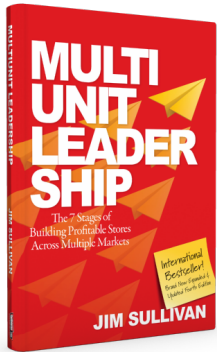


### QUARTERLY BUSINESS PLAN QUIK TEMPLATE

The purpose of an effective QBP (Quarterly Business Plan) is to create an active roadmap for Multi Unit Leaders that links quarterly goals to daily execution in each of your units. Use this QBP Quik-Template to plan and prioritize your next 90 days, and see better results immediately.



You can download a more detailed and comprehensive Ebook version of this QBP Planner at [MultiunitLeadership.com](http://MultiunitLeadership.com) along with a comprehensive Ebook for executing High Impact Unit Visits.

Use this template in conjunction with our best-selling book: *Multi-Unit Leadership: the 7 Stages of Building Profitable Stores Across Multiple Markets*.

Check out our e-learning course called Multi U at [MultiunitLeadership.com](http://MultiunitLeadership.com).

## PREVIOUS QUARTER

Analyze performance in key areas per unit over the past period.

	\$/%	+/- vs. Budget	+/- vs. Prior Year	+/- Trend
Total Sales	_____	_____	_____	_____
Cost of Goods	_____	_____	_____	_____
Labor Cost	_____	_____	_____	_____
Operating Costs	_____	_____	_____	_____
Controllable Income	_____	_____	_____	_____

For each unit:

- What are the key lessons and best practices that impacted last quarter?
- How will you share that insight with all of your managers?
- Did each team accomplish their targeted goals? What's still in progress?
- What hasn't been started, but needs to be done? What obstacles might be in the way?

## KRA GOALS

Assess and prioritize (1,2,3) the Key Result Areas to work on this quarter in each unit.

Use last quarter's results, period trends, GM Input and unit strengths & challenges.

Priority	KRA	Details & Tactics
<b>Team</b>	<input type="radio"/> Staffing	
	<input type="radio"/> Training	
	<input type="radio"/> Turnover/Tenure	
	<input type="radio"/> Development	
	<input type="radio"/> Bench Strength	
	<input type="radio"/> Diversity	
<b>Sales</b>	<input type="radio"/> Service Scores	
	<input type="radio"/> Marketing/Events	
	<input type="radio"/> Customer Traffic	
	<input type="radio"/> Comp Sales	
	<input type="radio"/> Salesmanship	
	<input type="radio"/> Incentives/Contests	
<b>Product</b>	<input type="radio"/> Food Safety	
	<input type="radio"/> Food Quality	
	<input type="radio"/> Waste	
	<input type="radio"/> Line Checks	
	<input type="radio"/> Purchasing/Receiving	
	<input type="radio"/> Spec Compliance	
<b>Profit</b>	<input type="radio"/> Best Practices	
	<input type="radio"/> Profitability	
	<input type="radio"/> Labor Costs	
<b>Facility</b>	<input type="radio"/> Overtime COG Supplies	
	<input type="radio"/> Cleanliness/Sanitation	
	<input type="radio"/> R&M	
	<input type="radio"/> Licenses Inspections	
<b>Process</b>	<input type="radio"/> Virus Protocol	
	<input type="radio"/> Systems	
	<input type="radio"/> Paperwork/Reports	
	<input type="radio"/> Cash Mgmt., Files	
<b>Marketing</b>	<input type="radio"/> LSM, LTOs, Signage, etc.	

## PEOPLE

At the end of the next 90 days, what do you expect your team to be better at?

What resources does each team and each Manager need?

For each unit, assess:

- **Leadership:** Discuss with each Manager the specific actions he/she will take to achieve the stated KRA goals. What stretch goals should be assigned? To whom? Why?
- **Manager Development:** Review and detail each Manager's development needs and career path. Address succession plans, timetables, and necessary training. Forecast any changes—like promotions, transfers, and departures—in the team over the coming quarter.
- **Training & Knowledge Capital:** What knowledge gaps exist in your Management and Hourly teams that may limit goal achievement, career growth, or executing the quarterly plan? What materials exist (or need to be created) to address those gaps? How is training being executed every day in each unit (new hires, veterans, shift meetings, individual coaching, LTO support, etc.)? How—specifically—will you improve sales & service through crew training this quarter? How will you measure ROI?
- **Recognition** Who is being honored this quarter for performance & achievement? Who is celebrating a hiring anniversary? Which family should be sent a note or gift to thank them for their support after a busy period? Which units staged contests and who won?

# MARKETING

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## Marketing and Promotions

What events in the immediate trade area are likely to affect business in the next 90 days?

Assess both internal events (LTOs, promotions, special events, etc.) and external events (construction, sporting events, concerts, conventions, etc.).

Event	Date(s)	Impact/Response

## Local Marketing

- Develop a Local Store Marketing (LSM) plan with each GM detailing specific strategies & tactics from the business & residential communities within a 3-mile radius of the unit.
- Discuss specific ways to increase traffic in the next 90 days by improving staff retention, service, salesmanship, training and other internal tactics.
- Survey the competition's tactics by visiting their websites and stores, reviewing their ads, coupons, and noting their social media posts, signage and promotions.

# FACILITIES & OPERATIONS

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Determine the readiness of the facility. Identify equipment or areas that need attention and rate them on a scale of 1-5:

### 1="Need to Have"

Poses immediate threat to safety, sanitation, product quality or Guest satisfaction.

### 5="Nice to Have"

Would improve cosmetic appearance of the operation or likely contribute to better productivity.

Item / Issue	Urgency / Priority
	<input type="radio"/>
	<input type="radio"/>
	<input type="radio"/>
	<input type="radio"/>
	<input type="radio"/>

### Cost Assessment

Identify top priority items from above and budget.

Item	Repair	Replace	Estimated Cost
	<input type="radio"/>	<input type="radio"/>	
	<input type="radio"/>	<input type="radio"/>	
	<input type="radio"/>	<input type="radio"/>	

# PROFITABILITY/PRODUCTIVITY

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## Are all units profitable?

### Rank Store Performance:

	Store	Sales	Service	COG	Margin
Top					
Bottom					

What can be learned from the top and communicated to the bottom?

With each GM, set specific revenue & profitability goals, and break them down to daily / shift targets:

- Quarterly Sales Goal: \_\_\_\_\_ Profit Goal: \_\_\_\_\_
- Monthly Sales Goal: \_\_\_\_\_ Tactics/Impact: \_\_\_\_\_
- Weekly Sales Goal: \_\_\_\_\_ Tactics/Impact: \_\_\_\_\_
- Daily Sales Goal: \_\_\_\_\_ Tactics/Impact: \_\_\_\_\_
- Shift Sales Goals (divide by # of shifts and weight according to volume.
- With Managers, detail a specific focus for each shift for the next 30 days.
- Review any controllable line-items (cost of goods, labor, supplies, utilities, comps, over/short, etc.) that are over budget or above prior year. Discuss reasons for overages and develop a plan to address.

## Throughput Review

Observe and assess the speed, efficiency and accuracy of the people and processes in each store. Identify bottlenecks or breakdowns in production. Identify causes. Is the team aware

of the problem? What is their plan for improvement? Are Managers on top of the situation? Have they measurably improved since last Quarter?

# VISITING THE UNIT

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Once you've filled out this Quarterly Business Plan, prioritize and schedule your unit visits based on the priorities you've assessed by reviewing each store's financials, manager performance and the most prevalent challenges or needs.

Which units need your attention the most? Why? Have a SPECIFIC plan for what to do Before, During and After each visit. Do not visit your stores like an Auditor or Inspector but rather a Coach. Remember, you are visiting People, not "stores". Connect with store managers daily. Visit each store weekly, or as often as possible

You can plan your Store Visits by downloading our free, short High Impact Unit Visit checklist at [MultiunitLeadership.com](http://MultiunitLeadership.com). But we recommend the full Ebook version of the High-Impact Unit Visit checklist (as well as the full Quarterly Business Plan Checklist) which are available at [MultiunitLeadership.com](http://MultiunitLeadership.com)

Check out our new MultiU e-Learning course at [MultiUnitLeadership.com](http://MultiUnitLeadership.com)