Daily Operations

A practical shift system for opening, service, closing and follow-through.



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Make the restaurant less dependent on memory. These five guide pages and five editable sheets connect recurring checks to named owners, visible exceptions and verified handovers. Start with one shift, adapt the checks to your site and improve what staff actually use.

Inside this toolkit

1. Turn recurring work into a reliable shift
2. Open with a release decision not a tick count
3. Run service with short actionable check ins
4. Close safely and leave a useful handover
5. Use the weekly review to remove repeat failures

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Turn recurring work into a reliable shift

Choose one recurring problem: late opening, missing prep, forgotten maintenance or weak shift handover. Watch one complete shift and list the work that must happen before, during and after service. Put each task at the point when someone can still correct a problem.

- Give each check one responsible role and one due point, such as “opening lead, before guests enter.” Avoid assigning a task to “everyone.”
- Define observable evidence: supplies present, count reconciled or a referenced approved record completed. “Looks good” is not a useful test.
- Keep safety, service readiness and administrative tasks distinguishable. A complete cash count does not compensate for an unresolved safety issue.
- Write the escalation path: who decides, what activity pauses and how the team learns about it.
- Pilot the sheet for three shifts, ask staff where it interrupts work and remove duplicate recording.

Scope: this is an operating organizer, not a complete food-safety, labor-law, emergency or occupational-safety program. FDA’s Food Code is a model; use locally adopted rules and the person in charge (PIC)’s approved procedures. Do not copy a generic checklist instead of required site-specific checks. (Source 1)

Practical setup: place the current checklist where the work occurs. Keep one controlled master and archive dated completed records through your normal retention policy. Staff should know where the live version is without asking the manager.

Open with a release decision not a tick count

Work in dependency order: access and facilities, required food-safety checks, equipment readiness, staffing and prep, then guest-facing readiness. The opening lead should know what prevents opening, what restricts part of the operation and what can be corrected without compromising service.

Check type	Useful evidence	If unresolved
Food-safety readiness	PIC-approved checks and records	PIC decides appropriate action
Equipment readiness	Required function verified safely	Restrict affected operation
People and prep	Coverage and priority list	Reassign or adjust service
Guest-facing systems	Menu, ordering and seating ready	Correct before promising service

Mark each item done, exception or not applicable. Add initials and time when the evidence is available; never pre-tick a shift. An exception needs an owner, immediate response and review time. A legitimate “not applicable” needs a reason, not a convenient shortcut.

FDA describes active managerial control as part of retail food-safety management. In this toolkit, named checks and corrective-action ownership support that approach, but the form itself is not proof that an operation is safe. (Source 2)

Example: an ordering tablet works, but a listed item is unavailable. Update availability before orders arrive, assign a person to verify every sales channel and record the time. Do not leave the correction for the first guest complaint.

Run service with short actionable check ins

Use a brief pre-service huddle to name the expected demand, staffing gaps, unavailable items, reservations or large orders, and the manager on duty. Share only necessary information about guests or employees. Safety and allergen concerns follow the PIC’s approved process, not a quick improvised workaround.

- Name one expediter or coordinating role for each service period. Clarify who can pause a channel, change quoted waits or authorize recovery.
- Set operating triggers based on your kitchen: queued tickets, oldest-ticket age or station workload. These are business controls, not food-safety limits.
- When a trigger is reached, assign an action and recheck time. “Watch the kitchen” is less useful than “reduce new delivery availability and reassess at 7:15.”
- Record repeated exceptions once in the shift log, rather than scattering them across texts and scraps.
- Escalate urgent safety or injury issues immediately under your existing procedure. Do not hold them for the shift review.

Hypothetical example: a restaurant chooses eight queued delivery orders as a pilot trigger. At nine, the authorized manager adjusts availability, tells the front team what guests should hear and checks the queue again after the chosen interval. The threshold must be tested against real capacity, not copied blindly.

Measure the result: compare promise misses and guest corrections across similar service periods. If the queue improves but dine-in delays rise, the intervention moved the problem rather than solving it.

Close safely and leave a useful handover

Closing is preparation for the next shift, not simply making the room look clean. Separate food disposition and required records, cleaning and sanitation under approved procedures, equipment status, cash reconciliation, and site security. Do not record passwords, alarm codes or payment-card details in a shared checklist.

- The PIC determines food storage, labeling, disposition and any safety corrective action. Reference those approved records instead of inventing storage rules on this form.
- Record incomplete work with a next action, owner and deadline. “Low stock” should become “four portions available; prep lead to confirm tomorrow’s requirement before opening.”
- Share unavailable items, expected deliveries, guest commitments and unresolved equipment issues with the next lead.
- Have the incoming lead acknowledge critical open items. A message sent is not the same as a handover understood.
- For suspect equipment, stop affected use and follow the site’s isolation and maintenance procedure. Only appropriately trained and authorized personnel should perform hazardous servicing. OSHA identifies unexpected energy release as a maintenance hazard. (Source 3)

Example handover: “Printer failed at 20:10. Manual ticket process in use. Manager assigned repair ticket 184. Opening lead must test the approved replacement workflow before service.” This provides context, containment, an owner and a verification step.

Final check: the closing lead confirms what is complete and makes every unresolved exception visible. Never sign for work that was not observed or completed.

Use the weekly review to remove repeat failures

Set aside one short weekly review. Bring the opening and closing exceptions, handovers, equipment issues and guest corrections. Look for recurring causes before adding more checklist lines. A checklist that grows every week eventually becomes paperwork nobody reads.

Measure	Calculation or question
On-time opening	Shifts ready by planned opening ÷ scheduled shifts
Exception closure	Exceptions closed by due time ÷ exceptions due
Repeat issues	Same cause returning after a claimed fix
Verification quality	Can a sample of signed checks be evidenced?

Worked example: 42 of 48 due tasks were verified on time, giving 87.5%. Investigate the six misses by severity; do not celebrate the percentage if any critical issue remains unresolved. Keep not-applicable tasks outside the denominator and record why.

- Choose one recurring issue, identify where the process broke and agree on one practical change.
- Set the owner, due date and verification method. “Retrain team” needs a named skill and a demonstration, not only a meeting.
- Check the next comparable shifts to see whether the change worked.
- Retire obsolete instructions and update the controlled master. Tell affected staff what changed.
- Keep safety and incident records in their appropriate restricted systems; the weekly sheet is a summary, not a replacement.

Thirty-day outcome: a new trained lead should be able to find current instructions, identify exceptions and run a handover without relying on the previous manager’s memory.

Opening readiness checklist

Location: _____ Date / shift: _____ Lead: _____ Planned opening: _____

Customize checks to your approved procedures. Status: D = done, E = exception, N = not applicable with reason. Do not pre-complete.

Check / procedure reference	Status	Initials / time	Exception / owner
Facilities and access checks	___	_____	_____
PIC-required safety checks	___	_____	_____
Equipment readiness	___	_____	_____
Staff coverage / roles	___	_____	_____
Priority prep / availability	___	_____	_____
Ordering and payment systems	___	_____	_____
Dining / pickup area readiness	___	_____	_____
Pre-service briefing	___	_____	_____

Required record references: _____

Restricted activity / immediate action: _____

Release decision by authorized lead: _____ Time: _____

Outstanding item / owner / next review: _____

Closing completion checklist

Location: _____ Date / shift: _____ Closing lead: _____

Use site-approved safety, cleaning, equipment and security procedures. This sheet does not prescribe them.

Check / procedure reference	Status	Initials / time	Exception / owner
Food disposition and records	___	_____	_____
Storage / labels per PIC procedure	___	_____	_____
Cleaning / sanitation checks	___	_____	_____
Equipment status / maintenance	___	_____	_____
Waste and stock records	___	_____	_____
Cash / transaction reconciliation	___	_____	_____
Next-shift prep / availability	___	_____	_____
Site security procedure	___	_____	_____

Status: done / exception / not applicable with reason. No passwords or security codes here.

Incomplete work / containment: _____

Next owner / due time: _____

Handover sent to: _____ Critical items acknowledged at: _____

Closing verification by: _____ Time: _____

Shift handover brief

Date: _____ Outgoing lead: _____ Incoming lead: _____ Handover time: _____

Topic	Current facts	Next action	Owner / due
Service / guest commitments	_____	_____	_____
Menu availability / prep	_____	_____	_____
Expected deliveries	_____	_____	_____
Staffing / station coverage	_____	_____	_____
Equipment / systems	_____	_____	_____
Open operational exceptions	_____	_____	_____

Critical approved-procedure or restricted-record references: _____

Next shift’s top three priorities: 1. _____ 2. _____ 3. _____

Incoming lead questions / clarifications: _____

Critical items understood and accepted by: _____ At: _____

A handover does not close an issue. Close it only when the corrective action has been verified.

Equipment issue and return to service record

Issue ID: _____ Date / time: _____ Reporter: _____ Equipment / location: _____

Observed symptom, without guessing the cause: _____

Affected operation / product or service impact: _____

Immediate response under approved procedure: _____

Step	Responsible person	Time / reference
Manager / PIC informed	_____	_____
Use restriction communicated	_____	_____
Authorized service requested	_____	_____
Repair / inspection documented	_____	_____
Return-to-service authorization	_____	_____

Service provider / ticket reference: _____ Next update due: _____

Approved temporary workflow: _____

Verification required before reuse: _____

Final status / approver: _____

Do not attempt repairs, bypass guards or improvise energy isolation. Follow trained, authorized procedures.

Weekly manager review

Week ending: _____ Reviewer: _____ Location: _____

Measure	This week	Prior comparable week	Comment
On-time openings / scheduled	_____	_____	_____
Exceptions closed / due	_____	_____	_____
Repeat issues by cause	_____	_____	_____
Guest corrections by cause	_____	_____	_____
Overdue equipment issues	_____	_____	_____

One recurring issue and evidence: _____

Likely process cause, to verify: _____

Change to test: _____

Owner: _____ Due: _____ Verification method: _____

Result checked on: _____ Keep / adjust / stop: _____

Master checklist revision and staff communication: _____

Urgent safety, injury and serious service matters follow the immediate escalation procedure, not this weekly meeting.

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

Source 1 FDA Food Code

The Food Code is a model for adoption by jurisdictions; the establishment must verify the locally applicable rules. Accessed 23 October 2026.

https://www.fda.gov/food/retail-food-protection/fda-food-code

Source 2 FDA: Retail & Food Service HACCP

Active managerial control and establishment-specific food-safety management. Accessed 23 October 2026.

https://www.fda.gov/food/hazard-analysis-critical-control-point-haccp/retail-food-service-haccp

Source 3 OSHA: Control of Hazardous Energy

Unexpected startup and energy release can injure workers during servicing and maintenance; use the applicable trained energy-control program. Accessed 23 October 2026.

https://www.osha.gov/control-hazardous-energy/

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.