Store Performance

Moneyball 2.0 Leadership Training

Proudly made in JOE collaboration with

Frederik Holch Schmidt

#1206 - Head of Implementation Nordics

© 2024 JOE & THE JUICE. All rights reserved.

AGENDA

1 **Why is this skill important?**

2 How to master the skill

3 Sum-up and Impact

4 How to apply into practice

© 2024 JOE & THE JUICE. All rights reserved.

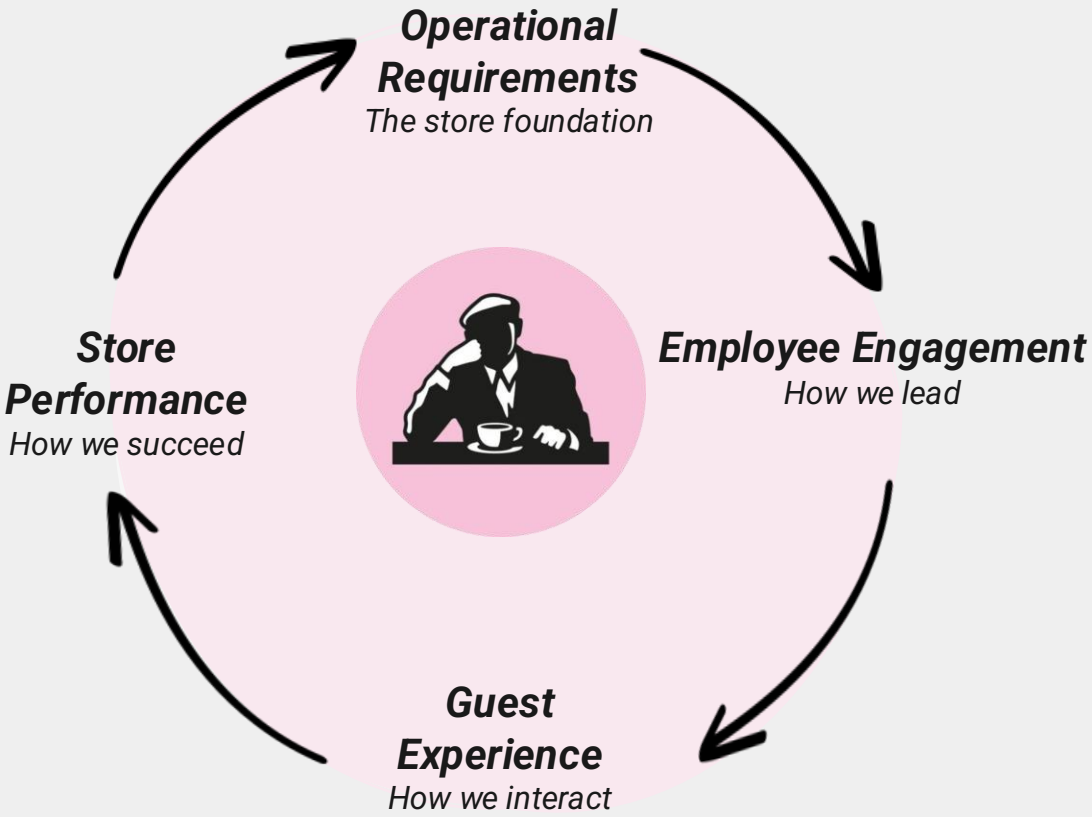
WHY IS THIS SKILL IMPORTANT?

Learning goals for this manager session

LEARNING GOALS

Learn the fundamental principles of your store P&L, and how to analyse, optimize and **drive financial performance within your store**, including presentation of store performance review.

CIRCLE OF OPERATIONAL EXCELLENCE



How does mastering these skills affect each area within *the Circle of Operational Excellence* in your store?

© 2024 JOE & THE JUICE. All rights reserved.

AGENDA

1 Why is this skill important?

2 **How to master the skill**
- **Principles of your Store P/L**
- **Drivers – Leading & Lagging KPIs**
- **Weekly and Monthly Operational Review**
- **Opportunity and Smart Actions**

3 Sum-up and Impact

4 How to apply into practice

© 2024 JOE & THE JUICE. All rights reserved.

WHY DOES JOE & THE JUICE EXIST AS A BUSINESS?

3.

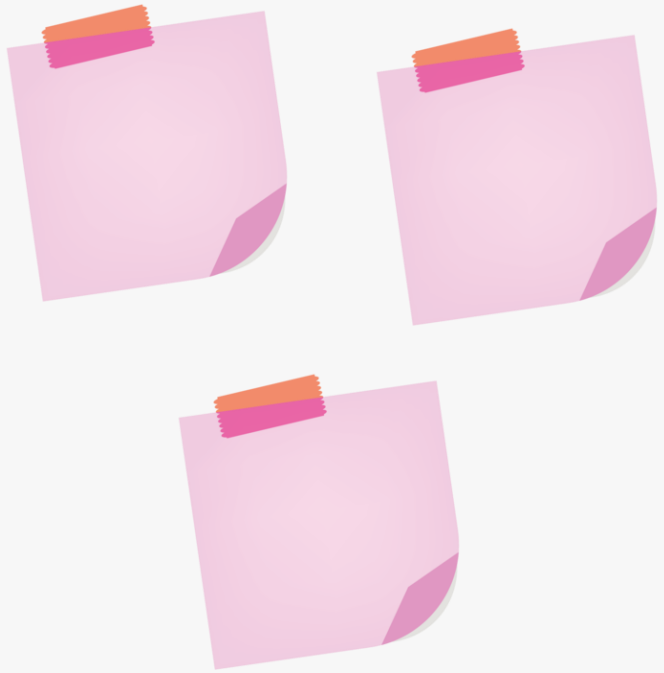
Take two Post-its and write one reply on each

© 2025 JOE & THE JUICE. All rights reserved.

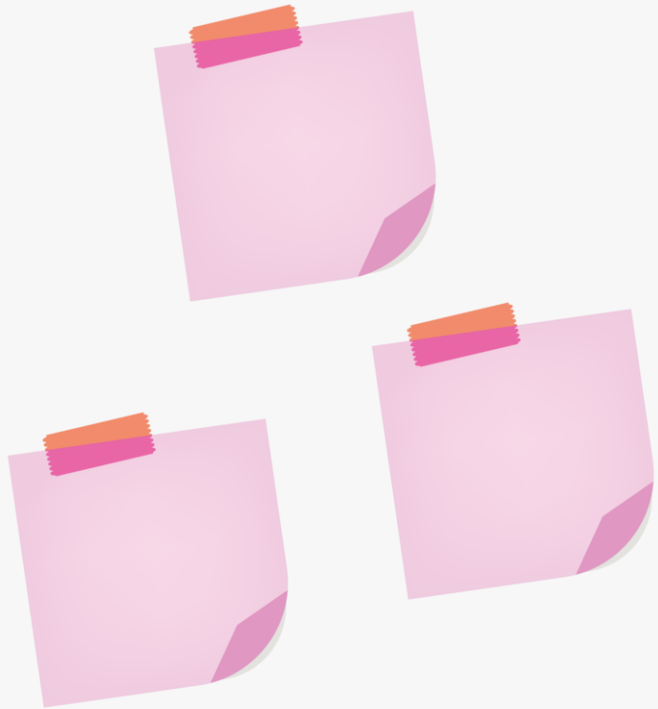
EXERCISE

Divide Post-its into Financial and Non-financial - have a discussion on the outcome and the purpose of a business

Financial



Non-financial



STORE PERFORMANCE

WHAT IS A P/L? - FOR YOUR STORE WE CALL IT STORE-LEVEL PROFIT

A **Profit and Loss Statement (P&L)** shows how much money a business makes, spends, and keeps as profit over a set time (like a month or year).

It’s a clear snapshot of whether the company is making or losing money.

This helps managers understand where money is going and what’s driving profits or losses.

It’s a key tool for tracking success and planning better decisions.

STORE PERFORMANCE

YOUR STORE LEVEL PROFIT = THE MONEY YOUR STORE MAKES

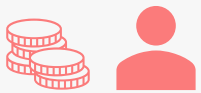
PROFIT AND LOSS - PERFORMANCE
MAGASIN BREMERHOLM [COPENHAGEN]

Actuals / Forecast (tLC)	YTD
Revenue	712
COGS	-153
Direct-Operational-Cost	-13
Store Salary	-214
Location Cost	-130
Store-Level Profit	**203**
COGS	-21 %
Direct-Operational-Cost	-2 %
Store Salary	-30 %
Location Cost	-18 %
Store-Level Profit %	**29 %**

Revenue **10 USD** ex. VAT

COGS (Cost of goods sold) -2.1 USD

Direct-Operational-Cost -0.2 USD



Store Salary -3.0 USD

Location Cost -1.8 USD

Store-Level Profit **2.9 USD**

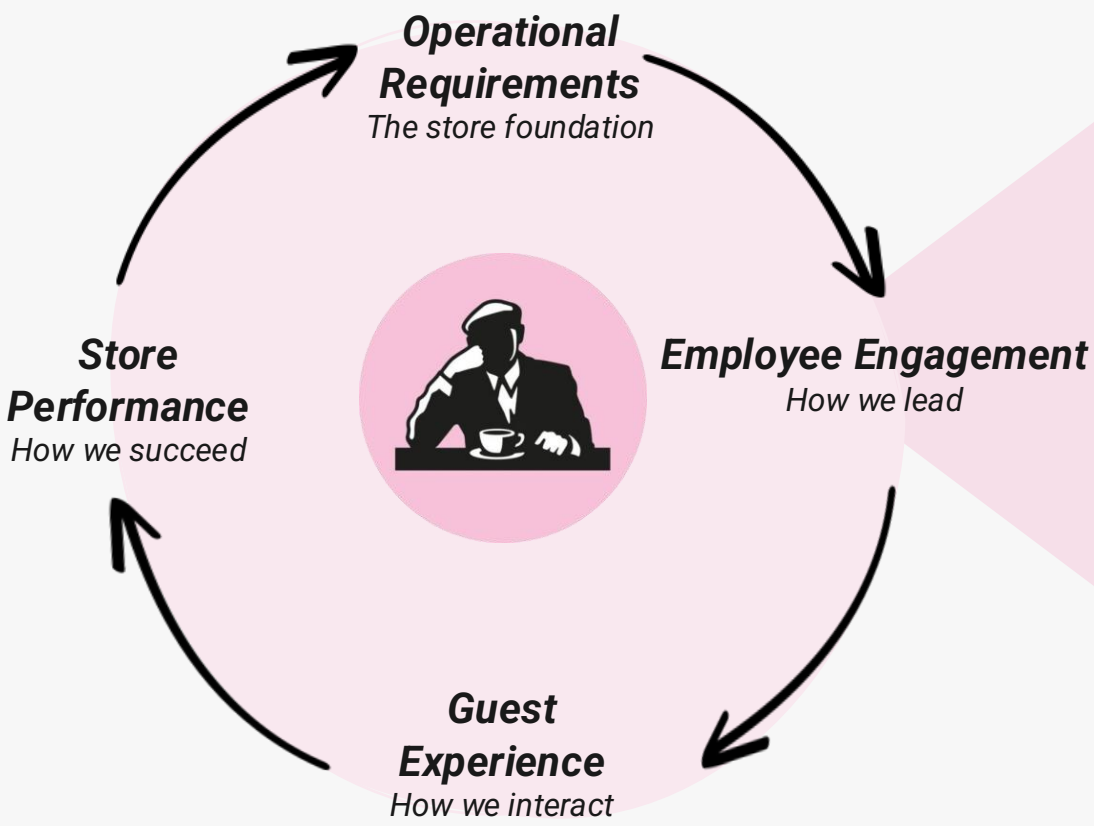
- Regional overhead
- HQ overhead

= Group Profit

Year-to-date Numbers are a “illustrative” store and DKK example are a period snap-shot as a rough example

EXERCISE

How does working with Operational Requirements,
Employee Engagement
and Guest Experience impact the Store-Level Profit?



Revenue	**10 USD** ex. VAT
COGS (Cost of goods sold)	-2.1 USD
Direct-Operational-Cost	-0.2 USD
Store Salary	-3.0 USD
Location Cost	-1.8 USD
Store-Level Profit	**2.9 USD**

STORE PERFORMANCE

Focus on Drivers and Leading indicators - and the Lagging indicators will follow

Drivers

Activities or factors that influence or cause the results reflected in your indicators.

“The do’s”

Example

Training
Feedback

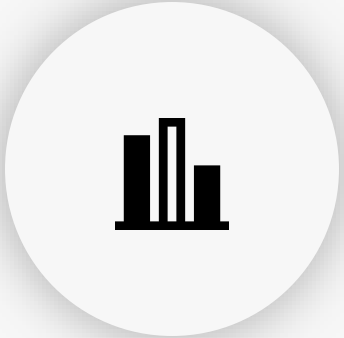
Leading indicators (KPI)

Predict future performance. They give **early signs** about whether you're on track to achieve goals

“The signs”

Tapout
Transactions
Extra topping
Successful QR codes

Lagging indicators (KPI)



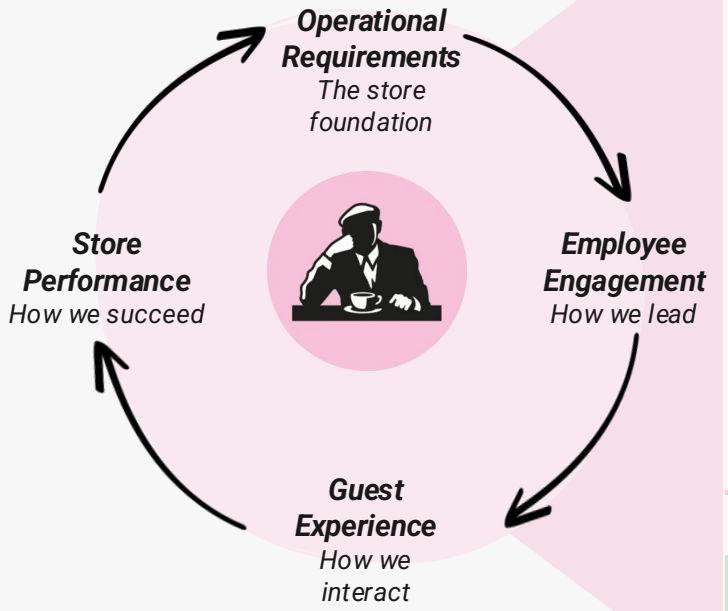
Metrics that show the **outcomes of past performance**. They tell you how well you've performed.

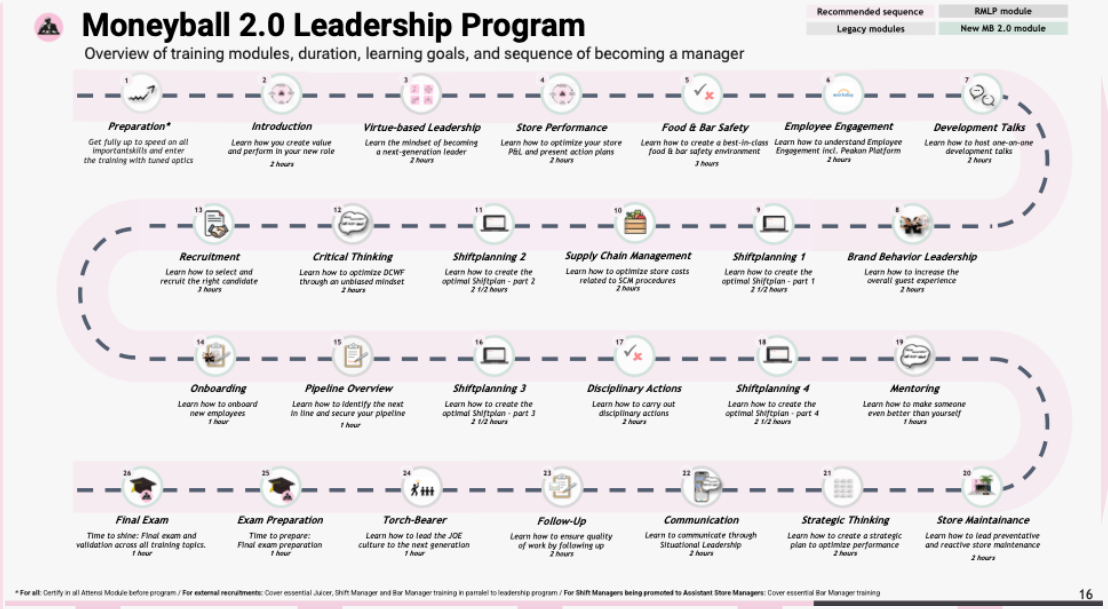
“Too late – to do”

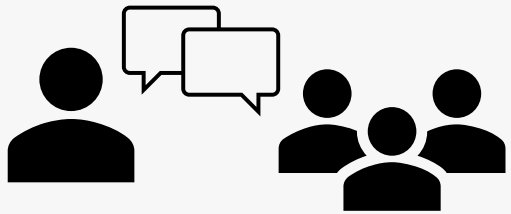
REVENUE

LEADERSHIP TRANING TO DELIVER STORE PERFORMANCE

Working together with a review structure already during training period putting the learning into immediate practice







WORS Weekly Operational Review **Structure**

WORS Weekly Operational Review **Structure**

WORS Weekly Operational Review **Structure**

MORS Monthly Operational Review **Structure**

WORS Weekly Operational Review **Structure**

WORS Weekly Operational Review **Structure**

WORS Weekly Operational Review **Structure**

MORS Monthly Operational Review **Structure**

DURING TRAINING

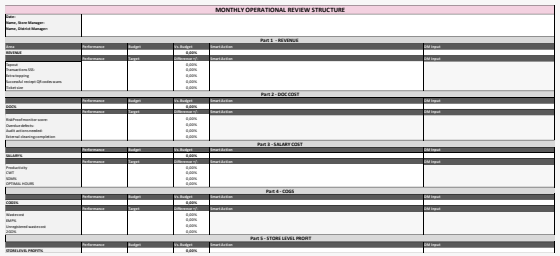
AFTER TRAINING

WHAT IS MORS AND WORS?

A proces building Operational Excellence driving strong financial performance

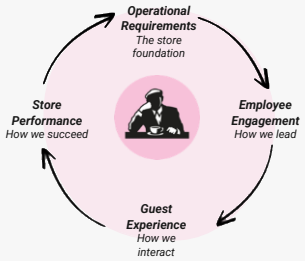
WORS Weekly Operational Review Structure → WORS Weekly Operational Review Structure → **MORS Monthly Operational Review Structure** → WORS Weekly Operational Review Structure → WORS Weekly Operational Review Structure → WORS Weekly Operational Review Structure → **MORS Monthly Operational Review Structure** → WORS Weekly Operational Review Structure → WORS Weekly Operational Review Structure → WORS Weekly Operational Review Structure → **MORS Monthly Operational Review Structure**

MORS – MONTHLY OPERATIONAL REVIEW STRUCTURE



PROFIT AND LOSS – PERFORMANCE

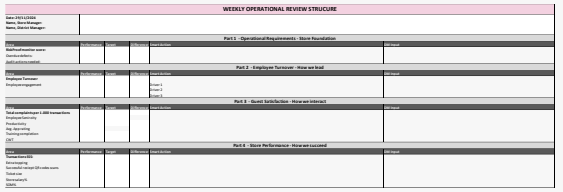
Actuals / Forecast (tLC)	YTD
Revenue	712
COGS	-153
Direct-Operational-Cost	-13
Store Salary	-214
Location Cost	-130
Store-Level Profit	**203**
COGS	-21 %
Direct-Operational-Cost	-2 %
Store Salary	-30 %
Location Cost	-18 %
Store-Level Profit %	**29 %**

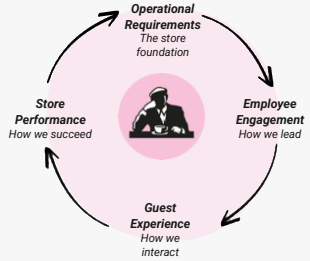


Focus:
- Monthly smart actions to drive Oprational Excellence and financial performance
- Profit and Loss (Store-Level Profit) KPIs and targets
- Operational excellence KPIs and targets

Timing:
- Each month
- STM presents to and review with DM
- DM presents to and review with OM

WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE





Focus:
- Weekly smart actions to drive Operational Excellence
- Operational excellence KPIs and targets

Timing:
- Each week
- STM presents to and review with DM
- DM presents to and review with OM

SO HOW DO YOU DO THAT?

WHY IS THE REVENUE SO LOW?

Notice your immediate feelings and thoughts

THE MIND-SET AROUND MORS AND WORS IS ABOUT…

NOT DWELLING ON THE PAST

LOOKING AHEAD AND CREATING ACTIONS - WITH A VIRTUE BASED BEHAVIOR

WHY?

Why did you not…?
Why is the……..so low?

PAST FOCUS

HOW? – WHAT?

How can you/we…?
What can you/we do to increase….?

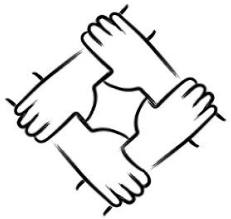
NOW & FUTURE FOCUS

Encourage
POSITIVE ATTITUDE

Our ability to see the coffee cup as half full - and not half empty

Choose your attitude

Empower
INCLUSION



Our promise to invite anyone to be a part of our culture

Be inclusive

Form
SOCIAL TIES

Our ability to create true connections across our stores

Be intentional

Offer
GROWTH

Our ambition to provide personal and professional development

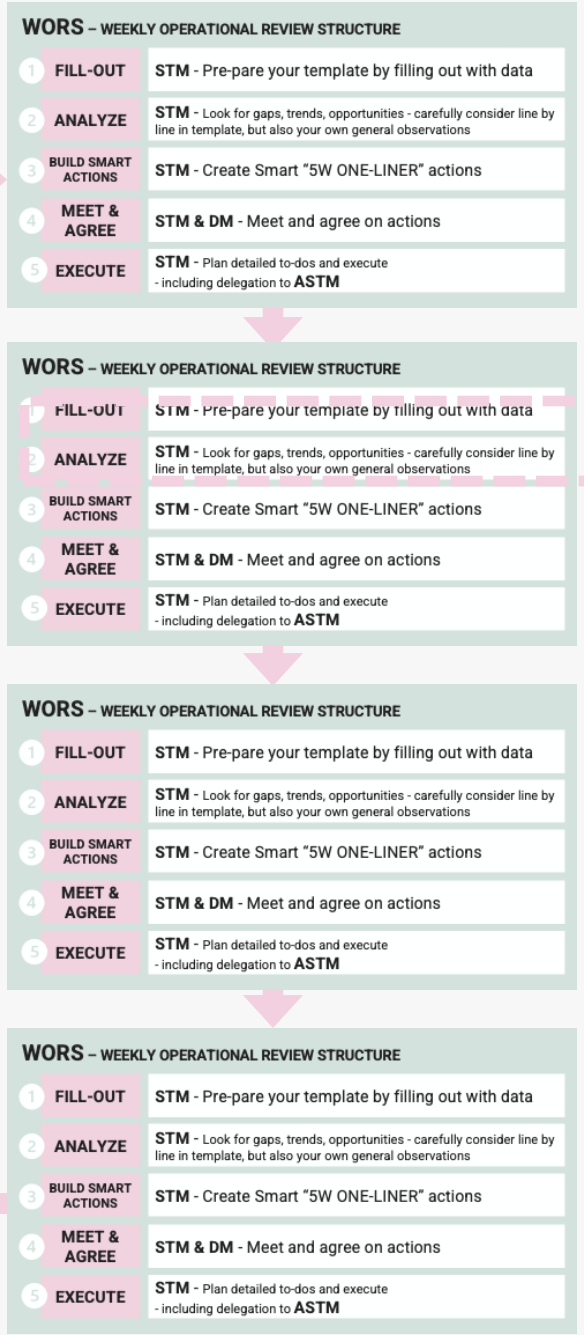
Be curious

VIRTUE-BASED DIALOGUE PUTS OUR FOCUS AND EFFORTS ON WHAT WE CAN DO

THE FIVE MORS AND WORS KEY STEPS

MORS – MONTHLY OPERATIONAL REVIEW STRUCTURE

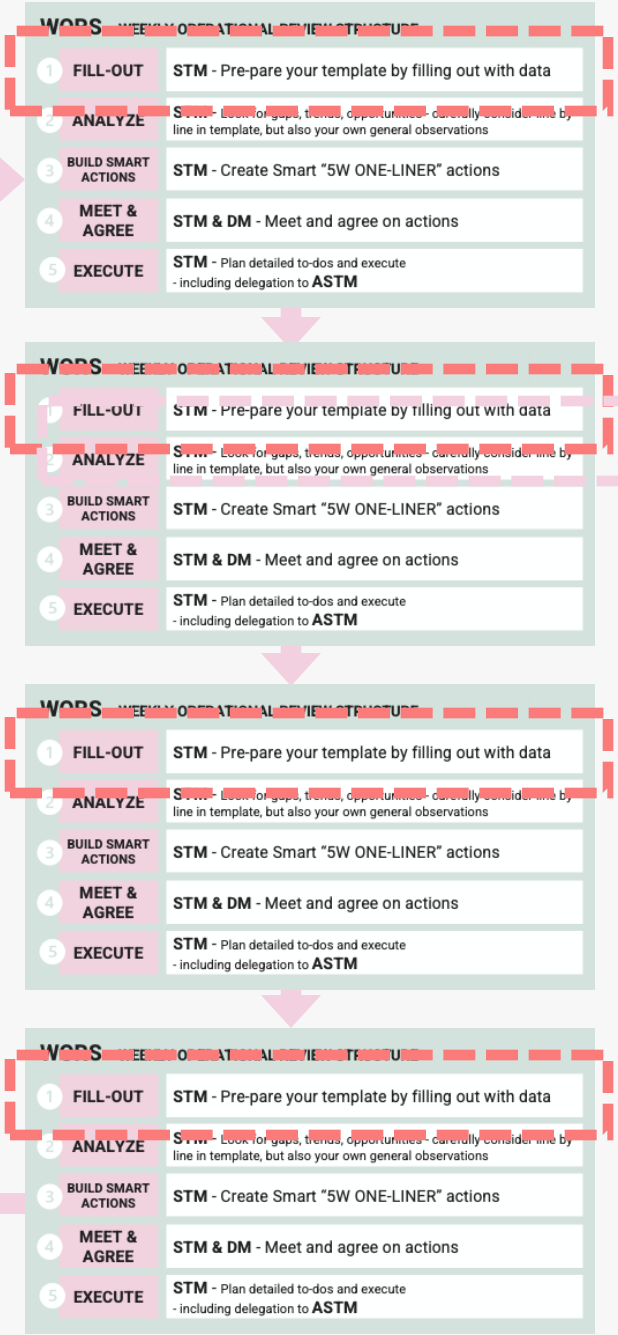
1	FILL-OUT	**STM** - Pre-pare your template by filling out with data
2	ANALYZE	**STM** - Look for gaps, trends, opportunities - carefully consider line by line in template, but also your own general observations
3	BUILD SMART ACTIONS	**STM** - Create Smart "5W ONE-LINER" actions
4	MEET & AGREE	**STM & DM** - Meet and agree on actions
5	EXECUTE	**STM** - Plan detailed to-dos and execute - including delegation to **ASTM**



STEP 1 - FILL-OUT

MORS – MONTHLY OPERATIONAL REVIEW STRUCTURE

1	FILL-OUT	**STM** - Pre-pare your template by filling out with data
2	ANALYZE	**STM** - Look for gaps, trends, opportunities - carefully consider line by line in template, but also your own general observations
3	BUILD SMART ACTIONS	**STM** - Create Smart "5W ONE-LINER" actions
4	MEET & AGREE	**STM & DM** - Meet and agree on actions
5	EXECUTE	**STM** - Plan detailed to-dos and execute - including delegation to **ASTM**



AND WE HAVE TEMPLATES TO FOCUS THE DIALOGUE

One for **MORS** (MONTHLY) – and you will train every month using it (**On the job training**)
- focus is on Store Level Profit and Operational Excellence with monthly Smart Actions

MONTHLY OPERATIONAL REVIEW STRUCTURE					
Date: Name, Store Manager: Name, District Manager:					
Part 1 - REVENUE					
Area	Performance	Budget	Vs. Budget	Smart Action	DM Input
REVENUE			**0,00%**		
	Performance	Target	Difference +/-	Smart Action	DM Input
Tapout			0,00%		
Transactions SSS:			0,00%		
Extra topping			0,00%		
Successful reciept QR codes scans			0,00%		
Ticket size			0,00%		
Part 2 - DOC COST					
	Performance	Budget	Vs. Budget	Smart Action	DM Input
DOC%			**0,00%**		
	Performance	Target	Difference +/-	Smart Action	DM Input
RiskProof monitor score:			0,00%		
Overdue defects:			0,00%		
Audit actions needed:			0,00%		
External cleaning completion			0,00%		
Part 3 - SALARY COST					
	Performance	Budget	Vs. Budget	Smart Action	DM Input
SALARY%			**0,00%**		
	Performance	Target	Difference +/-	Smart Action	DM Input
Productivity			0,00%		
CWT			0,00%		
SOM%			0,00%		
OPTIMAL HOURS			0,00%		
Part 4 - COGS					
	Performance	Budget	Vs. Budget	Smart Action	DM Input
COGS%			**0,00%**		
	Performance	Target	Difference +/-	Smart Action	DM Input
Waste cost			0,00%		
EMP%			0,00%		
Unregistered waste cost			0,00%		
2GO%			0,00%		
Part 5 - STORE LEVEL PROFIT					
	Performance	Budget	Vs. Budget	Smart Action	DM Input
STORE LEVEL PROFIT%			**0,00%**		

REPORTS	
Tapouts	COGS Report
Transactions SSS	New Sales Report
Extra Topping	Special Report
Successful reciept QR codes scans	Special Report
Ticket Size	New Sales Report
RiskProof	RiskProof
Overdue Defects	RiskProof
Audit Actions	RiskProof
External Cleaning	PnL
Productivity	Salary Controller
CWT	Salary Controller
SOM%	Salary Controller
Optimal Hours	Salary Controller
Waste Cost	New COGS Report
EMP%	New COGS Report
Unregistered Waste	New COGS Report
2GO%	New COGS Report

STANDARD REPORTS:

P&L Report - MONTHLY
Sales report - WEEKLY + MONTHLY
Guest experience report - WEEKLY + MONTHLY
Commercial iniative report - WEEKLY + MONTHLY
Delivery report - WEEKLY + MONTHLY
App Report - WEEKLY + MONTHLY
COGS report - WEEKLY + MONTHLY
Salary Report - WEEKLY + MONTHLY

To be filled as part of STM or DM preparation

- Performance: Using various reports as show (consolidated reports under development) for performance
- Targets: Use Store/District specific when available – otherwise Country or Global to be used

AND YOU HAVE TEMPLATES TO FOCUS THE DIALOGUE

One for **WORS** (WEEKLY) – and you will train every week using it (**On the job training**) – focus is on Operational Excellence with weekly Smart Actions

WEEKLY OPERATIONAL REVIEW STRUCURE					
Date: **Name, Store Manager:** **Name, District Manager:**					
Part 1 - Operational Requirements - Store Foundation					
Area	**Performance**	**Target**	**Difference**	**Smart Action**	**DM Input**
RiskProof monitor score: Overdue defects: Audit actions needed:					
Part 2 - Employee Turnover - How we lead					
Area	**Performance**	**Target**	**Difference**	**Smart Action**	**DM Input**
Employee Turnover Employee engagement				Driver 1 Driver 2 Driver 3	
Part 3 - Guest Satisfaction - How we interact					
Area	**Performance**	**Target**	**Difference**	**Smart Action**	**DM Input**
Total complaints per 1.000 transactions Employee Seniroity Productivity Avg. App rating Training completion CWT					
Part 4 - Store Performance - How we succeed					
Area	**Performance**	**Target**	**Difference**	**Smart Action**	**DM Input**
Transactions SSS: Extra topping Successful reciept QR codes scans Ticket size Store salary% SOM%					

STANDARD REPORTS (DISTRICT REVIEWS):

P&L Report - MONTHLY
Sales report - WEEKLY + MONTHLY
Guest experience report - WEEKLY + MONTHLY
Commercial iniative report - WEEKLY + MONTHLY
Delivery report - WEEKLY + MONTHLY
App Report - WEEKLY + MONTHLY
COGS report - WEEKLY + MONTHLY
Salary Report - WEEKLY + MONTHLY

STANDARD REPORTS (STORE REVIEWS):

P&L Report - Weekly + Monthly
Sales report - Weekly + Monthly
Guest Experience Report - Weekly + Monthly
App Report - Weekly + Monthly
COGS Report - Weekly + Monthly
Salary Report - Weekly + Monthly

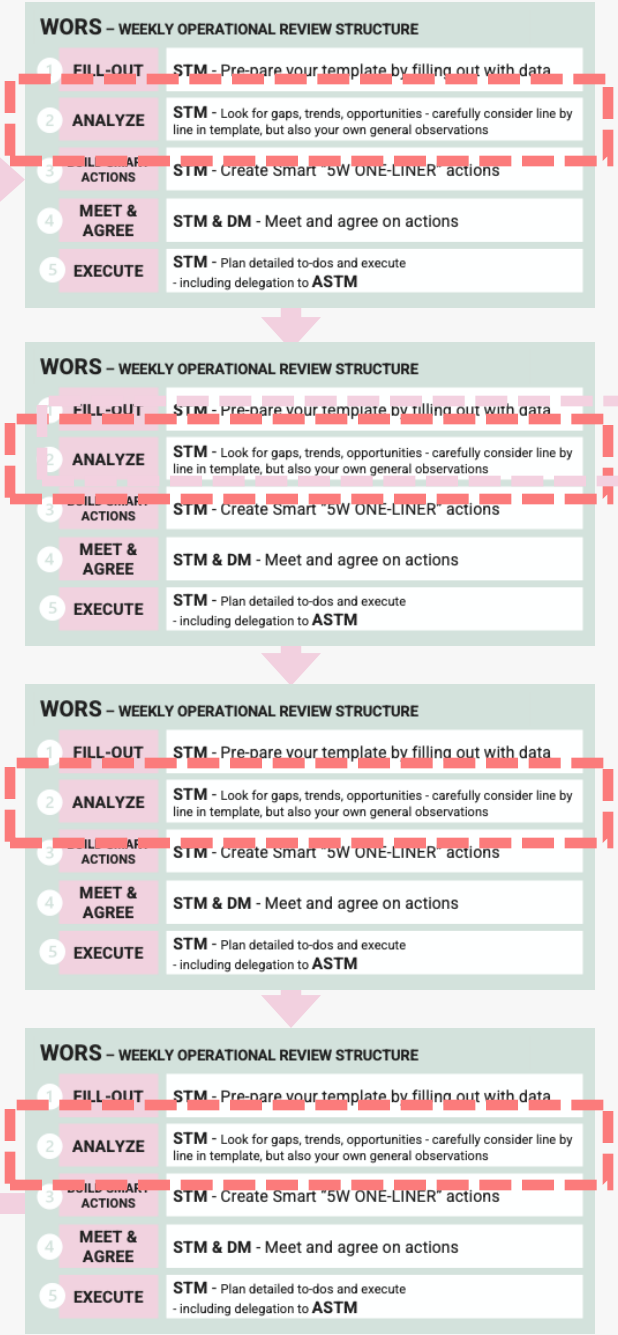
To be filled as part of STM or DM preparation

- Performance: Using various reports as show (consolidated reports under development) for performance
- Targets: Use Store/District specific when available – otherwise Country or Global to be used

STEP 2 - ANALYZE

MORS – MONTHLY OPERATIONAL REVIEW STRUCTURE

1	FILL-OUT	**STM** - Pre-pare your template by filling out with data
2	ANALYZE	**STM** - Look for gaps, trends, opportunities - carefully consider line by line in template, but also your own general observations
3	BUILD SMART ACTIONS	**STM** - Create Smart "5W ONE-LINER" actions
4	MEET & AGREE	**STM & DM** - Meet and agree on actions
5	EXECUTE	**STM** - Plan detailed to-dos and execute - including delegation to **ASTM**



CASE #1 - MORS

Date: Name, Store Manager: Name, District Manager:				
Area	Performance	Budget	Vs. Budget	S
REVENUE	475000,00	500000,00	-5,00%	
	Performance	Target	Difference +/-	S
Tapout	20,00%	0,00%	20,00%	
Transactions SSS:	-6,00%	3,00%	-9,00%	
Extra topping	4,00%	13,00%	-9,00%	
Successful reciept QR codes scans	1,50%	5,00%	-3,50%	
Ticket size	78,00	100,00	-22,00	
	Performance	Budget	Vs. Budget	S
DOC%	11,00%	10,00%	1,00%	
	Performance	Target	Difference +/-	S
RiskProof monitor score:	100,00%	100,00%	0,00%	
Overdue defects:	0,00	0,00	0,00	
Audit actions needed:	0,00	0,00	0,00	
External cleaning completion	100,00%	100,00%	0,00%	
	Performance	Budget	Vs. Budget	S
SALARY%	34,00%	32,00%	2,00%	
	Performance	Target	Difference +/-	S
Productivity	17,00	17,50	-0,50	
CWT	68,00%	70,00%	-2,00%	
SOM%	-2,00%	0,00%	-2,00%	
OPTIMAL HOURS	100,00%	100,00%	0,00%	
Employee Engagement	7,5	8,1	-0,6	
	Performance	Budget	Vs. Budget	S
COGS%	20,00%	20,00%	0,00%	
	Performance	Target	Difference +/-	S
Waste cost	3,00%	3,00%	0,00%	
EMP%	-1,70%	-1,70%	0,00%	
Unregistered waste cost	4,00%	2,00%	2,00%	
2GO%	1,20%	1,20%	0,00%	
	Performance	Budget	Vs. Budget	S
STORE LEVEL PROFIT%	22,00%	22,00%	0,00%	

Additional info

The store is currently facing a period of reduced foot traffic, resulting in a lower volume of in-store activity. While the staff has been able to manage the current demand effectively, the store is not meeting its target salary percentage, indicating inefficiencies in labour cost relative to revenue.

Operational Disruption:

A critical machine—the centrifuge—experienced a breakdown, halting production for an entire day. While a replacement unit was promptly ordered and delivered the following day, the incident caused a temporary but significant disruption in output.

Employee Engagement:

The store is also experiencing low employee engagement. The prevailing mindset among the staff is transactional, with many treating their roles as clock-in, clock-out jobs. This lack of motivation and ownership may be contributing to underperformance in other key areas.

IN GROUPS OF TWO

- Analyse the MORS and decide where you would put attention and why you want to focus there – make sure to write it down on a Post-It

CASE #2 - MORS

Date:				
Name, Store Manager:				
Name, District Manager:				
Area	Performance	Budget	Vs. Budget	S
REVENUE	515000,00	500000,00	3,00%	
	Performance	Target	Difference +/	S
Tapout	0,00%	0,00%	0,00%	
Transactions SSS:	-5,00%	3,00%	-8,00%	
Extra topping	14,00%	13,00%	1,00%	
Successful reciept QR codes scans	5,00%	5,00%	0,00%	
Ticket size	94,00	100,00	-6,00	
	Performance	Budget	Vs. Budget	S
DOC%	15,00%	10,00%	5,00%	
	Performance	Target	Difference +/	S
RiskProof monitor score:	71,00%	100,00%	-29,00%	
Overdue defects:	0,00	0,00	0,00	
Audit actions needed:	0,00	0,00	0,00	
External cleaning completion	100,00%	100,00%	0,00%	
	Performance	Budget	Vs. Budget	S
SALARY%	38,00%	32,00%	6,00%	
	Performance	Target	Difference +/	S
Productivity	14,00	17,00	-3,00	
CWT	68,00%	70,00%	-2,00%	
SOM%	-2,00%	0,00%	-2,00%	
OPTIMAL HOURS	100,00%	100,00%	0,00%	
Employee Engagement	8,1	8,1	0,0	
	Performance	Budget	Vs. Budget	S
COGS%	23,00%	20,00%	3,00%	
	Performance	Target	Difference +/	S
Waste cost	4,50%	3,00%	1,50%	
EMP%	-1,70%	-1,70%	0,00%	
Unregistered waste cost	4,20%	2,00%	2,20%	
2GO%	1,20%	1,20%	0,00%	
	Performance	Budget	Vs. Budget	S
STORE LEVEL PROFIT%	22,00%	26,00%	-4,00%	

Additional info

The store recently onboarded a significant number of new juicers, which has led to a decrease in overall team seniority. While this influx of new hires brings fresh energy, it also presents challenges in terms of experience and operational efficiency.

As the store prepares for the upcoming high season, the District Manager (DM) has proactively taken steps to ensure readiness. This includes the procurement of additional equipment and the engagement of external cleaning services, both of which were implemented last month to enhance the store's presentation and functionality.

IN GROUPS OF TWO

- Analyse the MORS and decide where you would put attention and why you want to focus there – make sure to write it down on a Post-It

CASE #3 - MORS

Date: Name, Store Manager: Name, District Manager:				
Area	Performance	Budget	Vs. Budget	S
REVENUE	525000,00	500000,00	5,00%	
	Performance	Target	Difference +/-	S
Tapout	0,00%	0,00%	0,00%	
Transactions SSS:	8,00%	3,00%	5,00%	
Extra topping	2,00%	13,00%	-11,00%	
Successful reciept QR codes scans	1,00%	5,00%	-4,00%	
Ticket size	94,00	100,00	-6,00	
	Performance	Budget	Vs. Budget	S
DOC%	9,00%	10,00%	-1,00%	
	Performance	Target	Difference +/-	S
RiskProof monitor score:	45,00%	100,00%	-55,00%	
Overdue defects:	0,00	0,00	0,00	
Audit actions needed:	0,00	0,00	0,00	
External cleaning completion	100,00%	100,00%	0,00%	
	Performance	Budget	Vs. Budget	S
SALARY%	28,00%	32,00%	-4,00%	
	Performance	Target	Difference +/-	S
Productivity	14,00	17,00	-3,00	
CWT	56,00%	70,00%	-14,00%	
SOM%	7,00%	0,00%	7,00%	
OPTIMAL HOURS	50,00%	100,00%	-50,00%	
Employee Engagement	8,1	8,1	0,0	
	Performance	Budget	Vs. Budget	S
COGS%	22,00%	20,00%	2,00%	
	Performance	Target	Difference +/-	S
Waste cost	5,60%	3,00%	2,60%	
EMP%	-1,70%	-1,70%	0,00%	
Unregistered waste cost	4,20%	2,00%	2,20%	
2GO%	1,60%	1,20%	0,40%	
	Performance	Budget	Vs. Budget	S
STORE LEVEL PROFIT%	26,00%	22,00%	4,00%	

Additional info

Over the past month, the store has experienced a sustained increase in customer activity due to a series of weekend events. These events have significantly boosted foot traffic and contributed to higher revenue levels.

Following the success of the events, several concerts are scheduled over the coming weekends, which are expected to continue driving increased customer flow. This aligns with the onset of the high season, during which consumer demand naturally rises.

Because of this the store and staff is not 100% ready for the following month.

IN GROUPS OF TWO

- Analyse the MORS and decide where you would put attention and why you want to focus there – make sure to write it down on a Post-It

CASE #1 - MORS

TAKE ACTION NOW

Impacts revenue

Extra topping and QR codes – gap vs. target potential to increase Ticket size and off-set drop in transactions

Impacts many areas

Employee Engagement – gap vs. target. Engaged team necessary to lift Revenue.

Impacts SLP

Date:			
Name, Store Manager:			
Name, District Manager:			
Area	**Performance**	**Budget**	**Vs. Budget**
REVENUE	**475000,00**	**500000,00**	**-5,00%**
	Performance	**Target**	**Difference +/-**
Tapout	20,00	0,00	20,00
Transactions SSS:	-6,00%	3,00%	-9,00%
Extra topping	4,00%	13,00%	-9,00%
Successful reciept QR codes scans	1,50%	5,00%	-3,50%
Ticket size	78,00	100,00	-22,00
	Performance	**Budget**	**Vs. Budget**
DOC%	**11,00%**	**10,00%**	**1,00%**
	Performance	**Target**	**Difference +/-**
RiskProof monitor score:	100,00%	100,00%	0,00%
Overdue defects:	0,00	0,00	0,00
Audit actions needed:	0,00	0,00	0,00
External cleaning completion	100,00%	100,00%	0,00%
	Performance	**Budget**	**Vs. Budget**
SALARY%	**34,00%**	**32,00%**	**2,00%**
	Performance	**Target**	**Difference +/-**
Productivity	17,00	17,50	-0,50
CWT	68,00%	70,00%	-2,00%
SOM%	-2,00%	0,00%	-2,00%
OPTIMAL HOURS	100,00%	100,00%	0,00%
Employee Engagement	7,5	8,1	-0,6
	Performance	**Budget**	**Vs. Budget**
COGS%	**20,00%**	**20,00%**	**0,00%**
	Performance	**Target**	**Difference +/-**
Waste cost	3,00%	3,00%	0,00%
EMP%	-1,70%	-1,70%	0,00%
Unregistered waste cost	4,00%	2,00%	2,00%
2GO%	1,20%	1,20%	0,00%
	Performance	**Budget**	**Vs. Budget**
STORE LEVEL PROFIT%	**22,00%**	**22,00%**	**0,00%**

NO ACTION NECCESARY

Tapout – caused by breakdown of centrifuge and already solved by new centrifuge

DOC% – caused by breakdown of centrifuge and already solved by new centrifuge

SALARY% – when revenue is increasing, due to actions increasing Revenue, SALARY% will drop

CASE #2 - MORS

TAKE ACTION NOW

RiskProof monitor score – risk for operation!!!

Salary% and COGS% – optimize efficiency to close gaps on Productivity and waste to lower Salary and COGS cost

Impacts SLP

Date:			
Name, Store Manager:			
Name, District Manager:			
Area	**Performance**	**Budget**	**Vs. Budget**
REVENUE	**515000,00**	**500000,00**	**3,00%**
	Performance	**Target**	**Difference +/-**
Tapout	0,00	0,00	0,00
Transactions SSS:	-5,00%	3,00%	-8,00%
Extra topping	14,00%	13,00%	1,00%
Successful reciept QR codes scans	5,00%	5,00%	0,00%
Ticket size	94,00	100,00	-6,00
	Performance	**Budget**	**Vs. Budget**
DOC%	**15,00%**	**10,00%**	**5,00%**
	Performance	**Target**	**Difference +/-**
RiskProof monitor score:	71,00%	100,00%	-29,00%
Overdue defects:	0,00	0,00	0,00
Audit actions needed:	0,00	0,00	0,00
External cleaning completion	100,00%	100,00%	0,00%
	Performance	**Budget**	**Vs. Budget**
SALARY%	**38,00%**	**32,00%**	**6,00%**
	Performance	**Target**	**Difference +/-**
Productivity	14,00	17,00	-3,00
CWT	68,00%	70,00%	-2,00%
SOM%	-2,00%	0,00%	-2,00%
OPTIMAL HOURS	100,00%	100,00%	0,00%
Employee Engagement	8,1	8,1	0,0
	Performance	**Budget**	**Vs. Budget**
COGS%	**23,00%**	**20,00%**	**3,00%**
	Performance	**Target**	**Difference +/-**
Waste cost	4,50%	3,00%	1,50%
EMP%	-1,70%	-1,70%	0,00%
Unregistered waste cost	4,20%	2,00%	2,20%
2GO%	1,20%	1,20%	0,00%
	Performance	**Budget**	**Vs. Budget**
STORE LEVEL PROFIT%	**22,00%**	**26,00%**	**-4,00%**

TAKE ACTION LATER

Ticket size and transactions SSS – gap vs. target potential to increase Transactions and Ticket size to further increase revenue

NO ACTION NECCESARY

DOC% – procurement of additional equipment and engagement of external cleaning services

CWT – considering the low seniority of the Juicers this will most likely go up without further action

CASE #3 - MORS

TAKE ACTION NOW

Impacts revenue

RiskProof monitor score – risk for operation!!!

Salary% – invest to keep up with future demand

Impacts SLP

Date:			
Name, Store Manager:			
Name, District Manager:			
Area	**Performance**	**Budget**	**Vs. Budget**
REVENUE	**525000,00**	**500000,00**	**5,00%**
	Performance	**Target**	**Difference +/-**
Tapout	0,00	0,00	0,00
Transactions SSS:	8,00%	3,00%	5,00%
Extra topping	2,00%	13,00%	-11,00%
Successful reciept QR codes scans	1,00%	5,00%	-4,00%
Ticket size	94,00	100,00	-6,00
	Performance	**Budget**	**Vs. Budget**
DOC%	**9,00%**	**10,00%**	**-1,00%**
	Performance	**Target**	**Difference +/-**
RiskProof monitor score:	45,00%	100,00%	-55,00%
Overdue defects:	0,00	0,00	0,00
Audit actions needed:	0,00	0,00	0,00
External cleaning completion	100,00%	100,00%	0,00%
	Performance	**Budget**	**Vs. Budget**
SALARY%	**28,00%**	**32,00%**	**-4,00%**
	Performance	**Target**	**Difference +/-**
Productivity	14,00	17,00	-3,00
CWT	56,00%	70,00%	-14,00%
SOM%	7,00%	0,00%	7,00%
OPTIMAL HOURS	50,00%	100,00%	-50,00%
Employee Engagement	7,8	8,1	-0,3
	Performance	**Budget**	**Vs. Budget**
COGS%	**22,00%**	**20,00%**	**2,00%**
	Performance	**Target**	**Difference +/-**
Waste cost	5,60%	3,00%	2,60%
EMP%	-1,70%	-1,70%	0,00%
Unregistered waste cost	4,20%	2,00%	2,20%
2GO%	1,60%	1,20%	0,40%
	Performance	**Budget**	**Vs. Budget**
STORE LEVEL PROFIT%	**26,00%**	**22,00%**	**4,00%**

TAKE ACTION LATER

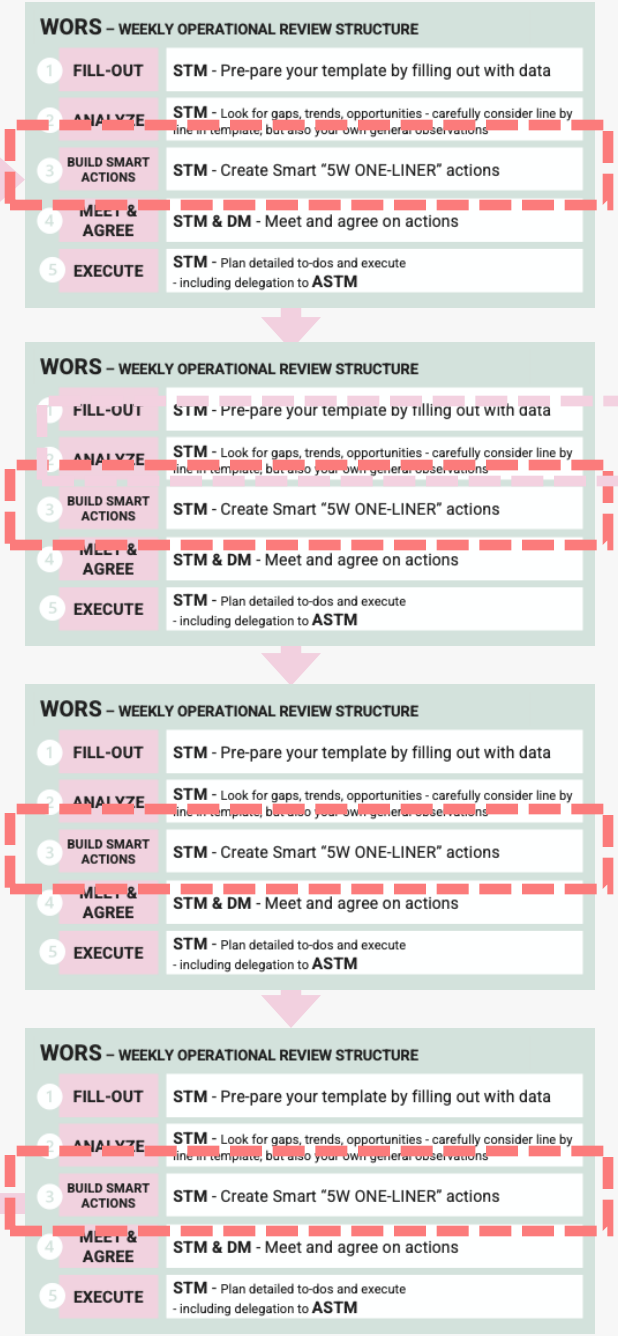
Ticket size, extra topping and QR codes – potential to increase Revenue even further in a more sustainable way than relying on events

COGS% – work on efficiency to reduce waste

STEP 3 – BUILD SMART ACTIONS

MORS – MONTHLY OPERATIONAL REVIEW STRUCTURE

1	FILL-OUT	**STM** - Pre-pare your template by filling out with data
2	ANALYZE	**STM** - Look for gaps, trends, opportunities - carefully consider line by line in template, but also your own general observations
3	BUILD SMART ACTIONS	**STM** - Create Smart "5W ONE-LINER" actions
4	MEET & AGREE	**STM & DM** - Meet and agree on actions
5	EXECUTE	**STM** - Plan detailed to-dos and execute - including delegation to **ASTM**

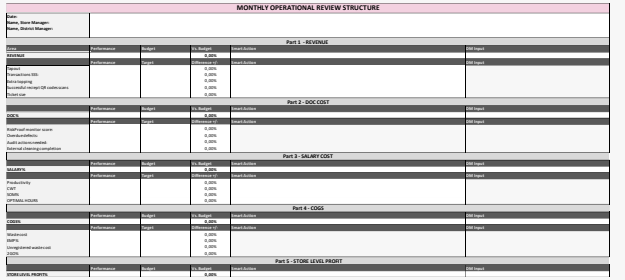


MAKE YOUR ACTIONS SMART BY USING THE FIVE W'S

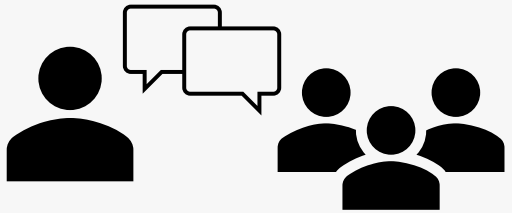
YOUR MANAGER WANTS TO KNOW AND YOUR TEAM WANTS TO KNOW TO FEEL "COMFORTABLE" TO SAY YES

WHY?	Why is this Action important? Ex. My analysis of … shows, the gap vs. target/process, an opportunity…
WHAT?	What are the deliverables of the Action? Ex. Training, Employee dev. talks, DOC report, Fewer on Shift…
WHO?	Who is responsible and involved in the Action? Ex. Delegate to Liz, train Ben, talk with Zoe, put Lin on morning shift…
WHERE?	Where will the Action be implemented? Ex. Your Bar, Zoes bar, Liz and Bens bar, customer area, coffee supplier…
WHEN?	When will the action be done? Ex. Starting Thursday 9.00 and finishing 12.00, Ben on Thursday 12.15…

Use to build or check your Smart Actions in WORS and MORS


MONTHLY OPERATIONAL REVIEW STRUCTURE

Use to communicate effectively with your manager and team



TAKE ACTION NOW – ALLOCATE TO GROUPS

CASE #1
TAKE ACTION NOW

Extra topping and QR codes – gap vs. target potential to increase Ticket size and off-set drop in transactions

Employee Engagement – gap vs. target. Engaged team necessary to lift Revenue.

CASE #2
TAKE ACTION NOW

RiskProof monitor score – risk for operation!!!

Salary% and COGS% – optimize efficiency to close gaps on Productivity and waste to lower Salary and COGS cost

CASE #3
TAKE ACTION NOW

RiskProof monitor score – risk for operation!!!

Salary% – invest to keep up with future demand

EXERCISE

IN GROUPS OF TWO

1

- You have now hosted your MORS last week with your DM and have agreed on that your proposed focus areas are relevant.
- You are now preparing your WORS for the following week and working on the focus area you were just allocated.
  Now make a Smart Action for that week to address your action area from the MORS

  (you can make assumptions for the missing data)
- Use Five W's to build your action from before into a
  Smart Action – write on a A4

WHY?	Why is this Action important? Ex. My analysis of … shows, the gap vs. target/process, an opportunity…
WHAT?	What are the deliverables of the Action? Ex. Training, Employee dev. talks, DOC report, Fewer on Shift…
WHO?	Who is responsible and involved in the Action? Ex. Delegate to Liz, train Ben, talk with Zoe, put Lin on morning shift…
WHERE?	Where will the Action be implemented? Ex. Your Bar, Zoes bar, Liz and Bens bar, customer area, coffee supplier…
WHEN?	When will the action be done? Ex. Starting Thursday 9.00 and finishing 12.00, Ben on Thursday 12.15…

EXERCISE

IN GROUPS OF TWO

1 ➢ Now make one sentence describing your Smart Action on a Post-it

WHY?	Why is this Action important? Ex. My analysis of … shows, the gap vs. target/process, an opportunity…
WHAT?	What are the deliverables of the Action? Ex. Training, Employee dev. talks, DOC report, Fewer on Shift…
WHO?	Who is responsible and involved in the Action? Ex. Delegate to Liz, train Ben, talk with Zoe, put Lin on morning shift…
WHERE?	Where will the Action be implemented? Ex. Your Bar, Zoes bar, Liz and Bens bar, customer area, coffee supplier…
WHEN?	When will the action be done? Ex. Starting Thursday 9.00 and finishing 12.00, Ben on Thursday 12.15…

SMART ACTION EXAMPLES (WORS)

CASE #1
TAKE ACTION NOW

Extra topping and QR codes – gap vs. target potential to increase Ticket size and off-set drop in transactions

WORS SMART ACTION
To start closing the gap on Ticket size and increase it from 78 to 83 this week, Yellow Employee Development Talks focussing on Extra Toppings will be held by myself with all Juicers during my BTC shifts

Employee Engagement – gap vs. target. Engaged team necessary to lift Revenue.

WORS SMART ACTION
To increase the Employee Engagement Driver Goal setting and Strategy as well as supporting an increased focus on increasing ticket size, I have planned a team meeting in the bar on Thursday 18.00. Here I will present the current commercial initiative, goals and the extratopping competition.

CASE #2
TAKE ACTION NOW

RiskProof monitor score – risk for operation!!!

WORS SMART ACTION
To bring RP monitor score to 100% this week, I will today in in the Juicerapp stress the importance. Further ASTM and myself will delegate the tasks manually for the coming week and praise progress in Juicerapp daily

Salary% and COGS% – optimize efficiency to close gaps on Productivity and waste to lower Salary and COGS cost

WORS SMART ACTION
To start lowering Salary% and COGS cost
1) I have scheduled a meeting on Friday 12.00 with Operational planner and my DM to get high level input for how we can optimize shift plans, according to the current state of the stores with new employees.
2) I will host a meeting on Wednesday 10.00 with my SMs to include them in the remaining onboarding and training plans that needs to be executed for new hires with key focus points on product quality.

CASE #3
TAKE ACTION NOW

RiskProof monitor score – risk for operation!!!

WORS SMART ACTION
To start improving RP monitor score next week, I have scheduled Care night for the whole team on Thursday to address current hygiene of the bar

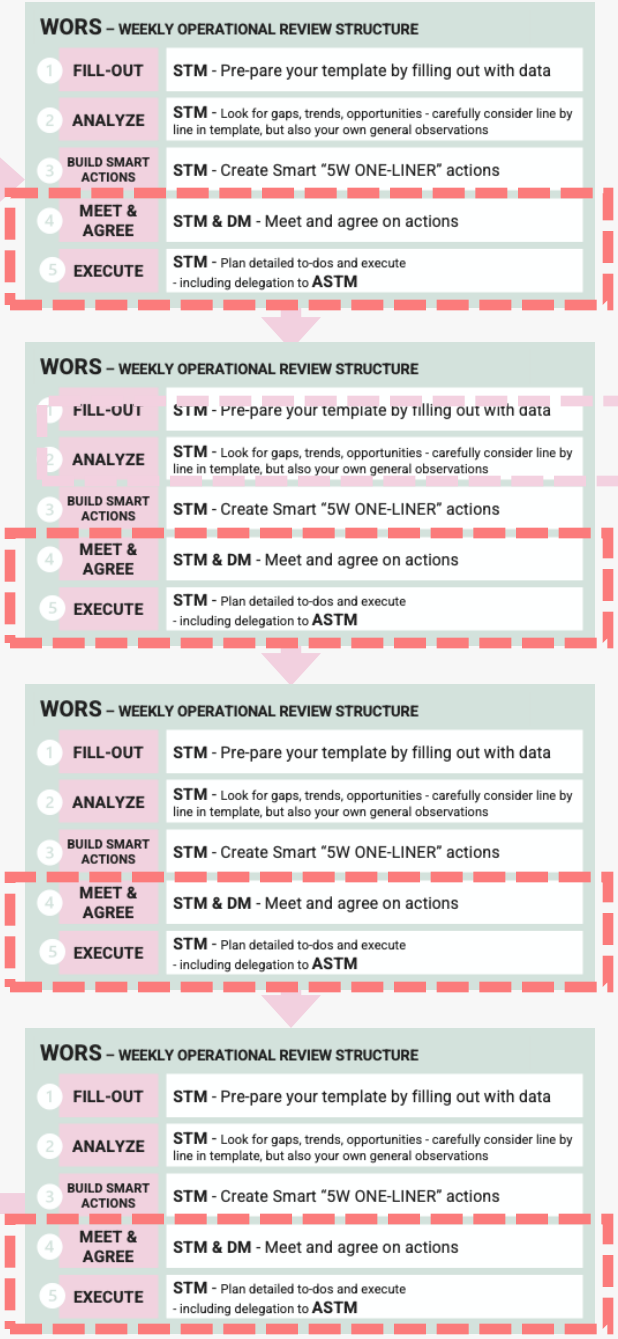
Salary% – invest to keep up with future demand

WORS SMART ACTION
To keep up with future demand I will, when doing Shiftplanning Monday afternoon, add 1 Lermo shift pr day from 9-15

STEP 4+5 – MEET, AGREE AND EXECUTE

MORS – MONTHLY OPERATIONAL REVIEW STRUCTURE

1	FILL-OUT	**STM** - Pre-pare your template by filling out with data
2	ANALYZE	**STM** - Look for gaps, trends, opportunities - carefully consider line by line in template, but also your own general observations
3	BUILD SMART ACTIONS	**STM** - Create Smart "5W ONE-LINER" actions
4	MEET & AGREE	**STM & DM** - Meet and agree on actions
5	EXECUTE	**STM** - Plan detailed to-dos and execute - including delegation to **ASTM**



STM – WEEKLY SCHEDULE EXAMPLE

MORS/WORS is fixed – Carefully plan OH and BTC…and when you do what TO-DOs

OH | BTC

STM	MON	TUE	WED	THURS	FRI	SAT	SUN
7 am							
8 am	Recount / Close Previous Week	**OH** - ***TO-DOs***, E-mails, admin…	**BTC** Incl. execution on actions from ***TO-DOs***				
9 am	**Create WORS or MORS report**	**Weekly Catch-Up with ASTM**		**BTC** Incl. execution of actions from ***TO-DOs***			
10 am	Salary Controller & Weekly Report	**BTC** Incl. execution on actions from ***TO-DOs***					
11 am	Count Verification						**OH** - ***TO-DOs***, E-mails, admin…
12 pm	**Weekly Catch-Up with DM & plan *TO-DOs* from WORS or MORS Smart-Actions**						**BTC** Incl. execution of actions from ***TO-DOs***
1 pm							
2 pm	E-mails/ Assess Team Pos. 2 wks ahead		**OH** - ***TO-DOs***, E-mails, admin…				
3 pm				**OH** - ***TO-DOs***, E-mails, admin…			
4 pm							
5 pm							

DM	**MON** pm 30 min Catch-Up with STM via Teams	**TUE** am Weekly catch-up with OM

Local variances in the company ROB may appear

AGENDA

1 Why is this skill important?

2 How to master the skill

3 Sum-up and Impact

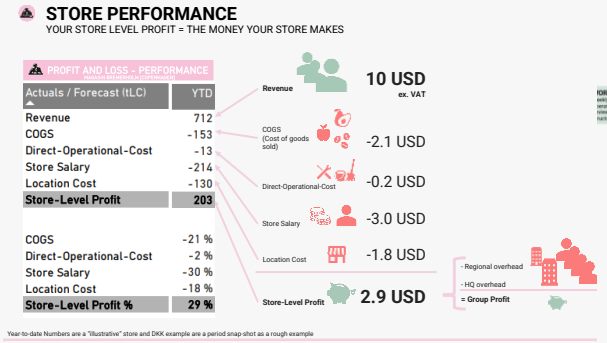
4 How to apply into practice

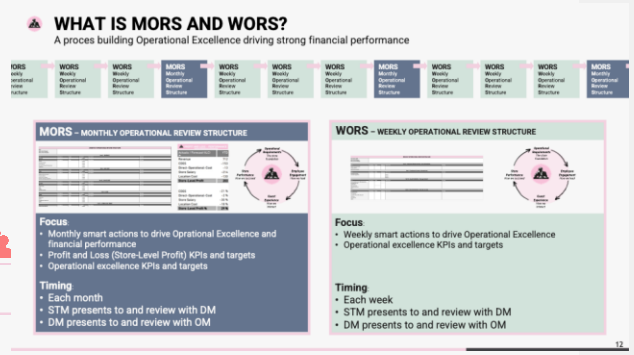
© 2024 JOE & THE JUICE. All rights reserved.

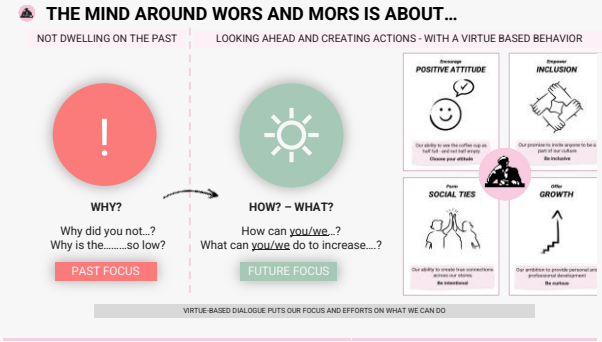
SUM-UP AND IMPACT

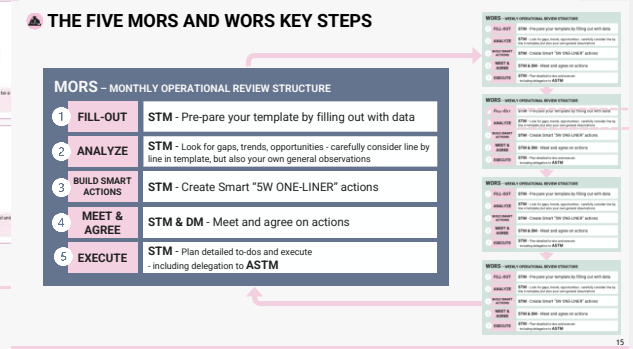
From class-room theory to practical in-store skills

What are your **key learnings** from the Store Performance Session?



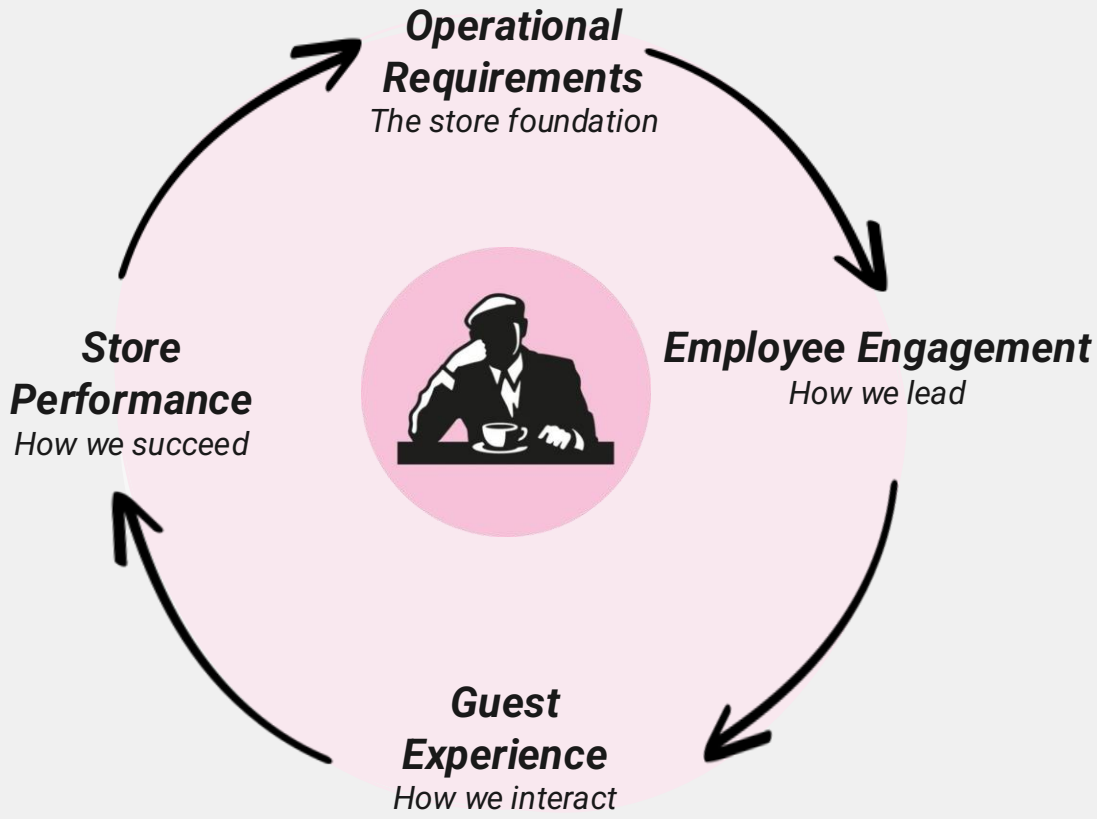






THE WORS AND MORS YOU WILL LEARN OTJ THE COMING WEEKS AND MONTHS

CIRCLE OF OPERATIONAL EXCELLENCE



How does mastering these skills affect each area within *the Circle of Operational Excellence* in your store?

© 2024 JOE & THE JUICE. All rights reserved.

AGENDA

1 Why is this skill important?

2 How to master the skill

3 Sum-up and Impact

4 How to apply into practice

© 2024 JOE & THE JUICE. All rights reserved.

HOW TO APPLY INTO PRACTICE

From practical in-store skills to daily, weekly, and monthly habits

Assistant Store Manager	Accountable for assisting in building sales and optimizing Financial store performance to achieve defined KPIs.
Store Manager	Accountable for building sales and optimizing Financial store performance to achieve defined KPI targets.
District Manager	Accountable for building sales and optimizing Financial store performance through store managers to achieve defined KPI targets (conduct store performance reviews)

© 2024 JOE & THE JUICE. All rights reserved.

MANAGER SPECIALIST SESSIONS

© 2024 JOE & THE JUICE – ALL RIGHTS RESERVED