Restaurant PhD Self-Assessment Tool

A Comprehensive Operational Excellence Evaluation

How to Use This Assessment

Scoring Scale:

- 4 = Excellent (Consistently exceeds standards)
- 3 = Good (Meets standards regularly)
- 2 = Fair (Sometimes meets standards)
- 1 = Poor (Rarely meets standards)
- 0 = Not Applicable/Not in Place

Instructions:

1. Rate each area honestly based on current performance
2. Provide specific notes for scores of 2 or below
3. Calculate section averages to identify priority areas
4. Use results to create an action plan for improvement

P - PEOPLE & CULTURE

Leadership & Management

□ **4** □ **3** □ **2** □ **1** □ **0** | Leadership team demonstrates consistent vision and values alignment

□ **4** □ **3** □ **2** □ **1** □ **0** | Managers effectively coach and develop team members

□ **4** □ **3** □ **2** □ **1** □ **0** | Clear accountability systems are in place and followed

□ **4** □ **3** □ **2** □ **1** □ **0** | Communication flows effectively up, down, and across the organization

Hiring & Onboarding

□ **4** □ **3** □ **2** □ **1** □ **0** | Structured hiring process attracts quality candidates

□ **4** □ **3** □ **2** □ **1** □ **0** | Comprehensive onboarding program for all positions

□ **4** □ **3** □ **2** □ **1** □ **0** | New hires receive proper training before working independently

□ **4** □ **3** □ **2** □ **1** □ **0** | 30-60-90 day check-ins are conducted consistently

Employee Engagement

□ **4** □ **3** □ **2** □ **1** □ **0** | Team members are engaged and motivated

□ **4** □ **3** □ **2** □ **1** □ **0** | Recognition and reward systems are effective

□ **4** □ **3** □ **2** □ **1** □ **0** | Career development opportunities are available

□ **4** □ **3** □ **2** □ **1** □ **0** | Employee turnover is at acceptable levels

Training & Development

□ **4** □ **3** □ **2** □ **1** □ **0** | Comprehensive training programs for all positions

□ **4** □ **3** □ **2** □ **1** □ **0** | Regular skills assessment and development planning

□ **4** □ **3** □ **2** □ **1** □ **0** | Cross-training programs increase flexibility

□ **4** □ **3** □ **2** □ **1** □ **0** | Leadership development pathway exists

People & Culture Section Average: ___/4

H - HOSPITALITY & SERVICE

Guest Experience Standards

□ **4** □ **3** □ **2** □ **1** □ **0** | Clear service standards are defined and followed

□ **4** □ **3** □ **2** □ **1** □ **0** | Consistent greeting and farewell procedures

□ **4** □ **3** □ **2** □ **1** □ **0** | Staff demonstrates genuine hospitality and care

□ **4** □ **3** □ **2** □ **1** □ **0** | Service recovery procedures are effective

Guest Satisfaction

□ **4** □ **3** □ **2** □ **1** □ **0** | Regular guest feedback collection and analysis

□ **4** □ **3** □ **2** □ **1** □ **0** | Online reviews are consistently positive

□ **4** □ **3** □ **2** □ **1** □ **0** | Guest complaints are resolved quickly and effectively

□ **4** □ **3** □ **2** □ **1** □ **0** | Mystery shop scores meet or exceed targets

Service Execution

□ **4** □ **3** □ **2** □ **1** □ **0** | Service timing meets established standards

□ **4** □ **3** □ **2** □ **1** □ **0** | Staff knowledge of menu and offerings is comprehensive

□ **4** □ **3** □ **2** □ **1** □ **0** | Upselling and suggestive selling are natural and effective

□ **4** □ **3** □ **2** □ **1** □ **0** | Special dietary needs are handled professionally

Brand Experience

□ **4** □ **3** □ **2** □ **1** □ **0** | Brand standards are consistently maintained

□ **4** □ **3** □ **2** □ **1** □ **0** | Physical environment supports brand positioning

□ **4** □ **3** □ **2** □ **1** □ **0** | All touchpoints deliver consistent brand experience

□ **4** □ **3** □ **2** □ **1** □ **0** | Staff embodies brand values in interactions

Hospitality & Service Section Average: ___/4

D - DOLLARS & FINANCIAL PERFORMANCE

Cost Management

□ **4** □ **3** □ **2** □ **1** □ **0** | Food cost percentage is at or below target

□ **4** □ **3** □ **2** □ **1** □ **0** | Labor cost percentage is optimized and controlled

□ **4** □ **3** □ **2** □ **1** □ **0** | Operating expenses are managed effectively

□ **4** □ **3** □ **2** □ **1** □ **0** | Waste tracking and reduction programs are in place

Revenue Generation

□ **4** □ **3** □ **2** □ **1** □ **0** | Sales trends are consistently positive

□ **4** □ **3** □ **2** □ **1** □ **0** | Average check growth strategies are effective

□ **4** □ **3** □ **2** □ **1** □ **0** | Customer count trends are stable or growing

□ **4** □ **3** □ **2** □ **1** □ **0** | Off-premise sales channels are optimized

Financial Controls

□ **4** □ **3** □ **2** □ **1** □ **0** | Daily cash handling procedures are followed

□ **4** □ **3** □ **2** □ **1** □ **0** | Weekly P&L reviews identify variances quickly

□ **4** □ **3** □ **2** □ **1** □ **0** | Inventory management systems are accurate

□ **4** □ **3** □ **2** □ **1** □ **0** | Budget forecasting and variance analysis are regular

Profitability

□ **4** □ **3** □ **2** □ **1** □ **0** | EBITDA margins meet or exceed targets

□ **4** □ **3** □ **2** □ **1** □ **0** | Menu engineering drives profitable mix

□ **4** □ **3** □ **2** □ **1** □ **0** | Pricing strategies optimize revenue and volume

□ **4** □ **3** □ **2** □ **1** □ **0** | ROI on marketing investments is tracked and positive

Dollars & Financial Performance Section Average: ___/4

OPERATIONAL EXCELLENCE AREAS

Food & Beverage Quality

□ **4** □ **3** □ **2** □ **1** □ **0** | Food quality consistently meets standards

□ **4** □ **3** □ **2** □ **1** □ **0** | Recipe standardization and portion control

□ **4** □ **3** □ **2** □ **1** □ **0** | Beverage programs (alcoholic and non-alcoholic) excel

□ **4** □ **3** □ **2** □ **1** □ **0** | Menu innovation and seasonal updates are effective

Kitchen Operations

□ **4** □ **3** □ **2** □ **1** □ **0** | Kitchen timing and coordination are excellent

□ **4** □ **3** □ **2** □ **1** □ **0** | Food safety protocols are strictly followed

□ **4** □ **3** □ **2** □ **1** □ **0** | Equipment maintenance prevents disruptions

□ **4** □ **3** □ **2** □ **1** □ **0** | Prep and mise en place systems are efficient

Technology & Systems

□ **4** □ **3** □ **2** □ **1** □ **0** | POS system is optimized and reliable

□ **4** □ **3** □ **2** □ **1** □ **0** | Technology enhances guest experience

□ **4** □ **3** □ **2** □ **1** □ **0** | Data and reporting systems provide actionable insights

□ **4** □ **3** □ **2** □ **1** □ **0** | Third-party integrations work seamlessly

Safety & Compliance

□ **4** □ **3** □ **2** □ **1** □ **0** | Health department standards consistently exceeded

□ **4** □ **3** □ **2** □ **1** □ **0** | Workplace safety protocols prevent incidents

□ **4** □ **3** □ **2** □ **1** □ **0** | Alcohol service compliance (where applicable)

□ **4** □ **3** □ **2** □ **1** □ **0** | All regulatory requirements are met or exceeded

Facilities & Maintenance

□ **4** □ **3** □ **2** □ **1** □ **0** | Physical appearance supports brand image

□ **4** □ **3** □ **2** □ **1** □ **0** | Preventive maintenance programs prevent issues

□ **4** □ **3** □ **2** □ **1** □ **0** | Cleanliness standards exceed guest expectations

□ **4** □ **3** □ **2** □ **1** □ **0** | Energy efficiency and sustainability programs

Operational Excellence Section Average: ___/4

MARKETING & GROWTH

Brand & Marketing

□ **4** □ **3** □ **2** □ **1** □ **0** | Local marketing efforts drive measurable results

□ **4** □ **3** □ **2** □ **1** □ **0** | Social media presence is engaging and active

□ **4** □ **3** □ **2** □ **1** □ **0** | Customer loyalty programs are effective

□ **4** □ **3** □ **2** □ **1** □ **0** | Community involvement enhances brand reputation

Strategic Planning

□ **4** □ **3** □ **2** □ **1** □ **0** | Clear vision and strategic plan guide decisions

□ **4** □ **3** □ **2** □ **1** □ **0** | Performance metrics are tracked and acted upon

□ **4** □ **3** □ **2** □ **1** □ **0** | Competitive analysis informs strategy

□ **4** □ **3** □ **2** □ **1** □ **0** | Innovation and adaptation to market changes

Marketing & Growth Section Average: ___/4

OVERALL ASSESSMENT SUMMARY

Section	Score	Priority Level
People & Culture	___/4	_____
Hospitality & Service	___/4	_____
Dollars & Financial Performance	___/4	_____
Operational Excellence	___/4	_____
Marketing & Growth	___/4	_____
Overall Average	**___/4**	_____

Priority Action Areas (Scores 2.5 and below):

1. _____
2. _____
3. _____

Strengths to Leverage (Scores 3.5 and above):

1. _____
2. _____
3. _____

Remember: Restaurant PhD isn't just about having systems—it's about executing them consistently with excellence. Use this assessment as a roadmap to operational mastery.