintain the discipline of entering each day's numbers and assessments – which shouldn't take more than 10 to 15 minutes. Periodic analysis and evaluation of what the numbers are showing will allow managers to formulate ideas and take steps to reduce staffing and payroll.

If not already doing it, step nine is a one-time change that will yield returns for the life of the operation.

**Take Away:** The ultimate requirement to implement all 9 steps is the “will to make it happen” and the discipline to do it. The payoff is in improved financial performance.



**#61**

## ***Budgeting***

Budgeting is the process of establishing a financial operating and capital plan for the coming year. Budgets are formulated using history, benchmarks, knowledge of upcoming events and current trends, and one's best professional judgment.

Most managers are familiar with the concept of budgeting, but here are some observations and disciplines that will organize and streamline the process:

- First, individuals responsible for financial performance of a club department should prepare the budgets for which they are accountable. In some clubs budgeting is a top-down process. This practice will diminish incentive. It robs the very people responsible for the results the "merits" of success or the "lessons" of failure.
- The budgeting process can be streamlined by having the controller prepare standard spreadsheet formats for budgeting. Each department head is then given the prepared spreadsheets for his or her department. When completed, department heads return the spreadsheets in both paper and electronic form. The controller reviews the paper copy and then copies and pastes the electronic copy into the club's Master Budget file. When all departments have been entered, the draft budget is finished and ready for the general manager's review.
- The budgeting process starts with the board and/or the general manager deciding on the strategic direction and specific goals for accomplishment during the coming year. These goals have a direct impact on departmental budgets and, therefore, must be considered during the budgeting process.
- With goals in hand, department heads start to build their budgets. The first step is to project revenues for the coming year since the level of business will have a direct impact on expenses, both payroll and other operating expenses. Revenue projections are far easier if managers have benchmarked their revenues and the interplay of volume and average member expenditure that underlies all revenues. When previous year benchmarks for revenues are available, all the manager has must do is to create data entry cells in the budget spreadsheet for projected volume and average member expenditure for each revenue category (see *Teachable Moments #67*). These then automatically calculate revenues by category. The added advantage is that reviewing parties can easily see the assumptions underlying revenue projections.
- Payroll projections can be calculated similarly when payroll benchmarks are kept. Here the data entry cells are for payroll hours and average hourly wage. Again, the reviewing parties can easily see the assumptions underlying wages and related payroll expenses.
- Cost of goods sold for F&B departments can easily be calculated by multiplying monthly F&B sales projections by the target cost of goods sold percentage.
- Lastly, other operating expenses are easily projected when managers have maintained the [Tools to Beat Budget](#) discipline in prior years (see *Teachable Moments #s 71 and 72*).

**Take Away:** Budgeting can be organized and simplified by various disciplines such as using standard departmental budgeting spreadsheets, data entry cells for key projections, and Tools to Beat Budget.



**#62**

## ***Benchmarking – 1***

Like the pilot of a plane or the captain of a ship, a club manager needs to know that all systems are operating within desired parameters. How will she know without detailed measures of performance? The club's monthly operating statements provide good basic information, but these summary numbers can mask troubling trends within the operation. For instance, higher food revenues can be a result of less patronage, but each member spending more because of higher menu prices. The manager is happy with the higher revenues but is blissfully ignorant of declining member usage.

Benchmarking is the act of measuring and analyzing operating performance, helping managers better understand the patterns underlying a club's operation. Everything in life follows patterns. When patterns are tracked and analyzed, they can be used to predict future operations.

Benchmarking is best accomplished by club department heads who have bottom line responsibility. They have an absolute need to know and understand the underlying factors that affect their revenues and expenses. Each department head will need to decide what data to track.

Most performance measures will fall into the following broad categories:

- Revenues and expenses, both aggregate and by type
- Expenses, particularly payroll
- Inventories
- Retail sales mix to determine buying patterns of members
- Incidences of specific tasks or events

Most of the raw data necessary to benchmark comes from point-of-sale (POS) reports. Much of the lode of daily information gets looked at briefly by department heads or the accounting office and is then filed away, rarely to be seen again. The real value of this information comes from tracking it over time to determine trends by day of week, week to week, month to month, and year to year. This makes it necessary for managers to pull the daily information from POS reports and enter it into spreadsheet software.

Even without sophisticated POS systems, benchmarking can still be done. Cash registers offer a fair amount of data, but state-of-the-art POS systems provide the most information and the greatest flexibility of reports. Despite these reports, it is still necessary to transfer daily POS data into electronic spreadsheets that allow archiving of data for future analysis.

Benchmarking is not complicated, but it does require organization and persistence. It is best accomplished by setting up routine systems to collect, compile, analyze, and report the information collected.

**Take Away:** The discipline of benchmarking helps track the underlying statistical trends of club operations, enabling managers to better understand their operation.



**#63**

## ***Benchmarking – 2***

Benchmarking allows managers and supervisors to:

- Establish realistic performance goals for future periods.
- Compare a period's performance with past periods, other similar operations, or the industry.
- Identify under-performance or best practices.
- Forecast business levels.
- Measure member response to new products/services and initiatives.
- Establish the condition of an operation when a new manager assumes control.
- Create measurable accountabilities for managers' performances.
- Establish parameters for bonuses and other performance-based incentives.
- Improve the accuracy of budgets.

**A few cautions:**

- There are as many aspects of an operation to measure as time, resources, and ingenuity will allow. Focus on those most critical to a department's operation.
- Data used in benchmarking must be defined and collected in a consistent manner.
- When comparing data, always compare like to like.
- Ensure benchmarks measure practices and processes with only one underlying variable.
- Do not draw conclusions from too small a sample. The larger the sample, the more accurate the conclusion.
- When two pieces of data are compared to generate a benchmark, both a small sample size and extreme volatility in one or the other, can skew the resultant benchmark.

More detailed information can be found in [Club Benchmarking Resources](#) on the PCMP Marketplace store.

**Take Away:** The discipline of benchmarking helps track the underlying statistical trends of club operations, enabling managers to better understand their business.



#64

## Twelve Reasons I Benchmark – 1

Benchmarking is one of the most significant things managers can do to improve the performance of their operations. By understanding the underlying drivers of the operation, he or she can take action to enhance results. As Lord Kelvin said, *“If you cannot measure it, you cannot improve it.”*

- 1. To establish the baseline or “benchmark” of existing operational performance.** Businesses generate many variable measurements of performance. Existing data determines the baseline performance against which all future operations will be compared. Often past data is available, it’s just that no one has made the effort to collect, organize, and summarize it. With a little effort baseline measures can be reconstructed from past periods. If this is too much trouble, begin by collecting today’s data. In a short time, valid benchmarks will emerge, though usually a full year’s must be collected to account for seasonal variations in business. In the absence of significant changes, the longer the data is tracked, the more valid it becomes as the standard for the operation and a predictor of future activity. But a corollary to this is that the older the data, the less relevant it is to current operations.
- 2. The benchmark performance can be considered the operating standard and all future performance can be compared to it.** Once the operating standard has been established, all future performance is compared to it. “Out of line” benchmarks become warning indicators that something demands scrutiny. Often there are valid reasons for out-of-line numbers, perhaps the benchmark is a true anomaly that will correct itself in future periods, or it may be the start of a trend that bears management consideration and decision.
- 3. After tracking operating statistics for a sufficient period of time to ensure a statistically sound sample, benchmarks can be used to establish performance goals for future operating periods.** When creating budgets, managers can use benchmarks to establish realistic and accurate goals for coming operating periods. Once goals are established, they can be used to compare to actual performance day by day, week by week, and month by month to measure progress toward overall objectives. Should actual performance fall short of expectations, management can make interventions to get back on track.
- 4. It is useful to compare an operation’s performance measures for a period to other past periods, to other similar operations, or to the industry.** For example, comparing September of this year to September of last year or this year’s Mother’s Day brunch to all previous years. In large, multi-unit, restaurant companies, one restaurant is compared to all others of a similar kind by use of benchmarks. There are also national trade associations and certain accounting firms that publish annual performance comparisons of various types of clubs on a nationwide or regional basis.
- 5. Identifying under-performance or best practices.** Hopefully, comparisons with previous periods or other similar operations will be for the better, but if not, it will alert management to problems and possible solutions. By monitoring the operation’s continuing performance measures and closely analyzing the circumstances that lead to extraordinary performance, a department head can identify best practices – those actions, conditions and practices that optimize efficiency and profitability. In the case of downward trends, it can alert management to necessary interventions.

**Take Away:** There are many important and useful reasons to benchmark. Managers should not miss this opportunity to better understand their business and make better decisions.



#65

## Twelve Reasons I Benchmark – 2

6. **Benchmarks from past periods can make budgeting for future periods easier and far more accurate.** Absent major change, the best predictor of the future is the record of the past.
7. **Revenue benchmarks from previous periods aid in forecasting business levels in future periods.** Accurate forecasting of future business allows managers to properly staff their operations and schedule appropriately for expected levels of business. This, in turn, helps control payroll cost while ensuring service to members.
8. **Tracking revenues and comparing them to historical benchmarks allows management to measure member response to products/services and new initiatives.** The most accurate indicator of member response to new initiatives such as new menus, new hours of operation, improved service training, hiring a new chef, etc., is the response seen in member patronage and buying habits. If members traditionally spend an average of \$232 per month on food, but since the new chef came on board that average has climbed to over \$320 per month, management could feel comfortable that their decision to hire a new highly-paid chef was the right one. Without the benchmark of previous operations, how would they know, except by anecdote and gut-feel?
9. **While most managers have a general sense of the many variables influencing their operation, having the hard numbers and statistics supports the validity of decisions, proposed changes in the operation, and requests for additional resources.** Careful tracking and analysis of performance measures is the basis for sound decision-making and is extremely useful in proposing changes in the operation. Proposals for capital purchases have a better chance for success when supported by details and analysis. Further, there is no better way to manage the boss than with timely reports about the challenges and progress of the operation.
10. **Benchmarks can be used to establish performance parameters for bonus and other incentive programs.** When goals are established based upon historical benchmarks, the ongoing performance measures can be used to determine eligibility and extent of bonus payments and other forms of incentive programs.
11. **The few minutes spent each day in recording and reviewing key operating statistics make a manager intimately familiar with the rhythms and flow of his operation.** Over time this develops into what can readily be called an intuitive understanding of the essential aspects of the business. As a result, a department head can foresee and prepare for expected variations in the business, such as traditionally slow and busy periods; doing this will ensure keeping costs in check while maintaining high levels of service.
12. **A significant reason for benchmarking is that it establishes the condition of the operation upon a new manager's arrival and gives a graphic demonstration of the many operational improvements under her leadership.** This is most helpful in gaining the trust and confidence of bosses, peers, and employees alike. Coincidentally, it also makes it easier to justify increased compensation for job performance.

**Take Away:** There are many important and useful reasons to benchmark. Managers should not miss this opportunity to better understand their business and make better business decisions.



#66

## Three Essential F&B Benchmarks

I have written again and again of the importance of benchmarking key operating statistics which will tell you far more about your operation than just how much of a profit or loss you had in any given period. While I strongly recommend that every club department benchmark in detail, here are three key things that the food and beverage department should begin benchmarking immediately:

1. **Payroll hours by category** (regular, overtime, holiday, vacation, and sick time) **and payroll cost** – both by pay period. Just the fact that this data is being recorded and looked at regularly will bring down overtime costs, while pinpointing further cost saving opportunities as the ongoing norms of the operations become clearer.
2. **Sales, number of transactions** (meal counts) **and average check by revenue category** (appetizers, entrees, desserts, liquor, beer, wine by the bottle, wine by the glass). Taken together these measures will pinpoint whether shortfalls in revenues are caused by declines in volume (# of transactions) or by the average member spend. Since the steps to overcome these deficiencies are different, knowing whether the problem is volume decline or lower average check is critical to turning the situation around. Also, knowing the historical level of sales for each category allows measurement of progress in any attempt to increase revenues by suggestive selling.
3. **Sales, number of transactions** (meal counts) **and average check by meal period** (breakfast, lunch, dinner, Sunday Brunch) **by day of week** (week by week and month by month). Knowing the member dining habits by meal period and day of week throughout the year will help you forecast business levels and schedule staff more effectively.

Benchmarking these three key measures of cost, revenues, and member spending habits will make you far more knowledgeable about your operation. They will also make preparing budgets for future periods far easier and more accurate.

There are many other key numbers to benchmark in club operations, but these three should be the starting point for implementing a larger discipline of benchmarking in the food service operation. Remember the words of William Thomson, Lord Kelvin *“If you cannot measure it, you cannot improve it.”*

**Take Away:** Benchmarking is an essential management discipline for success in food and beverage operations.



**#67**

***Benchmarking and Budgeting***

When managers benchmark their department’s performance, they have a wealth of detail to assist in developing future period budgets.

By setting up a bank of data entry cells in a spreadsheet (shaded below), the manager defines the assumptions underlying revenue projections at the same time he creates those projections. Nothing could be simpler – the spreadsheet is set up to automatically multiply the number of rounds by the benchmark for each revenue category to project future sales. Such clearly stated assumptions make it easy for those who review the budget to understand how the projections were made. It also makes it easy for the manager who has missed his or her projections in a given period to go back and see why they were missed – either not enough customers (in this case rounds of golf) or lower expenditures per round.

| <b>Assumptions</b>   | <b>Oct</b> | <b>Nov</b> | <b>Dec</b> | <b>Annual</b> |
|----------------------|------------|------------|------------|---------------|
| Lunch Covers         | 3,300      | 2,800      | 2,250      | 28,550        |
| Dinner Covers        | 2,950      | 2,775      | 2,540      | 26,500        |
| Sunday Brunch Covers | 485        | 420        | 405        | 3,850         |
| Lunch Average Check  | 8.45       | 8.75       | 8.50       | 8.45          |
| Dinner Average Check | 12.75      | 12.35      | 12.00      | 12.90         |
| Brunch Average Check | 14.75      | 14.60      | 14.85      | 14.55         |

| <b>Income</b> |          |          |          |           |
|---------------|----------|----------|----------|-----------|
| Lunch         | \$27,885 | \$24,500 | \$19,125 | \$241,248 |
| Dinner        | \$37,613 | \$34,271 | \$30,480 | \$341,850 |
| Sunday Brunch | \$7,154  | \$6,132  | \$6,014  | \$56,018  |
| Total         | \$72,651 | \$64,903 | \$55,619 | \$639,115 |

**Projected Revenues using Cover Counts and Average Check Benchmarks**

Once revenue projections are made, it is easy enough to project operating expenses if they have been benchmarked as a percentage of revenues. Therefore, if office supplies have historically run at say .12% of revenues, then it’s a good bet, that absent significant change, they’ll continue to run at that level.

Given the magnitude of payroll costs in most operations, payroll can also be projected using volume (number of hours worked) and average hourly wage benchmarks. These are easy enough to track since gross pay is a function of how many aggregate employee hours are worked and what the gross payroll amount is for any given pay period and by extension for the entire fiscal year.

My own experience with benchmarking for over 30 years has proven not only the practicality of benchmarking to better understand one’s operation, but also as the most effective tool for easy and accurate budgeting.

**Take Away:** The discipline of benchmarking will make budgeting far easier and more accurate.





#68

**Formal Forecasting**

Imagine having a crystal ball that permits the chef and the dining room manager to know how many members and guests will be coming to the club for lunch today. The chef would have a better idea of how much food to have on hand and how many cooks were needed in the kitchen. The dining room manager could schedule servers to ensure great service without killing her payroll budget.

While there is no such crystal ball, there are tools to help forecast upcoming business levels. The first is benchmarking. The next logical step is to take the wealth of information derived from benchmarking – cover counts, menu items sold, and payroll hours and use it to formally forecast business using a simple spreadsheet form such as the one below to forecast meals served.

| Weekly Sales Forecast |                        | Main Dining Room |                |                 |      |                |         |                  | ABC Club   |  |
|-----------------------|------------------------|------------------|----------------|-----------------|------|----------------|---------|------------------|--|--|
| Week: <u>24</u>       | Dates: <u>Jun 8-14</u> |                  |                |                 |      |                |         |                  | Meal Pd: <u>Lunch</u>  |  |
|                       | Historic Average       | Last Year        | Proj. this Yr. | Actual this Yr. | Var. | Servers Sched. | Pay Hrs | Svc Quality 1-10 | Comments / Service Issues / Problems   |  |
| <b>Covers</b>         |                        |                  |                |                 |      |                |         |                  |  |  |
| Fri                   | 64.3                   | 59               | 60             | 64              | 4    | 3              | 12.25   | 7                | Mostly smooth. Bit of a rush at 12:45 with a party of 12 w/o reservation. We sold them limited prie fix w/ dessert and bev incl. |  |
| Sat                   | 104.7                  | 110              | 108            | 102             | -6   | 4              | 14.74   | 9                | Very smooth, orderly flow. Sent one server home at 1:15  |  |
| Sun                   | 215.1                  | 198              | 210            | 219             | 9    | 6              | 24.75   | 10               | Excellent Sunday brunch. Adequate servers, good flow of food to buffet.  |  |
| Mon                   | <b>CLOSED</b>          |                  |                |                 |      |                |         |                  |  |  |
| Tue                   | 42.4                   | 45               | 45             | 40              | -5   | 2              | 4.50    | 4                | Kelly called in sick at last moment. Hostess filled in as best as she could. Mrs. Jones unhappy with slow service.               |  |
| Wed                   | 59.8                   | 63               | 65             | 67              | 2    | 3              | 13.25   | 7                | Kitchen short staffed in pantry. Salads slow in coming out. Private party in alcove kept DR Manager busy.                        |  |
| Thu                   | 63.5                   | 60               | 65             | 48              | -17  | 3              | 11.00   | 9                | Slow lunch due to rainy weather. Sent 1 server home at 12:40.  |  |

By using actual historical averages of meals served, the number served on the same day of the week last year, and knowledge of upcoming events, reservations, and the weather forecast, the dining room manager can formally forecast how many meals she expects to serve each day for lunch. She also notes how many servers are scheduled, records the total server payroll hours for the meal period, and gives a subjective rating of how smooth the meal service went on a scale of 1-10 (with 10 being the smoothest). Lastly, by entering specific comments, service issues, and problems encountered, she can take any necessary corrective action and will be well-prepared to forecast next year's business during the same week.

The process of formally forecasting business levels takes a little time, organization, and discipline, but the rewards are a better understanding of the flow of your business, what specific factors may contribute to poor service, and how many staff should be scheduled. Each of these benefits directly impacts the crux of what you do.

**Take Away:** Help yourself be a better manager and improve your department's bottom line by establishing a discipline of formally forecasting future business levels.

**Teachable Moments**



**#69**

## ***The Discipline of Reports***

Imagine a pilot of a commercial airliner in the cockpit of a plane. At any moment of the flight from pre-flight preparation, take off, cruising to destination, to approach and landing, he has a host of dials, gauges, and indicators that keep him informed of the status of all operating systems and external factors affecting the plane, thereby assisting him in taking the appropriate action to assure the safety of plane and passengers.

It may be argued that club operations are just as complex with thousands of details that must be attended to daily (though without the serious safety implications). Yet the person with overall responsibility for club operations – the general manager – has limited mechanisms to gauge the health and vitality of the club in anything approaching real time. In some clubs the only indicator of developing problems is the monthly financial statement that becomes available weeks later. Even then, the summary information in the club's operating statement provides only a limited assessment of performance at best.

Modern point of sale and club management software systems have come a long way in providing the underlying detail of the operations with “drill-down” capabilities and custom reporting, yet how many managers avail themselves of this trove of information or make a formal effort to analyze the detail in the longer-term context of goals and budgets?

This brings me to reports. A discipline of formal reporting can and does provide a means of monitoring specific information on a regular basis. As such, reports are an important mechanism for the general manager, as well as department heads, to monitor performance in a timely and efficient way. For the department head tasked with preparing the report, it is a disciplined means of focusing on the important details of departmental operations while creating a record of ongoing initiatives, progress toward goals, and departmental performance. Once established, the discipline of routine periodic reports is the best way for a subordinate manager to influence the boss's perceptions about his or her performance.

For the general manager, regular reporting of key information from department heads is the best way to monitor departmental performance with the least investment of time. For department heads, once the initial decisions about what to report and reporting formats are made, completing the reports will take but a few moments of time.

**Discussion Points:** Discuss the benefits of reporting for both the general manager and food and beverage managers.

**Take Away:** Formal, periodic reports are an excellent discipline for focusing on important operational details and creating a written record of progress and performance, while keeping the General Manager informed with the least amount of her valuable time.



#70

## Essential F&B Reports

**Informal daily P&Ls.** These “dailies” show key revenues by category, estimated cost of goods sold based on historical food and beverage cost percentages, actual labor cost, and estimated other operating expenses based on historical levels. The importance of the daily report is that it pinpoints the absolute importance of revenue generation and the impact of labor on the department’s bottom line daily.

**Weekly Revenue Report, PCPM Form 203**, prepared by the controller. This report shows key revenues, as well as the key underlying volume and average sale benchmarks, by day of week and summarized for the week and compares them to a year-to-date budget target. Food service managers should review this report carefully and file it away for future use. It’s an excellent tool to help budget revenues in future years. If your controller does not prepare such as report, with a little ingenuity food service managers can prepare this report themselves.

**Pay Period Summary Report, PCPM Form 229**, prepared by the controller that details payroll hours by category (regular, overtime, holiday, vacation, and sick time) and cost by department and for the club. As with the Weekly Revenue Report, the Pay Period Summary Report provides detailed payroll numbers for the food and beverage department that are extremely useful in future period budgeting. File these reports for easy access when needed. Again, if your Controller does not provide this, arrange to get the information from him or her and prepare it yourselves.

**Monthly Benchmarking Reports** by department. Key benchmarks provide important detail about departmental operations. Prepared by department heads, they not only provide the general manager with underlying detail, but they also assure the department heads are paying attention to these numbers. For food service managers tracking the underlying volume of sales by category and average member spend and payroll hours, total payroll, and average hourly wage by position are critical numbers to benchmark. Not only will they make you “smarter” about your business, but they will be invaluable when it comes to preparing next year’s budget.

**Monthly Departmental Summary** reports prepared by department heads covering basic monthly performance, problems and issues, projects and initiatives, and progress toward annual department goals and the department head’s work plan. This short summary report (usually no more than one page) is brought to the Monthly Review of Financial Statements meeting along with the [Tools to Beat Budget](#) binder and presented to the general manager.

**Weekly Catering Sales Report** prepared by the catering director and presenting catering event and revenues for the week, key benchmarks, prospecting efforts, call reports, and 60-day rolling forecast of upcoming events.

While this list may seem like a lot of work, once the discipline of preparing and submitting these reports is established, food service managers will discover that they are just part of operational routine. On the other hand, the benefit of everyone paying attention to key performance indicators is well worth the effort.

**Take Away:** Reports are an essential element of monitoring the performance of the club while keeping the general manager informed of key operating detail.



#71

## *Tools to Beat Budget – Real Time Accounting*

[Tools to Beat Budget – Real Time Accounting](#) is a discipline to:

- Assist managers with bottom line responsibility in meeting the goals of their annual operating budget.
- Help managers become more familiar with the details of their operation.
- Provide managers with more real time information about the health and well-being of their operation.
- Make it far easier to prepare accurate budgets in coming years.

The concept behind Tools to Beat Budget is no different than an individual monitoring personal income and expenses in real time each month. While simple in concept, Tools to Beat Budget does require managers to monitor all revenues carefully and view each expense account (payroll and other operating expenses) as if their balances were maintained in a separate checkbook. Therefore, managers must deduct all expenses as incurred and keep a declining balance on each account.

As with any other management tool, Tools to Beat Budget is only as valuable to a manager as the effort put into it. Managers should keep in mind that if their operation was their own business, each of the tools would be a necessary part of maintaining the business' profitability. While club managers don't own their operations, management's responsibility to ensure financial performance is just as much a necessity.

*Note: To avoid missing any invoices managers should check with the controller to make sure they receive copies of all invoices for their departments that might go directly to the accounting office. A printout of the department's General Ledger detail will allow a manager to see all charges posted to their expense accounts.*

**Take Away:** Tools to Beat Budget is a program that will help managers meet or beat their budgets by the discipline of real time recording and tracking of revenues and expenses. As such it is a key performance management tool.



#72

## Tools to Beat Budget – The Program

The Tools to Beat Budget program is made up of the following elements which are filed under the appropriate tabs in a large (3 inch) 3-ringed binder:

- **Annual Budget.** Each department has a budget comprised of Departmental Schedule, Departmental Revenue Assumptions (profit centers only), and Departmental Payroll Cost Assumptions. The budget is the financial plan for that department for the fiscal year.
- **Monthly Profit & Loss Schedules.** Actual profit and loss schedules for each month as prepared and distributed by the club's accounting office. The Monthly P&L's report actual financial performance for the period and year-to-date (YTD) and compare them to the budget.
- **Weekly Revenue Reports, PCPM Form 203.** Reports prepared by the controller and distributed weekly showing revenues by department (profit centers only). This report also compares YTD actual to YTD budgeted revenues. This report also computes key departmental revenue benchmarks which can be compared to budgeted benchmarks. The format for this report may vary from club to club, but the essential revenue information must be included in the binder.
- **Pay Period Summary Reports, PCPM Form 229.** Reports prepared and distributed for each pay period which show payroll costs by department. This report also compares YTD actual to YTD budgeted payroll cost. Finally, it computes the average hourly wage by department and compares it to the budgeted amount. The format for this report may vary from club to club, but the essential information of payroll costs for the department must be included in the binder.
- **Cost of Goods Analysis.** This worksheet is available for those departments with retail sales, i.e., golf, food, beverage, tennis, and other retail outlets. Department heads can compute and track their cost of goods percentage and compare it with the budgeted cost of goods. In addition, they use the [Cost of Goods Sold Analysis, PCPM Form 244](#), to record the Cost of Goods Sold numbers month to month to help analyze trends.
- **Other Expense Log.** These worksheets allow department heads to record their monthly Other Operating Expenses each month by expense account. By keeping these logs, department heads will know how much they have spent of their budgeted amount for each expense category.

*Note: Resale purchases such as food and beverage and retail items are not considered Other Operating Expenses and Expense Logs are not kept for these items. They will be accounted for in the Cost of Goods Sold calculation. It is still a good idea for department heads of resale departments to get the General Ledger detail of such purchases and file them in the Tools to Beat Budget binder.*

**Discussion Points:** Review the above elements of Tools to Beat Budget in detail to ensure a complete understanding of why these items will help food service managers monitor revenues and expenses in real time and help control departmental costs.

**Take Away:** Tools to Beat Budget is a program that will help managers meet or beat their budgets by the discipline of real time recording and tracking of revenues and expenses.



**#73**

## ***Monthly Review of Financial Statements***

In order to ensure that the club meets the financial objectives of its annual operating budget, it is imperative that all department heads monitor their monthly performance closely and be prepared to answer questions about their department's performance.

On a monthly basis after the final statement is prepared and distributed, the controller will set up a schedule of meetings for department heads to meet with the general manager and controller to review individual department's performance.

Department heads must be prepared to answer detailed questions about their department's performance and give reasons for any significant variance from budgeted amounts. Department heads will bring their individual copies of the Tools to Beat Budget binder and their departmental benchmarks to the meeting and be prepared to discuss any issues with their departmental performance.

Department heads can prepare for these meetings by carefully reviewing their departmental P&L schedules, obtaining a copy of their General Ledger detail of their expenses from the accounting office, and ensuring that their Tools to Beat Budget binder is up-to-date.

Department Heads must also be prepared to present plans to remedy significant or ongoing shortfalls in revenue or overages in expense categories.

Finally, these monthly meetings are an excellent opportunity for each department head to brief the general manager on their progress toward the objectives and timelines of their Departmental Plan and annual Work Plan.

**Take Away:** The Monthly Review of Financial Statements is a performance management discipline to hold department heads accountable for the operating results of their department and keep the general manager informed on progress on goals, objectives, and plans.



**#74**

## ***Purchasing***

Purchasing and handling merchandise and supplies are major responsibilities for managers. Retail operations such as pro shops, general stores, and food and beverage outlets purchase resale merchandise and products on a regular basis. The need to purchase at the best price and receive and handle incoming items properly requires the ongoing attention of department heads.

Even those without resale operations may purchase large quantities of consumable supplies such as cleaning products, ware wash chemicals, pool chemicals, laundry products, etc. These consumable supplies can represent a major cost for the club and their purchase price, handling, and use should be carefully monitored by managers.

A club should establish purchase authority and limits for all club purchases and managers should be made fully aware of these requirements. For an example of a policy on purchase authority and limits, see [Accounting Policy](#), A-4001, Purchase Authority and Limits.

Managers involved in purchasing must always seek the best price by shopping around with multiple purveyors. Again, a policy example can be found at [Accounting Policy](#), A-4005, Competitive Pricing.

Purchasing managers must also understand the pitfalls of receiving gifts from vendors and purchase rebate programs as spelled out in [Accounting Policies](#), A-4010, Gifts from Vendors and A-4015, Purchase Rebate Programs. Managers must abide by the highest standard of ethics as spelled out in these policies, as well as the [Managers Code of Ethics](#).

**Take Away:** Managers must be aware of and follow all the requirements of a club's purchasing policies.



**#75**

## ***Receiving***

When received, all purchased items must be inspected to ensure the correct item, count and/or weight, and that all items are undamaged or unspoiled. It is also important that any authorized employee receiving a purchased item carefully inspect the item to ensure it is the item ordered, is complete, intact, and has the correct count and/or weight.

Items received should be carefully compared to items listed on the packing slip, purchase requisition, or purchase order. The receiving employee indicates the order is correct and complete by writing 'Received,' signing, and dating the packing slip, purchase requisition, or purchase order.

After inspecting the order and ensuring that it is correct and intact, the employee should file the receiving paperwork (packing slip, purchase requisition, or purchase order) in a departmental receiving file until the vendor invoice is received.

Upon receipt of the vendor invoice, the authorized employee will:

1. Attach the approved purchase requisition, purchase order, and/or packing slip to the invoice,
2. Stamp and date the invoice with an invoice coding stamp supplied by the accounting office,
3. Initial and date the invoice coding stamp if the invoice agrees with the items received, and
4. Resolve any discrepancies as soon as possible with the vendor and note resolution on the invoice.

The invoice is then coded with the appropriate expense coding, approved by the department head, and forwarded to the accounting office for processing and payment. The accounting office will process invoices on a regular schedule and then submit them to the general manager for approval.

In approving invoices for payment, the general manager should cancel or invalidate the invoice by marking through it and signing it (or some other indelible marking to indicate it has been approved for payment and cannot be submitted again for another payment). Once approved, disbursements are made.

**Take Away:** Managers who receive merchandise and supplies for the club must be familiar with and consistently follow receiving policies.





#76

## *Expense Coding*

Coding standards are established to ensure that all purchasing managers correctly code their invoices and that all coded invoices turned in to the accounting office are coded correctly and accurately. Correct and accurate coding of invoices by all purchasing managers would greatly reduce the workload of the controller, thereby permitting him or her to focus on other pressing issues and assisting department heads and the general manager with other accounting issues and outreach programs.

One controller estimates that 50% of the time spent in processing payables could be saved by purchasing managers correctly and accurately coding their invoices.

Coding Standards for all invoices include:

1. Using a Coding Stamp. This stamp should be ordered by the controller and distributed to all managers who will be coding invoices.
2. Entering the month and department to which the expenses will be charged.
3. Entering the General Ledger account code from the club's chart of accounts. It's a helpful discipline to create and use an expense dictionary to aid in consistent coding of purchased items (see *Teachable Moments #77* for more information) to aid in consistent coding of purchased items.
4. Entering the corresponding total dollar amount charged to each account code.
5. A notation indicating what the charge(s) are for.
6. The coding manager's signature or initials.
7. The date the coding takes place.

**Take Away:** Purchasing managers must know and consistently follow standards when coding expenses.



#77

## Expense Coding Tips

**Chart of Accounts.** To properly code expenses managers will need a copy of the club's Chart of Accounts from the Controller.

**Consistent Coding.** In order to maintain consistency in the classification of expenses, managers must ensure that they code consistently. While most expenses are self-evident and easily classified, some unusual or one-time expenses require careful consideration. For example: poster board and magic markers purchased to make posters advertising upcoming events – should they be expensed to office supplies or marketing expense?

Where they are expensed is not nearly as important as consistently classifying them in future periods. When expenses are not consistently coded or miscoded, it misstates the performance of the department, is misleading when trying to identify problems, and will be misleading when using the misstated numbers as historical records to create the next year's budget. To ensure that expenses are classified consistently, managers should create an Expense Dictionary.

**Expense Dictionary.** An Expense Dictionary is nothing more than an alphabetized journal (purchased from an office supply store) where the purchasing manager notes all expenses as classified. In short order the Expense Dictionary will include all normal and ongoing expenses. As unusual and one-time expenses are classified by account name and number, the manager will record the classification in the Expense Dictionary. Should the same or similar expense be incurred in the future, the purchasing manager will refer to the Expense Dictionary and know exactly which account to code the new expense.

In lieu of using an alphabetized journal, managers can record the same information in an MS-Excel spreadsheet alphabetically. In either case, the Expense Dictionary is a handy reference to assist the purchasing manager in consistently coding expenses.

**Multiple Codes on One Invoice.** Another coding challenge occurs when a purchasing manager receives a vendor invoice with multiple purchased items needing to be coded to different expense accounts. Depending upon the number of items needing to be coded to different accounts, the purchasing manager may simply calculate the dollar amounts needed to be coded for each account and note them separately on the invoice.

For complicated invoices with multiple items needing to be expensed to many accounts, managers should consider using an MS-Excel spreadsheet to breakout expenses (including sales tax and shipping) to the different expense accounts. The benefit of using the spreadsheet is that it can automatically subtotal expenses by category and "prove" these amounts back to the total of the invoice. See an example using a [Multiple Expense Coding Sheet, PCPM Form 245](#).

**Take Away:** Those managers who purchase also have the responsibility to properly code all invoices so that the expenses may be properly classified on financial statements.



#78

## Invoice Payment Certification

Mark Clayton, Chief Financial Officer for East West Partners Club Management, provided this excellent reminder of what a manager is certifying when he approves an invoice for payment.

“When approving and submitting an invoice for payment, a department head or manager must understand that they are certifying to the controller and the general manager that the item (or service) is appropriate to pay because:

- **It was Ordered.** Beware of companies that send out fake invoices to see who will simply pay it because somebody figures someone else probably ordered it or that someone else got it.
- **It was Received.** Check the shipping address on the invoice. It should have come to your club. It should not have been drop shipped somewhere else. Make sure it wasn't a delivery for the club down the street with the similar sounding name – let them pay for their own stuff!
- **It was Inspected.** Don't let your employees quickly sign for stuff so that the delivery guy can be on his way. Make sure you received exactly what you are signing for.
- **It Is The Right Item.** Is it what you expected, and will it be used? Is it what you contracted for?
- **It Is The Right Price.** Is it the price they quoted you?
- **It Is The Right Quantity.** Is it the amount you ordered? Did they short you or did they send too much to see if you'll pay for it because you'll think that you'll probably use it eventually anyway?
- **It Is Complete.** If you are authorizing payment for a contracted service, make sure it is complete to your satisfaction before you pay a vendor in full.

If you can't say YES to all these statements then you need to ask some questions and do some research before you submit anything for payment (after all, you would be that careful if it was your money being spent). Take the extra time – it's YOUR responsibility.”

**Take Away:** When you submit an invoice for payment, you are certifying a number of things so make sure they are correct before you do.



**#79**

## ***Storerooms and Par Stocks***

All storerooms used for storage of resale and consumable inventories must be properly secured and organized. It is also important that managers establish par stock storage areas to provide ready access to reasonable levels of inventory for daily operating needs.

### **Storerooms**

1. Proper storage of inventories reduces damage and spoilage of stock.
2. Proper organization (appropriately labeled shelving and items stocked on shelves in the same order as listed on inventory sheets) will reduce the amount of time needed to conduct month-end inventories. Cases of product should not be opened until previously broken-down cases are fully consumed.
3. To reduce spoilage, stock should be rotated so that older stock is used first.
4. Inventories represent assets of the club and must be safeguarded.
  - a. Access must be limited to as few employees as possible.
  - b. Doors to storerooms must be closed and locked at all times.
  - c. Keys to storerooms must be assigned to specific individuals by means of a key register and a key control plan must be in place to ensure proper issuance and recovery of keys. Lost keys must be reported to the General Manager immediately. Keys to these areas must be closely controlled.

### **Par Stocks**

1. Consumable items of inventory must be available to line employees, but only in sufficient quantity to meet daily needs.
2. These stocks should be established at “par” or pre-arranged levels and replenished daily by supervisors by means of inventory and issue forms. Such par stocks might include restaurant paper supplies, alcoholic beverages, sodas, snack mix for the bar, and other items consumed during normal operations.
3. Par stocks should be kept in secured lockable closets, drawers, cabinets, and other easily accessible locations for use by line staff.
4. When par stocks are significant, they should also be counted during month-end inventories to properly compute the cost of goods sold.

**Take Away:** Organizing and properly securing storage areas is an important requirement for managers with resale and supply inventories.



**#80**

## ***Inventories***

All resale stocks must be inventoried on a monthly basis. Such routine inventories are used as a control mechanism to verify the amount of stock on hand, to determine the cost of goods sold, and to ensure that the operation does not run out of any item of stock unexpectedly.

Department heads for food, beverage, and any retail operations, such as golf shop, tennis shop, or general stores, will ensure that inventories are properly conducted. A limited number of well-organized storerooms will make monthly inventories easier and less time consuming to conduct. Those responsible for food and beverage resale inventories may also want to let stock levels dwindle in the period leading up to inventories to make the count less time-consuming.

Responsible department heads will conduct their monthly inventories on the last day of each month, or if that day falls on a day the club is closed or extremely busy, the department head with the concurrence of the controller may conduct the inventory on the previous or next day.

Regardless of the date selected, the exact date of the inventory must be entered on the top of any inventory count sheets. If the day of the inventory is materially different from the end of the period, then sales and inventory must be aligned as closely as possible to give the most accurate cost of goods sold.

Responsible department heads will organize their work and storage areas to ensure that they are set up to allow as quick and efficient an inventory as possible. Techniques to do this include:

- Noting counts on “unbroken” boxes, i.e., those boxes that have not yet been opened.
- Removing items from “broken” boxes to ensure that the box is not mistaken as being “unbroken.”
- Establishing specified locations for the storage of each stock item.
- Ensuring that the order that items appear on inventory count sheets is the same order that stock is stored on shelving (suggested for food & beverage, but not retail inventories). This is not always possible but can aid greatly in efficient inventories.
- Separate inventory locations should be inventoried separately and then combined on a spreadsheet or consolidated inventory report.
- Create and follow a map for counting inventory locations so that you or the person assigned to inventory does not inadvertently skip a section.
- Create written instructions for conducting departmental inventories to use as an aid in training those who conduct inventories.

**Take Away:** Without timely and accurate inventories the cost of goods sold calculation will not be accurate which contributes to wild monthly swings in cost of goods sold.



#81

Food Sales Analysis

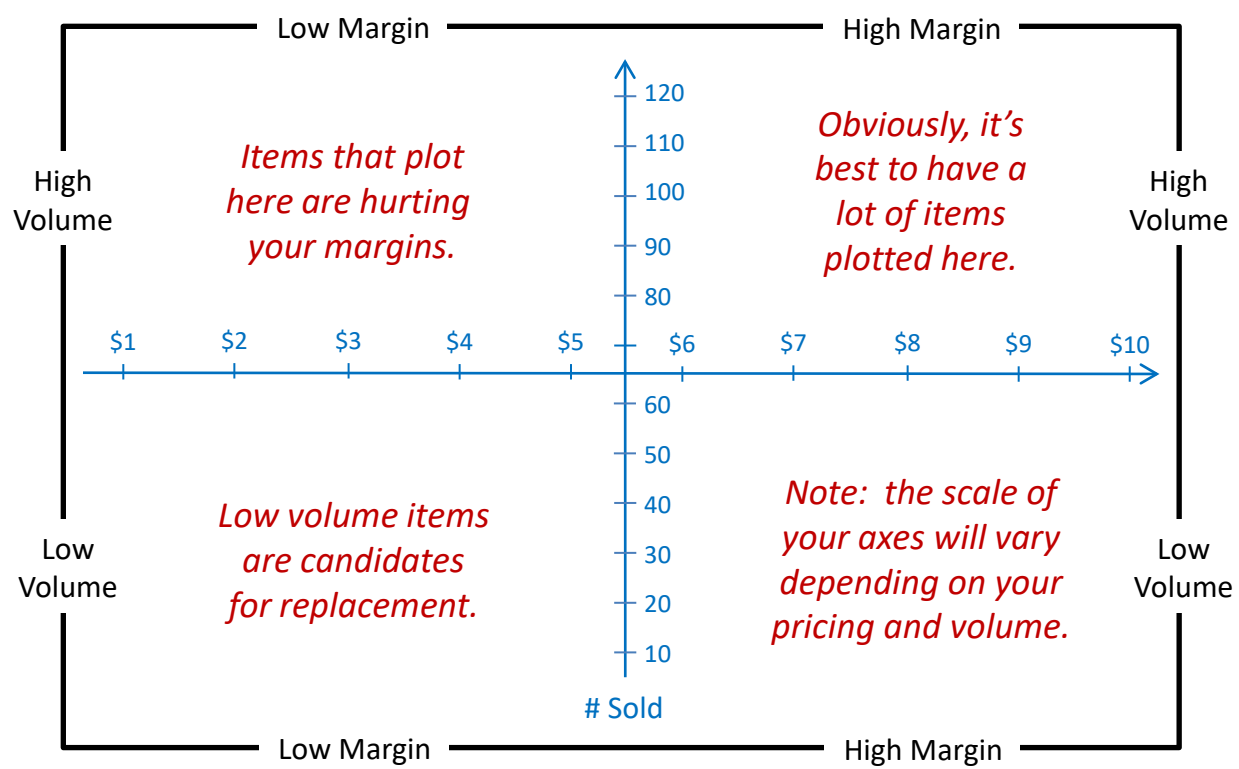
Teachable Moments

One of the most important things you can do to better understand the dining preferences of your members is to analyze your menu sales mix every month, for not only food sales (appetizers, soups, salads, entrées, and desserts), but also for alcoholic beverage sales by beer, wine, and liquor by brand or label. The information to do this is easily obtainable from your point-of-sale system which, when properly set up, will give you the number sold and total sales for each item.

At its most basic these numbers tell you what sold well and what didn't. It also gives an indication of your members' preferences for beef, chicken, seafood, salads, pasta, heart healthy, expensive vs. inexpensive, desire of appetizers, and how much of a sweet tooth they have. Additionally, when you track specific beverage sales, it will indicate whether your members prefer house or premium liquors, domestic or imported beers and wines, and which brands you should replace as not selling well.

But the most important thing these numbers will tell you is which items contributed the most to your profitability and which ones made for a higher food cost and lower margins. Based on ingredient costs and the prices set, menu item margins will vary. If you sell a lot of low margin items and few with high margins, your food cost will be high and your overall margin low. Conversely, high volumes of high margin items will yield lower food cost and more profitability.

One way to monitor menu item sales contribution to margins is to plot the number of sales per item against the difference between price charged and cost for each item. When plotted on a graph as the sample below shows, you get a graphic representation of which items contribute to profitability and which do not.



**Take Away:** Menu item sales mix analysis will help you ensure that you improve your menus and maintain your margins by constantly monitoring what is selling and what isn't.



## ***Culinary R&D***

Almost all clubs except those in the Sunbelt and tropics have a winter-related slow season. While seasonal employees have usually been laid off for this period, the kitchen's full time, year-round staff may be under-employed. Sure, this is the time to rest, recuperate, and take well-earned vacations, but I would like to suggest another activity to recharge the kitchen staff – Culinary R&D. Since many clubs have a fairly static, or at least predictable, dining fare, I would encourage the chef and sous chefs to use the down time to enhance their kitchen's skill level by taking on some creative tasks they may not have the time for during the hectic pace of the busy seasons.

Depending on the club's usual menus and kitchen skills, the amount of available time, as well as cost considerations, I would propose the chefs explore some of the following skills:

- Baking unusual artisanal breads and making made-from-scratch desserts such as tortes, pies, or cakes. Another thought would be to create fresh-made gourmet pizzas.
- Pickling and preserving. These skills and techniques offer limitless opportunities to create out-of-the-ordinary offerings for club members.
- Exploring the art of charcuterie – the opportunity to make some interesting creations is immense.
- Focusing on a specific cuisine such as Asian Fusion, Indian, Caribbean, Middle-Eastern, or vegetarian, or even regional American cuisines such as Cajun, Low Country, or Tex-Mex. The skills learned offer some new possibilities during the busy season.
- Making homemade ice creams, ices, and puddings. With today's emphasis on comfort foods, members will appreciate the creativity and effort.
- Preparing unique, interesting, and even exotic canapés and appetizers. These may become regulars on your menus or offered for high-end catered events.
- Exploring the products offered by local artisanal cheese makers or the many uses of yoghurt in various world cuisines.

Some of the skills mentioned here were more prevalent in restaurants and homes of the past but were overtaken by industrial production, time and labor consciousness, and menu standardization. But if you watch any of the TV food channels you will find that more and more restaurants are making their own items from scratch on premises.

In investing in culinary R&D, the general manager and chef can expect some level of higher food costs during this off-season period of experimentation, but the additional skills mastered by the kitchen staff will enhance the club's capabilities, reinvigorate the culinary curiosity and interest of the staff, and may even add some new and unusual offerings for members. The additional cost of ingredients, and maybe even specialty cookware and utensils, may be better justified if some of the experimental efforts are used for "wow" factor offerings in the bar on typically slow nights.

When well-conceived, planned, and executed, the club can build some slow season specialty nights into the club's calendar of events that may attract dining business during the traditionally slow period.

**Take Away:** The end result of off-season culinary experimentation is a more talented, versatile, and reinvigorated kitchen team, a more creative year-round food service, and appreciative members.



**#83**

## ***Beverage Cart Service Tips***

Drive the cart backwards around the course so that you are always approaching players from the opposite direction.

Do not solicit tips. If insisted upon by a member or guest, you may graciously accept a tip offered to you.

Get out of the cart when anyone approaches. Do not remain seated when speaking to a member or guest. Do not let approaching members see you slouched on the seat with your feet up.

Be cheerful, upbeat, and friendly to everyone.

Speak to members. Be engaging. Develop your own “patter” or phrases that you’re comfortable with in speaking to members. For example:

- “Good afternoon, gentlemen! What may I offer you?”
- “It’s hot today! How about some iced water?”
- “I’ve got some hot coffee to warm you up on this chilly morning!”

Cheerfully greet any players. If you know their name, greet them by name, i.e., Mr. Smith or Dr. Jones. Refer to the copy of the Tee Sheet to help recognize members by name.

Be prepared to tell them what you have on the cart. This means keeping track of your inventory. Don’t ever be in a position of offering a brand and then apologizing because you’re out of it.

When a member signs a charge slip, make sure it’s legible. If you can’t, ask them politely to provide their name. Once you associate a name with a face, try to remember the name in the future. Print the member’s name on the charge slip. After they have signed their charge slip, thank them, and wish them a good day or a great round, etc.

Practice good golf etiquette when driving the cart.

- Stop for groups who are hitting the ball. Always stop a good distance away.
- Avoid being in the field of vision of players who are hitting the ball as this may distract their swing.
- Allow your engine to shut off when players are hitting. The noise may also prove to be a distraction.
- Do not talk if players are hitting or putting. If asked a question by a member while others are hitting, answer quietly so as not to disturb play.
- Pay attention. Be knowledgeable. Be prepared to answer questions a member or guest may have.
- Act as a fore caddy for golfers. In other words, watch their shots and point out the location of any errant golf balls that are out of the fairway or in the deep rough.
- If you find any clubs, umbrellas, caps, or other lost items on the course, turn them in to the golf shop.
- Pick up any trash you may find on the golf course.

Report any problems or issues to the golf shop.

**Take Away:** Golf is the reasons many members joined the club. A quality golfing experience is important to all players, so do your part by providing outstanding service.





#84

## *A System Solution to Beverage Cart Losses*

Quick fixes usually do not address the underlying causes of problems. By examining, improving, and documenting the process, you can establish underlying systems that will routinely handle situations. When the bulk of details and situations in a club are handled routinely, more time is available for member service and paying attention to details.

Attempt to follow the 80-20 rule (the Pareto Principle). If you have established routine system procedures for your operation, you are able to devote 80% of your efforts to 20% of the operation – the most critical details. Look at how one recurring problem was solved with the development of an efficient system.

*Joanne is the food service manager in a high-end country club. One of her responsibilities is the beverage cart service provided on the golf course. The challenge presented by this service is a lack of inventory control over readily consumable and easily pilfered snack items. Predictably, the club has ongoing problems. After continually suspecting employees and worrying about unidentified losses, Joanne designed a system of checks and balances.*

*The beverage cart attendant is required to draw inventory from the golf course snack bar. The snack bar attendant completes the inventory issue sheet and notes all issues as well as turn-ins at the end of the day. The beverage cart attendant keeps track of sales on an inventory sold sheet. Both forms are turned in to Joanne daily, giving her an easy way to compare both sales and inventory consumption.*

The system is not foolproof, is subject to counting errors, and can be overcome by collusion among employees. But for the most part, it works well and gives Joanne a routine tool to monitor beverage cart sales.

**Take Away:** Systems don't have to be complex or highly sophisticated; they just have to work.



#85

## *The Value of a Super Service Employee*

For those of us who dine out with any regularity, we've all had the experience, unfortunately too rarely, of being waited on by what I call a "super server." From the moment she approaches the table we know we're in for a treat. Sparkling with personality, she overflows with knowledge about the food, beverages, and accompaniments. She immediately sizes up our interest in engagement and calibrates her contacts accordingly. She speaks with confidence and authority, questioning us regarding our preferences and without hesitation recommending what she thinks we'll enjoy. The best of the best can even unerringly take and serve orders without benefit of pen and dup pad – an ability that never ceases to amaze me.

Such extraordinary individuals are worth their weight in gold. Not only do they serve with flair and expertise, but they sell, thereby increasing the average check, while making a distinctly favorable impression of competence and professionalism that brings diners back again and again. This is true in restaurants and just as true in private clubs where members appreciate the recognition and special touches that a super server adds to the dining experience.

Far more frequently, we've experienced the norm of service – undertrained, inexperienced employees who may understand the basics of service, but little more. Often lacking in knowledge, personality, and attitude, their service may meet minimum expectations but seldom inspire the diner to sample the extras – appetizers, desserts, wines, and specialty drinks – that the kitchen works so hard to create and which enhances the dining experience. If truth be told, these employees are doing no service to their employers and in many cases are doing outright harm by driving customers away.

The often-repeated maxim for employers "to hire for personality and train for technique and competence" encompasses a basic truth. Attitude, personality, and engagement seem to be inborn skills and are difficult to teach. While training can provide service skills and knowledge, thereby increasing a server's confidence and maybe even engagement skills, the best service employees possess an indefinable quality that is difficult, if not impossible, to replicate.

Given the dearth of these extraordinary service employees, they should be recognized and compensated for the rare skills they possess. Too often though, their presence on an employer's staff is viewed as simple good fortune with little effort made to differentiate them from the herd. The result is that in short order they move on to greener pastures where their talents are more fully appreciated. When this happens the loss to the establishment is often more than can be appreciated in the moment. Not only has the employer lost a super server, but a money-maker, an ambassador, and an example for other less accomplished workers.

So why don't we recognize and reward super service employees for their special abilities? I suspect it's a combination of cost consciousness, an unwillingness to go beyond the status quo, and a fear of exchanging real costs for unmeasured benefits.

**Take Away:** While a club will never fill all positions with super service employees, a handful of such talented individuals scattered throughout the club's workforce will have a dramatic overall impact on service, member engagement, and ultimately the club's bottom line.



**#86**

## ***How to Attract and Retain Super Service Employees***

By analyzing and considering the wants and needs of super service employees, it is possible to set up programs to attract and retain them. In simplest terms it boils down to respect, status, meaningful work, and enhanced compensation. I would focus on the following:

- Establishing consistent [Service-Based Leadership](#) at your club. The underlying premise of this powerful style of leadership is recognizing the essential need to serve all constituents, including employees. Weak or self-serving managers will drive them away.
- Implementing [employee empowerment](#) – a natural extension of Service-Based Leadership. Empowered employees are enlisted as partners in the club's effort to improve the operation and provide high levels of service. Super service employees want and need this enhanced participation and contribution.
- Improving communications with employees. All employees, but especially the super service ones, want to know what is going on and how the operation and direction of the club affects them.
- Mentoring employees. Curious and intelligent, super service employees appreciate the time and effort made in giving them the big picture and a deeper understanding of the workings of the club.
- Creating “master” server positions that recognize higher skill levels and greater knowledge. The job descriptions for these positions must clearly lay out those distinguishing skills, characteristics, and duties that warrant more responsibility and higher compensation.
- Creating a clear career path of knowledge, skill development, and certification which allows other employees to set their sights on the more highly regarded and compensated master level.
- Assigning master level employees the task of teaching and training those who aspire to the higher level. Such tasking serves the super service employees' need for participation and contribution while improving the overall skill level of other employees.
- Challenging super service employees to engage in creative project work such as taking a larger role in training, creating more effective training programs, formulating and executing [member relationship management](#) strategies, and establishing a “wow” factor program for members.
- Recognizing and rewarding super service employees. This serves their needs, but also demonstrates to other employees their value, thereby motivating others to follow their example. Rewards should also be tangible, such as: higher pay based on their higher levels of performance and contribution; incentive opportunities based on clearly defined benchmarks; preference in scheduling; and educational benefits to further enhance job skills, knowledge, and opportunity.

As an industry we can no longer view employees as a disposable asset, which is what we do when we view ongoing turnover as a cost control measure. Operating small, stand-alone hospitality organizations with multiple businesses, high levels of service, and lean management staffs covering long hours and weeks is too difficult a task to do without a stable, competent workforce. When we view labor as a disposable, easily-replaceable commodity, we condemn ourselves to high levels of turnover with its attendant training costs, turmoil, and loss of organizational continuity. High levels of turnover must be viewed as a critical organizational and leadership failure that is damaging in all ways to the club's mission and operation.

**Take Away:** None of these solutions is easy to implement and will certainly add costs to the club, but the current employment paradigm is far more damaging to a club's success and remains a significant hidden cost of operations.



#87

Teachable Moments

## *Why the Wrong People are Hired*

While there is no fail-safe method of hiring only the right people, there are common denominators underlying most mis-hires. They include:

**Failure to Use Due Diligence.** Given the responsibility of managers to hire the right people and avoid hiring the wrong people, hiring supervisors need to exercise “due diligence,” that is, taking reasonable care throughout the hiring process to prevent mistakes.

**Lack of Interview Skills.** A brief informal survey of hospitality managers revealed that none has ever received formal training in how to screen and interview applicants or in reference-checking techniques. Despite the overwhelming importance of hiring the right people, it seems to be assumed that people can figure out for themselves how best to do it or will intrinsically know or possess such skills.

**Not Taking Full Responsibility for the Hiring Process.** There is only one person responsible for hiring the right people and that is the manager or supervisor of the person being hired. The hiring manager or supervisor is the one who is accountable for his department or section’s performance and, therefore, is the only person who should make the hiring decision.

Never assume that hiring is the responsibility of a human resource manager or department. They may assist in the process, but their assistance is consultative or clerical.

**Hiring a “Warm Body” to Fill a Position.** There are times when there is a great sense of urgency to fill a position. Despite these pressures, hiring managers should resist the temptation to hire a less-than-ideal candidate to quickly fill the vacant position. Don’t settle for less. At best you’ll have a B-Player. At worst, you’ll have someone that you’ll need to spend hours and hours working with before letting him go, only to start over again.

**Failure to Learn from Past Hiring Mistakes.** While it is understood that every hiring manager will make some hiring mistakes, it is essential that lessons are learned from mis-hires. This can only be done if there is enough documentation of the hiring process. Without a written record that includes a resume or application, thorough interview notes including questions asked and answers given, and details of each reference checked, there is no way to go back after a mis-hire to try and determine what was missed during screening and interviewing.

With proper documentation, the hiring manager can review the entire screening, interviewing, and hiring process to see what signs were missed to improve interview and reference-checking skills during future hires.

**Take Away:** The discipline of hiring well may take more time, but it is well worth the time and effort.



**#88**

## ***The Damage Done by the Wrong People***

Dr. Bradford Smart, author of *Topgrading*, lists the many downsides of hiring and retaining the wrong people, whom he calls C-Players, as managers or supervisors. He says they:

- “Embrace tradition over forward thinking.
- Have difficulty coping with new and complex situations.
- Prefer the status quo.
- Lack credibility, so others are hesitant to follow them.
- Require specific direction [from superiors].
- Hire mostly C-Players [A- and B-Players are viewed as threats].
- Tolerate mediocrity.
- Drain energy from others; their [inaction or] actions prevent synergy.
- Sporadically meet expectations.
- Bend the rules.
- Have mediocre skills [and seldom seek self-improvement].”

Hiring and retaining low performing managers or supervisors can have a long-term ripple effect in an organization. On the other hand, hiring A-Players for those critical leadership positions in a club can have long term positive effects.

If hiring the right people is critical in hiring the managers and supervisors of the club, it is also important, though for different reasons, in hiring line employees – those that interface directly with members. The dangers in hiring the wrong people in member-interface positions include:

- The damage they can do to member service.
- The turmoil they create in your work team while they are with you.
- The amount of time that you must spend in training and retraining them.
- The amount of time that you must spend in counseling, disciplining, and ultimately discharging them.
- The lost opportunity of using your limited time and resources to work with them – time that could be better spent on other initiatives and pressing issues.
- The cost of replacing a substandard employee – both in terms of hiring and training a replacement.
- And the emotional wear and tear on everyone involved.

**Take Away:** Hiring poorly damages the club in a variety of ways, but ultimately the results show up on the bottom line for a host of reasons.



#89

## *Disciplined Hiring*

Hiring well is an important discipline in any successful business. Jim Collins, in his groundbreaking book *Good to Great: Why Some Companies Make the Leap . . . and Others Don't*, said 'getting the right people on the bus' was an essential discipline of great companies. Dr. Bradford Smart, author of *Topgrading*, said that in his experience 50% of all hires are mis-hires. This miserable success rate is no better than gambling by flipping a coin – and gambling is exactly what a club does every time it hires without the basic requirements of Disciplined Hiring. These include:

- Interviewing Skills. Dr. Smart recommends a “structured, chronological” interview where the interviewer reviews the candidate’s entire education and work history chronologically and in detail to understand the candidate’s personal and professional growth in the context of expanding responsibilities, accomplishments, lessons learned, and work skills and habits. While such a thorough process is excessive for line employees, it is an excellent discipline for hiring managers whose efforts have much greater impact on the club’s success.
- Type of Interviews:
  - ❖ Telephone interviews are screening interviews and are designed to reduce the hiring focus to a smaller number of qualified applicants. These interviews can be delegated by the hiring manager to properly trained subordinates or the human resources office so long as the interviewer has a clear understanding of the experience and skill set the hiring manager requires.
  - ❖ Face-to-Face interviews are more in-depth and are reserved for final candidates. These interviews must be conducted by the hiring manager to ensure he takes full responsibility for the hiring decision. Face-to-face interviews require careful preparation including reviewing candidate’s resume or application, developing a series of questions that focus on the necessary experience and skills for the position, and the determination to pursue an understanding of the candidate, particularly when responses to questions are vague or evasive. Ultimately, the hiring manager needs to understand who the candidate is, what his values are, how he approaches his work, that his work experiences are valid and germane, and that his personality fits the culture of the club and the necessities of the position.

In both types of interviews, thorough notes should be taken of questions asked and responses given. These are useful when reviewing the candidates after the interviews and in making the final decision.

**Take Away:** Hiring well requires discipline and commitment to ensure the right person is hired for each club position.



**#90**

## ***Departmental Staffing Guides***

Clubs will typically create well-defined employment categories for employees to make benefit determinations based on the number of hours worked. As an example, one club created the following definitions:

- *Full time – employees who work not less than 35 hours per week on a continuous basis and employment is anticipated to last 11 months or more.*
- *Part time – employees who work less than 35 hours per week on a continuous basis and employment is anticipated to last 11 months or more.*
- *Seasonal – employees whose employment is expected to last less than 11 months regardless of the number of hours worked per week.*

In this instance, full time positions were eligible for full benefits, the part time staff received more limited benefits, and the seasonal positions received no benefits.

Given the seasonality of most club operations, clubs have a need to expand and shrink their labor force to meet the needs of each seasonal business level. The ability to do this in a timely manner will save the club significant amounts of unnecessary cost. Further, most club managers recognize the benefits to member service and organizational continuity of having a stable work force. Lastly, clubs should avoid full time staff layoffs as much as possible for both the cost and morale impact they create. The challenge then is to balance the need for a stable staff with the cost-saving ability to shed excess positions when business levels warrant.

The solution to these competing needs is to establish staffing guides for each department made up “core” and seasonal positions. The core positions represent those staffing needs for year-round minimum function and service needs and can be either full or part time depending upon the needs of both the club and employees. Seasonal positions are just that – those that are added and reduced as business demand warrants.

Each department head, by creating a staffing guide of core and seasonal positions, determines optimal year-round staffing. These core positions, then, are “protected” from seasonal adjustments in all but extreme situations. Once the staffing guides are determined for each department, no new hires should be made for core positions without an existing vacancy or the express approval of the general manager.

**Take Away:** Staffing guides are a discipline to ensure that year-round staffing levels are established to protect core requirements while controlling seasonal pay costs.



#91

## *Exempt and Non-Exempt Positions*

There are a lot of misconceptions regarding the paying of employees either as salaried (a fixed amount each pay period) or hourly (an amount based on the number of hours worked times an hourly rate of pay). Some managers seem to think that you can avoid overtime payments by simply paying the employee on a salaried basis. But nothing could be further from the truth and such a practice could put a club in violation of the federal Fair Labor Standards Act (FLSA) which specifies a number of wage and hour requirements for employers.

The FLSA mandates that employees who work more than 40 hours in a workweek be paid overtime – that is time and one half for each hour worked over 40. Exemptions are made to this requirement for certain managerial, professional, and commission-compensated positions – thus the term “exempt” employees.

But the requirements for these exemptions are few, defined, and have been narrowly construed in court cases. All other employees are considered “non-exempt” and must be paid overtime as required by the FLSA.

It is dangerous, then, for any club not to assess and classify each position as either exempt or non-exempt depending on a careful evaluation of job functions to meet the exemption requirements. Even after positions are classified, the club must be vigilant that new positions are not designated as exempt without a formal review of duties and responsibilities and that job requirements of existing exempt positions do not materially change, thereby affecting their exempt status.

Failure to carefully adhere to exemption criteria can be costly for clubs in terms of fines, penalties, and orders for payment of back overtime work.

Clubs may pay a non-exempt position on a salaried basis but are still liable for overtime payments for working more than 40 hours a week. Thus, paying non-exempt positions a salary requires ongoing vigilance to ensure overtime compensation is paid correctly.

**Take Away:** No position should be made salaried to avoid overtime payments without a careful review of job requirements and exemption criteria.





**#92**

## ***Prohibited Interview Questions***

When hiring, managers must know what questions can and cannot be asked during interviews. The questions that should not be asked are derived from federal anti-discrimination law which prohibits employment discrimination based on protected groups. Direct questions of a job applicant on the following topics are prohibited:

- Age – including questions that may reveal age, such as the year of high school graduation.
- Religion – you can and should state the working hours of the position, particularly if it includes weekend work and whether the applicant can work those hours with reasonable accommodation.
- Race
- Gender
- National Origin/Citizenship – you may ask if the applicant is eligible to work legally in the U.S.
- Disabilities/Health History – you can enquire about the applicant’s ability to perform the essential functions of the job.
- Union Membership
- Languages Proficiency – unless a specific language skill is required for the job.
- Marital/Family Status – including questions about maiden name, pregnancy, children and childcare. You can ask job-related questions about hours/shifts applicants would and would not be available to work, as well as any other responsibilities that might interfere with specific job provisions, such as traveling.
- Workers’ Compensation/History of Sick Days
- Prior Arrests – being arrested is not the same as being convicted.
- Current Military Service and Type of Discharge from any Previous Service – you can ask if an applicant was formerly in the military, but enquiries should be limited to length of service, final rank upon discharge, and the type of applicable work experience gained in the military.
- Sexual Orientation
- Past Bankruptcies or Garnishment of Wages – employers may still use credit reports in their hiring process, but they must ensure that they comply with the Fair Credit Reporting Act, as well as any applicable state privacy laws.
- Frequency of and/or Treatment for Illegal Drug/Alcohol Abuse – some very limited questions about illegal drug use are technically permitted. Specific questions such as, ‘Do you currently use illegal drugs,’ ‘Have you ever used illegal drugs?’ and ‘What types of illegal drugs have you used in the last 6 months?’ can be asked, but to be safe, these are better left to the HR experts.
- Clubs/Organization Memberships – you can, however, ask ‘What professional or trade groups do you belong to that you consider relevant to performing this job?’
- Home/Car Ownership – you can ask if the applicant has a reliable method of getting to work.

**Take Away:** While prohibited questions can be quite specific, a good rule of thumb if ever in doubt about a potential question is “If it’s not job-related, don’t ask.”



**#93**

**Teachable Moments**

## ***Reference Checking***

The responsibility to check references is an essential part of due diligence and may not be delegated or passed off to others. Without checking references, there is no way to check the veracity of the applicant's claims about education, experience, and accomplishments.

While many people claim to have almost psychic skills when it comes to sensing the integrity and character of applicants, it must be clearly understood that scam artists and others who lie professionally are often considered to be the most genuine and convincing of people. In other words, the person most adept at being sincere and in giving the answers you want to hear is quite possibly the applicant with the most to hide. The rule must be: Don't ever accept an applicant at face value. Do your homework and check references carefully!

Reference Check Requirements and Techniques:

- Reference checks must be conducted by the hiring manager.
- Conduct reference checks after you have completed the final interview.
- Contact the applicant's supervisors from at least the past five years.
- Get the applicant's written permission to check references during the interview. Verify the name, title, location, and contact information of each listed reference and any others you may wish to talk to.
- Ask the applicant to contact each desired reference, asking if it would be alright to accept a reference call from the hiring manager at a time of his or her convenience.
- Contact each reference. Promise absolute confidentiality and make sure you keep that promise.
- Create the tone of a trusted colleague, a fellow professional who knows the applicant well, who might hire the applicant, and who will be better able to manage the applicant if the reference will share certain insights.
- Contact the current supervisor (if applicable). Some applicants may not desire this until they have an offer that is formally accepted. If this is the case, ensure that the applicant understands that the offer is contingent upon receiving a clean bill of health with no surprises from the current supervisor.
- Depending upon the type of position being filled, the hiring manager may want to check references with peers, subordinates, or customers of the applicant. The same requirements mentioned above will apply.
- Take notes during all reference checks using the [Applicant Reference Check, PCPM Form 108](#). Keep notes for at least six months so you can refer back and see how your interview impressions and the references disclosures dovetail with your actual experience with any hired individual.

**Take Away:** Checking references is a critical part of hiring process and must be done with due diligence.



#94

## Screen for Success

The Ritz-Carlton hotel company, renowned for its legendary service, has devised a new hire screening process that focuses on 11 basic talents and every position in the company is indexed on how much of each talent that position needs. For example, a housekeeper position needs high levels of “exactness” (attention to detail) because there are over 150 items or details that must be checked in every room every day; on the other hand, front desk and guest service employees need high levels of “relationship/engagement” skills to interact and engage guests in a multitude of ways.

The hiring process with Ritz-Carlton can take up to eight separate phone and face-to-face interviews to ensure they hire people with the right set of talents for the positions they seek. One impressive element of the interview process is that specially-trained line employees conduct the first telephone screening interview to ascertain the candidates “Talent Index.” If the candidate does not meet certain minimum levels in this interview, they do not receive further consideration.

The success of their screening process can be seen by their employee turnover rate. When first started in 1983, the company experienced a 73% turnover rate. More recently, it was 23% with 15 of that 23% being voluntary resignations for a variety of reasons.

*The same screening discipline, though more limited due to budgetary constraints and lack of economies of scale, can be used by clubs to ensure the right persons are hired for the right job. There are a number of companies that offer personality assessments used in hiring and such a service may be cost-effective for a standalone operation. A quick search of the Internet will yield such companies.*

*By using the principles of Disciplined Hiring a club may significantly improve its hiring success rate while improving member service when employees have the right personality and interpersonal skill set necessary for each position.*

**Take Away:** Jim Collins, in his *Good to Great* book, speaks of the importance of getting “the right people on the bus” and getting “the right people in the right seats on the bus” as an essential discipline for success.



**#95**

## ***New Hire Onboarding***

The purpose of an onboarding plan is to ensure that new employees are welcomed to the club, receive the appropriate orientation and introductions, and are indoctrinated into the club's culture, as well as receiving a basic introduction to club information, employee benefits, club policies, and work rules. When the onboarding process is formalized and consistent, all employees have an appreciation for the history and traditions of the club, an awareness of their job requirements, and a common understanding of expectations for their conduct and performance. One club's onboarding process included:

- Completion of all new hire paperwork with the HR office. Order nametag.
- All required screenings and/or physical as required.
- Welcome from the General Manager or other senior executive.
- Club orientation, tour, and introductions to key staff by the HR manager.
- [Acknowledgement of Employee Handbook and Disclaimer, PCPM Form 118](#), with instructions to read within first week and sign, date, and return the acknowledgement form.
- Review of club dress code, grooming, and hygiene policy.
- Issue of timecard/badge and timekeeping/pay cycle orientation
- Initial club training to be completed within 30 days:
  - ❖ Club culture training and issue of pocket values card.
  - ❖ Service ethic training, introduction to the *Daily Huddle* discipline.
  - ❖ Club etiquette training.

The departmental onboarding process included:

- Department head welcome.
- Departmental orientation, tour, and introductions conducted by the department head.
- Review of department functions, responsibilities, plan, and goals by department head.
- Review of club culture in departmental context by department head.
- Review of job description, performance expectations, and performance review forms by department head.
- Issue of uniforms and nametags, review of dress code.
- Departmental safety briefing, to include any hazardous materials or machinery and equipment, Material Safety Data Sheets, personal protective equipment if required, and emergency and accident instructions.
- In the case of administrative workers, workspace set up, fully prepared, and waiting for the new hire.
- After several weeks, the department head sets up a one-on-one meeting with the new hire to see how he or she is settling in, to answer any questions, and to once again reinforce basic club values and departmental policies.

**Take Away:** There is much basic information that new employees must know. A formal onboarding process will ensure new hires consistently receive such information.



**#96**

## ***New Hire Orientations***

Orientations are an important part of the onboarding process for new hires. There is much for the new employee to learn about the club and the way it does business, as well as an explanation of work rules and employee benefits. Given the amount of material the new employee needs to learn, two separate orientations are recommended – a Club Orientation presented by the HR manager covering broad topics of interest to all new hires and a Departmental Orientation given by individual department heads covering topics specific to the department, as well as to reinforce certain club-wide topics.

Here is a list of suggested topics to cover in the Club Orientation:

- Issue [Employee Handbook](#)
- Discuss club values and culture, as well as mission and standards of service
- Explain employment status (full time, part time, seasonal)
- Explain employee personnel file
- Explain performance reviews and introductory period review
- Explain work week, pay cycle, paydays, and overtime pay
- Explain benefits and benefits eligibility
- Explain designated employee parking areas and locker availability
- Explain club alcohol, drug, and tobacco policies
- Discuss prohibition of removing items from club premises
- Discuss club training process and programs
- Discuss discrimination, harassment, and sexual harassment
- Explain who to see for personnel and benefits issues
- Tour of property and introduction to key staff

Departmental orientations will reinforce some of the key issues above and also discuss:

- Work schedules
- Club and departmental work policies
- Employee development, counseling, and discipline
- Uniform, nametags, appearance, and grooming policies
- Breaks and meal policies
- Review of job descriptions, work expectations, and performance review forms
- Departmental training
- Accidents and emergencies
- Notification for absences and late arrivals to work
- Timekeeping and resolution of pay issues
- Need to bring issues, problems, complaints, and suggestions to supervisor.

**Take Away:** New hire orientations are an important part of the employee onboarding and training process. They also present an opportunity to formally welcome the new hire.



**#97**

## ***Job Descriptions***

[Job Descriptions](#) describe the principal duties of a position. It is a manager's responsibility to establish written job descriptions for each position in his department and to keep them current, as duties may change over time.

Job descriptions are also helpful in determining the necessary knowledge, skills, and capabilities a candidate must have to meet the requirements of a position. Such a position analysis is helpful in the hiring process and in preparing job vacancy notices.

All job descriptions should contain the following information:

- Job title
- Department
- Reports to, i.e., supervisor's title.
- Concise summary of the position's function or role.
- A listing of the principal duties and responsibilities of the position.
- A statement that employees must "perform other duties as assigned." This general catch-all phrase is designed to prevent the "it's not my job" syndrome, though if a specific duty becomes a routine part of the job, the description should be revised to indicate the new principal duty.
- Whether the position is supervisory, i.e., whether its function includes supervision of other employees.
- An employment classification indicating whether the position has been determined as exempt or non-exempt from the overtime provisions of the Fair Labor Standards Act.
- Any potentially exclusionary requirements of the position, such as physical lifting, need to speak a particular language, or appropriate levels of vision and hearing that may or may not be met with reasonable accommodation.

Managers and supervisors must review a position's job description with candidates during the hiring process to ensure they understand the requirements of the position. Further, during the onboarding process of a new hire, the manager must again review the position requirements and performance review form (or performance criteria) for the position to ensure the employee understands how his or her work will be measured and reviewed.

**Take Away:** Well-thought out, written job descriptions are important part in the overall training and development of a new employee



#98

## *Passively Creating a Hostile Work Environment*

Most leaders readily understand the negative impact of a hostile work environment on employees. Employees who aren't properly trained, who aren't given the tools and resources to do their jobs, and who are demeaned by the abusive actions of supervisors or other employees, cannot contribute effectively to the team effort and the success of their organization. Often the hostile work environment is created by bullying, teasing, or insensitive remarks or actions that center on:

- Gender – sexually suggestive remarks, posting inappropriate pictures in the workplace
- Race or ethnicity – “Polish” jokes, making fun of accents or racial and ethnic stereotypes
- Religious beliefs – not respecting a person's religious or moral values by telling “dirty” jokes or making fun of another's religious symbols or practices
- Age – “over the hill” comments or pranks centered on the young, inexperienced “rookie”
- Sexual orientation – using disparaging words to characterize someone with a different orientation
- Differentiation – drawing attention in a demeaning way to anything that isolates and mocks someone who is different from the norm in any way

When an enterprise is trying to build a team focused on a common vision and shared goals it cannot afford for any team member to be demeaned, handicapped, or marginalized by words or actions that exclude. Leaders at all levels are expected to intervene to ensure that this does not happen. If they don't get actively involved to stop such behavior, they are abetting it and allowing a hostile work environment.

A more subtle factor in creating a hostile work environment is the supervisor who does not communicate well or often with his or her team or who doesn't pay attention to what is going on in his or her section or department. Consider that:

- Individuals in any group setting rarely have neutral feelings toward or about the others in the group. They like some and dislike others, usually for their own, sometimes hard to discern, reasons.
- People are naturally attracted to and spend time with those they like and avoid those they don't. This results in cliques of the included and, outside the cliques – the excluded.
- The excluded often feel jealous, resentful, and fearful because of their exclusion.
- In the absence of ongoing timely and accurate information, fearful people assume the worst. Fearful people can be paranoid and perceive discrimination and favoritism where it may not exist.
- A fragmented work team cannot perform effectively.

When a supervisor does not engage daily with team members, give specific directions regarding who is to do what, and communicate thoroughly about all matters affecting the team, the fragmented team will gossip, backbite, and bicker among themselves. Seldom will they work together and often their antagonisms affect members, guests, and co-workers. Sometimes their behavior is passive-aggressive – trying to sabotage the efforts of others, all the while acting helpful and friendly.

**Take Away:** If a manager fails to communicate and interact daily with all employees, he or she may be responsible for passively creating a hostile work environment. Such inattention to the daily functioning of the organization is just as destructive as a supervisor who actively engages in demeaning, disparaging, and abusive behaviors.



#99

## *Give Them More Than Just a Paycheck*

Throughout my career I've too often heard managers complain about the labor pool, the lack of work ethic and sense of responsibility among workers, and the constant headaches that came from their human "resources." The overwhelming sense from these managers was, "We pay too much to these people whose only interest is in collecting a paycheck."

Yet at the same time and in the same or similar markets, there were other managers who did just fine in finding and retaining good people who made a real contribution to their clubs. What then made the difference? The answer is quite simple – good leadership! So instead of just providing your employees with a paycheck, consider giving them the following:

**Respect.** The life of all human beings is important to themselves, yet too many people are treated by their bosses as if they didn't matter. This maltreatment is not necessarily by design; it's the byproduct of busy bosses too focused on themselves or the many problems they face in busy operations. But every employee deserves to be treated with the utmost respect and the common courtesies of human interaction. When consistently and sincerely given, this respect will transform any work team.

**Responsibility.** Placing responsibility on your work team demonstrates your trust in them. Trust given returns trust. In contrast, when you treat your employees like idiots or children, many will respond by acting like idiots or children.

**Recognition.** Every day your employees do hundreds of things right. Make sure you recognize that essential contribution to the success of your operation. When sincerely given, a simple thank you or handshake of appreciation has a profound impact on morale, commitment, and contribution.

**Responsiveness.** Leaders must engage with their employees every day and respond to their issues and concerns. In any group of people working in a complex, fast-paced, and detail-intensive business there will be conflict and turmoil. Without the leader's guiding hand, this turmoil can consume the operation. Leaders must stay engaged, be approachable, and respond to concerns.

**Example.** Someone once said, "A leader leads by example, whether he intends to or not." The leader's example is paramount in setting the standards of the operation. If the leader doesn't seem to care about his employees, they won't care about him or his initiatives and agenda.

**Training.** Most people want to do a good job and appreciate when they are properly trained to improve their knowledge, skills, and job performance. Lack of training leads to a chaotic and confusing work environment, the loss of conscientious employees, and a staff dominated by people who "couldn't care less."

**Removal of Roadblocks.** Leaders should be hyper-sensitive to anything in the workplace that inhibits efficiency. Do whatever is necessary within reason to identify and eliminate anything that makes employees' jobs more challenging, time consuming, and frustrating. Not only do you gain speed, efficiency, and improved productivity, but your employees will understand that you are dedicated to improving the operation and you care enough about them to address legitimate concerns.

In contrast, when you give your employees no more than a paycheck, you shortchange them, the club, and your members.

**Take Away:** All of the above steps from leaders will have a dramatic effect on employees and the operation.





**#100**

## ***Steps to Lower Employee Turnover***

Study after study has demonstrated the high cost of employee turnover, particularly in the hospitality industry where the work is so detail-intensive, requiring significant training to meet standards.

Recognizing that the desired outcome of every hiring decision is to find and bring aboard a qualified and enthusiastic person who will make a positive contribution to the success of the club, it is essential for all managers to make efforts to lower employee turnover rates. Here are six steps to help do just that:

- **Hire Well.** Use the techniques of Disciplined Hiring to screen applicants and check references. When possible, use personality profiles to ensure you put the right person in “the right seat on the bus.”
- **Onboard Well.** Use all the club’s tools to both welcome and orient new hires to the workplace. An Employee Handbook, as well as the club and departmental orientations, are designed to provide and reinforce important information to the new hire. Managers must make sure that orientations are welcoming and make all necessary introductions to both supervisors and peers.
- **Train Well.** Both initial and ongoing training is essential. Most people want to do a good job and appreciate the efforts made to train them. Without adequate training and the necessary tools and resources to do their jobs well, new hires will quickly become cynical and alienated. Never forget that their success guarantees your success.
- **Organize Well.** No one wants to work in a chaotic environment. If your department or section is well-organized, if everyone knows where things are, if employees are well-trained in opening and closing procedures, if everyone knows their responsibilities and is held accountable, the workplace runs almost effortlessly. Don’t run off good people by putting them through the hell of a disorganized operation.
- **Communicate Well.** Daily interaction and direction ensures that everyone is informed, knows what is going on, and what they must do individually to accomplish the tasks at hand. It is also instrumental in building teamwork and a sense of shared values and mission. Some form of pre-shift meeting or *Daily Huddle* is a necessary discipline to ensure ongoing, consistent communication.
- **Value Them Well.** Remember the ultimate value of people in all you do. Value your employees and they will value you as a leader and their efforts at work.

**Take Away:** Your leadership is the essential element in your success. If you have high levels of turnover, there is no one to blame but yourself.



**#101**

## ***The Shift Log***

Because clubs are open 6 or 7 days a week for extended hours, it is a challenge for supervisors to consistently communicate important information to employees working varying shifts. In addition, things that happen on one shift frequently need to be passed on to those working later shifts. Too often someone doesn't get the word resulting in service breakdowns, missed instructions, and the perception that service staffs don't know what they're doing.

All of this can be avoided by using the simple expediency of shift logs. These are nothing more than a notebook where the supervisor or employees record information that must be passed on to each other and to later shifts. Entries can include:

- Information or instructions from the supervisor that all staff need to know, such as a new policy or procedure, announcements of a departmental meeting or training session, or reminders to close out all POS tickets before leaving.
- Information that needs to be passed from one shift to another, such as Mr. Smith's party coming in tonight has ordered a special birthday cake, or Mrs. Jones called to say she left her umbrella on her golf cart and will be by to pick it up tonight, or John can't work his Friday night shift and can anyone cover for him.
- Information that employees need to pass on to their supervisor, such as Dr. Williams stopped by to say that his is now expecting 18 people for his private dinner tomorrow night, or Mary called in sick, or a package was delivered for the supervisor and is behind the pro shop counter.

The key to success in using a shift log rests on the following practices:

- The logbook must always be kept in a designated location where the supervisor and all employees can find it quickly and easily.
- Supervisors and all employees must read and initial all entries in the log since they last worked.
- While the log is not an appropriate place to complain about management, members or other employees, problems encountered by employees should be recorded so that the supervisor can contact upset members, discuss matters with involved employees; take care of any unresolved issues, and design policies and procedures to systematically address problems. Often, it is a great source for issues that need to be discussed at departmental or shift meetings.

Formatting the shift log is simple. Enter today's date on the first page. The supervisor and employees make any necessary entries on the page. The next day, the first person to open the logbook draws a line across the page under the last entry from the previous day and enters the new day's date. After reading all entries since last working, the supervisor and employees initial each day's entries to indicate that they have read the material. This pattern is repeated until the notebook is filled and replaced by a new book.

**Take Away:** Managers who institute shift logs will find departmental communications to be easier, more thorough, and more consistent.



#102

## Training

While many managers find it difficult to devote the time, resources, and effort to proper training, they miss the forest for the trees. When a club has a well-trained staff, more problems are avoided, the quality and quantity of work is better, problems are solved more easily at lower levels, member complaints are minimized, and time spent to correct errors decreases. As a result, management has more time for organizational issues, planning, continual process improvement, problem solving, and taking advantage of opportunities.

A prevalent method of training in the hospitality industry is called “trailing.” This takes place when the new employee follows a long-term employee around. The idea is that the new employee will learn all the right things from the veteran. This, of course, assumes that the veteran was properly trained, knows what he is doing, is conscientious, and so forth.

While there is nothing wrong with appointing individual employees as departmental trainers, they should be selected based on knowledge, teaching ability, patience, conscientiousness, and quality of work. Still, the trainer must have a well-organized, fully-prepared training program to ensure that the necessary information is passed on to each new hire thoroughly and consistently. Finally, the supervisor must monitor the process to ensure the new hire receives correct and consistent information and learns all the right skills.

Determining what skills and knowledge are necessary for each position is easy if the supervisor has created thorough job descriptions. For instance, if one of the principal duties of a cart attendant is to welcome golfers to the club and assist them with their cart, then the trainee needs to know how to greet a member or guest, how to help them with their bag, how to instruct them on the use of the cart, pertinent course information such as course distances measured to the center of the greens, how to show them the pin placement sheet, how to answer any questions about club events and services, etc.

Formal training should be conducted in frequent, small blocks of time and material. Do not expect a new hire to grasp the multitude of details and instructions received in the first few days of training. Plan for appropriate breaks and intersperse classroom instruction with tours and demonstrations. The best way to teach someone a new skill is to tell him how to do it, show him how to do it, allow him to do it, and constructively critique his effort. Not everyone has the same comprehension skill. It may require several sessions to teach a skill. Supervisors should also create a list of the competencies that must be learned for each position and check each off as the employee masters it.

Finally, department heads should never assume that others will do the necessary training of their department’s new hires. While the HR manager provides certain training, it is ultimately the department head’s responsibility to ensure that employees are properly trained.

**Take Away:** There are significant benefits to a well-trained club staff, but proper training requires well-organized and disciplined management to undertake the challenging effort.



#103

## *Types of Training*

All who work in the service business understand that operations are both people-intensive and detail-intensive. It takes a lot of employees to provide the requisite levels of service and every aspect of service involves many details. These two facts make detailed, ongoing training an absolute necessity for any successful operation.

There are a wide variety of topics that must be taught to both managers and employees to fully prepare them for their jobs.

1. **Leadership Development Training** for managers and supervisors – designed to foster consistent, club-wide leadership skills which are the driving force behind the club's success.
2. **Club Values and Culture of Service Training** for all employees – designed to foster a thorough understanding of the club's values and service ethic.
3. **Organizational Systems Training** such as Human Resource and Accounting Standards, Policies, and Procedures (SPPs) for managers and supervisors, as well as departmental SPPs for employees – all designed to teach the underlying systems that permit the enterprise to operate efficiently.
4. **Legal Compliance Training** for managers, supervisors, and employees – designed to provide all required training in matters with legal implications for the club such as Equal Employment Opportunity, Fair Labor Standards Act, Sexual Harassment, and others.
5. **Liability Abatement Training** for managers, supervisors, and employees – designed to limit the club's liability exposure for occupational safety and health, food sanitation, public health, and responsible alcoholic beverage service.
6. **Departmental SPPs, Organizational Systems, Job Skills and Service Technique Training** for employees – designed to give each employee the knowledge and skill set necessary to perform his job and meet standards of service.

Items 1 through 5 above should be developed by the club and provided club-wide for consistency sake; item 6 is specific to each department and should be developed and taught by individual department heads.

**Take Away:** Managers tend to think that training is only necessary for line employees, but as the list above suggests, much of the training is required for management staff.



**#104**

## ***Etiquette Training***

Thirty-five years in hospitality management have proven to me that etiquette is a basic training requirement for all club employees. To expect that a wide assortment of employees with diverse backgrounds and socio-economic life experiences will have an appropriate understanding of the expected behaviors and decorum for a private club is unrealistic.

So like any other management expectation of its employees, such as dress and grooming standards and the requirements and rules of conduct, club etiquette must be taught consistently to all employees. To ensure this consistency, several years ago I created a Power Point presentation that presented and discussed the concept of good manners under the following six topics:

- Respect for others, both members and fellow employees.
- Common courtesies such as attitude, mood, and smiles; using names and titles when addressing members; using please and thank you, yes ma'am and no sir; interrupting personal conversations; stepping aside and holding doors; offering assistance; inappropriate personal habits such as smoking, drinking, eating, and chewing gum in front of members; and the need to take breaks out of view.
- Appropriate and inappropriate words and phrases and the need to act naturally and sincerely in all dealings with members.
- Body language and how it can convey unintended messages.
- The importance and impact of tone of voice.
- Alertness and responsiveness to members at all times.
- Focus on the task at hand and satisfying members.

This presentation was designed as a basic introduction to appropriate behaviors and decorum in the club, but it was fully expected that managers and supervisors continued to reinforce and expand upon the concepts of club etiquette in all they said and did. Most importantly, club etiquette would be continually discussed in *Daily Huddle* meetings where actual service situations and issues are reviewed.

The result of basic club etiquette training and ongoing discussion of appropriate behaviors and decorum is a staff with a uniform understanding of the finer points of service in all their interactions with members and guests.

**Take Away:** To expect that a wide assortment of employees with diverse backgrounds and socio-economic life experiences will have an appropriate understanding of the expected behaviors and decorum for a private club is unrealistic. They must be trained.



**#105**

## ***Training Requirements and Principles***

Before establishing training requirements, the club must determine in great depth its operating standards, policies, and procedures. They are, after all, the backbone of any organized system of training. But there are certain things necessary for a training program to be successful:

- Leadership – the will to make it happen.
- The necessary focus and attention.
- Designated responsibilities and accountabilities.
- Established training objectives, standards, guidance, and budget.
- Curriculum development for each position.
- Administrative system or software to monitor and track training compliance.
- Training benchmarks and reports to track time and costs of training effort.
- Standardized list of teaching aids and equipment to facilitate training.

There are a number of principles which affect the development and implementation of a club's training effort:

- Not all employees learn equally well or fast; and not all employees find the same teaching methods conducive to learning. Therefore, there is a need to develop training formats that meet the needs of all learners. Such formats will include self-study [position training manuals](#), checklists, handouts, quizzes, YouTube videos, Power Point presentations, [On the Go Training](#) material, scripting of key member interfaces, and ongoing discussions at staff meetings.
- Training employees is not a one-time task. New employees must receive initial training, but the amount of material that must be mastered requires that initial and refresher training be given in most topics and job skills.
- Some sort of *Daily Huddle* should be used by every department every shift to inspect staff, remind them of important service details, provide On the Go Training, and ensure every employee has the proper mind-set and enthusiasm to deliver high levels of service.
- Some training, such as the topics of sexual harassment and safety, is required by law. Because of legal and liability issues, such training must be consistently taught throughout the club and thoroughly documented.
- All individuals tasked with training responsibilities must be trained. Completing a Train the Trainer class is a prerequisite to training other employees.

**Take Away:** In establishing a formal discipline of training the club is undertaking an extremely challenging endeavor. While it adds a number of time-consuming tasks to already busy schedules, it ultimately will make everyone's job easier.



#106

## *Initial and Ongoing Training*

As we have said before there is much that new hires must learn in the detail-intensive club business. We have also said that the sheer amount of material that must be learned by new employees is difficult to absorb all at once. Finally, we have pointed out that different people learn in different ways and that training material must be provided in various formats that meet the needs of all learners.

What all this means is that the training needs of the club and for each position in the club must be carefully identified, designed, and deployed. In the broadest sense, the club must decide what training topics and skills are considered critically important, what skills new hires must learn immediately, and what topics must be taught in the initial period of employment. Beyond this, there are important topics that require ongoing review, as well as required training that must be given and documented on a regular basis (usually annually) such as sexual harassment and safety topics.

Given these needs, the club and department heads must design new hire orientations, both club and departmental, to cover and reinforce critical information and skills that employees need to know. Then each department head should design his or her department's initial training requirements based on the necessary curriculum for each position. These topics should be documented for each new hire as they are completed.

Finally, recognizing the need to continually reinforce key standards, policies, and procedures, as well as to meet legal requirements and avoid liability issues, refresher topics must be scheduled, taught, and documented on an ongoing basis.

*As an aside – the Ritz-Carlton hotel company believes initial training to be so important that new hires are not allowed to interact with hotel guests until they've completed their basic training. As they say, they don't allow their employees to "practice" on their guests.*

**Take Away:** A formal program of training should be designed to cover training topics on an immediate, initial, and ongoing basis.



**#107**

***Training Curriculum by Position***

The first step in preparing a curriculum is to analyze any position in detail and develop an outline of the knowledge, information, and skills that the employees in that position must master. Most of the knowledge and information can be read, studied, and reviewed by the new hire, but many of the service techniques and skills will need to be demonstrated by the supervisor and then practiced by the employee to ensure proficiency.

Below is a sample listing of topics for a dining room server. This list is necessarily abridged for space considerations but gives some idea of the level of detail that must be mastered.

- |                                 |                              |
|---------------------------------|------------------------------|
| General Knowledge               | Meeting/Greeting/Seating     |
| Food                            | Table/Section #s             |
| Alcoholic beverages             | Reservations                 |
| Tableware familiarization       | Table selection              |
| Food service policies           | Seating and assistance       |
| Service protocols/sequence      | Highchair/booster seats      |
| Service etiquette               | Menu presentation            |
| Uniform/dress code              | Wine list presentation       |
| Personal hygiene                | Daily specials               |
| Dining room familiarization     | Table Service                |
| Kitchen familiarization         | Beverage order               |
| Location of supplies and stocks | Food order                   |
| Point of Sale Training          | Food service techniques      |
| Opening ticket                  | Wine service                 |
| Ordering/changes to order       | Beverage service             |
| Closing ticket/member charge    | Clearing courses             |
| Adjustments/voids               | Dessert service              |
| Club Fare Familiarization       | Coffee service               |
| Lunch/Dinner menus              | Presenting charge ticket     |
| Menu selling sheets             | Table resets                 |
| Dessert menu                    | Special Service Issues       |
| Beverage selection              | Differently-abled patron     |
| Beer selection                  | Children                     |
| Wine selection                  | Elderly                      |
| Spirits/Cordial selection       | Responsible Beverage Service |
| Specialty drinks                | Resolving complaints         |
| Daily specials                  | Difficult member/guest       |
| Condiments                      | Slow service                 |
| Pre-Shift Setup                 | Adjustments                  |
| Table settings                  | Member Service               |
| Section prep                    | Greeting                     |
| Dining room sidework            | Engagement                   |
| Kitchen prep                    | Inappropriate words/phrases  |
| Reservations                    | Body language                |
| Pre-shift meeting               | Tone of voice                |

**Teachable Moments**

**Take Away:** In order to train new hires consistently and completely, managers must develop a curriculum for each position and then ensure all training topics are completed.





#108

## *Training on the Go*

Clubs face a challenging training burden if they are to deliver the service levels expected by their members. Yet with tight budgets how can managers meet their training obligations while controlling costs since every hour of training is a payroll hour for each employee being trained? Add to this the difficulty of getting all departmental or section employees together at one time for a formal training session.

The answer to these challenges is to build training programs around the “on the go” concept where ongoing training material is formatted in brief – no more than five to ten minute – sessions. In every shift, in every club department, there are spare moments, time when employees have finished their shift preparations, time when employees are socializing among themselves or awaiting instructions from supervisors. Since the club is already paying for this time, put it to good use.

In every department there are hundreds of operational details that employees must learn and be reminded of with some frequency. This is just as true in golf operations, golf course maintenance, aquatics and activities, as it is in food and beverage. All that is necessary is for the department head to outline training requirements in brief doses and format them so they can be pulled out at a moment’s notice for either group-led or individual instruction. One manager who used [Food and Beverage Training on the Go](#) (see *Teachable Moment #109*) found that the most effective way to use this material was to assign employees the task of teaching each other specific on-the-go topics.

With today’s ability to find anything on the Internet with just a few keywords and keystrokes, all the information needed to teach employees values, etiquette, product knowledge, safety, security, sanitation, HR requirements, responsible beverage service, or how to operate or maintain any piece of equipment is readily available. It just has to be formatted for easy use.

Club Resources International has developed a number of [On the Go Training programs](#) for food and beverage, human resources, values, safety, leadership, and management disciplines. These offer a proven model of how easy it is to format material and train employees to increase their knowledge, skills, abilities, and service techniques.

**Take Away:** Given the amount of training that must be done in the detail-intensive club environment and the high cost of training, managers should use the On the Go Training concept to develop short lessons that can be used in the spare moments of every shift.



**#109**

***Training on the Go – A Direct Line to Restaurant Profits – 1***

**Teachable Moments**

Several years ago, the Peninsula Yacht Club was selected to be the club to implement the PCPM Food and Beverage Training on the Go Program. Initially, the program was met with some resistance from the front of house staff. They felt that the program was another monotonous program whereby the dining room managers preach F&B mechanics to them for what seemed like hours. Upon the staff's recommendation, I changed the program's delivery and made it involve the servers and bartenders more than the dining room managers.

In this new delivery, the servers studied a pre-determined module and then they were charged with presenting it to the rest of the staff. This was the key to making the program work. Now, servers would become teachers and would instruct their "class" in the pre-shift meetings. There was no way to avoid having to teach a module as we required busboys, hostesses, servers and bartenders alike to instruct a class twice a month.

At first, the restaurant staff was enthralled by the alcoholic beverage information, especially the histories of liquors and wines. This is the easiest part to teach because the 18 to 24-year-olds seem to have an interest in learning about alcohol. After they taught the beverage portion, we focused on foods and specifically our restaurant's menu. With the help of our chef, we were able to discuss the history of our menu choices, which wines would complement which entrées, and how to sell the daily features. After the beverage and food modules were taught, we moved on to other important issues such as the steps of service, flow of the dining room, recovery techniques, etc. In the end, 94 modules were taught over a 16-month period. Some of the more important modules were repeated. After completing the modules in order, we have now begun to teach them in random order and allow the staff to choose the module they wish to teach.

Once the program was instituted and the bugs were worked out, several amazing things happened in our restaurant. The first noticeable change was in the demeanor and confidence of the front of house staff. Almost instantly, they became more comfortable discussing foods and beverages with members and guests and with making recommendations. Their newly gained knowledge of the preparations and histories of the food and beverages helped them to become more confident in their ability to answer members' questions. They looked forward to being asked about the history or preparation of certain items and the social interaction that was created when these questions were asked.

The second noticeable change was that our front of house staff turnover rate declined. Our servers enjoyed coming to work and were not as apt to move on to another restaurant opportunity. The restaurant staff felt more a part of the club and they enjoyed getting to know members more personally through their social interaction. The staff no longer felt they were "going through the motions while waiting for the next new restaurant to open in the area."

The third and most noticeable change was in the number of appetizers, desserts, and after-dinner drinks sold during the dinner shifts. Just by gaining knowledge of these items, servers were able to discuss daily specials, suggestively sell at every table they were working. The increase in the a la carte average check was immediate. The servers' confidence created an aura of professionalism and also caused a competitive nature in the restaurant. Personal bets were being made to see who could upsell the most wine or desserts. Managers started offering a complimentary dessert to the server who sold the most after-dinner drinks. The front of house staff loved the competition and it drove our sales to levels not seen in the past.

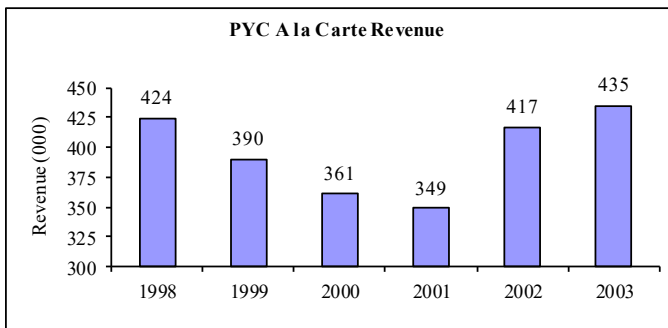
*- Chris Conner, General Manager, The Peninsula Yacht Club*



**#110**

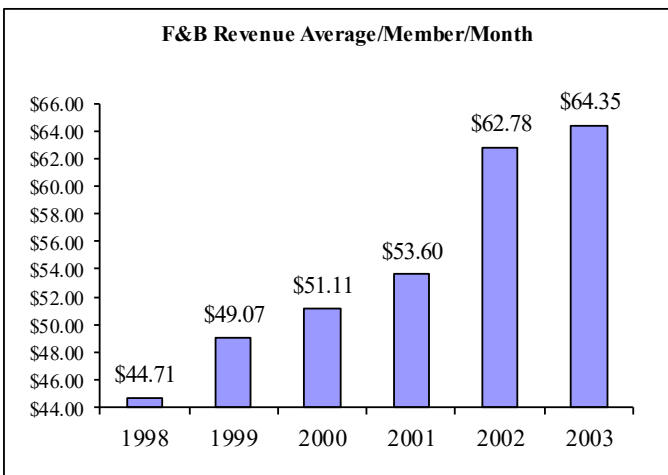
***Training on the Go – A Direct Line to Restaurant Profits – 2***

To answer the question, "Is the Food and Beverage Training on the Go program a direct line to restaurant profits?" I offer the following evidence:



At the start of implementation, the club's restaurant was experiencing a four-year decline in a la carte business. This decline was, at the time, blamed on the poor economy before and after September 11 and a declining membership level. In hindsight, these were only excuses for a more prominent problem.

Although the club's membership level was declining, the average food and beverage revenue per member was holding steady at the 5-year average and the cover counts did not show a decline either. Therefore, members were using the restaurant at a consistent rate in 1999, 2000, and 2001 up until 9/11. What we noticed when looking at the revenue data was that the average check per member had declined drastically. The data told us that members were continuing to dine in the restaurant at a steady rate, but they were spending less on each visit. Our a la carte menu prices had not fluctuated during this period, so it led me to believe that we were doing something different in the dining room or, as I found out later, we were not doing some things that we had done in the past.



The program was started in October of 2001. Almost immediately, the average check increased, and the number of appetizers and desserts increased as well. Soon after, our alcoholic beverage sales increased, especially wine by the bottle, which shot up 200%. In 2002, the program really took off. By the spring of 2002, the upselling competitions had begun, and revenue increases were seen in appetizers, daily specials, desserts, after-dinner drinks, wine by the bottle and wine by the glass.

For the 2002 year, the average F&B revenue per member increased 15% to \$62.78 per month. The trend continued in 2003 with revenues continuing to increase in 2004. It is without question that implementing the Food and Beverage Training on the Go program has had and continues to have a direct positive effect on restaurant revenues at the club. If you think this program could help your club, visit PCPM Marketplace store and purchase the Food and Beverage Training on the Go program. It is a sure-fire way to increase your restaurant's revenues.

*- Chris Conner, General Manager, The Peninsula Yacht Club*



#111

## *The Club's Mental Environment*

Every space has a mental environment made up of the attitudes, moods, activities, and pace of the people occupying that place. Compare the mental environment of a happy well-adjusted home and one that is beset by marital strife. Even the same place can have a different feel at different times. Consider the camaraderie in a busy bar on Friday night versus the same bar that morning when it had one patron. The environment is not only a reflection of current occupants and activity, but it also affects everyone who enters. Walk into that same bar on Friday night and you'll soon join in with the good time.

In some dining establishments the prevailing mental environment is one of "horsing around" and a compelling sense that the restaurant is there for the amusement and pleasure of the employees. Certainly, it's not an environment of service and caring for the customer; and certainly not appropriate for a private club.

What is the mental environment of your club? Is it one of service? Is there a sense among all employees of dedication to helping and assisting not only members and guests, but also each other? If not, what are the factors that contribute to your club's mental environment?

- **Organizational Values** – all employees must understand the importance of your [organizational values and culture of service](#) and demonstrate it in all they do.
- **Attitude and Mood** – it is up to managers to insist upon basic requirements of positive attitude and good mood. Say to everyone, "Be of good cheer, or don't be here." Employees should reinforce this good cheer among themselves. No one needs or should be subjected to someone else's bad mood or sour attitude.
- **Standards of Decorum and Demeanor** – as a fundamental requirement everyone must understand club etiquette and appropriate behavior. Working quietly, efficiently, and with purpose sends a powerful message to all who witness it.
- **Organization and Efficiency** – a sense of order and efficiency says a lot about your operation. Everyone needs to know what to do and when and how to do it.
- **Controlled Pace** – while hustle is an important quality in any operation, having a well-organized and efficient operation results in fewer chaotic moments with people rushing wildly about – which doesn't inspire confidence in anyone.
- **Helpfulness and Good Cheer** – your service teams create this by their absolute dedication to members and each other, but it must be directed and reinforced.

Your club and all aspects of its operation are a reflection of everyone who works there. Make sure your club's mental environment is appropriate to your membership and you'll see the results in member satisfaction and your bottom line.

**Discussion Points:** Every inhabited physical space has a mental environment based on people and their activities. Examine your workspace and discuss its mental environment. How do the actions of employees reinforce or take away from the environment desired by club members?

**Take Away:** Club employees need to be aware that their actions and demeanor contribute to the correct environment for club members and guests.



#112

## *F&B Marketing*

There is just too much effort put into your club's food and beverage service every day not to make a concerted effort to market the products everyone works so hard to prepare and serve. And the fact that your members are somewhat of a captive audience based on their membership in the club does not mean you can take them for granted. In fact, if anything it should mean you work harder to know their desires and preferences, give them what they want, and recognize that in many markets there are plenty of other quality alternatives for spending their dining dollars.

So, what steps should you take to market your food service operation?

First, you must have menus that attract their business. They should be engineered with a mix of proven club fare and new and interesting offerings. You should also offer daily specials for additional variety. You must also recognize that menus are, in and of themselves, marketing tools by using enticing descriptors and locales of product origin to describe offerings in the most creative and appetizing way possible.

Secondly, you must train your sales staff – the club's servers so that they are knowledgeable about every food and beverage item you offer. You must use [Menu Item Selling Sheets, PCPM Form 484](#), and you must consistently have pre-shift meetings and menu tastings to continually educate them about each item on your menu.

Lastly, you must develop a member food service marketing plan that lays out all your strategies to keep members aware of what's going on in the food and beverage areas of the club. Elements of the plan should include:

- Posting flyers on bulletin boards in various member areas of the club, such as locker rooms, entryways, elevators, fitness rooms, pro shops, etc. Also, share these flyers with other department staff around the club. The more everyone knows about what's going on, the better able they are to "sell" the club's F&B. These flyers should advertise new menus, daily specials, and any planned specialty nights or club-sponsored events.
- Using the club's online and/or print newsletter to do the same. This will require you plan your F&B offerings far enough in advance to take advantage of these advertising venues.
- Developing a database of member dining preferences. Analyze member dining and spending habits to give them what they want.
- Having the chef and sous chefs regularly visit the dining room to engage with members. Such interaction builds relationships and will yield a steady stream of actionable "intelligence" about what members like and dislike.
- Using social media marketing by setting up a dining room Facebook page and inviting members to join as friends. This is an excellent way to let them know of late-breaking news or last-minute specials. Set up a Twitter account for the same purpose and send tweets to members who may be interested in the jumbo shrimp that just came in fresh and will be offered this evening.

**Take Away:** Don't expect that if you build it, they will come. You must aggressively advertise your food and beverage offerings to members.



**#113**

## ***Special Occasions***

Most membership databases have considerable information of value for the conscientious club manager. Take for instance birthdays and anniversaries. These celebratory occasions are a real opportunity to improve the club's bottom line.

- Have your food and beverage manager design special celebratory packages for anniversaries and birthdays.
- Customize birthday packages by gender and age for adults and children.
- The package should include a cake or special dessert and, in the case of anniversaries, a bottle of champagne or favorite wine.
- Price the packages aggressively to ensure perceived value. The benefit of this program for the club is not in margin per meal, but in increasing the overall food and beverage volume, especially during slow periods.
- The General Manager should send a special congratulatory card to the celebrants, inviting them to the club. Require an RSVP and limit the celebration to traditionally slow nights by excluding traditionally busy Friday and Saturday nights. This will build volume on slower nights and will allow servers to give special attention to the celebratory party.
- If available, the General Manager of Clubhouse Manager should stop by the table to wish the party a Happy Anniversary or Birthday.
- If servers are going to sing Happy Birthday, make sure they can sing, are properly rehearsed, and on key.
- Children's birthday parties also offer a special opportunity for a Birthday Bash, possibly at the pool during the swim season or a themed party in some other club venue. This is a great opportunity for the club's activities staff to use their ingenuity and creativeness to do something memorable.

The potentials are significant for the effort expended. Consider a club of 900 memberships with an average of 3.2 family members per membership. This translates to 2,880 birthdays a year. At a conservative capture rate of 25% of the birthdays and an average check of \$75 per birthday celebration (and much higher for Birthday Bashes), the potential could be as high as \$54,000 in additional food and beverage revenues. With upselling opportunities, the number could be significantly more.

The same membership with 700 couples could yield an additional \$14,000 in anniversary revenues with a 40% capture rate and a \$50 average check per couple.

**Take Away:** For the small price of an organized system, administered by the club receptionist or administrative assistant, the club can reap significant rewards – not the least of which is the goodwill of members who appreciate the special efforts made on their behalf.



**#114**

## ***Make Any Day a Special Occasion***

Most people don't need much of an excuse to go out to eat, especially if they have a little jingle in their pockets – as we hope your club members do. The reason to go out doesn't even have to be particularly important because who doesn't like a little celebratory occasion?

While every club recognizes and celebrates the standard holidays for its country and locale – as in the U.S. we celebrate New Year's Eve, Valentine's Day, Easter Sunday, Mothers' Day, etc. – every day of the year is celebrated somewhere for some reason; and in many cases there are multiple occasions for each day. Some are wild and crazy; others are traditional, national, and even local to their state, county, and town.

By using any one of a number of websites listing celebratory occasions, you can create your own reason for bringing members to the club to dine. Many international holidays can be tied to a specific cuisine as in Cinco de Mayo, which has now become a commonly-celebrated holiday in the U.S. with Mexican food, beverages, décor, music, and traditional costumes. Such holidays present a perfect opportunity to market your food service to your membership. You just have to do a little research and get creative.

Even the weird, wacky, and unusual commemoration can be made into a fun, celebratory occasion that members will enjoy. Consider that in 1968, students at the University of Colorado at Boulder named their new cafeteria grill the "Alferd G. Packer Memorial Grill" in commemoration of the prospector's conviction for cannibalism with the slogan "Have a friend for lunch!" Today students can enjoy the meat-filled "El Canibal" underneath a giant wall map outlining his travels through Colorado. Even the National Press Club in Washington D.C. offers an Alferd G. Packer burger on its menu.

For starters here is a website that list holidays (and this was on the first page of the Google search return):

➤ Holidays - Daily, Weekly, Monthly, Bizarre, Crazy, <http://www.brownielocks.com/month2.html>

So, get busy and have some fun creating special occasions for any occasion. Not only will you make some money doing so, but you may create a new club tradition.

**Take Away:** With a little research, creativity, and effort you can create your own special celebrations at the club. Well-conceived, marketed, and executed, these occasions can grow your food and beverage revenues during traditionally slow periods.



#115

## *Romancing Your Members*

I recently read a book called *Romancing the Customer, Maximizing Brand Value through Powerful Relationship Management* written by two British authors\* and exploring the concept of Customer Relationship Management (CRM). While its message was targeted to large businesses in the retail and service sectors, it contained the seeds of important ideas for private club managers.

So, what is Customer Relationship Management? It's about collaborating with each customer and adding value to each customer's life. In return, you get their loyalty. Further, it's about dealing with each customer individually, because all customers are not the same and should not be treated the same. A small percentage of customers contribute far more to your revenues and to your profit. But as compelling as the economics of focusing on your best customers, a good CRM program should not ignore the others. In fact, good programs encourage less profitable customers to become better customers. There is no doubt that by turning your organization into one that is centered around the customer, everyone will ultimately benefit. "But," the authors say, "the focus must be on capturing share of heart, not share of wallet. While money-grubbing will certainly build short-term sales, it will not ensure that you build an enduring relationship."

Traditional marketing theory says that it's all a numbers game. The more you market, the more people you contact, they greater your sales. The authors point out that what makes marketing a numbers game "is the lack of specific information about individual customers." Today, though, with the rapid growth in computing power and data capture, it is possible to know each of your customers far better. And that information provides the power to romance your customers. "Instead of focusing your efforts on your product, focus on your customers. By building up that body of information on each customer over time, you can increase the degree of tailoring of your product or service and, in the process, strengthen the emotional bond between the customer, your brand, and your company."

Ultimately, "Customer Relationship Management builds strong brand by creating the right blend of organization, systems, and processes that allow your people to understand your customers as individuals, and potentially tailor every interaction with a customer to their specific needs."

What does this mean for private club managers? Simply put, the more they know the members and their needs, the better able they will be to provide the individualized service that members join clubs to receive. The purpose then of Member Relationship Management is to build and institutionalize a system that will replicate the personalized service that was the hallmark of the best "Mom and Pop" operations of old. Such service was based upon the trust and accumulated knowledge of years of day-to-day contact and personalized service.

*\* Dr. Paul Temporal and Martin Trott*

**Take Away:** Given that all club revenues come from members, shouldn't as much effort be placed on encouraging their use of the club as any other discipline of management.





**#116**

## ***Touch Points***

The term “touch point” refers to those critical moments and events that shape and define a member’s impression of service and service delivery. Also called “moments of truth,” touch points are defined as “a critical or decisive event on which much depends; a crucial action.” But no matter what they are called, if your club is to be a service leader, it must consistently get the touch points right and it’s up to the club’s managers to work with employees to identify, plan for, train, and flawlessly execute each of these service opportunities.

Most club departments have a limited number of touch points, probably less than ten. The food and beverage department has considerably more due to the intensive interaction with members during food service. Regardless of number, it’s up to service teams to identify and establish standards for each touch point – even to go so far as scripting and rehearsing employees’ touch point roles.

So, what are the steps in planning touch point tactics? Here’s a basic list of requirements:

- Identify members’ needs and expectations.
- Carefully review interfaces with members and identify all touch points.
- Prioritize touch points based on service impact and impression.
- Spell out in detail the optimum manner of executing each touch point.
- Script, train, and rehearse to consistently execute touch points.
- Revise and refine touch point execution based on employee feedback.

Points of caution:

- Avoid robot-like, lockstep execution. You must be comfortable enough in your service role to improvise according to the dictates of the moment and situation. Everything you do must be comfortable and personal – that’s why employee empowerment is so important and powerful.
- Managers must encourage and act upon feedback from employees. The people who have direct service contact with members are in the best position to determine what works and what doesn’t.

**Discussion Points:** Examine your service contacts with members to identify touch points. Then work with your supervisor and service team to determine the optimum approach(es) for service and service delivery. Continue to evaluate these important events to fine tune them as you gain more experience. Share experiences among your team to learn from the experience of others.

**Take Away:** Managers and employees must identify touch points and focus on consistent and appropriate service delivery at these critical moments.



#117

## Rules of Engagement

While many members appreciate and enjoy their interactions with service staff, even engaging in playful banter, chit-chat, and teasing with their favorite employees, there are also those members who expect a more formal and detached level of service. It is also often the case where the member who likes to “play” with employees when in the bar after a round of golf, does not want the same level of engagement when family and friends are present. The challenge then is to assess each service situation and gauge the member’s mood and interest in engagement. Here are some of the factors involved:

**Time of Day and Day of Week.** The time of day can have a great deal to do with a member’s interest in engagement. Some members are not morning people and don’t appreciate noise, exuberance, or conversation early in the morning. If a member has his nose in the paper, he probably doesn’t want any more than polite and efficient service. On the other hand, Friday night cocktail hour is a time of conviviality and sociability, and you could expect a more playful interaction.

**Occasion.** Dr. and Mrs. Jones celebrating their anniversary will probably appreciate discreet service with as few interruptions as possible. Service should still be prompt and attentive, but servers should take their cue from the intensity and privacy of the couple’s conversation. Conversely, a group of ladies coming in for lunch after a morning of tennis are probably keyed up and looking forward to a fun time together. The same group while entertaining their gardening club with a number of guests would expect a more distant and detached approach. The businesswoman entertaining clients may want formal, correct, and efficient service with as few interruptions as possible so she can conduct her business in a manner that reflects well on herself and her club.

**Members in the Party.** The makeup of a member’s party will have a lot to do with the level of engagement. A group of members and guests just off the golf course are probably more ebullient, particularly if someone shot his low round, had an eagle, or sank a 40-foot putt to win the match. On the other hand, a member hosting his aged parents for Mother’s Day Brunch is not there to play with employees. It is also possible that a member who comes in alone for a drink may interact with staff very differently than when he is with his wife and children.

**Past Experience.** There is no better predictor of the future than experience. If a member has always been reserved and formal, with little or no personal engagement with staff, employees can expect that he will continue to be so. John, the single junior member, is casual, relaxed and always enjoys playful repartee with the bar staff. No doubt he will be that way when he stops in after work for a few drinks. However, should John arrive with a date, he may not want the same level of engagement from the bartender.

As can be deduced from these examples, there is no hard and fast way of knowing how a member will act, react, or interact with the friendly engagement of employees. Therefore, it’s up to the employee to assess the mood and manner of the member. Most people have a good sense of when someone wants to interact with them. Employees should always hold back until a member makes it clear by initiating a greater degree of contact. When in doubt, an employee should go no further than being courteous, polite, and friendly.

**Discussion Points:** Discuss the above situations and others to determine the best approach to engaging with members. Share experiences and best practices with your work team.

**Take Away:** Employees must take the engagement cue from members and act accordingly.



#118

## *Give 'Em What They Want*

Management can establish the facilities, products, and services that a private club provides, but if they are not the ones that members want, the club will not be successful. It is incumbent upon management, therefore, to fully understand the expectations of the membership. This is complicated by the fact that different members may want different things and the desires of individual members may change over time, often influenced by popular culture, ever-changing technology, and societal trends.

A typical club mission statement says that the club must “exceed the expectations” of members. But how can the employees exceed expectations if they don’t know what those expectations are? A more realistic mission statement would be to “understand and exceed the expectations” of members.

This need to understand the changing expectations of members requires that management continually “take the pulse” of the membership by any means available. This includes intensive personal contacts, management calling programs, membership meetings, various member or advisory boards, surveys, comment cards, analysis of members’ club usage and spending habits, as well as ongoing feedback from employees about the receptivity of members to the club’s offerings and individual member preferences.

**Take Away:** Club management cannot begin to satisfy the needs and desires of members unless it knows what they want. This requires a discipline of listening to the members by all managers and employees at every level and then providing well-analyzed and intelligent products and services that the members want.



#119

## Teaching the Subtleties of Service

High levels of service in a food service operation are so much more than knowing service techniques, smiling, and greeting members. To do service well requires people who are sensitive to the needs and desires of others and who understand a wide range of the customs and courtesies of human interaction. They need to recognize the subtleties of service. But what do we mean by subtleties?

Subtlety is the awareness and ability to make fine distinctions in how one engages with others or a well-calibrated sense of how to respond to or engage a person in a particular situation.

So, as leaders how do we go about teaching employees the subtleties of service? It certainly takes more than telling them to smile and be nice to members. They need to have a basic understanding of the underlying customs and practices of service, manners, and gracious behaviors, as well as an awareness of the signs and signals of unspoken needs. Not only do they need to know what to do, but they need to have the sensitivity and perceptiveness to recognize members' needs even before these are expressed.

Such sensitivities improve with knowledge and experience, but unless a new hire naturally possesses these abilities (which experience has shown that few do), food service managers must start somewhere in training employees in the subtleties of service. Here's a list of requirements:

- The club must have well-defined [organizational values](#) and a constantly reinforced culture of service. When employees are immersed in such a culture, service becomes second nature to all.
- Daily engagement and consistent example of service-based leaders. Without appropriate examples of the subtleties of service from leaders, don't expect employees to possess and provide it.
- Empowerment training that spells out the limits of employee initiative and discretion in resolving issues and problems.
- Etiquette training – employees must understand the appropriate behaviors for a hospitality setting.
- Making employees aware of the rules of engagement. Different members will want to engage differently with employees at different times and in different settings. Understanding the issues of engagement is critical to service and service delivery.
- Ensure that all staff are aware of the mental environments for each area of the operation. Different areas have different mental environments at different times of the day. Being aware of the concept of mental environment and recognizing member moods and desires is an important part of providing appropriate levels of engagement.
- Teach [service recovery and how to apologize](#). This is so basic it hardly needs stating, but experience has shown that a consistent approach must be taught to ensure employees understand the importance of recovering from bad situations and the need for a sincere “we accept all responsibility” apology.
- Make sure employees understand the importance of the Three A's of Service – that is:

***Be Alert, Aware and Anticipate member needs.***

As with everything else demanding quality, service behaviors and delivery must be defined and taught consistently to all employees . . . otherwise how would they know what you and your members expect?

**Take Away:** Employees should be aware of all the service issues associated with hospitality and food service operations.



**#120**

## ***Wow Factor – 1***

None but a few creatures of inviolable habit like the “same ol’, same ol’,” yet that’s what many clubs serve up month after month, year in and year out. Why not try a different approach that will “wow” your members? Make “wow factors” a part of your club’s traditions.

What is a “wow factor”? It’s anything, usually unexpected, that causes members to say or think, “Wow, that’s really neat!” or “Wow, I didn’t expect that!” or “Wow, that’s impressive!”

Wow factors are characterized by their unexpectedness and as such any wow factor should not become part of the club routine. They are executed for one-time or short-term effect. They are also characterized by being unusual – either cutting edge or just out-of-the-ordinary. They can be extravagant and expensive, but these should be few and far between. Most wow factors should be small scale, inexpensive, and momentary, that is, of short duration as in one day, one evening, or one event.

The key to making wow factors is to challenge club employees to come up with a specified number of wow factor ideas for their areas of the operation – say 10 new ideas for the coming busy season. Each idea should be briefly described on paper – what it is, how it will be done, what items need to be purchased, any talent that needs to be contracted, any associated labor cost, and an overall estimated cost. Then all department heads should meet with the General Manager in a brainstorming session to discuss, settle on, and schedule the roll out of each wow factor.

Here are a handful of ideas to give you a sense of the program:

- Complimentary mini-trio sampler of desserts or appetizers for all diners on a given night – this is also an excellent way to test, preview, or market new menu items.
- Free soft-serve ice cream or smoothies for the kids (of all ages) at the pool on a hot summer day. An alternative would be to arrange for the local ice cream truck to pull up in front of the pool with music playing. Everyone gets their specialty ice cream treat and the club pays the bill.
- Flowers for all the ladies dining on some non-special night just for the surprise effect. Google search “special days” for calendars of unusual celebrations and holidays.
- A giveaway of a sleeve of golf balls to each golfer on a busy Saturday morning; handed out by the Head Golf Professional on the first tee for maximum effect.
- Free mini-pizzas in the lounge on an unexpected evening.
- A themed ice carving for a ladies’ luncheon.
- Complimentary and unusual hors d’oeuvres for the weekly card game in the men’s lounge.
- Face painting or a clown or a balloon artist at the next children’s event.
- Complimentary wine for no special reason. A great way to clear out dead stock or showcase new wines.

**Take Away:** Keep the club fresh and interesting for members with wow factors. Brainstorm with your work team for wow factor ideas.



**#121**

## ***Wow Factor – 2***

As mentioned in *Wow Factor - 1*, the key to the wow factor is its unusual nature and unexpectedness. Several tips:

- Execute wow factors where they will have the most effect – food and beverage areas, golf areas, locker rooms, special events, activities, aquatics, tennis.
- Plan, budget, and schedule. Formalize the program enough so that the wow factors are spread out and spread around. Always have a budget. Say you budget \$500 per month for club-wide wow factors. The cost to the club is \$6,000 per year – not an inconsequential amount but think of the benefit to member pleasure and even employee morale.
- Wow factor ideas are everywhere. Borrow from other establishments or something you saw on vacation. The Internet is a treasure trove of ideas. Google search words or phrases such as “Fun,” “Fun Ideas,” “Fun Activities,” “Fun Recreational Activities,” and “Inexpensive Activity Ideas” and you’ll get a sense for how many resources are out there.
- To keep your costs down, get together with vendors for freebies. Many would be thrilled to get some exposure to your members for their products and services. Just make sure you prominently give them credit for their donations.
- Once you’ve used a wow factor, save the concept for some future time. Avoiding routine doesn’t mean never doing it again, just doing it again when unexpected. Over time, you’ll develop an extensive list of wow factors that can be deployed for maximum effect at some future moment.
- Keep your wow factor strategy, plans, and schedule under tight wrap. Don’t ruin the surprise with “loose lips.”
- Let your members do the talking about the wow factor, not you or the club staff. Act like nothing special is going on while the members “buzz” about the unusual and unexpected. Certainly, you may acknowledge a wow factor when asked about it, but act like it’s no big deal, just some little thing that happened “spontaneously.”

There are hundreds of websites offering unusual and fun ideas. Get your department heads and employees excited by searching out the most unusual activities, events, or ideas. Your members will still ask, “What have you done for me lately?” but they’ll be delighted by the unexpected moments and your employees will be energized by the fun of giving these special gifts to your membership.

**Take Away:** Keep the club fresh and interesting for members with wow factors. Brainstorm with your work team for wow factor ideas.



**#122**

## ***Safety***

The club is responsible for the health and safety of its members and employees. To meet this responsibility the club must take reasonable steps to ensure employees:

- Work and act in a safe and healthful manner;
- Conduct their work in compliance with all applicable health and safety rules;
- Use all means and methods available to work in a safe and healthy manner;
- Not remove or disable any safety device, guard, notice or warning provided for use in providing safe working conditions; and
- Are informed about any known health hazards to which they are exposed, the measures which have been taken for the prevention and control of such hazards, and the proper methods for utilizing such control measures.

While the General Manager has ultimate responsibility to ensure that the club provides a safe environment for members, guests, and employees, individual managers and supervisors have the following responsibilities in regard to safety:

- Identify any safety hazards in their areas of responsibility.
- Analyze departmental positions for inherent safety hazards.
- Modify work practices or workspaces to reduce hazard risks.
- Ensure proper training of employees in all matters relating to safe work practices and work environment.
- Cooperate with the club's safety director in conducting routine safety inspections.
- Correct all deficiencies noted in such inspections in a timely manner.
- Investigate and analyze accidents to determine unsafe conditions and causes of accidents.
- Promptly and properly complete Accident Reports when necessary.
- Enforce safe work practices, special safety requirements, and the use of safety clothing, equipment, and protective devices.

For a complete discussion of club safety issues and responsibilities, review the [Club Safety Plan](#).

**Take Away:** Club managers are responsible for the safety of members and employees.



#123

## Safety Matters – The Heimlich Maneuver

Choking can occur in the most pleasant surroundings – enjoying Father’s Day dinner, talking with friends over coffee and cookies, or cheering the ball game on TV while munching pop-corn – all of which can happen in a club environment. Choking, respiratory distress and oxygen lack can quickly ensue if a piece of food, becomes lodged in the throat, partially or totally obstructing the air passage.

Usually, a good strong cough releases whatever is stuck in the throat and the person is left somewhat red-faced, teary-eyed, and perhaps a trifle embarrassed. But sometimes coughing isn't enough to dislodge the object and death from choking can quickly follow once the airway is completely blocked.

The choking person can quickly become unconscious and suffer cardiac arrest. Although the heart may still be resuscitated, the person may be left with mild to severe neurological damage. Brain damage from lack of oxygen will follow in four to six minutes if the airway remains completely obstructed.

Recognition of choking is the key to saving a life. A large proportion of choking deaths occur because – prompted by social conditioning – the choking person seeks privacy while trying to clear the airway. A choking person needs immediate first aid and should never leave a room where others are present. If the person does leave, the potential rescuer should follow to give first aid if necessary. If the choking person can still breathe and make sounds, leave him or her alone and encourage vigorous coughing to expel the object. If the person cannot speak, has a weak cough, bluish face or finds it hard to breathe, try the Heimlich maneuver, which will often clear the obstruction with three to four thrusts.

Emergency help should be summoned if a choking person can't speak, is making a high-pitched wheezing noise and most urgently if the person becomes unconscious. Dial 911 immediately for emergency aid if a choking person loses consciousness.



Before performing any lifesaving technique on a conscious person, the rescuer must obtain consent. Ask the victim: “Do you need help?” Once consent (a nod will do) is received, the four-step Heimlich maneuver can be performed while the choking person is standing or seated.

1. From behind, place your arms around the victim's waist.
2. Make a fist with one hand and place the thumb side of the fist against the choking person's abdomen, well below the rib cage and just above the navel.
3. Grasp your fist with the other hand and press into the victim's abdomen (just above the navel) with quick upward thrusts.
4. Repeat thrusts until the object is expelled.

If the airway is not cleared, the choker may become unconscious. If this happens, try to make the person's fall to the ground as gentle as possible to prevent injury, especially to the head. An ambulance should have been called since brain and heart damage can quickly follow loss of consciousness.

While awaiting emergency medical help, a trained rescuer can perform the Heimlich technique on an unconscious person who's placed on his or her back. Although the principle is the same when lying down, the technique varies slightly. The rescuer kneels astride the person and body weight is used to produce quick upward thrusts.

**Take Away:** All front of the house food and beverage employees should be taught to recognize the signs of a person choking and how to perform the Heimlich Maneuver.

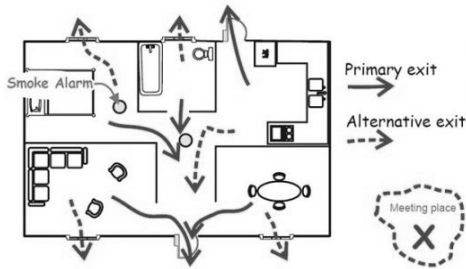




#124

Teachable Moments

## Safety Training



Given the distinct differences between club departments in terms of facilities, work practices and processes, hours of operation, staffing, presence of members and guests, and fire hazards, each department head must develop a Departmental Fire Safety Plan. Once drafted this plan must be reviewed by the safety director or general manager to ensure it is integrated with the larger Club Fire Safety Plan.

At minimum, the departmental plan must address the following:

- Listing of fire hazards.
- Specific fire safety, prevention, and evacuation responsibilities.
- Emergency services notification responsibilities.
- Location of fire alarm pull stations.
- Location and types of fire extinguishers.
- Location of all fire exits.
- Evacuation routes for different parts of the facilities, including identification of primary and alternate exits.
- Listing of any fire suppression systems, if any.
- Designation of exterior safe assembly areas.
- Safe evacuation of members, guest, and other employees.
- Identification and specific requirements of any special-needs individuals.
- Fire safety training of employees.
- Scheduling and rehearsing fire evacuations (fire drills).
- Routine reporting of fire safety training and evacuation drills to safety director or general manager.

The ultimate responsibility for fire safety rests squarely with each department head and the club's general manager. Fire safety planning and rehearsal of all aspects of fire emergencies saves lives and must be a top priority.

**Take Away:** Each club department must have a well-thought out and rehearsed fire safety and emergency evacuation plan.



**#125**

## ***Emergency Evacuation Drills***

An essential element of any fire safety plan is the emergency evacuation drill, commonly called a fire drill. Without making the effort to train and rehearse employees on their responsibilities and actions in case of fire or other emergency, the lives of many people – members, guests, and employees may be at risk.

The challenge for clubs is that the facility use patterns are very different for different parts of the club and for different times of the day and week. The evacuation issues at the golf course maintenance facility or aquatics center are far different than the clubhouse; and a clubhouse evacuation on a Tuesday morning will have far different concerns than a busy Saturday night.



Add to this is the disruption of member service and enjoyment of their club by scheduling frequent evacuation drills or holding such drills when members are dining, and guests are attending a large and expensive wedding. Clearly, evacuation drills must be held, but they must be carefully planned and executed to provide full safety value with the minimum disruption to member and guest activities. So, what strategies would meet both requirements? Here are some thoughts:

- Hold quarterly departmental evacuations drills for remote (non-clubhouse) facilities and activities such as aquatics, racquet center, golf course maintenance, and cart barn. These will be scheduled by the department head in coordination with the club safety director or general manager. The time of the drill should be chosen based on greatest rehearsal impact for the largest number of employees with the least disruption to member service.
- Schedule two types of quarterly clubhouse evacuation drills:
  - ❖ Daytime – scheduled drills for two quarters of the year will be for a weekday timeframe when all operating and administrative departments are functioning – again with the least disruption to members.
  - ❖ Evening – the remaining two quarterly drills should be scheduled for an evening period. Clearly a nighttime drill will impact members, but this impact on member service and enjoyment of their club can be lessened by various strategies such as a Board approved and supported weeknight “Fire Drill Night” when members are alerted in advance to the evening’s drill and the drill is scheduled for a designated time. Meal service on this “special activity” night would be a reduced-price buffet scheduled to start just after the drill is completed. Members would be asked to arrive early for a brief open bar and complimentary hors d’oeuvres while seated in the dining room. After participating in the drill, members would return to their seats for the specialty buffet. The selected date should be one without scheduled catered functions.

**Take Away:** Periodic emergency evacuation drills will increase the fire safety awareness of club staff and provide valuable information and experience in emergency evacuation procedures.



#126

## Emergency Evacuation Simulations

Given the difficulties of scheduling emergency evacuation drills and the resulting disruption to members and guests, club managers must use other means of training and testing employees on their responsibilities and actions during an emergency evacuation. Such an alternate means would be the use of departmental Emergency Evacuation Simulations. These routine periodic simulations would consist of a variety of cards describing simulated emergencies for each area of the operation and the supervisor testing employees what their actions would be when handed the card.

Simulation cards would be readily identifiable by design and color. Each card would:

- Describe an emergency scenario.
- Require the employee to describe his or her actions, including:
  - ❖ Notification of the emergency.
  - ❖ Location of emergency exits.
  - ❖ Primary and alternate evacuation routes.
  - ❖ Steps to evacuate members, guests, and other employees.
  - ❖ Location of exterior assembly area.
- Require the employee to list:
  - ❖ Appropriate life safety actions in the presence of fire, heat, and smoke.
  - ❖ Steps to fight or slow the spread of a minor fire.
- Require the employee to:
  - ❖ Point out the location of fire pull stations.
  - ❖ Point out the location of fire extinguishers.
  - ❖ Explain the types of fire extinguishers and their respective uses.
  - ❖ Simulate the use of a fire extinguisher, while describing the necessary operating procedures and techniques.



The supervisor presenting the simulation card would grade the employee responses and point out any incorrect actions or answers. The whole exercise should take no more than ten minutes and can be executed without disturbing normal service routines.

**Take Away:** The use of Emergency Evacuation Simulation cards will increase the fire safety awareness of staff and reinforce critical information and experience regarding emergency evacuation procedures with a minimum disruption to members and guests.



**#127**

## ***Make It Sparkle***

When one considers all of the things that go into making a club distinctive and appealing to its members, one of the most visible is its cleanliness. Whether a club has its own housekeeping staff or contracts with a cleaning service, cleanliness is an essential element of a quality club operation. As with any other aspect of quality, standards must be defined and ensured. The following list includes some of the essential areas that must be monitored for a high level of cleanliness:

- **Entryways** are one of the most visible areas of the club through which every member and guest will pass and make the first impression of any visit to the club. Sidewalks and pavers must be constantly blown or swept. Cigarette butts must be policed continually; trash or butt cans must be cleaned and emptied frequently. The entry door must be appealing. Smudges and handprints on glass doors or sidelight windows are unsightly and require constant attention. The doorsill or plate has edges and grooves that collect dirt and debris and is often overlooked. Entry walk-off mats need to be removed and cleaned daily.
- **Restrooms** are areas where members expect the highest level of sanitation and cleanliness. They are used constantly and need constant attention. Sinks and counters need to be wiped down. Mirrors get splattered and must be cleaned. Trash cans, particularly on busy occasions, can overflow with hand towels and waste. Supplies must be checked and replenished as usage levels dictate.
- **Dining Rooms and Bars**, because of the food and beverages served, must be kept clean and “appetizing” at all times. Trash cans must be emptied frequently, wiped down, and sanitized to avoid offensive odors. Carpets around tables and chairs receive spills and dropped food items. They must be vacuumed thoroughly daily and shampooed with some frequency. The furniture itself must be cleaned daily to prevent food buildup. Young children can make a mess of highchairs with each use. These must be cleaned and sanitized after each use. Menu covers can quickly get smudged and grimy and should be cleaned or replaced often.
- **Lobby or Seating Areas** often have large overstuffed furniture. These should be vacuumed daily, particularly the cushions which collect dust and debris under cushions and along raised seams. Tables and bookshelves need to be dusted daily.
- **Picture Frames, Paintings, and Window Molding** need frequent dusting and are often overlooked, particularly if high on a wall.
- **Windows** allow light to enter, and **Mirrors** reflect that light. Often one doesn’t notice how dirty they can get until light hits them in a certain way, and this will most certainly be noticed by members.
- **High Ceilings, Chandeliers, and Ceiling Fans** give dramatic effect, but are the perfect place for cobwebs and dust to collect. Inspecting with a keen eye and the use of a telescoping duster should be a daily habit, particularly in dining areas prior to opening.
- **Verandahs and Porches** require the same discipline, but even greater vigilance given their exposure to the elements.
- While not as visible, **Sanitation** is of even greater importance given the health and hygiene implications. Disinfectant cleaners must be used on any surface touched by human hand.

**Take Away:** Cleanliness and sanitation are an important part of a quality food service operation.



#128

## *Personal Productivity – 1*

Club management is a demanding and time-consuming profession. Managers and supervisors too often find themselves reacting to events and constantly responding to the crisis of the moment.

In order to stay ahead of the never-ending press of daily operations and to attend to the many important issues of member service, managers must be well-organized and highly productive. Below are some of the strategies and habits that can improve your personal productivity.

- **Annual planning.** Have an annual plan and timelines for your department or section. Put it in writing to commit to its accomplishment and review it on a regular basis.
- **Work planning.** Your personal work plan will include what steps need to be accomplished to meet your departmental goals, but will also have personal goals, such as developing yourself and your skill set.
- **Use a Day-Timer** to better organize yourself, your schedule, and your daily tasks. Use it to look and plan ahead as well as to keep a record of your daily and weekly goals, activities, meetings, and tasks completed. The same can be accomplished with smart phone applications or a personal digital assistant.
- **Make lists and prioritize.** Priorities change frequently – even daily – so keep a list of priorities (1. Critical – must be accomplished as soon as possible; 2. Priority – must be accomplished; 3. Routine – may be accomplished as time and resources permit).
- **Develop and use checklists.** These pre-prepared lists for project work, such as organizing storage areas or deep cleaning workspaces, can be used to assign your employees recurring tasks when business is slow, but you are not yet prepared to send anyone home.
- **Plan ahead.** The planning horizons may vary from department to department, but you should always be looking ahead at least one month (and often 2 to 3 months) for special events, seasonal activities, increasing or decreasing business levels, vacation scheduling, and any other events or activities that require advance planning.
- **Use a personal computer, laptop, or digital tablet.** The PC is a great productivity tool and standard word processing, spreadsheet, and graphics software, such as MS-Office, will allow you to create professional-looking documents that can be stored for future use or modification, such as written standards, policies, and procedures; training materials; budgets and benchmarks; and room diagrams. Having these skills will not only make you more productive and help you communicate more professionally but will significantly enhance your career opportunities and progression.

**Take Away:** Personal productivity is a key discipline for any club manager.



#129

## Personal Productivity – 2

Here are some additional strategies and habits that can improve your personal productivity.

- **Organize and save your work.** As you produce written standards, policies, and procedures; training materials; various communications; specialized spreadsheets; and any other intellectual material on the computer, save them for future use. Most of what you spend time to create you'll use again as you progress through your career, but you must be able to find it.
- **Benchmark your operation and forecast business levels.** Benchmarking will give you a deeper understanding of your business and its seasonality and will help you budget more accurately for future years. It will also allow you to formally forecast upcoming business levels, allowing more efficient staffing. Both disciplines will help take some of the guesswork out of your business decisions.
- **Master and delegate routine tasks.** Routine tasks such as setting schedules, ordering consumable supplies, benchmarking, formal forecasting, and others can and should be delegated to competent and conscientious employees (see *Teachable Moments #131*). You must still supervise the work and check its accuracy on a regular basis, but you'll save your own time while helping develop the confidence and abilities of one or more of your employees. Be sure the selected employees are also benefiting by the arrangement through genuine learning opportunity or possibly additional compensation for the tasks. Also, before you delegate any task to another, make sure you have mastered the task yourself, have a complete understanding of any and all issues involved, and train the selected employee thoroughly – not just by showing him how, but by explaining why at the same time.
- **Establish daily, weekly, monthly, seasonal, and annual habits.** The above disciplines will be far easier to implement if you establish regular schedules to do some of them.

The efficiency of your operational area and your employee work habits will reflect your personal productivity. To the extent you are disorganized, undisciplined, and work without a plan, your area of the operation will follow suit.

**Take Away:** Personal productivity is a key discipline for any club manager.



**#130**

## ***Time Management***

In the often-hectic environment of club management, managers must use their limited time efficiently. But you must understand that time management is not about managing time. It's about identifying time-wasting personal habits and changing them to be more efficient. Here are some disciplines that will help:

- Ensure your department or section is well-organized with detailed operating systems, standards, policies, and procedures. Without these, employees “freelance,” requiring continual supervision and intervention to do things properly. This will eat up more of your time than anything else.
- Plan ahead. Always be looking ahead for upcoming activities, events, projects, and tasks. Planning is near impossible if a manager always has his head down. By identifying upcoming tasks, the manager can review what needs to be done to prepare.
- Make to do lists. Not only do lists help on a day-by-day basis, but they should also be made for upcoming events and tasks.
- Establish priorities and continually review them.
- Develop routines. Daily, weekly, and monthly routines help sort out what has to be done and when.
- Use checklists for routine tasks. Tasks such as monthly inventories, new hire onboarding, and benchmarking summaries should be detailed on checklists that can be used as necessary.
- Develop and use [meeting disciplines](#) when planning and holding meetings.
- Delegate routine tasks to properly trained subordinates.
- Organize workspace, files, and records. An immense amount of time can be wasted by looking for misplaced items such as:
  - ❖ Personnel files
  - ❖ Departmental benchmarks
  - ❖ Contact information for frequently contacted individuals
  - ❖ Training materials and checklists
  - ❖ Room and space diagrams
- Set office hours to avoid excessive interruptions.
- Set and keep a routine schedule as much as possible.
- Keep track of those things that waste time. Review this list periodically and brainstorm ways to avoid “time wasters.”

**Take Away:** Managers have a lot going on and must be highly disciplined to avoid wasting time.



#131

## *Delegation*

Delegation can be a tremendous training tool for individuals who want to learn and do more. Delegating duties to employees makes sense for three reasons:

- It frees up managers' time for other matters,
- It develops employees to take on broader responsibilities, and
- It prepares others to step into a position should the incumbent move on.

Practice delegation by selecting one or more employees who show both the aptitude and the interest to take on expanded duties. The manager's role towards these individuals should be that of a mentor.

When mentoring staff, in addition to showing them what to do, the manager needs to explain in depth the reasons behind various duties. If employees are to grow into broader responsibilities, they will need to have knowledge, not just technical experience. While mentoring can be time-consuming, it will ultimately free up a manager's time. Employees will appreciate both the interest and effort devoted to their development and the manager's career and personal development will be advanced by the additional time she has to focus on other issues and projects.

Cautions:

- Unless the manager makes a concerted effort to provide employees proper direction, feedback, and ongoing growth opportunities, delegating may alienate them. In other words, don't use them. The manager needs to put effort into their growth and make it worthwhile for them as well.
- If employees are put in a supervisory role, pay close attention to how they interact with other staff. The critical aspects of supervision are directing and motivating employees. Many first-time supervisors have difficulty with the more subtle aspects of directing employees and may end up alienating the rest of the team.
- When authority is delegated to a subordinate, the manager still retains the responsibility that it is done correctly. A manager must never use the excuse that she told a subordinate to do something, and it wasn't done.

Delegating requires extra effort on the part of a leader, but ultimately it is one of the most rewarding things she can do. Not only will the manager have more time to concentrate on projects and details, but she also helps others grow personally and professionally – certainly, a win-win scenario for everyone.

**Take Away:** Delegating can be a win-win situation for both the manager and the employee and frees up the manager's time for other matters.





**#132**

## ***Managing Dining Flow – 1***

For decades, if not generations, club managers have been encouraging members to make dining reservations. Some do, many don't; and this trend only seems to be growing more pronounced with the more casual and spontaneous lifestyles of today's memberships.

But as every food service professional knows, a culture of "drop by" dining in a club only makes a difficult business more challenging. Even a highly disciplined food manager who has a long historical record of dining patterns and who practices the discipline of formal forecasting knows that any number of factors can throw a monkey wrench into the most professionally-run operation. Whether it's the employee calling off at the last minute, the unexpected change in weather, or the spontaneous decision by a large circle of members to drop by the club, the best laid plans, as the poet Robbie Burns noted, "gang aft agley."

So, what can the conscientious food and beverage manager do to protect herself, the club, and member service from the daily vagaries of the business? In looking at food service operations, there are several disciplines to help manage the flow of a club's a la carte dining.

As mentioned above, two essential best practices are benchmarking and formal forecasting:

- By tracking the number of diners and the percentage of walk-in traffic (# of walk-ins/total # of diners expressed as a percentage) by meal period, day of week, and seasonally throughout the year, a manager has some basis for forecasting business levels and scheduling staff.
- The discipline of formal forecasting allows managers to examine past history and take into account the weather forecast, the number of reservations on the book, and any known activities or events (at the club, in the community, or in some cases on television), and then make their best guestimate as to the expected levels of business.

These two disciplines alone will go a long way in helping to manage the flow of diners. But even with these disciplines in place, there will still be unexpected rushes of business. Recognizing this reality, there is still more to be done (see *Teachable Moments #134* for more detail).

**Take Away:** Managing the timing of dining flow in the club's food service operation is essential to providing high levels of service.



**#133**

## ***Managing Dining Flow – 2***

Ultimately, dining flow is an issue of timing, but there are multiple moving parts, each with its own pace and impact. Consider that on any given day, dining can be impacted by:

- Parties with reservations arriving on time, early, or late.
- Walk-in parties of varying size. When infrequent or during slow periods, these present no problem and should be immediately seated. It only becomes an issue when large numbers of parties arrive in short order or at the same time.
- Large parties (more than 10 or 12) arriving and wishing to order off the menu. Typically, such parties would be made by reservation so tables can be combined, and a set or limited menu arranged. When they arrive unexpectedly or during a busy rush, they can create a cascading series of events that impacts service throughout the dining room.
- The number of servers and sections open in the dining room. Just because the dining room has 50 tables, and a hundred and fifty seats doesn't mean the club is properly staffed to serve all available tables and chairs. A properly run food service operation will staff both the front of house (dining room) and back of house (kitchen prep staff) based on forecasted business, but sometimes the actual business is unexpectedly high by a significant margin.
- The "service intensity" for each seated table depending on where in the sequence of service the table is. Service intensity varies for each table based on the number in the party and the courses of food and drink ordered. Typically, service intensity is highest at first seating, when menus and wine list are handed out, drinks ordered, specials explained, and food orders taken. Thereafter, the intensity and pace of service will depend on the individual party and what was ordered. A table celebrating a special occasion and ordering all courses, plus cocktails, wine with the meal, desserts, and after dinner drinks and coffee will be far more intensive than a family of four coming in for burger, fries, and sodas before heading out to the movies. Other moments of service intensity occur during the serving of various courses, clearing the table, and taking orders for dessert and after dinner drinks. All would be simple if each server had only one table, but they typically have multiple tables at different points of service sequence.
- The moment-by-moment arrival of diners and seating pattern in the different "open" sections of the dining room. Too many tables seated in the same section in close time proximity can overload the server with the service intensity of multiple tables at the same point in the sequence of service.
- The possibility of banquets being plated in the kitchen. Many small operations will prepare and serve banquets from the same kitchen space that is being used for a la carte dining. While the chef may take steps to lessen the impact of banquet plating in terms of timing, scheduling extra staff, and setting up a separate plating area, the kitchen staff is still at the mercy of the banquet – whether it starts on time and its pace is on schedule. Large or multiple banquets unfolding off-schedule can interrupt the smooth flow of a la carte food preparation at the most critical of moments.

**Take Away:** Managing the timing of dining flow in the club's food service operation is essential to providing high levels of service.



#134

## *Managing Dining Flow – 3*

With the large number of dining flow variables to manage, it can be a real challenge to provide the smooth and gracious service that members expect from their club. Having thus described the issues, let's discuss some strategies to minimize the negative impact on dining flow.

1. Create written dining policies, get the buy-in and blessing of the club's Board, and make sure the membership is aware of the policies and their necessity to provide better service to all members. Periodic reminder notices or articles in the club newsletter will help everyone understand that the policies simply codify basic courtesies that enhance everyone's enjoyment of the club.
2. Use a host stand or a "Please Wait to Be Seated" sign as a control point to manage seating in the dining room. This allows the seating of members and guests in a manner to ensure no individual server section is overloaded and seating timing and service intensity issues do not overwhelm the staff's ability to smoothly handle the level of business. The host or other persons controlling the seating must be trained and prepared to tactfully explain that forecasted staffing levels determine the capacity of the dining room, not the number of open tables.

To diffuse potential problems at the host stand, the club should have a policy of requesting those parties without reservations that cannot be immediately seated to wait in the lounge until tables are available. Spelling out options for the host to offer complimentary drinks or hors d'oeuvres under certain circumstances may also help to diffuse any member dissatisfaction. An important point, though, is to be able to give waiting parties a realistic wait time for a table. This is not the time to over-promise and under-deliver!

3. In addition to the host stand the other location critical to smooth dining room flow is the order pick up line in the kitchen. On most occasions when the dining flow is smooth and orderly, servers can handle their own order pick-ups. However, when it gets busy, it is essential to have an expeditor on the server side of the line to organize and prioritize orders, tell the cooks when to fire the orders of particular tables based on their pace of dining, and ensure each server gets the right order for his or her table. Like an air traffic controller, an expeditor's purpose is to bring order to potential chaos. When done properly having an expeditor ensures the smooth ordering, prepping, cooking, and pick-up of the many orders the kitchen has received.

While the challenge of ensuring a smooth dining flow is significant, the consistent application of proven disciplines will improve the situation. Food service managers must recognize, though, that there will always be circumstances beyond their careful planning and control that result in service breakdowns. But the more they know about their operation, coupled with their willingness to closely examine failures, will bring about continued improvement, as well as a great deal of personal satisfaction.

**Take Away:** Managing the timing of dining flow in the club's food service operation is essential to providing high levels of service.



#135

## *Handshakes and High Fives*

In reviewing a career, what often stands out are not your accomplishments, their luster having diminished with distance, rather it is the meaningful relationships you forged with employees, coworkers, customers, and bosses that will remain bright in your memory.

Thinking about this points directly and dramatically to where you should focus your attention, not inwardly on yourself and your ambitions, but outwardly on the quality of your interactions with others. This is the crux of service-based leadership.

A simple yet effective way of cementing work relationships is to shake hands. Politicians understand the value of "pressing the flesh." A variation on this traditional practice is the "high five" used by athletes. Psychologically, this touching of others establishes contact and rapport. While gratuitously touching employees is inappropriate, the handshake is an accepted sign of recognition and respect.

A hearty handshake of greeting each day, as well as using the opportunity at the end of the work shift to thank employees for their efforts, is a marvelously simple way of establishing a bond with your employees. As with any other symbol of relationship, the handshake must be sincere, open, and direct. There can be no question of ulterior motive, only good fellowship and cheer. Phoniness is evident to everyone.

So, say thank you to your employees on a regular basis. Nothing could be simpler or more profound in its impact on staff morale since so few managers do it.

"Thanks for your help today," "I really appreciate your efforts on this project," "I realize how difficult this assignment was, and am most appreciative of your help," "I couldn't have done it without you," "You did a great job" – any of these expressions of appreciation, when sincerely given, will have a stunning impact on your service team.

**Take Away:** Express your appreciation often and sincerely. You like to hear it, they like to hear it, everyone likes to hear it!



#136

## The Grand Theory

Albert Einstein, after his world-shaking General Theory of Relativity was published, validated, and accepted by the scientific community, spent the remainder of his life working on a Unified Field Theory that attempted to boil all physics down to one elemental formula, hopefully as elegantly simple as his earlier stroke of genius –  $E=mc^2$ . While he never achieved his Grand Theory, I fully understand his desire to distill complexity to simplicity.

On a far humbler scale, I have also been impelled to boil down the seeming complexities of club operations into a smaller number of principles that when followed would lead to organizational success. What I've come to believe is that there are five basic requirements for any successful organization. They are:

1. **Leadership** – the skills that permit those who direct an enterprise to win the enthusiastic support and efforts of their followers to the accomplishment of specific goals and tasks.
2. **Culture** – the well-defined and consistently reinforced values that underpin the efforts of the club.
3. **Organization** – the ability to structure and integrate the complex and interrelated programs and processes of the club to promote efficient operations.
4. **Management Disciplines** – the ability to consistently execute generally-accepted requirements and best practices at all levels of the organization.
5. **Hiring Well and Training Thoroughly** – the programs and disciplines that cultivate the attraction and retention of the best talent, as well as consistent, efficient, and professional completion of all tasks and engagements with members.

Having outlined these requirements, I would go on to say that they are all supported by one key element and that is **DISCIPLINE**.

While complex business enterprises require both broad and specific skill sets for success, these mean little if each individual and the corporate group as a whole don't have the intense and overriding discipline to focus daily on the essential tasks at hand and complete them as efficiently as possible.

Complex enterprises may be based on sound management ideas and theory, but without, as Jim Collins says, "*disciplined people who engage in disciplined thought and then take disciplined action,*" they will never build enduring greatness. In other words, despite whatever talents your management team may possess, without discipline you're just muddling through.

**Take Away:** In real estate it's all about location, location, location. In club management it's all about discipline, discipline, discipline. Experience shows that discipline can be taught by setting challenging requirements for subordinates, and then holding them strictly accountable for results.



**#137**

## ***Mastering the ABCs***

As children we all mastered our ABCs, the basic building blocks of language and learning. The term “ABCs” has long since come to signify the basics of any endeavor.

All of us who work in our industry recognize that the profession is made up of mastering the many basics of hospitality and service. Even in an enterprise as seemingly complex as food service, it is the execution of the basics that underpin all our efforts and ultimately leads to success.

Of all the things I’ve learned in my hospitality career spanning over 35 years, the ultimate discipline of success is the necessity of executing the basics well.

While there are many innovative, cutting-edge ideas to improve the products, service, and performance of your operation, you must build these enhancements onto a foundation of the basics.

With these thoughts in mind, I’d like to commend to you the most basic, yet ultimate discipline – that as you contemplate the many ways to add service and value to your club and members, you must always focus your attention and that of your entire staff on the ABCs, that is . . .

### **Accomplish the Basics Consistently**

**Discussion Points:** Club management is not rocket science, but there is much that needs to be done right every day and every time. Have your managers list some of the basics that must be done right in their departments and how they ensure these basics are done consistently by employees.

**Take Away:** In the detail-intensive world of club management you and your employees must be disciplined enough to consistently accomplish the many basics of the operation every day.



#138

## *Profitable Food Service by the Numbers*

We have covered a lot of basic ground in this Training on the Go manual. But recognizing that the consistent application of knowledge is power, let's summarize those management disciplines that will enhance any food service operation's bottom line.

- 1. Benchmarking revenues, cover counts, and average check by day of week and meal period.** This will help you schedule staff more efficiently, monitor sales trends, and allow you to track the success of new menus and efforts to upsell.
- 2. Benchmarking payroll cost, hours worked, and average hourly wage by pay period.** This essential discipline will allow you to stay within budget, monitor overtime, and control your most significant expense.
- 3. Formal forecasting** by using historical cover benchmarks and knowledge of upcoming events, external factors, and optimum staffing levels. This will allow you to ensure expected service levels in the most cost-effective way.
- 4. Timely and accurate inventories and benchmarking of inventories.** This will ensure budgeted cost of goods sold and identify any adverse anomalies or trends for investigation. A further discipline that will yield significant benefits is to identify and inventory high value items weekly.
- 5. Food sales analysis.** This discipline will help you understand your members' dining preferences while protecting profit margins.
- 6. Basic dining policies.** Well-thought out and advertised dining policies will give all members an equal opportunity to enjoy your dining services while ensuring the highest service levels for all.
- 7. Consistent pre-shift meetings with a purpose and continual On the Go Training.** There is no better way to prepare and train your staff for service.
- 8. Product knowledge and suggesting training for servers.** They can't sell what they don't know and servers well-trained in upselling techniques will increase your operation's average check while enhancing your members' dining experiences.
- 9. Suggesting upsell feedback.** If servers are provided daily sales goals and feedback on their efforts to suggest, they will be far more engaged, enthusiastic, and effective in increasing their average checks. You just need to provide the numbers to them daily.
- 10. Tools to Beat Budget.** The powerful discipline of tracking revenues and expenses in real time will ensure your bottom line, make you more knowledgeable about your operation, and make preparing future budgets a breeze.

Food service managers must make these disciplines part of their daily and weekly routines. Once these disciplines are instituted and mastered, some can be delegated to properly-trained and motivated subordinates.

**Take Away:** When consistently applied, these basic and commonsense disciplines will ensure both profitability and member service. What more could you want for your operation?



#139

## *Additional Resources*

To further assist you in your quest for quality and service we offer additional resources available on the club Resources International website:

[Leadership on the Go](#) – 53 topics that can be used for discussions at staff meetings, as reading for managers, or to explain the club’s leadership style to newly hired managers and supervisors. The perfect tool for teaching a consistent, service-based style of leadership.

[Organizational Values on the Go](#) – A proven training tool to constantly and consistently remind your management team of the club’s underlying values. These 57 values topics can be used for discussions at staff meetings, as reading for managers, or to explain values to newly hired managers and supervisors. Includes topics on Mission, Vision, Guiding Principles, and Operating Standards.

[Service on the Go](#) – The 54 topics in the Service on the Go book cover such topics as The Foundation of Service, Principles of Service, Attitude, Basic Service Issues, Teamwork, Etiquette, Common Courtesies, Appropriate and Inappropriate Language and Phrases, Body Language and Tone of Voice, The Challenges of Food Service, The Pre-Shift Meeting, Suggestive Selling, Engaging members, Dining Service Tips, Service Recovery, Wow Factors, and more. Taken together they form an incredibly effective tool for training new employees and reminding long term employees of the basics of service and service delivery.

[General Food and Beverage Knowledge Training Manual](#) – A 44-page training manual that familiarizes servers with basic and common food and beverage terms. This knowledge will make your servers more confident in dealing with members. Perfect for self-study or group led instruction. Formatted in MS-Word to allow easy customization.

[Food and Beverage Training on the Go](#) – 75 plus topics covering F&B knowledge, information, and skills. Perfect for brief training sessions during pre-shift meetings.

[Alcoholic Beverages on the Go](#) – 136 training topics covering beer, wine, and spirits to help train your servers to suggest and upsell.

[The Power of Employee Empowerment](#) – This 27-page guidebook explains the concept of employee empowerment and what it takes to achieve it. A great training tool for managers at all levels and a perfect complement to Service-Based Leadership training.

[Leadership on the Line, A Guide for Front Line Supervisors, Business Owners, and Emerging Leaders and Leadership on the Line – The Workbook](#) – These two classic books that describe Service-Based Leadership are written specifically for the hospitality industry and are the perfect tool to bring your management group to a common understanding and application of leadership.

[PCPM Marketplace store](#)



### *About the Author*

Ed Rehkopf is a graduate of the U.S. Military Academy and received a Masters of Professional Studies degree in Hospitality Management from Cornell's School of Hotel Administration. During his long and varied career, he has managed two historic, university-owned hotels, managed at a four-star desert resort, directed operations for a regional hotel chain, opened two golf and country clubs, worked in golf course development, and launched a portal web site for the club industry.