



# Store Performance

Moneyball 2.0 Leadership Training



Proudly made in JOE collaboration with

*Frederik Holch Schmidt*

#1206 - Head of Implementation Nordics



# AGENDA

- 1 **Why is this skill important?**
- 2 How to master the skill
- 3 Sum-up and Impact
- 4 How to apply into practice



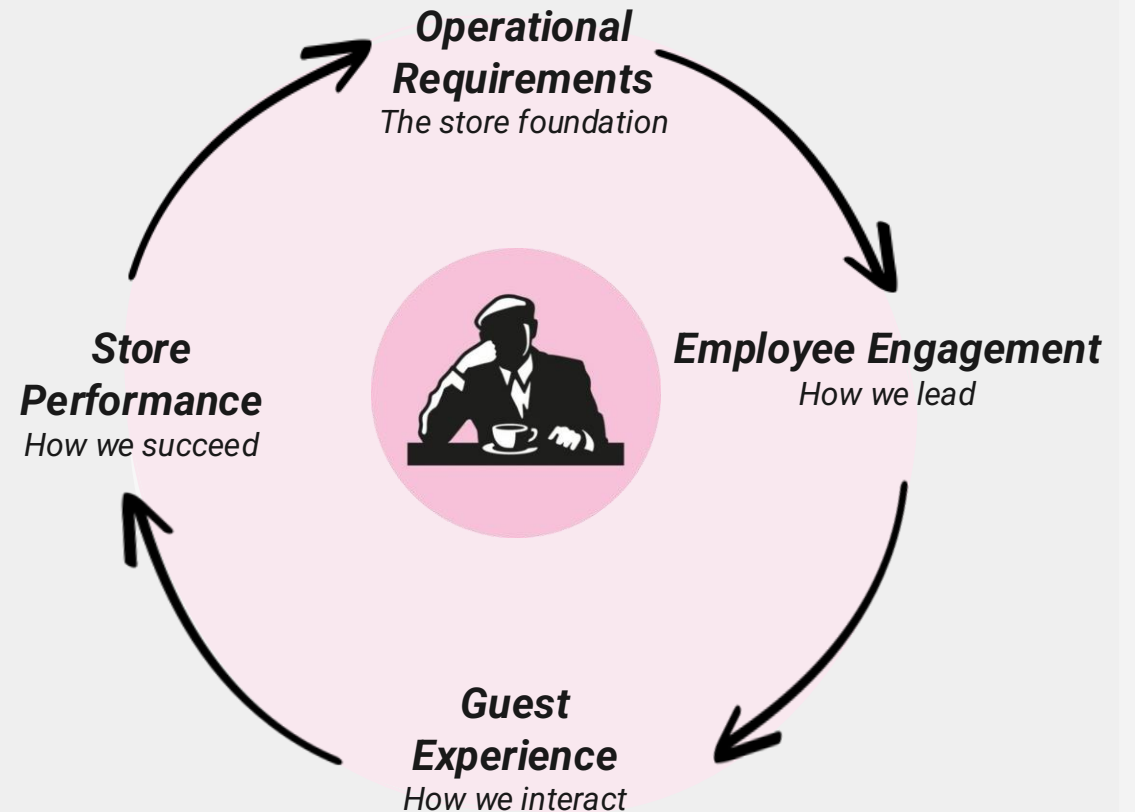
# WHY IS THIS SKILL IMPORTANT?

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?



# AGENDA

1 Why is this skill important?

## **How to master the skill**

- **Principles of your Store P/L**
  - **Drivers – Leading & Lagging KPIs**
  - 2 • **Weekly and Monthly Operational Review**
  - **Opportunity and Smart Actions**
- 3 Sum-up and Impact
- 4 How to apply into practice



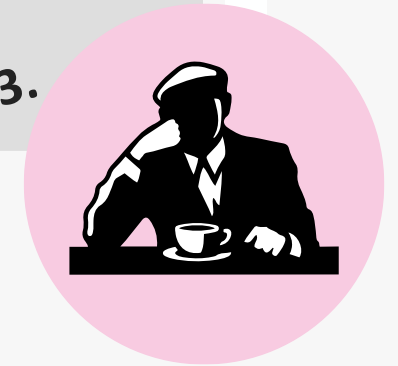


# WHY DOES JOE & THE JUICE EXIST AS A BUSINESS?

Take two Post-its and write one reply on each



3.





# 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

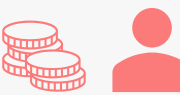
YOUR STORE LEVEL PROFIT = THE MONEY YOUR STORE MAKES

| PROFIT AND LOSS - PERFORMANCE<br>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 EUR**  
ex. VAT

COGS  
(Cost of goods sold)  **-2.1 EUR**

Direct-Operational-Cost  **-0.2 EUR**

Store Salary  **-3.0 EUR**

Location Cost  **-1.8 EUR**

Store-Level Profit  **2.9 EUR**

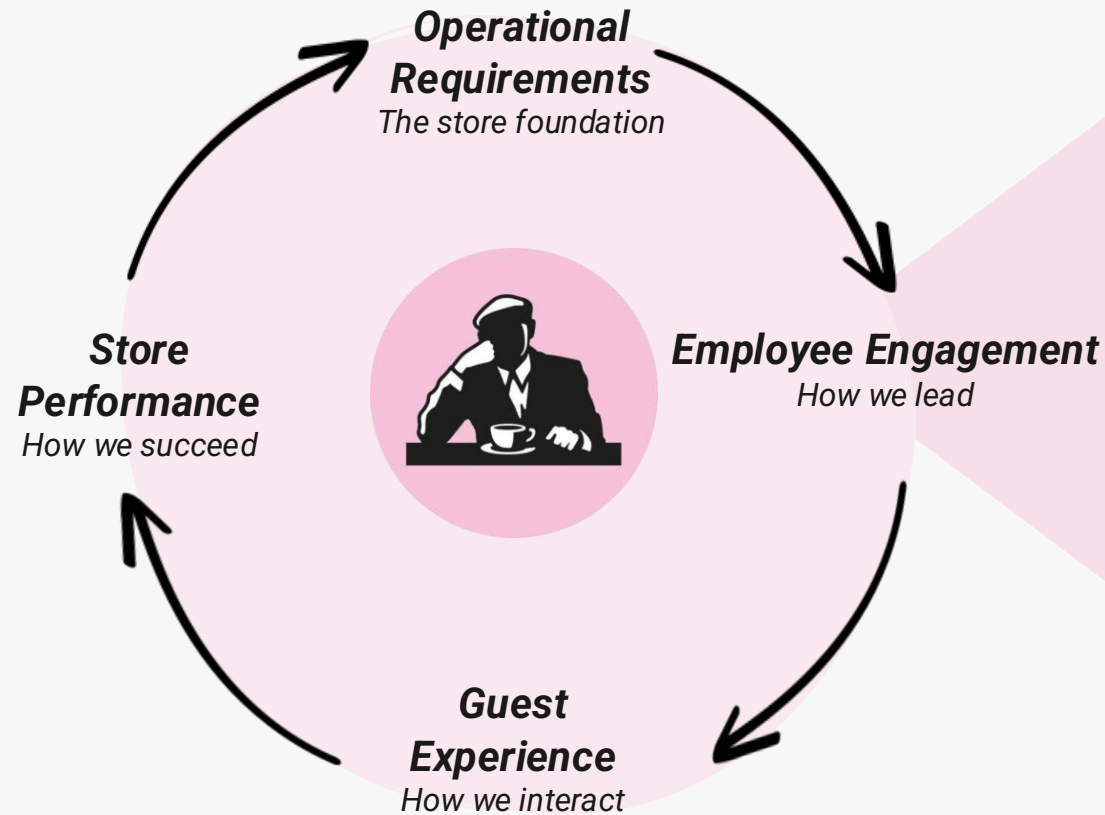
- Regional overhead  
- HQ overhead  
= Group Profit





# EXERCISE

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

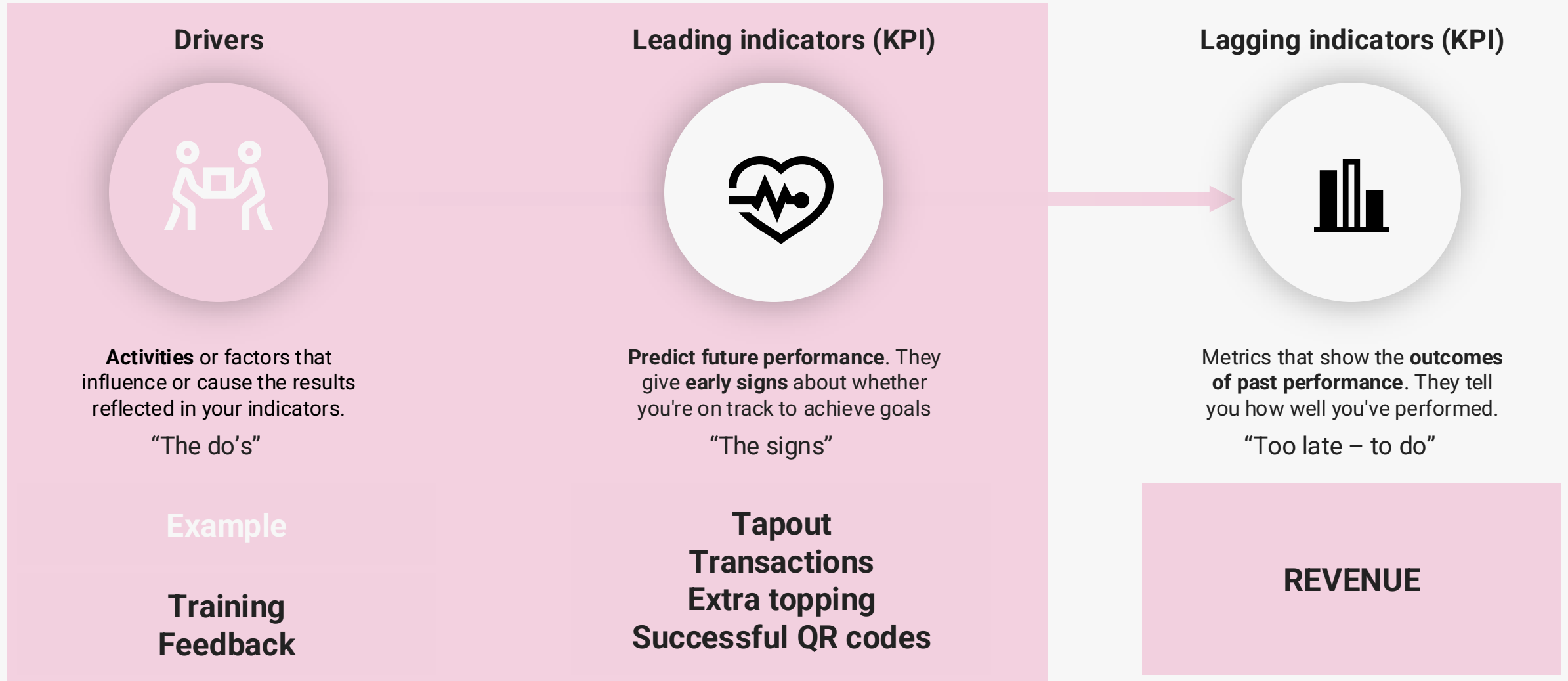


|                              |  |                          |
|------------------------------|--|--------------------------|
| Revenue                      |  | <b>10 EUR</b><br>ex. VAT |
| COGS<br>(Cost of goods sold) |  | <b>-2.1 EUR</b>          |
| Direct-Operational-Cost      |  | <b>-0.2 EUR</b>          |
| Store Salary                 |  | <b>-3.0 EUR</b>          |
| Location Cost                |  | <b>-1.8 EUR</b>          |
|                              |  | <hr/>                    |
| Store-Level Profit           |  | <b>2.9 EUR</b>           |



# STORE PERFORMANCE

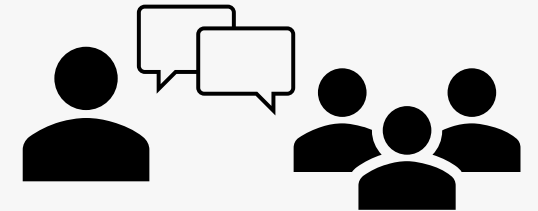
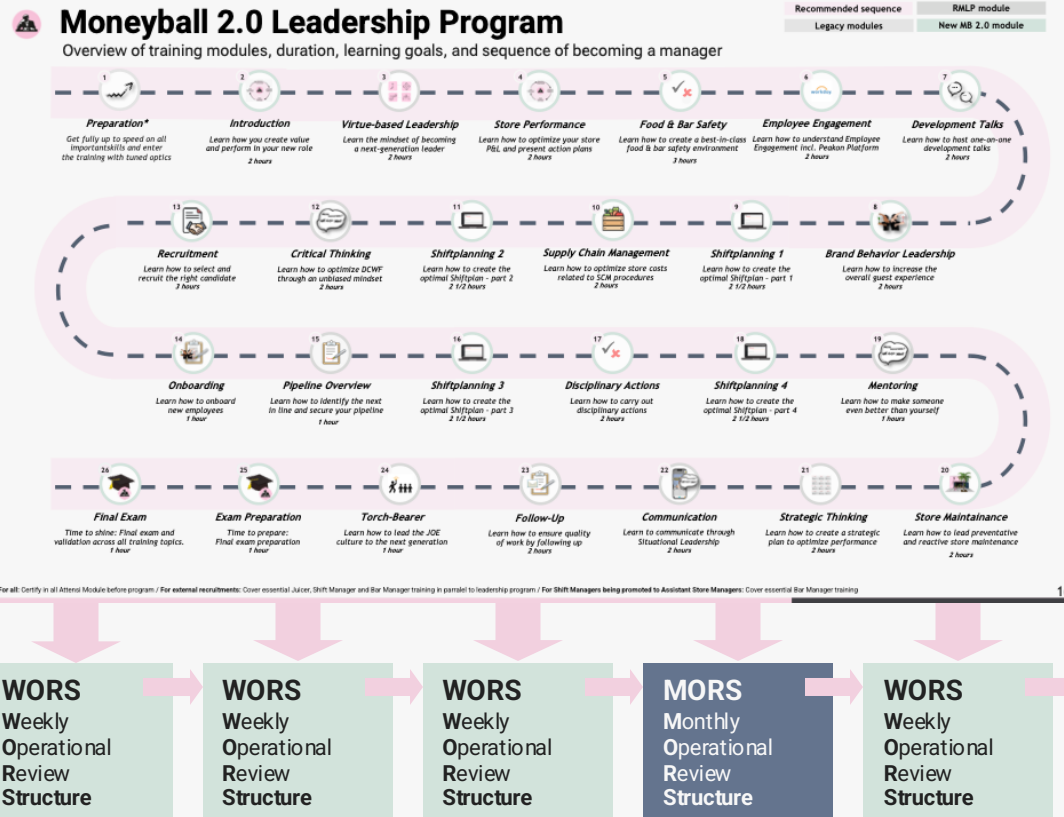
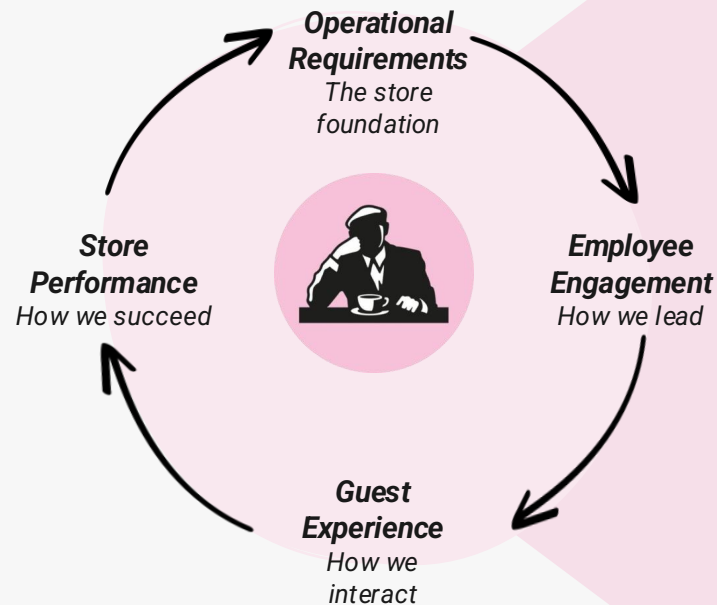
Focus on Drivers and Leading indicators - and the Lagging indicators will follow





# LEADERSHIP TRAINING TO DELIVER STORE PERFORMANCE

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



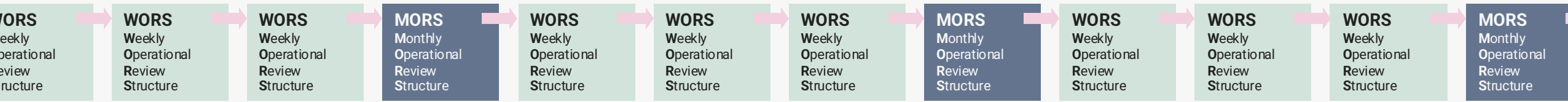
DURING TRAINING

AFTER TRAINING



# WHAT IS MORS AND WORS?

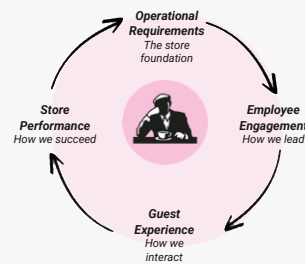
A process building Operational Excellence driving strong financial performance



## MORS – MONTHLY OPERATIONAL REVIEW STRUCTURE

| MONTHLY OPERATIONAL REVIEW STRUCTURE |       |  |  |  |  |  |  |  |  |
|--------------------------------------|-------|--|--|--|--|--|--|--|--|
| PART 1 - REVENUE                     |       |  |  |  |  |  |  |  |  |
| Revenue                              | 712   |  |  |  |  |  |  |  |  |
| PART 2 - COGS                        |       |  |  |  |  |  |  |  |  |
| COGS                                 | -153  |  |  |  |  |  |  |  |  |
| Direct-Operational-Cost              | -13   |  |  |  |  |  |  |  |  |
| Store Salary                         | -214  |  |  |  |  |  |  |  |  |
| Location Cost                        | -130  |  |  |  |  |  |  |  |  |
| Store-Level Profit                   | 203   |  |  |  |  |  |  |  |  |
| PART 3 - SALARY COST                 |       |  |  |  |  |  |  |  |  |
| COGS                                 | -21 % |  |  |  |  |  |  |  |  |
| Direct-Operational-Cost              | -2 %  |  |  |  |  |  |  |  |  |
| Store Salary                         | -30 % |  |  |  |  |  |  |  |  |
| Location Cost                        | -18 % |  |  |  |  |  |  |  |  |
| Store-Level Profit %                 | 29 %  |  |  |  |  |  |  |  |  |

| PROFIT AND LOSS - PERFORMANCE |       |  |
|-------------------------------|-------|--|
| Actuals / Forecast (tLC)      |       |  |
|                               | YTD   |  |
| Revenue                       | 712   |  |
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### Focus:

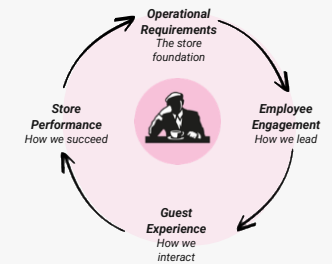
- Monthly smart actions to drive Operational Excellence and financial performance
- Profit and Loss (Store-Level Profit) KPIs and targets
- Operational excellence KPIs and targets

### Timing:

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

## WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

| WEEKLY OPERATIONAL REVIEW STRUCTURE                  |  |  |  |  |  |  |  |  |  |
|------------------------------------------------------|--|--|--|--|--|--|--|--|--|
| PART 1 - Operational Requirements - Store Foundation |  |  |  |  |  |  |  |  |  |
| Revenue                                              |  |  |  |  |  |  |  |  |  |
| PART 2 - Employee Engagement - How we lead           |  |  |  |  |  |  |  |  |  |
| COGS                                                 |  |  |  |  |  |  |  |  |  |
| Direct-Operational-Cost                              |  |  |  |  |  |  |  |  |  |
| Store Salary                                         |  |  |  |  |  |  |  |  |  |
| Location Cost                                        |  |  |  |  |  |  |  |  |  |
| PART 3 - Guest Experience - How we interact          |  |  |  |  |  |  |  |  |  |
| COGS                                                 |  |  |  |  |  |  |  |  |  |
| Direct-Operational-Cost                              |  |  |  |  |  |  |  |  |  |
| Store Salary                                         |  |  |  |  |  |  |  |  |  |
| Location Cost                                        |  |  |  |  |  |  |  |  |  |
| PART 4 - Store Performance - How we succeed          |  |  |  |  |  |  |  |  |  |
| COGS                                                 |  |  |  |  |  |  |  |  |  |
| Direct-Operational-Cost                              |  |  |  |  |  |  |  |  |  |
| Store Salary                                         |  |  |  |  |  |  |  |  |  |
| Location Cost                                        |  |  |  |  |  |  |  |  |  |



### 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

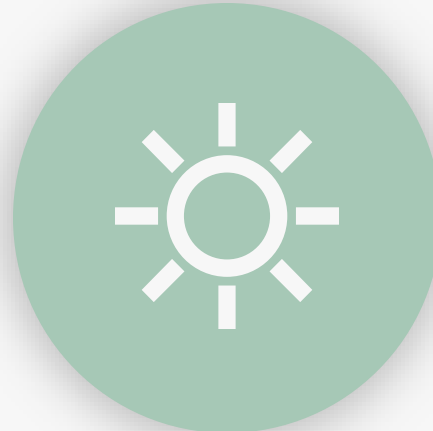
LOOKING AHEAD AND CREATING ACTIONS - WITH A VIRTUE BASED BEHAVIOR



**WHY?**

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

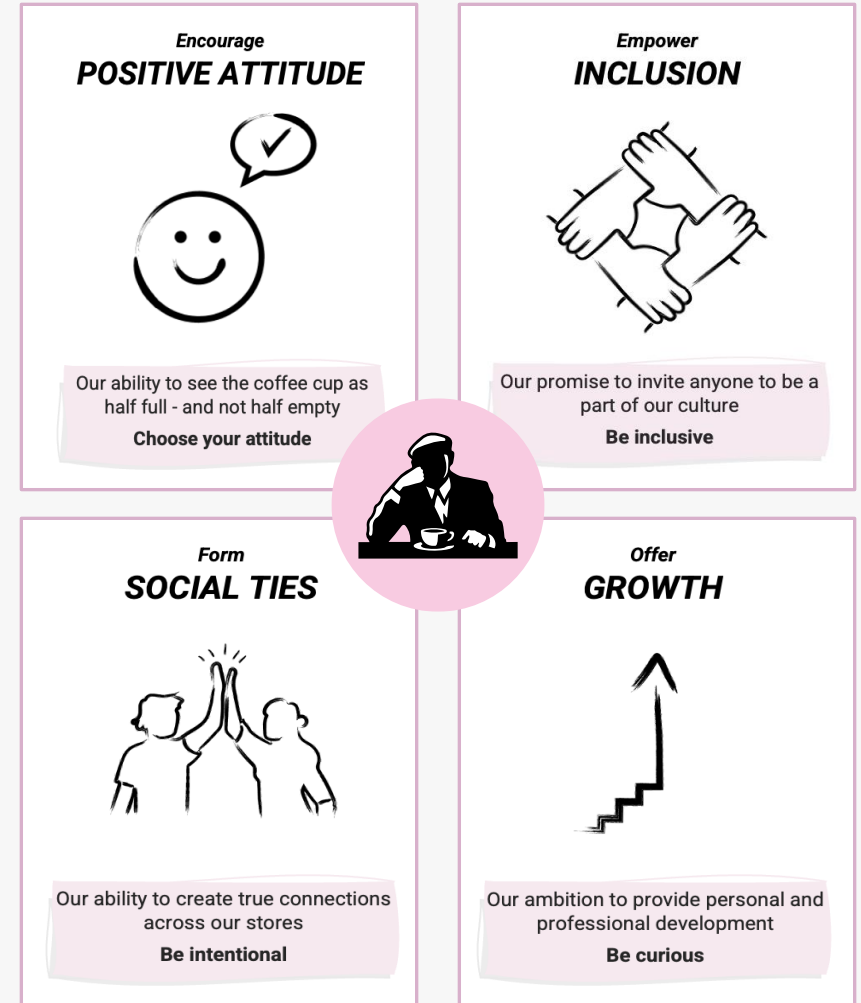
**PAST FOCUS**



**HOW? - WHAT?**

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

**NOW & FUTURE FOCUS**

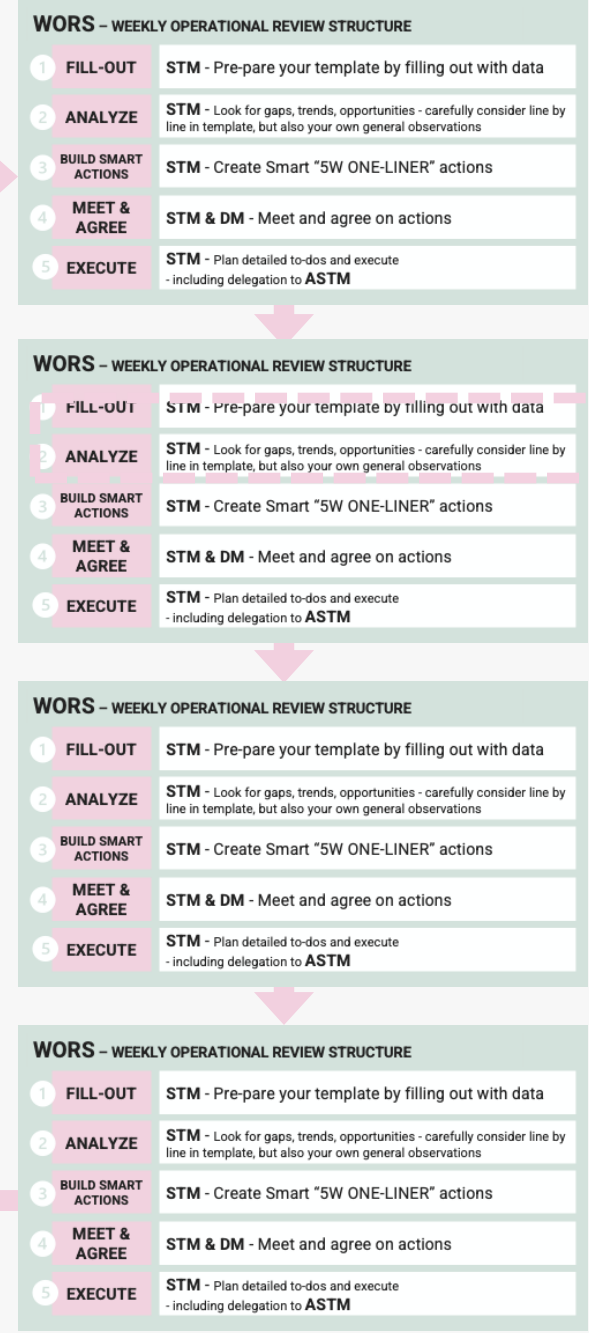


VIRTUE-BASED DIALOGUE PUTS OUR FOCUS AND EFFORTS ON WHAT WE CAN DO

# THE FIVE MORS AND WORS KEY STEPS

## MORS – MONTHLY OPERATIONAL REVIEW STRUCTURE

|   |                     |                                                                                                                                  |
|---|---------------------|----------------------------------------------------------------------------------------------------------------------------------|
| 1 | FILL-OUT            | STM - Pre-prepare 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<br>- including delegation to <b>ASTM</b>                                                  |

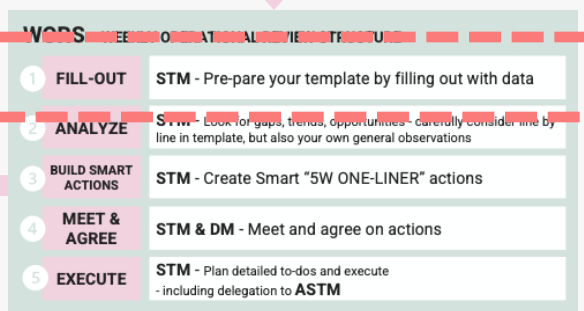
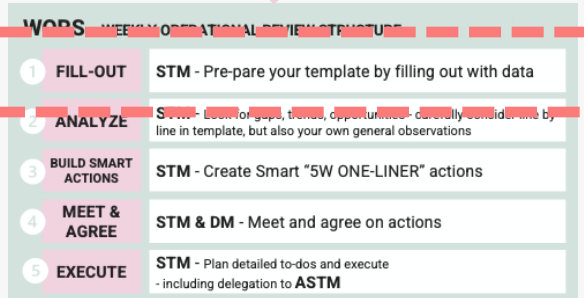
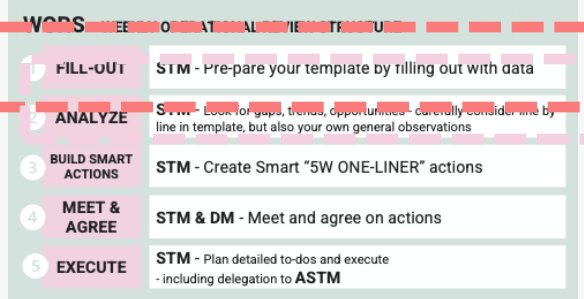
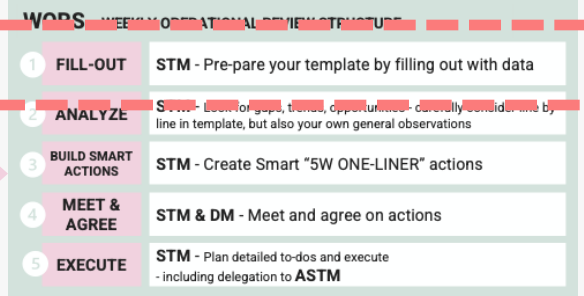




# STEP 1 - FILL-OUT

## MORS – MONTHLY OPERATIONAL REVIEW STRUCTURE

- 1 FILL-OUT** STM - Pre-prepare 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 receipt 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 receipt 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 initiative 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:<br>Name, Store Manager:<br>Name, District Manager:                                                                       |             |        |            |                                  |          |  |
| Part 1 - Operational Requirements - Store Foundation                                                                           |             |        |            |                                  |          |  |
| Area                                                                                                                           | Performance | Target | Difference | Smart Action                     | DM Input |  |
| RiskProof monitor score:<br>Overdue defects:<br>Audit actions needed:                                                          |             |        |            |                                  |          |  |
| Part 2 - Employee Turnover - How we lead                                                                                       |             |        |            |                                  |          |  |
| Area                                                                                                                           | Performance | Target | Difference | Smart Action                     | DM Input |  |
| Employee Turnover<br>Employee engagement                                                                                       |             |        |            | Driver 1<br>Driver 2<br>Driver 3 |          |  |
| Part 3 - Guest Satisfaction - How we interact                                                                                  |             |        |            |                                  |          |  |
| Area                                                                                                                           | Performance | Target | Difference | Smart Action                     | DM Input |  |
| Total complaints per 1.000 transactions<br>Employee Seniroity<br>Productivity<br>Avg. App rating<br>Training completion<br>CWT |             |        |            |                                  |          |  |
| Part 4 - Store Performance - How we succeed                                                                                    |             |        |            |                                  |          |  |
| Area                                                                                                                           | Performance | Target | Difference | Smart Action                     | DM Input |  |
| Transactions SSS:<br>Extra topping<br>Successful receipt QR codes scans<br>Ticket size<br>Store salary%<br>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

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# STEP 2 - ANALYZE

## MORS – MONTHLY OPERATIONAL REVIEW STRUCTURE

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

### WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

- |   |                            |                                                                                                                                         |
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| 1 | <b>FILL-OUT</b>            | <b>STM</b> - Pre-prepare your template by filling out with data                                                                         |
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| 5 | <b>EXECUTE</b>             | <b>STM</b> - Plan detailed to-dos and execute<br>- including delegation to <b>ASTM</b>                                                  |

### WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

- |   |                            |                                                                                                                                         |
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### WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

- |   |                            |                                                                                                                                         |
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| 2 | <b>ANALYZE</b>             | <b>STM</b> - Look for gaps, trends, opportunities - carefully consider line by line in template, but also your own general observations |
| 3 | <b>BUILD SMART ACTIONS</b> | <b>STM</b> - Create Smart “5W ONE-LINER” actions                                                                                        |
| 4 | <b>MEET &amp; AGREE</b>    | <b>STM &amp; DM</b> - Meet and agree on actions                                                                                         |
| 5 | <b>EXECUTE</b>             | <b>STM</b> - Plan detailed to-dos and execute<br>- including delegation to <b>ASTM</b>                                                  |

### WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

- |   |                            |                                                                                                                                         |
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| 1 | <b>FILL-OUT</b>            | <b>STM</b> - Pre-prepare your template by filling out with data                                                                         |
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| 3 | <b>BUILD SMART ACTIONS</b> | <b>STM</b> - Create Smart “5W ONE-LINER” actions                                                                                        |
| 4 | <b>MEET &amp; AGREE</b>    | <b>STM &amp; DM</b> - Meet and agree on actions                                                                                         |
| 5 | <b>EXECUTE</b>             | <b>STM</b> - Plan detailed to-dos and execute<br>- including delegation to <b>ASTM</b>                                                  |



# CASE #1 - MORS

| 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 receipt 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%        |    |

## 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     | \$ |
| 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 receipt 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%         |    |

## 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     | \$ |
| 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 receipt 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               | 8,1         | 8,1       | 0,0            |    |
|                                   |             |           |                |    |
|                                   | 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%          |    |

## 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 receipt 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 NECESSARY**

**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 receipt 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 receipt 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-prepare 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 <b>ASTM</b>                                                     |

### WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

- |   |                     |                                                                                                                                  |
|---|---------------------|----------------------------------------------------------------------------------------------------------------------------------|
| 1 | FILL-OUT            | STM - Pre-prepare 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 <b>ASTM</b>                                                     |

### WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

- |   |                     |                                                                                                                                  |
|---|---------------------|----------------------------------------------------------------------------------------------------------------------------------|
| 1 | FILL-OUT            | STM - Pre-prepare 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 <b>ASTM</b>                                                     |

### WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

- |   |                     |                                                                                                                                  |
|---|---------------------|----------------------------------------------------------------------------------------------------------------------------------|
| 1 | FILL-OUT            | STM - Pre-prepare 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 <b>ASTM</b>                                                     |

### WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

- |   |                     |                                                                                                                                  |
|---|---------------------|----------------------------------------------------------------------------------------------------------------------------------|
| 1 | FILL-OUT            | STM - Pre-prepare 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 <b>ASTM</b>                                                     |



# 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?

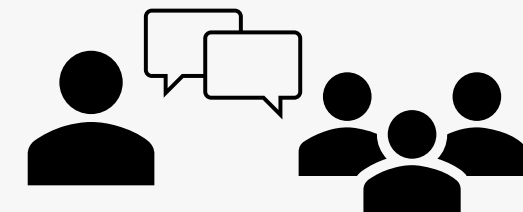
When will the action be done?

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 |        |        |          |          |                    |        |        |          |          |
|--------------------------------------|--------|--------|----------|----------|--------------------|--------|--------|----------|----------|
| Part 1 - REVENUE                     |        |        |          |          |                    |        |        |          |          |
| Revenue                              | Target | Actual | Variance | Comments | Revenue            | Target | Actual | Variance | Comments |
| Food                                 | 10,000 | 9,500  | -500     |          | Food               | 10,000 | 9,500  | -500     |          |
| Drinks                               | 5,000  | 4,800  | -200     |          | Drinks             | 5,000  | 4,800  | -200     |          |
| Bar                                  | 2,000  | 1,900  | -100     |          | Bar                | 2,000  | 1,900  | -100     |          |
| Other                                | 1,000  | 950    | -50      |          | Other              | 1,000  | 950    | -50      |          |
| Part 2 - DOC COST                    |        |        |          |          |                    |        |        |          |          |
| DOC                                  | Target | Actual | Variance | Comments | DOC                | Target | Actual | Variance | Comments |
| Food                                 | 10,000 | 9,500  | -500     |          | Food               | 10,000 | 9,500  | -500     |          |
| Drinks                               | 5,000  | 4,800  | -200     |          | Drinks             | 5,000  | 4,800  | -200     |          |
| Bar                                  | 2,000  | 1,900  | -100     |          | Bar                | 2,000  | 1,900  | -100     |          |
| Other                                | 1,000  | 950    | -50      |          | Other              | 1,000  | 950    | -50      |          |
| Part 3 - SALARY COST                 |        |        |          |          |                    |        |        |          |          |
| SALARY                               | Target | Actual | Variance | Comments | SALARY             | Target | Actual | Variance | Comments |
| Food                                 | 10,000 | 9,500  | -500     |          | Food               | 10,000 | 9,500  | -500     |          |
| Drinks                               | 5,000  | 4,800  | -200     |          | Drinks             | 5,000  | 4,800  | -200     |          |
| Bar                                  | 2,000  | 1,900  | -100     |          | Bar                | 2,000  | 1,900  | -100     |          |
| Other                                | 1,000  | 950    | -50      |          | Other              | 1,000  | 950    | -50      |          |
| Part 4 - COST                        |        |        |          |          |                    |        |        |          |          |
| COST                                 | Target | Actual | Variance | Comments | COST               | Target | Actual | Variance | Comments |
| Food                                 | 10,000 | 9,500  | -500     |          | Food               | 10,000 | 9,500  | -500     |          |
| Drinks                               | 5,000  | 4,800  | -200     |          | Drinks             | 5,000  | 4,800  | -200     |          |
| Bar                                  | 2,000  | 1,900  | -100     |          | Bar                | 2,000  | 1,900  | -100     |          |
| Other                                | 1,000  | 950    | -50      |          | Other              | 1,000  | 950    | -50      |          |
| Part 5 - STORE LEVEL PROFIT          |        |        |          |          |                    |        |        |          |          |
| STORE LEVEL PROFIT                   | Target | Actual | Variance | Comments | STORE LEVEL PROFIT | Target | Actual | Variance | Comments |
| Food                                 | 10,000 | 9,500  | -500     |          | Food               | 10,000 | 9,500  | -500     |          |
| Drinks                               | 5,000  | 4,800  | -200     |          | Drinks             | 5,000  | 4,800  | -200     |          |
| Bar                                  | 2,000  | 1,900  | -100     |          | Bar                | 2,000  | 1,900  | -100     |          |
| Other                                | 1,000  | 950    | -50      |          | Other              | 1,000  | 950    | -50      |          |

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

- 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?

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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-prepare 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<br>- including delegation to <b>ASTM</b>                                                  |

### WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

- |   |                     |                                                                                                                                  |
|---|---------------------|----------------------------------------------------------------------------------------------------------------------------------|
| 1 | FILL-OUT            | STM - Pre-prepare 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<br>- including delegation to <b>ASTM</b>                                                  |

### WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

- |   |                     |                                                                                                                                  |
|---|---------------------|----------------------------------------------------------------------------------------------------------------------------------|
| 1 | FILL-OUT            | STM - Pre-prepare 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<br>- including delegation to <b>ASTM</b>                                                  |

### WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

- |   |                     |                                                                                                                                  |
|---|---------------------|----------------------------------------------------------------------------------------------------------------------------------|
| 1 | FILL-OUT            | STM - Pre-prepare 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<br>- including delegation to <b>ASTM</b>                                                  |

### WORS – WEEKLY OPERATIONAL REVIEW STRUCTURE

- |   |                     |                                                                                                                                  |
|---|---------------------|----------------------------------------------------------------------------------------------------------------------------------|
| 1 | FILL-OUT            | STM - Pre-prepare 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<br>- including delegation to <b>ASTM</b>                                                  |



# 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 - <i>TO-DOs</i> ,<br>E-mails, admin...               | BTC<br>Incl. execution on actions from<br><i>TO-DOs</i> |                                                         |     |     |                                                         |
| 9 am                                          | Create WORS or MORS report                                                   | Weekly Catch-Up with ASTM                               |                                                         | BTC<br>Incl. execution of actions from<br><i>TO-DOs</i> |     |     |                                                         |
| 10 am                                         | Salary Controller & Weekly Report                                            | BTC<br>Incl. execution on actions from<br><i>TO-DOs</i> |                                                         |                                                         |     |     |                                                         |
| 11 am                                         | Count Verification                                                           |                                                         |                                                         |                                                         |     |     |                                                         |
| 12 pm                                         | Weekly Catch-Up with DM & plan <i>TO-DOs</i> from WORS or MORS Smart-Actions |                                                         |                                                         |                                                         |     |     | BTC<br>Incl. execution of actions from<br><i>TO-DOs</i> |
| 1 pm                                          |                                                                              |                                                         |                                                         |                                                         |     |     |                                                         |
| 2 pm                                          | E-mails/ Assess Team Pos. 2 wks ahead                                        |                                                         | OH - <i>TO-DOs</i> ,<br>E-mails, admin...               |                                                         |     |     |                                                         |
| 3 pm                                          |                                                                              |                                                         |                                                         | OH - <i>TO-DOs</i> ,<br>E-mails, admin...               |     |     |                                                         |
| 4 pm                                          |                                                                              |                                                         |                                                         |                                                         |     |     |                                                         |
| 5 pm                                          |                                                                              |                                                         |                                                         |                                                         |     |     |                                                         |
| <hr style="border-top: 1px dashed #f08080;"/> |                                                                              |                                                         |                                                         |                                                         |     |     |                                                         |
| 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





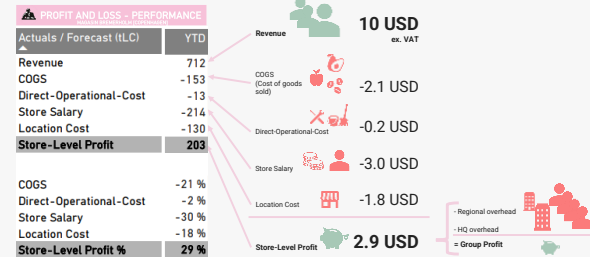
# SUM-UP AND IMPACT

From class-room theory to practical in-store skills

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

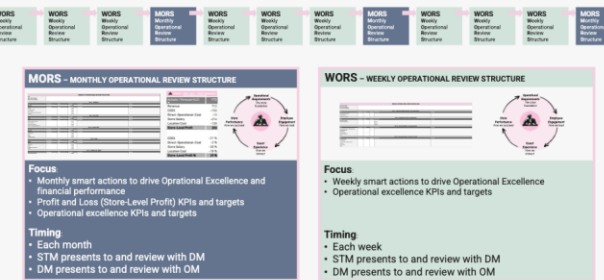
## STORE PERFORMANCE

YOUR STORE LEVEL PROFIT = THE MONEY YOUR STORE MAKES

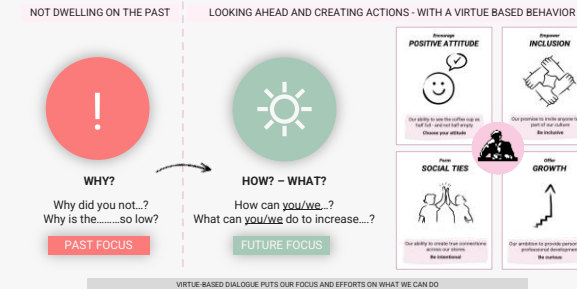


## WHAT IS MORS AND WORS?

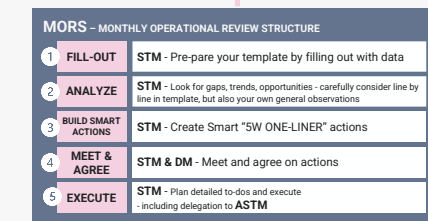
A process building Operational Excellence driving strong financial performance



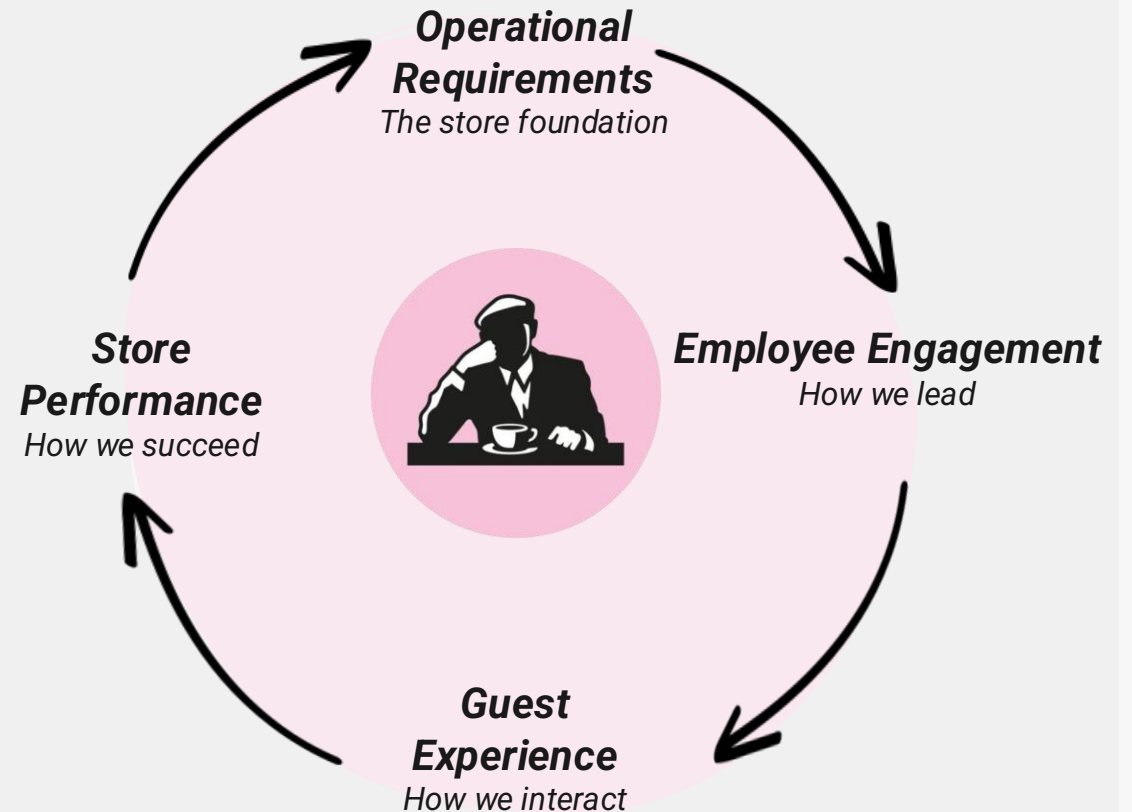
## THE MIND AROUND WORS AND MORS IS ABOUT...



## THE FIVE MORS AND WORS KEY STEPS



## CIRCLE OF OPERATIONAL EXCELLENCE



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

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



# AGENDA

- 1 Why is this skill important?
- 2 How to master the skill
- 3 Sum-up and Impact
- 4 **How to apply into practice**





# HOW TO APPLY INTO PRACTICE

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

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



## **MANAGER SPECIALIST SESSIONS**

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