

**First Things First:**

The purpose of all unit visits is developmental.

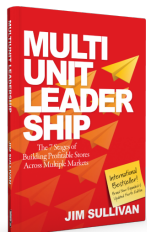
You are visiting *people*, not “stores.” Conducting unit visits as an “inspector” instead of a Coach stifles team growth, initiative and innovation.

This High Impact Unit Visit Checklist will help you evolve from an “inspect, correct, direct” approach to the more effective “*observe, inquire, and develop*” process. Visit every unit weekly if possible, have a specific focus, and leave it better than you found it. A MUL’s primary role during visits is to help managers improve, not merely tell them what to do. Bring them up, not down.

Use this template to make every store visit a high-impact one. An expanded, more detailed version of this High-Impact Template is available at [Multiunitleadership.com](http://Multiunitleadership.com) as an E-book.



To make every visit an effective one, follow these 7 steps and have a specific action plan for what you’ll do before, during, and after the visit.



For best results, use this template in conjunction with Stage 6 (SYNERGIST) in our best-selling book or audiobook (available at Amazon or Audible.com)

**Multi-Unit Leadership: the 7 Stages of Building Profitable Stores Across Multiple Markets**

**PRE-VISIT PLANNING**

**First: Evaluate & Prepare**

Using the appropriate reports and your Quarterly Business Plan, assess the following:

- This Unit’s rank among all units \_\_\_\_\_
- Detail progress on all Key Result Areas (KRAs)
- Assess 13-month financial & performance trends
- Review last visit report, assigned goals & timetable
- Consider recent marketplace trends and events

**Second: Determine the TYPE of Visit**

- Announced  Unannounced

Daypart / Volume (check all that apply)

- Morning  Lunch  Night  Transition
- Peak Volume  Slow Volume
- Weekday  Weekend  Open  Close

**Third: Determine the FOCUS of Visit**

- Financial (sales, profits, labor, COG, R&M, etc.)
- Morale (turnover, crew engagement, management)
- Leadership (bench strength, direction, energy)
- Systems/Processes (purchasing, receiving, inventory, scheduling, bookkeeping, throughput)
- Safety & Security (use your company checklists)
- Marketing (POP, menus, signage, selling, etc.)
- Performance Evaluations (up-to-date for all team?)
- Customer-centric (hospitality, shopper scores, etc.)
- Follow-up from previous visit/information gathering
- Training/Recognition (observe, attend or facilitate a manager meeting, recognition ceremony, orientation, in-store training, or pre-shift meeting)
- Major Operation Turnaround (this may require several visits...make sure to analyze root causes first to determine the best course of action)
- My top 3 concerns/GM’s top 3 concerns?

**Fourth: Determine the TIME FRAME of Visit**

- Full Day (best way to comprehensively assess)
- Half-Day (for follow-ups & high-performing units)
- 1-3 hours (looking for answer to a specific question)

**DURING THE VISIT**

**Outside the Unit**

Walk it SOLO first from the customer POV. Take pictures to document good/bad issues.

- Curb appeal  Signage  Parking lot
- Building  Dumpster  Back door
- Cleanliness  Lighting  Landscaping
- Walkways  Front Door  Drive-thru (I/A)

NOTES

**Now assess from the MUL Perspective**

(Is the team focused on the right things?)

Use your brand checklist of what to look for, paying special attention to systems, standards, people, POS, and any safety issues. Assess both good and bad things. Document with pictures.

NOTES

**Now walk it with the manager on duty, assess their perspective.**

(Note what they see, don’t just point out what you saw)

NOTES

**Evaluate Manager Performance as You Walk**

1. How well do the managers interact with the team members and customers?
2. Are they solving problems or walking past them? Are they getting the “Big Rocks” in place? Are they spreading energy or taking it away? Note what’s positive and what’s not.
3. Try to get a sense of what they understand and if there are limits to their ability to connect process to performance. Are the teams having fun?

## DURING THE VISIT <sup>2</sup> (cont'd.)

### As You Walkabout Inside the Unit

- Spread energy, don't take it away. Greet the entire team. Be a Brand Ambassador.
- Use your company's checklists, assess KRA's.
- Stay focused on the performance you came to address. If you see another major area that needs attention, note it and address it later.
- Compliment team members, note positive progress, and then walk inside & outside with the MOD. Assess each area below and rate them from 1-5. Note why they're 1's or 5's and determine possible underlying causes.

1=perfect 3=further observation 5=immediate action

- Evaluate furniture, glassware, beverage stations, restrooms, equipment, lighting, walk-ins, and storage areas.
- Observe line checks, quality and food safety.
- Observe food handling and hand washing.
- Observe pre-shift meeting. Is there effective and motivational coaching going on? Is it fun?
- Observe behaviors and efficiency of greeters or Drive-Thru Crew (if applicable).
- Are fundamentals being properly executed throughout the shift?
- Make a note of progress/regress since last visit. Did they resolve last visit's challenges?
- Review manager log book since last visit. Filled-out? Right kind of detail?

**NOTE POSSIBLE UNDERLYING CAUSES**

## AFTER THE VISIT <sup>3</sup>

### Gather Your Thoughts

1. Select a quiet corner of the store and review your visit before sitting down with the manager.
  - Label and date your visit report
  - Record as much detail as possible
  - Sort bullet points and actionable items
2. Next to each challenge area, note:
  - Is the problem a new or recurring issue?
  - Is it a surface problem, or deeper rooted?
  - Is it a process or people problem?
  - What process or system might have failed?
  - If it's a manager challenge, what kind of coaching is necessary?
3. Make a "difference list." What would be different if you were the unit manager?

### One-on-One Manager Discussion

Briefly review and recap key points of the prior visit.

**YOUR TOP 3 CONCERNS**

**YOUR MANAGER'S TOP 3 CONCERNS**

- Share and discuss your impressions with the manager. This should be a dialogue, not a monologue. Bring energy, don't take it away.
- Balance discussion between unit performance and personal development.
- Praise progress. Then identify problem areas and their possible root causes. Don't just "show and tell." Ask questions that uncover problem solutions and improve performance.
- Link all suggestions and direction to the Big Rocks, quarterly goals, and shift execution.
- Clarify and verify. Agree on an action plan and next steps with a timetable.

## IN YOUR OFFICE <sup>4</sup>

### Continuous Improvement is Key

What are 3 things I can do to improve my visits?

- 1.
- 2.
- 3.

What are 3 things I can do to improve my one-on-one conversations with my managers?

- 1.
- 2.
- 3.

Did I achieve my goals during this visit?

- Knowledge transfer/Energy transfer?
- Identify any Big Rock issues needing attention?
- Coach & develop manager(s) during visit?
- See measurable progress on quarterly goals?
- Identify any company standard issues?
- Are the teams growing or standing still?
- Did I lead by example?
- Did I leave it better than I found it?

### Set up the Next Visit: Habitual Consistency

Before your next visit, review your last visit report to refresh and re-focus your memory on the key impact issues from the previous visit. It's all about Habitual Consistency. That which is the same is the MUL's impact, that which is different is the GM's impact. Send an email the next day recapping the visit feedback.

Store Location/Unit #:

Visit Date:

Visit Time/Daypart:

Manager on Duty: