



Pre-shift Meeting Procedure

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Introduction

Purpose

To ensure a complete procedure that allows staff a clear and comprehensive guide to lead and understand a pre-shift meeting protocol.

Scope

This procedure applies to the owner, all supervisors, and all staff
The pre-shift meeting will happen before every single shift and will include the supervisor on duty and the front of house staff and back of house supervisor. It will entail using one job aide: a pre-shift meeting matrix.

Roles

Owner:

- Ensures supervisors are equipped with any pertinent information that staff needs to know about their daily shift.
- Fills out all sections of the pre-shift matrix with the exception of the “Supervisory Notes”

Supervisor:

- Ensures staff attend the pre-shift meeting at the designated meeting location
- Finalizes and delivers the pre-shift meeting content to shift staff
- After pre-shift meeting, ensure staff are following tasks

Staff:

- Be on time to pre-shift meeting
- Listen and absorb the content of the pre-shift meeting
- Ask questions if unclear of direction
- Execute pre-shift meeting tasks

Training

Train supervisors. Training will consist of:

- Reviewing the process steps
- Showing where to get the pre-shift meeting template, how to fill out, speak to it, and house it
- Go over the logistics of the meeting (where, when, etc)
- Set them up to train the staff

Train staff with the aid of various supervisors on duty. Training will consist of:

- Review what will be discussed during the pre-shift meeting
- Logistics: when the pre-shift meeting will take place and its location
- Review importance of punctuality
- Set some ground rules for the pre-shift meeting

Procedure (Steps)

The following set of procedures must be followed to accomplish a given task.

Owner produces daily notes for pre-shift meetings

Step 1 Owner fills out Pre-shift meeting matrix

Step 2 Owner places the pre-shift meeting matrix at the specials board located in the kitchen.

Step	Action by	Detail of activities and remarks
1	Owner	<p>The pre-shift meeting matrix will cover 4 areas:</p> <ul style="list-style-type: none"> <li data-bbox="992 632 1406 726">³⁵/₁₇ Goals for Service (GFS): This section will be specific to the day. <li data-bbox="992 737 1406 852">³⁵/₁₇ Forecast: This section will be specific to upcoming items, events, menus, and happenings <li data-bbox="992 863 1406 978">³⁵/₁₇ Teaching: This section will consist of skill focus and sharpening, as well as product knowledge expansion. <li data-bbox="992 989 1406 1104">³⁵/₁₇ Tasks: This section will consist of tasks beyond what maybe covered on the side work checklist.
Standards	<p>This pre-shift meeting matrix will be in print form. This pre-shift meeting matrix will be produced daily.</p>	

Step	Action by	Detail of activities and remarks
1.1	Owner	<p>Owner fills in the following sections of the pre-shift meeting matrix:</p> <ul style="list-style-type: none"> ○ Sets goals for the service <ul style="list-style-type: none"> ▪ Up-selling (“each person upsell 20 items) ▪ Better handling customer complaints ▪ “Accomplish 90% of your side work duties” ○ Forecast <ul style="list-style-type: none"> ▪ Upcoming events and how that will affect the service ▪ New menu items/specials ▪ Any staff members that will be late or won’t be there ○ Teaching <ul style="list-style-type: none"> ▪ Teach a skill that the staff should employ ▪ Have a weekly skills focus – reinforce this skill for all shifts during that week. ▪ Mid-week start to solicit feedback, success stories, best practices. ○ Tasks <ul style="list-style-type: none"> ▪ Projects beyond what may appear on the side work checklist ▪ Team oriented tasks <ul style="list-style-type: none"> ○ Replacing inserts under table glass ○ Cleaning and organizing a specific area ○ Window frames and window sills
Standards	<p>This matrix will be a dry erase capable; laminated two sided sheet All 4 sections on the matrix will be filled out daily. Owner responsible for goals, forecast, teaching, and tasks</p>	
2	Owner	Owner places matrix at the meeting Hub in the kitchen near the specials board.

Step	Action by	Detail of activities and remarks
Standards	The matrix will always be kept in the same place The matrix needs to be placed at the meeting Hub before AM supervisor start time	

AM Supervisor procedure (10 AM start time for 11 AM shift)

- Step 1** Supervisor arrives at 9:55 AM
- Step 2** Navigates to pre-shift meeting matrix.
- Step 3** Brings matrix to meet with kitchen supervisor.
- Step 4** Fill in or adjust applicable sections of the pre-shift meeting matrix based on meeting with the kitchen supervisor.
- Step 5** Proceed with opening procedures via the checklist
- Step 6** Have pre-shift meeting with day staff at 10:30 AM shift using matrix at the takeout register

Step	Action by	Detail of activities and remarks
1	AM Supervisor	AM Supervisor arrives at 9:55 AM
Standards	AM supervisor should be on the floor, ready to work no later than 10AM	
2	AM Supervisor	The meeting matrix will be housed at the specials board located in the kitchen.
Standards	Matrix will always be housed in the same place. If meeting matrix is not located call Owner immediately. If owner is unavailable, proceed with pre-shift meeting and communicate to the staff the information from the kitchen supervisor discussed in step 2.	

Step	Action by	Detail of activities and remarks
3	AM Supervisor	Meet with kitchen supervisor : Items Discussed: 86ed items Shortages New Items Catering/Large Deliveries Incidentals Maintenance issue that will effect timing A cleaning issue that may pull dish away Oven temp.
Standards	If there is no kitchen manager available, confer with the cooks at both pantry and pizza station. Always bring meeting matrix to share information based on owners comments	
4	AM Supervisor	Fill in Supervisory Notes and/or adjust applicable sections of the pre-shift meeting matrix based on meeting with the kitchen supervisor: Outages Shortages large parties specials board changes sales goals the days sections/cut order side work assignment Incidentals (same as above)
Standards	New information does not replace pre-existing owner prescribed information. The supervisor needs to be filling in the "Supervisory Notes" section with any new information gathered.	
5	AM Supervisor	Proceed with opening procedures via side work checklist.
Standards	<ul style="list-style-type: none"> ▪ Side work standards are out of scope for this document 	

Step	Action by	Detail of activities and remarks
6	AM Supervisor	Conduct pre shift meeting with day staff using filled in matrix. <ul style="list-style-type: none"> ▪ Share all information on the matrix. ▪ Be positive and upbeat
Standards	This is a daily task. Meeting will be conducted no later than 10:45 am.	

PM Supervisor procedure (4 PM start time for a 5 PM shift)

- Step 1** Supervisor arrives at 3:55 PM
- Step 2** Navigates to pre-shift meeting matrix.
- Step 3** AM and PM shift supervisor discuss the day's activities
- Step 4** PM supervisor updates matrix based on discussion with AM supervisor.
- Step 5** Proceed with PM procedures via the checklist
- Step 6** Conducts pre-shift meeting with staff at 4:55 in the kitchen at the meeting Hub

Step	Action by	Detail of activities and remarks
1	PM Supervisor	PM Supervisor arrives at 3:55 PM

Step	Action by	Detail of activities and remarks
Standards	<ul style="list-style-type: none"> ▪ PM supervisor should be on the floor, ready to work no later than 4 pm 	
2	PM Supervisor	The meeting matrix will be housed in the kitchen near the specials board.
Standards	<ul style="list-style-type: none"> ▪ Matrix will always be housed in the same place, ▪ If meeting matrix is not located, confirm the status of the pre-shift matrix with the AM supervisor. If a pre-shift meeting was not created for that day, still conduct a pre-shift meeting with the information you do have. 	
3	PM Supervisor	<p>AM and PM shift supervisor review the pre-shift matrix and discuss the day's activities</p> <p>Day's sales so far</p> <p>Shipments received</p> <p>New outages/shortages</p> <p>Carry over tables/takeout</p> <p>Incidentals</p> <p>Any normal tasks that weren't done</p> <p>A large reservation that just called</p> <p>Turn the AC on at 6.</p>
Standards	<p>Discussion will occur at the front register/ bar area</p> <p>This is a daily task</p>	
4	PM Supervisor	<p>³⁵/₁₇ PM supervisor updates matrix based on discussion with AM supervisor. Note any adjustments</p> <p>(Update information using the PM Notes section of the matrix)</p>
Standards	<p>This is a daily task</p> <p>Matrix will be always be located in the same place</p>	
5	PM Supervisor	Proceed with PM procedures via the checklist

Step	Action by	Detail of activities and remarks
Standards	<ul style="list-style-type: none"> ▪ (Side work standards are out of scope for this document) 	
6	PM Supervisor	<p>Conducts pre-shift meeting with staff at 4:55 in the kitchen at meeting Hub.</p> <p>Meeting begins when all staff is present.</p> <p>First staff member in will be designated to take any table/s that come in during the meeting.</p> <p>If the meeting cannot take place at designated time all staff should refer to matrix and specials Board.</p> <p>Share all information on the Matrix</p> <p>Be positive and upbeat</p>
Standards	<p>This is a daily task.</p> <p>Meeting will be conducted no later than 5:05 PM.</p>	

Pre-shift meeting Job Aid

Pre-shift Meeting Matrix

Develop standards to ensure process is working consistently and accurately.

Description	Detailed aid description	Notes
A document that will summarize the goals and agenda for the work shift and serve as the primary resource for pre-shift meeting.	<ul style="list-style-type: none">▪ Will be printed (in the short term – see notes)▪ Will be completed everyday▪ Owner is responsible for all sections (except “Supervisory Notes”) that will be applicable for both AM and PM shifts▪ It will be housed FOH Take-Out station terminal attached to the bulletin board to the left of the register.	Initially this matrix will be in print form but will transition (after 2 months) to a laminated, 2 sided (day and night shift), sheet capable of dry-erase and reuse.

Appendix A – Pre-shift meeting template

Pre-shift Meeting Matrix

Date:		AM Supervisor:		PM Supervisor:	
Goals for Service	Forecast				
1. 2. 3. Notes:	1. 2. 3. Notes:				
Teaching	Tasks				
1. 2. 3. Notes:	1. 2. 3. Notes:				
Supervisory Notes					