GM Playbook

CENTER OF EXCELLENCE - PMI BEST PRACTICE

Publisher	d2o
Target audience	General Managers
Objective	The aim of this document is to aid GMs to use PMI in their daily operations and provide guidelines for acting towards an improved bottom line.
Property coverage	Properties with R&P
Introduction	PMI by d2o is a platform specializing in productivity management for hotels and restaurants for over 20 years. Some of the tasks that PMI will help with are forecasting accuracy and measuring productivity. The purpose of measuring productivity is to ensure that human resources are allocated where they are best needed. Optimal staffing is the best way to ensure guest satisfaction and continued growth, which can only be achieved through accurate forecasting. The operation needs to know what is happening from day to day for the next weeks to be able to plan their work schedules accordingly.
	This document will help the GMs to drive results through actively engaging in PMI with focus on daily, weekly and monthly tasks, how to read reports and modules and motivate HoDs to take ownership of planning and operating their areas of responsibility. PMI is meant to work as a tool giving the hotel a better overview of what is lying ahead and organize the operation in the most productive way.

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Message from our CEO

Imagine having a crystal ball to reveal next week's occupancy, restaurant bookings and ancillary sales. You'd take advantage of that and prepare, right? Impossible, you say?

PMI lets you do just that. Its live forecasts help department heads quickly respond to changes in demand. They can also measure productivity, optimize their operation, and keep fellow decision makers in the loop. At d2o, we believe in the power of communication. That's why PMI makes it easy to interact and collaborate across departments and management levels.

Real time collaboration; flow
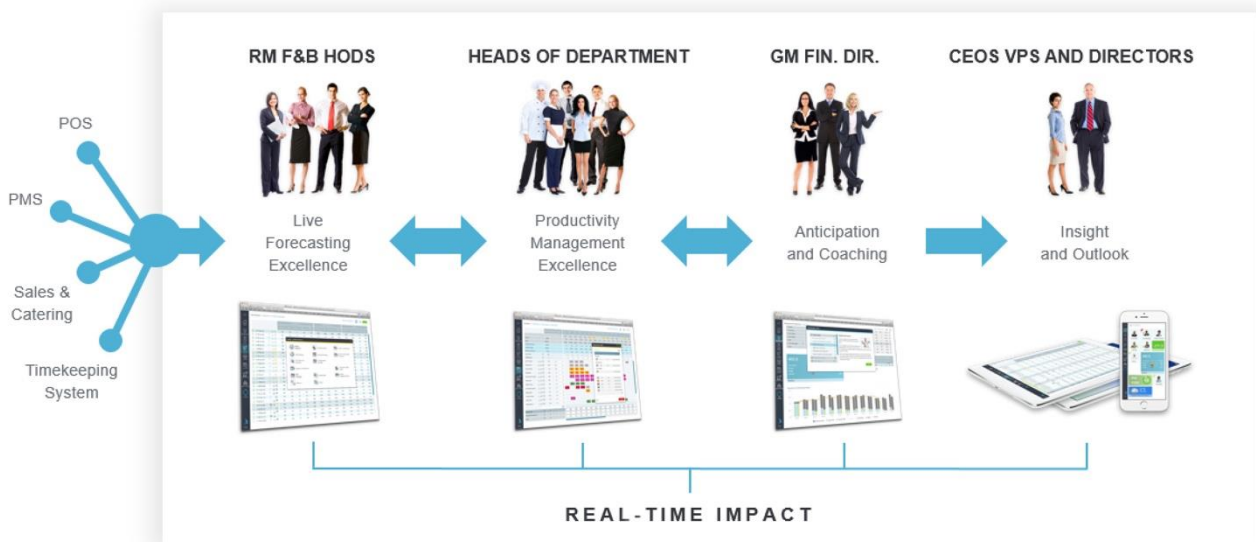
1   General best practice

1.1   Daily routines

- ✓ Import/save actuals hours
- ✓ Check Live forecast in cost driver and hours for the next days
- ✓ Adjust manning and plan

1.2   Weekly routines

- ✓ Include in HoD meetings, separate or in groups.
- ✓ Discuss actual vs forecasted productivity targets.
- ✓ Review Management Perspective for productivity performance vs changes in Revenue.
- ✓ Labor Hour Cockpit analysis.
- ✓ List any actions linked to a deadline and responsible person.

- Look at how the last week (or month) has been and how the next few weeks are planned.
- Always identify, adjust and confirm the next month´s productivity target at the weekly meeting in the forecasting period.
- Use the Management Perspective to have a quick look at the performance MTD and Month-End
    - o How does the revenue for the actual department compare to Forecast, Budget and Last year? (Change view in View Options in the top right corner)
    - o How does the MTD productivity compare to Forecast, Budget and Last Year?
    - o How will the department finish at Month End (or next month when applicable)?

1.3   Monthly routines

Monthly meetings:
- The Management Perspective gives the most complete picture for pin-pointing total and departmental performance in terms of both revenue and productivity.
- Review previous, current and next month(s) and compare to last year, forecast and budget to identify and draw learning from past experience that can benefit future operations.

1.4   Monthly process (company/chain policy specific, the below dates are examples)

- ✓ 20th - Room forecast for next (3-15) months, submit to forecast
- ✓ 21st - Other forecasting, F&B and Other for next (3-15) months, submit to forecast
- ✓ 22nd - Scheduling for next month, and adjust target/hours for next two months if needed
- ✓ 23rd - 25th adjustments together with GM, forecasted targets need to be approved and adjusted if needed to reach the mutual target for the property.
- ✓ *Under documents in the main menu you will find the monthly procedures for your group*

Forecasting tip

First day in a new month, go to next year, and previous month. Copy last year to Live Forecast, do some adjustments while you have this year fresh in mind. Have notes been made in this year Live Forecast that we can benefit from next year? Update Live Forecast and submit to forecast as your target for next year.

2 PMI Reports

2.1 Flash Reports

a. How was the activity in the different departments yesterday, as well as the total revenue?

b. How are the different departments and revenue developing compared to Last Year, Budget and Forecast? Are there departments that need extra attention?

c. In the F&B department, how is the sales mix for food and beverage developing?

d. Depending on your concepts, you need to know which segments affect your bottom-line in the most positive way in relation to both labor cost and cost of goods sold.

- Are there any new trends (over a longer period) that need attention?
- Have you made good decisions that had a positive impact, that should be continued and strengthened?
- Have you made decisions that had a negative impact? Do you need to change strategy?

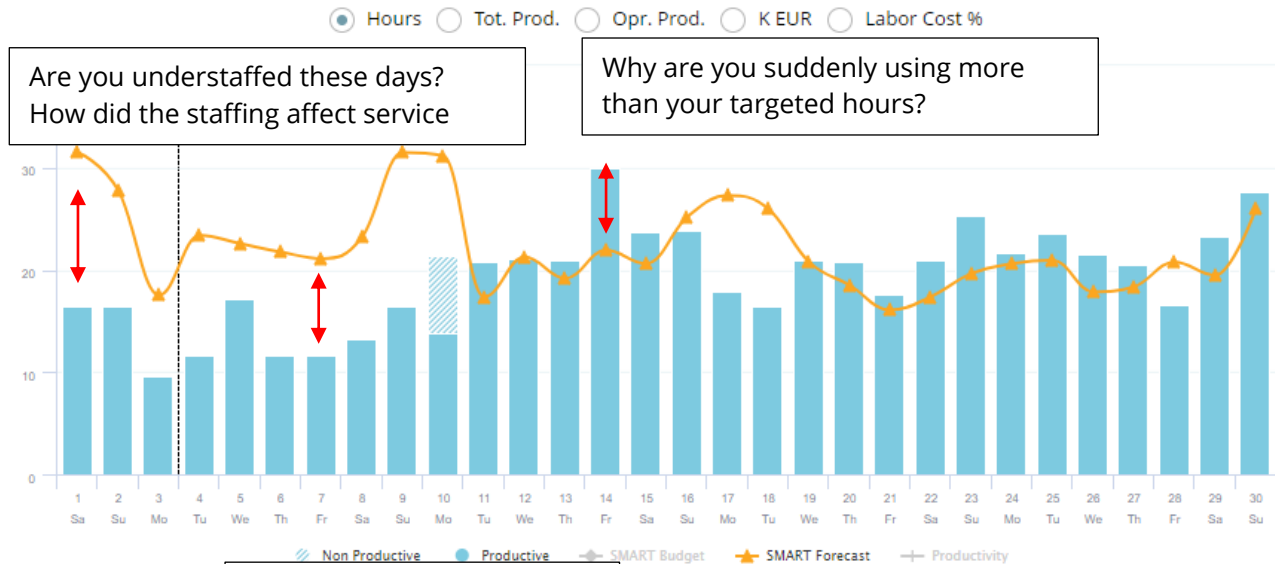|	Rooms (MILZD - RD Milan)						Food & Drinks							Meeting & Event		Other	Sum				
	Room Revenue	Room Nights	Guest Nights	ARR	Occupancy	RevPAR	Breakfast Revenue	Breakfast Covers	Leonardo Restaurant Revenue	Leonardo Restaurant Covers	Minibar Revenue	Room Service Revenue	Lobby Bar Revenue	M&E Operations Revenue	Conf. Room Rental Revenue	Other Revenue	F&D Revenue	F&D Covers	M&E Revenue	Other Revenue	Total Revenue
01 Jun, Sat	16,300	164	322	99.4	65.6%	65.2	1,785	164	981	35	134	250	1,051	0	0	531	4,199	199	0	531	21,030
02 Jun, Sun	5,933	63	109	94.2	25.2%	23.7	781	210	68	5	113	80	341	0	0	-46	1,382	215	0	-46	7,269
03 Jun, Mon	16,839	148	170	113.8	59.2%	67.4	1,433	76	918	36	88	202	576	2,504	841	402	3,217	112	3,345	402	23,803
04 Jun, Tue	18,064	155	175	122.0	61.2%	74.7	2,699	143	1,280	42	129	220	456	3,100	2,182	333	4,769	185	5,282	333	29,048
05 Jun, Wed	19,836	153	176	129.7	61.2%	79.3	2,489	150	600	22	128	252	631	6,194	2,126	431	4,099	172	8,319	431	32,686
06 Jun, Thu	12,256	102	141	120.2	40.8%	49.0	2,090	121	351	20	116	138	343	2,806	722	323	3,038	141	3,528	323	19,145
07 Jun, Fri	4,695	51	95	92.1	20.4%	18.8	1,225	85	245	11	45	73	211	0	0	120	1,799	96	0	120	6,613
08 Jun, Sat	4,219	57	105	74.0	22.8%	16.9	998	60	269	14	57	54	133	0	0	176	1,512	74	0	176	5,906
09 Jun, Sun	28,717	149	258	192.7	59.6%	114.9	963	58	645	25	171	228	288	0	1,157	364	2,295	83	1,157	364	32,533
10 Jun, Mon	49,458	196	299	252.3	78.4%	197.8	3,323	224	1,157	37	80	385	540	10,404	4,232	544	5,486	261	14,636	544	70,124
11 Jun, Tue	51,315	196	297	261.8	78.4%	205.3	4,514	254	2,183	72	218	373	769	240	1,591	565	8,058	326	1,831	565	61,769
12 Jun, Wed	51,094	196	290	260.7	78.4%	204.4	4,044	252	988	37	211	414	1,040	7,121	2,369	710	6,697	289	9,491	710	67,991
13 Jun, Thu	51,336	196	290	261.9	78.4%	205.3	3,617	242	672	25	238	283	706	1,315	1,059	664	5,517	267	2,373	664	59,890
14 Jun, Fri	50,540	188	289	268.8	75.2%	202.2	3,294	245	727	25	137	221	643	0	0	364	5,022	270	0	364	55,926
15 Jun, Sat	17,084	96	137	178.0	38.4%	68.3	3,361	203	344	12	74	71	174	0	0	229	4,024	215	0	229	21,337
27 Jun, Thu	19,974	178	227	112.2	71.2%	79.9	2,292	135	761	27	177	229	720	5,278	2,412	520	4,179	162	7,690	520	32,362
28 Jun, Fri	16,122	145	212	111.1	58.0%	64.5	1,940	134	731	30	94	106	407	3,132	1,659	267	3,280	164	4,791	267	24,459
29 Jun, Sat	9,649	98	183	98.5	39.2%	38.6	1,902	112	759	25	93	116	335	0	0	306	3,205	137	0	306	13,160
30 Jun, Sun	8,703	85	141	102.4	34.0%	34.8	1,058	53	577	23	130	222	346	0	0	199	2,333	76	0	199	11,235
MTD	39,072	375	601	104.2	50.0%	52.1	3,999	450	1,967	76	334	532	1,968	2,504	841	887	8,799	526	3,345	887	52,102
Month-end	627,326	4,128	5,971	152.0	55.0%	83.6	64,024	4,152	22,884	817	3,736	6,441	14,649	60,000	38,630	10,978	111,734	4,969	98,630	10,978	848,668
MTD Forecast	39,413	377	587	104.5	50.3%	52.6	3,473	389	2,206	0	385	802	3,459	2,504	871	2,223	10,325	389	3,374	2,223	55,335
Forecast Index	99%	99%	102%	100%	99%	99%	115%	116%	89%	0%	87%	66%	57%	100%	97%	40%	85%	135%	99%	40%	94%
MTD Forecast Dev. in EUR	-341	-2	14	-0.4	-0.3%	-0.5	526	61	-240	76	-51	-270	-1,492	0	-30	-1,336	-1,526	137	-30	-1,336	-3,233
Forecast	632,801	4,149	5,835	152.5	55.3%	84.4	55,602	3,589	25,672	0	4,302	9,711	25,754	60,000	40,000	27,517	121,041	3,589	100,000	27,517	881,359
MTD Budget	35,747	489	717	73.1	65.2%	47.7	3,152	505	2,464	81	385	802	3,459	2,796	505	2,223	10,261	586	3,301	2,223	51,532
Budget Index	109%	77%	84%	143%	77%	109%	127%	89%	80%	94%	87%	66%	57%	90%	167%	40%	86%	90%	101%	40%	101%
MTD Budget Dev. in EUR	3,325	-114	-116	31.1	-15.2%	4.4	847	-55	-497	-5	-51	-270	-1,492	-292	336	-1,336	-1,462	-60	44	-1,336	570
Budget	573,945	5,378	7,124	71.7	71.7%	76.5	50,458	4,656	28,672	869	4,302	9,711	25,754	66,998	23,200	27,517	118,897	5,525	90,198	27,517	810,557
MTD Last Year	55,357	576	997	96.1	76.8%	73.8	8,020	446	2,499	84	392	456	845	0	0	1,867	12,212	530	0	1,867	69,437
MTD Last Year Index	71%	65%	60%	108%	65%	71%	50%	101%	79%	90%	85%	117%	233%	0%	0%	47%	72%	99%	0%	47%	75%
Month-end Last Year Index	113%	74%	77%	153%	74%	113%	111%	130%	87%	87%	79%	81%	88%	115%	124%	74%	99%	121%	119%	74%	111%
MTD LY Dev. in EUR	-16,286	-201	-396	8.1	-26.8%	-21.7	-4,021	4	-533	-8	-58	76	1,122	2,504	841	-980	-3,413	-4	3,345	-980	-17,335
Last Year	554,949	5,605	7,768	99.0	74.7%	74.0	57,535	3,187	26,380	936	4,702	7,909	16,678	52,006	31,166	14,833	113,203	4,123	83,172	14,833	766,157

Notes:

2.2 Management Perspective

The MP (Management Perspective) is a consolidated report for good daily view for the GM and HoDs. Remember you can switch the view options and compare to
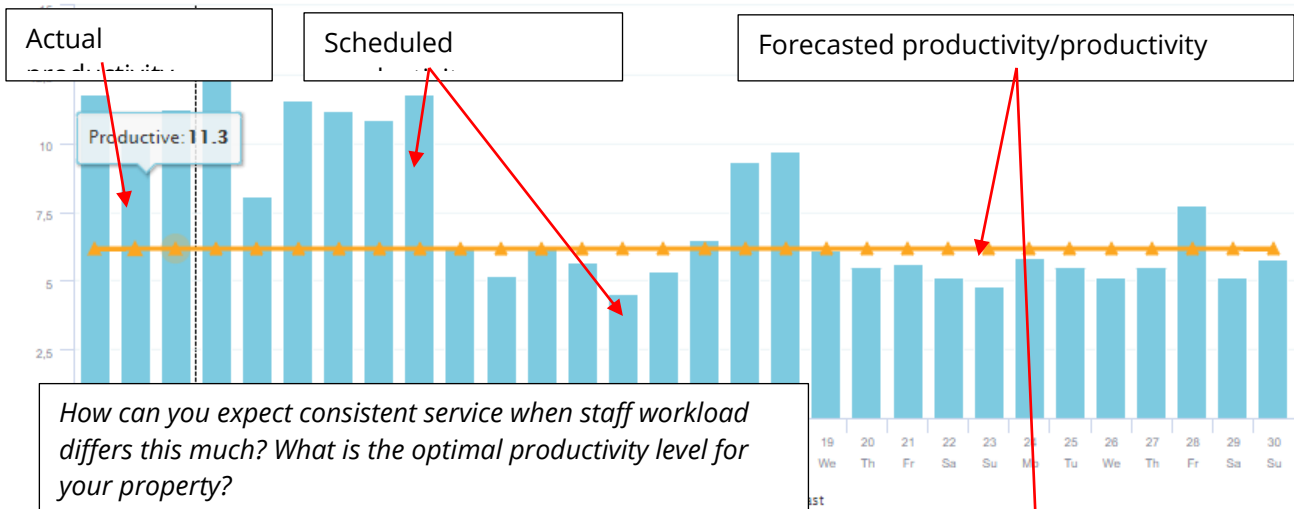
- Last Year
- Budget
- Forecast

Breakfast

○ Hours ○ Tot. Prod. ○ Opr. Prod. ○ K EUR ○ Labor Cost %

> Are you understaffed these days? How did the staffing affect service

> Why are you suddenly using more than your targeted hours?

> How well is staffing adjusted to the changes in activities?

> Are you able to adjust the schedule according to changes in the

	KPI	Actual	SMART Fcst.	Stat. Fcst.	Non Prod.	Live forecast	SMART Fcst.	Stat. Fcst.	Non Prod.	
Total	▲	627	547	708	4.6 %	7,261	7,124	7,082	4.0 %	
⊟ Rooms	▼	309	270	308	0.0 %	3,183	3,054	3,078	3.1 %	
Front Office	▲	103	83	92	0.0 %	1,009	915	917	7.4 %	⇨
Housekeeping	▼	155	157	177	0.0 %	1,750	1,751	1,766	1.3 %	⇨
Public Area Cleaning	▼	51	31	40	0.0 %	424	389	395	0.0 %	⇨
⊟ Food & Drinks	▼	241	192	265	11.2 %	2,707	2,534	2,649	4.9 %	
Breakfast	▲	43	77	67	0.0 %	581	667	666	1.3 %	⇨
Oui Bar	▼	115	58	119	11.7 %	1,307	1,143	1,188	8.0 %	⇨

Notes:

Use **Productivity View** in the graph to the right. The Productivity View displays what the different departments produce and gives better information on performance than if the Hours View is selected. Change period to year or months if you want to have a quick look at a specific period. We recommend having a look at your Live Forecast at Year-end, to keep an eye on the end goal to ensure your property is on track.

Breakfast

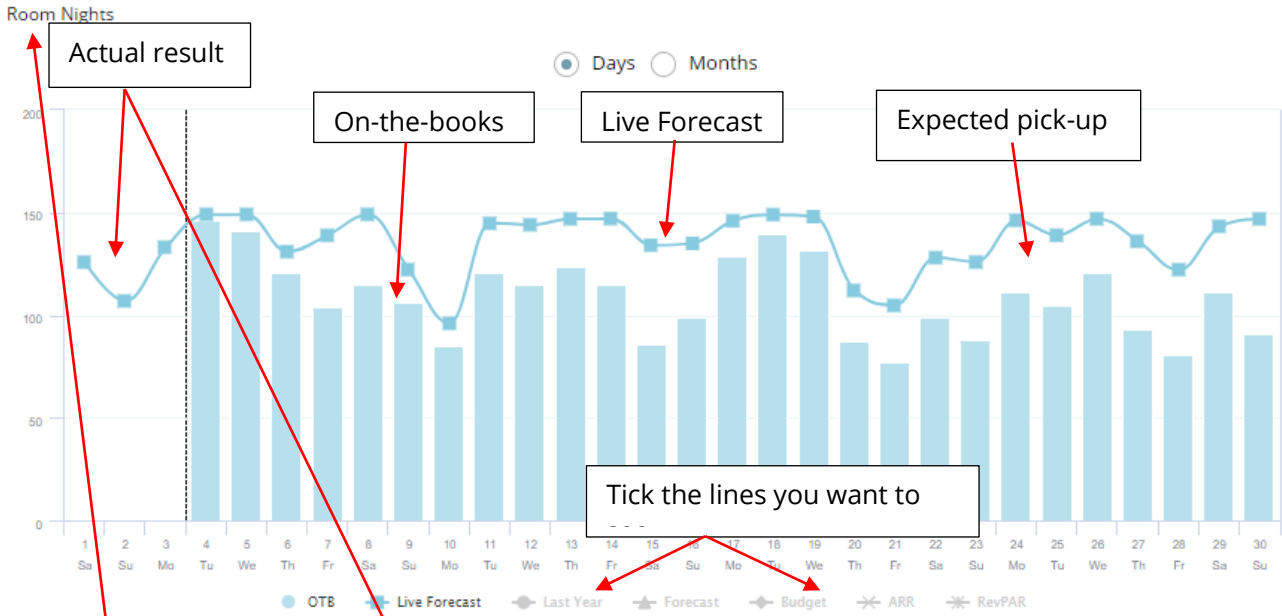○ Hours ○ Tot. Prod. ● Opr. Prod ○ K EUR ○ Labor Cost %

Actual productivity

Scheduled productivity

Forecasted productivity/productivity

Productive: 11.3

How can you expect consistent service when staff workload differs this much? What is the optimal productivity level for your property?

		Productivity MTD			Productivity Month-end			
	KPI	Actual	SMART Forecast	Non Prod.	Live forecast	SMART Forecast	Non Prod.	
Total	▲	92.27	100.61	4.6 %	98.50	96.21	4.0 %	
⊟ Rooms	▲	151.98	173.86	0.0 %	182.20	183.75	3.1 %	
Front Office	▲	3.57	4.43	0.0 %	4.36	4.43	7.4 %	⇨
Housekeeping	▼	2.32	2.30	0.0 %	2.33	2.30	1.3 %	⇨
Public Area Cleaning	▼	1,072.34	1,763.58	0.0 %	1,616.81	1,763.58	0.0 %	⇨
⊟ Food & Drinks	▼	36.81	40.55	11.2 %	31.06	31.47	4.9 %	
Breakfast ⊕	▲	11.10	6.16	0.0 %	7.17	6.16	1.3 %	⇨
Oui Bar	▼	28.71	49.55	11.7 %	47.46	49.55	8.0 %	⇨
Kitchen	▼	96.17	115.80	15.4 %	104.34	115.36	2.2 %	⇨

Are you on track vs Forecast and Budget? Are you improving on last year?
There are different ways to increase productivity:
1. A more accurate Live Forecast contributes to a more aligned staffing situation according to activity and revenue.
2. Adjustment opening hours/days.
3. Change concept.
4. Upselling, service and quality.
5. How can your co-workers be more efficient and spend more time to ensure guest satisfaction? Can the logistics be improved?

Room Nights

Actual result

On-the-books

Live Forecast

Expected pick-up

○ Days ○ Months

Tick the lines you want to see

● OTB ─■─ Live Forecast ─●─ Last Year ─▲─ Forecast ─◆─ Budget ─✕─ ARR ─✳─ RevPAR

Choose the department you want to see in the graph

	KPI	Yesterday	MTD		Month-end	
		Actual	Actual	Forecast	Live forecast	Forecast
Total Revenue	▲	25	55	56	685	697
Room Revenue	▲	23	47	48	561	567
RevPAR	▲	154.9	105.1	106.3	125.5	126.9
Occupancy	▲	89.3 %	81.9 %	82.2 %	90.5 %	90.9 %
Room Nights	▲	133	366	367	4,047	4,063
Guest Nights	▲	170	613	612	5,913	5,900
	▲	173.5	128.4	129.3	138.7	139.6
	▲	2	8	8	80	79
Breakfast	▲	1	5	5	45	45
Oui Bar	▲	1	2	2	24	24
Lunch	▼	0	1	1	9	9
Take Away	▼	0	0	0	1	1
⊞ Meeting & Event	▲	0	0	0	30	34
⊞ Other	▼	0	0			

If the live forecast changes vs forecast, we would like to see an adjustment of the hours in the department affected

Notes:

2.3 Live forecast

		Covers			**1** **2** **3**		Average Cover Revenue						Revenue					
		LY	Budget	Forecast	Revenue Driver	Pickups	Live forecast	LY	Budget	Forecast	Revenue Driver	Pickups	Live forecast	LY	Budget	Forecast	Revenue Driver	Pickups	Live forecast
⊞ 01 Jun, Sat		26	33	0	35	13	35	29	38	0	28	30	28	755	1,243	1,010	981	319	981
⊞ 02 Jun, Sun		38	17	0	5	-15	5	33	29	0	14	26	14	1,246	501	404	68	-445	68
⊞ 03 Jun, Mon		20	30	0	36	13	36	25	37	0	26	31	26	498	1,101	875	918	202	918
⊞ 04 Jun, Tue		35	56	0	12	-30	12	31	36	0	31	31	31	1,085	2,042	1,607	374	-912	374
⊟ 05 Jun, Wed		65	36	0	13	-9	13	31	29	0	30	27	30	1,993	1,057	825	395	-191	395
Food		65	36	0	13	-9	13	23	23	0	22	19	22	1,484	845	613	287	-133	287
Drinks														509	211	211	108	-58	108
4 ⊞ 06 Jun, Thu		42	19	0	17	-3	17	24	23	0	25	17	25	1,023	430	332	417	75	417
⊞ 07 Jun, Fri		22	26	0	8	3	11	19	31	0	29	2	21	413	810	634	229	6	235
⊞ 08 Jun, Sat		30	43	0	9	5	14	26	31	0	29	1	19	786	1,347	1,087	261	5	266
⊟ 09 Jun, Sun		7	36	0	25	0	25	38	33	0	26	0	26	264	1,197	951	650	0	650
Food		7	36	0	25	**5** 0	25	24	25	0	17	0	17	170	899	653	430	0	430
Drinks														94	298	298	220	0	220
⊞ 10 Jun, Mon		12	33	0	38	0	38	28	36	0	31	0	31	338	1,173	919	1,169	0	1,169
⊞ 11 Jun, Tue		44	53	0	72	0	72	31	36	0	30	0	30	1,361	1,926	1,526	2,191	0	2,191
⊞ 12 Jun, Wed		62	26	0	37	0	37	30	31	0	27	0	27	1,888	810	661	1,002	0	1,002
⊞ 13 Jun, Thu		30	19	0	25	0	25	27	37	0	27	0	27	817	699	563	684	0	684
⊞ 14 Jun, Fri		22	11	0	25	0	25	32	45	0	29	0	29	695	493	413	734	0	734
⊞ 15 Jun, Sat		13	32	0	12	0	12	39	33	0	28	0	28	506	1,059	849	342	0	342
⊞ 16 Jun, Sun		37	27	0	7	0	7	28	33	0	25	0	25	1,048	884	710	178	0	178
⊞ 17 Jun, Mon		32	30	0	19	0	19	27	33	0	30	0	30	877	995	768	577	0	577
⊞ 18 Jun, Tue		35	45	0	59	0	59	27	32	0	30	0	30	955	1,427	1,139	1,794	0	1,794
⊞ 19 Jun, Wed		52	20	0	33	0	33	27	39	0	27	0	27	1,408	789	627	893	0	893
⊞ 20 Jun, Thu		24	19	0	16	0	16	32	27	0	27	0	27	775	508	396	433	0	433
⊞ 21 Jun, Fri		22	16	0	14	0	14	22	31	0	28	0	28	491	497	396	397	0	397
⊞ 22 Jun, Sat		19	11	0	15	0	15	26	27	0	29	0	29	489	295	231	430	0	430
⊞ 23 Jun, Sun		13	22	0	15	0	15	22	26	0	25	0	25	286	567	450	373	0	373

The revenue driver (1) gives a daily forecast either based upon PMIs algorithms that look at seasonal patterns in occupancy, rates, covers and revenue going back up to 4 years; or the driver is built by the hotel using ratios of occupancy, average cover revenue or historic revenue.

Pick-up (2) is the difference between Revenue Driver (RD) and Live Forecast (3), and Live Forecast is the RD + Pick-up.

Figures above the red line (4) are actual from passed days, and figures below are future days. Once a day is passed, the RD shows actual numbers and are the same as Live Forecast. Pick-up column shows the difference between the last saved Live Forecast and actual results. You can see the true figures when hovering over the numbers.

The revenue driver gives a forecast based on trends, but when you expect a special occasion where covers or revenue will be outside the norm, you can make changes directly (5) on the day by adding covers and average revenue for food (if activated) and/or add revenue for drinks or total.

Keep in mind that the revenue driver will update almost daily as and when the live forecasted rooms occupied changes. What is added in the pick-up column will always add to the revenue driver to give you the live forecast.

The M&E Live Forecast works slightly differently since it is working with OTB.

2.3.1 Revenue drivers

- The revenue drivers exist to make your life easier by providing you with a credible live forecast of F&B departments.
- The seasonal revenue drivers are based on seasonality calculated by algorithms in PMI. The system identifies different operational seasons of minimum 3 weeks that have the same occupancy, booking, and rate patterns. These are updated weekly.

- If the seasonal driver is not giving the desired result, you can work with a manual driver where the hotel sets the ratios of covers and or revenue per weekday, based on occupancy or historic revenue.

For M&E, OTB is imported every day from the hotel's PMS so there is no Revenue Driver. PMI imports Daily Forecast Block Status (version 1) or Event Status (version 2) Act, Def, and Ten. In the Pick-Up column you enter the expected pick-up on a daily basis (options, prospects etc.). OTB and Pick-up will add up to the Live Forecast. However, when OTB changes, the Pick-Up will go up or down with the same amount, Live Forecast remains as you forecasted.

If you see that Live Forecast is zero but you have amounts OTB, it is recommended that you reset pick-up from the tools-menu ⚒ . This will align OTB and Live Forecast.

2.3.2 What to look for in the live Forecast

- How was the live forecast vs actual last week?
  - Why the deviations?
- How comfortable are you with the daily forecast for the coming weeks?
  - When was the last update by the HoD?
- *It is key to have a credible live forecast since it drives the cost drivers and scheduling*

When hovering over the cells in the Live Forecast you can see when the numbers were last saved or submitted.

Notes:

2.4 Cockpits

The month end forecasted hours (1) is what you have said you needed to serve the forecasted cost driver (2). The cost driver (2) divided by hours (1) will give you the productivity target (3). The daily forecast (4) divided by productivity target (3) gives you the SMART forecasted hours indicated by the yellow line in the graph (5). If you have activated min and max (6), the yellow line will not go below the minimum daily hours or above the max.

In the bottom left graph (7) you can follow the accumulated hours MTD or include the scheduled hours Month-end (10). Choosing K currency in the same graph allows you to follow the accumulated labor cost for the month. This is based on the Rates (8) multiplied by hours. Rates are defined as labor cost per hour, which is calculated on your reported total labor cost over hours.

The bottom right graph (9) shows the Total productivity that includes non-productive hours, Operational productivity that is only productive/worked hours. Consumption gives you the number of minutes spent on each cost driver unit. Consumption is probably most valuable for HSK to see how many minutes are spent on each room.

At the top of the page you can also choose to see the productivity graph and how this fluctuates on a daily basis, the same view as described for Management Perspective.

2.4.1 What to look for in the cockpit

- How aligned are the hours (blue bars) with the smart hours (yellow line)?
    - If there are differences, why is this?
    - Are you understaffed or overstaffed?
    - Did you set a realistic productivity target?
    - How is service affected by the different staffing levels vs business load?
- Are the hours and costs well aligned with SMART forecast?
    - If you have a good alignment, GREAT, keep doing what you are doing (without stopping to look for opportunities of better productivity)
    - If you are "off the charts", verify that targets were correct.
        - Did something unexpected happen and is this mentioned in a comment?

- ▪ Is there a chance to catch up with your forecast?
- Is current productivity, MTD, as expected?
- Do you have a complete schedule for the weeks to come that is aligned with forecasted activity?
  - o If future dates are above or below the target, do you need a comment to explain?
- ✦ *Kitchen and M&E will often see "unproductive" days before events due to preparation and mise-en-place, this is expected. A good live forecast visualizes peak days and indicate that staff will be needed beforehand. On the day of the event you will usually see high productivity. In these departments you will often benefit from looking at MTD.*
- ✦ *HSK will often see a very productive Sunday and non-productive Monday if some rooms are left on departure day.*

Notes:

2.5 Looking at the next 12 months

- Are next 12 months looking like expected?
- Is your OTB in line with last year? If not, what is the difference?
- Where are the surprises?
- Do you still foresee sufficient pick up? Has the pick-up pace changed?
- Do you need to change strategy?

12-months On The Book Room Nights
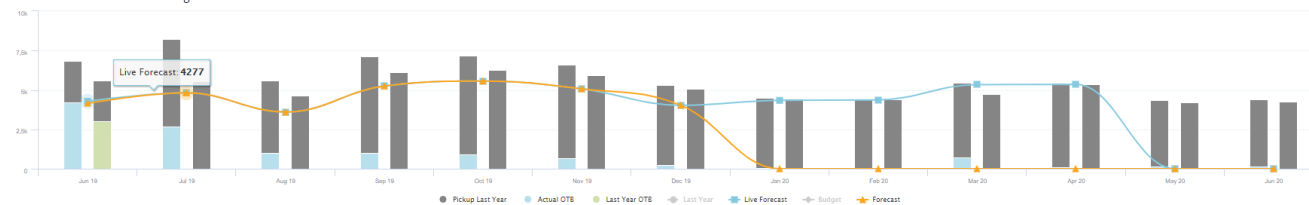
3 Hygiene factors and daily routines important for credibility and optimization

To have credible and realistic Live Forecasts in PMI you should perform tasks in a specific order:

1. **Room Live Forecast** – the primary driver for all activities and revenue for the hotel - will be updated weekly by Regional Revenue Managers for an accurate daily forecast. Any changes or new information the hotel receives that will affect occupancy beyond the weekly update, must be communicated for a correct live forecast.
2. **F&D, M&E and Other Profit Centers** – update expected outcome depending on hotel guests, happenings/events and other related factors. All operating forecasts should be on daily basis and updated 2-3 times per week for the current month; weekly for the next three months and monthly for the coming 18 months.
3. **Staffing** - 4 weeks schedules (6 weeks for Norway) should be updated according to the new revenue/activity expectations. Horizon will be set to 28 days, from which point PMIs SMART forecast will take over and suggest hours based on set productivity targets and activities at the hotel.
4. **Adjustments:**
   - ✓ Verify the imported worked hours in each department daily (cockpit owners) and **save**. Any adjustments must be made in the Time Keeping System and will be included in the next import.
   - ✓ Are you overstaffed compared to expected activity for any of the future days?
     - o Can these be shifted to another day that is understaffed?
     - o If it is too late to adjust the staffing, what can be done not to end up too far behind productivity target? (Upselling?)
   - ✓ What can be learned from the daily deviation in Live Forecast?
     - o Are targets realistic and achievable? Too high or too low?
       - ▪ How is this affecting staff and guest experience?
     - o Are there any new trends on specific weekdays that should be taken into consideration to improve forecasting accuracy in both revenue/activity and staffing?
     - o How is the revenue stream for each department and how is the sales mix developing?
       - ▪ Opportunities to increase total sales?
       - ▪ Opportunities to increase the sales mix of beverage? - *which is often a positive consequence of upselling*

Notes:

4 Taking action

- Are there some departments that need more attention for the future months?
- Is the revenue stream maintaining? If not, what is the reason and do you need to adjust?
- Are there any new trends to watch out for? Are you on top of the change?
- How are the different productivity targets for future months? Are they reasonable compared with the last month's actuals?
- Simulate the effect on bottom line by raising productivity target with a small amount.
- Try to include and engage the department heads by displaying the effect in currency, thus to motivate increased productivity targets in their respective departments.
- How does OTB look for the coming months? Do you need to take action for some periods? -> If occupancy is decreasing, do you need to adjust the operations in time as well?
- Compare also your own submitted forecast with the OTB pattern – if very different, why is this? Do you need to adjust the forecast if demand seems a lot stronger? - or do you have to perform any marketing/sales activities and/or check with revenue team if OTB looks weaker? (OTB graph in Management perspective gives great view to detect this)

4.1 How motivated is your staff?

- Do they want to be there and do the job?
- Do they have the capacity to do the job?
- Do they have the skills to do the job?
- *Both too much and not enough work act as demotivators*

4.2 Evaluate processes

- When was the last time you had a look at the SOPs?
  - Are you operating according to company standards?
  - Are the standards the best and most efficient way to run the outlet? i.e. considering both time and quality of service delivery
- What are the time-wasters in operations?
- Do you have the right processes in place for most efficient flow of business?
- Does the staff have the right tools and equipment to perform their tasks efficiently?
- *Use your POS to establish when the peak and slow periods are and plan the schedule accordingly.*

4.2.1 Do an analysis of the daily operations by using a flow-chart for each meal period. You may need to change the way you run the restaurant, create new procedures.

- Ask the employees to participate
- Brainstorm new ideas
- Identify training needs
- Update and/or replace outdated, broken, unnecessary or missing equipment

4.3 Contracting/Finding employees (difficult does not mean impossible)

- Can the worker be contracted as a hotel employee rather than in a specific department?
- Are you allowed to make amendments to the contract allowing for cross-departmental work?
- Can you use an incentive program for employees that are flexible in working hours and intra-departmental skills and engagement?
- Are there any colleges or universities nearby with students wanting to work extra on weekends, holidays and evenings?
- Can you share workers with other hotels in your area?
- What is the cost to use a temp-agency vs hiring full time staff?

o	UK: temptribe.co.uk	o SE: se.sodexo.com
o	UK: rota.com	o NO: manpower.no
o	UK: atyourservice.co.uk	o NL: tempo-team.nl
o	BE: elite-events.be	o FR: indeed.fr
o	BE: daoust.be	o FR: optioncarriere.com
o	DE: timecrew.de	o FR: simplyhired.fr
o	DE: caluma.jobs	o

4.4 Is the restaurant drawing enough business?
If not, why? - Would you eat in your restaurant?

- What do your guests want?
- Do you know who your guests are?
- Does the restaurant look nice, i.e. ambiance, color schemes, lighting, tables, chairs, napkins...?
- A stroke of paint on the walls and new carpets and curtains?
- When did you last change the menus?
- Do you have a USP (unique selling point)?
- What is not selling on your menu?
- How flexible are you when accommodating guest requests on the menu?
- Is the quality as it should be?
- Is the restaurant easy to find?
- Is the Front Office actively selling the hotel's outlets? (Incentives?)
- Do the restaurant staff meet, greet and farewell all guests?
- Could you try a new concept?
- Do you have enough vegetarian and other dietary options at high quality?
- Can you close a restaurant or bar to combine the relevant services in one place?
- Can you move the location of the outlets?

4.4.1 Breakfast

- Is there a natural flow around the breakfast buffet? - Are the different items set up in the most natural sequence to avoid people from crossing their own and others' paths?
- Are all items easily visible to keep guests from stopping up and looking around to find what they want?
- Can you change the table set-up without compromising guest experience?
- Can some of the tasks be automated - coffee, tea, juice, cereals?

- Do you need a person to stand at the door, or can the process of checking room numbers be done at the table or with an automated card reader (Gangway control)?
- How easily can an employee replenish missing items/restock (food, beverage, tableware…)?
- Who does what - are all tasks distributed and communicated between service and kitchen team?
- When are the peak business hours? Do the staff shifts begin and end at appropriate times? Can they start/finish an hour earlier or later?

4.4.2 Bar

- What is on the drinks-menu? Are your offers aligned with in-house guests/segments/"local flare"?
- How are you priced compared to competing outlets outside the hotel?
- Do you offer any snacks to draw guests?
- Is the music adapted to your guests rather than employees - both volume and genre?
- When are the guests coming to the bar? While waiting for others, before or after dinner?
- What is the purpose of the guests coming to the bar? Killing time? Apero? Going out? Night-cap? After work? Meeting-point before going elsewhere?
- How accessible and visible is the bar? Is it better to change the location/position?
- How welcoming is the bar? Is the ambiance/atmosphere fit for purpose?

4.5 Environmental alternatives

- Paper, bamboo, iron or glass straws and stirrers
- Paper, bamboo, iron or glass cups and glasses
- Glass bottles or cans
- Re-usable coasters
- Reusable menus, chalk-boards
- No individually wrapped sugar, butter, jams…

- Filtered tap water, both still and sparkling
- Local produce (food and beverage)
- Fewer ingredients on the food menus
- Seasonal ingredients
- On-site herb garden
- On-site vegetable garden
- Hydroponic garden
- On-site compost use for own garden or donate to a local community garden
- Plan the use of food to avoid spending extra water or energy to thaw frozen goods
- Can you donate left-over food to shelters or others in need?
- Soap dispensers in bathrooms
- Real towels in public restrooms instead of paper or air-dryers

4.5.1 Useful information can be found at:

- Green restaurant association - www.dinegreen.com
- White Paper for hospitality in Europe - https://nexttourismgeneration.eu
- Travindy - transforming tourism news - www.travindy.com
- Take a Green step - European Commission's tips on how to make your hotel and restaurant more eco-friendly - http://ec.europa.eu/environment/emas/takeagreenstep/

- Green Hotelier - https://www.greenhotelier.org/