

Daily Report

Question:

You notice on Saturdays that your sales are down after you recently had some turnover and added new team members. You want to take a closer look at why this is happening. Study the Daily Report and find 3 things that represent opportunities to improve sales. Each correct opportunity found is worth \$5,000.

Schedule Peter Pretzel on the register during busy times. He has the highest average ticket.

Daily Report Phelpstown Mall, WP #S-711, Pasadena, CA Saturday 09/22/2018 thru Saturday 09/22/2018										
Employee	Hours	Net Product Sales	Gift Certificate Sales	Gift Card Sales	Donation Sales	Net Employee Sales	Net Discounts	Net Invoices	Net Avg Invoice	Tips
Peter Pretzel	7.69	\$974.06	\$0.00	\$0.00	\$0.00	\$0.00	\$15.55	113	\$8.62	\$0.00
Debbie Dip	7.17	\$693.68	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	92	\$7.54	\$0.00
Lois Lemon	7.14	\$973.95	\$0.00	\$0.00	\$0.00	\$0.00	\$51.92	129	\$7.55	\$0.00
Gary Granita	7.52	\$687.50	\$0.00	\$0.00	\$0.00	\$0.00	\$28.09	110	\$6.25	\$0.00
Benny Bitz	7.50	\$678.78	\$0.00	\$0.00	\$0.00	\$0.00	\$4.50	81	\$8.38	\$0.00
Denny Dogg	5.00	\$500.25	\$0.00	\$0.00	\$0.00	\$0.00	\$196.75	69	\$7.25	\$0.00
Total	42.02	\$4,508.22	\$0.00	\$0.00	\$0.00	\$0.00	\$296.81	594	\$7.59	\$0.00

Gross Sales	\$4,805.03
Net Discounts	\$296.81
Total Sales	\$4,508.22
Net Refunds	\$0.00
Net Sales	\$4,508.22
Gift Certificate Sales	\$0.00
Gift Card Sales	\$0.00
Donation Sales	\$0.00
Total Taxes	\$349.73
Total Receipts	\$4,857.95
Paid Outs	\$0.00
Total Amount To Account F	\$4,857.95

American Express	\$22.77
Cash	\$2,249.11
Discover	\$9.34
MasterCard	\$556.66
VISA	\$2,019.98
Total Drawer	\$4,857.87
Over/Short	\$0.08

Tax Name	Taxable Sales	Non-taxable Sales	Tax
STATE	\$4,508.22	\$0.00	\$349.73
Total	N/A	N/A	\$221.59

Deep dive Denny Dogg discounts as they appear high

Train Gary Granita on Master Cashier Techniques to increase his avg. ticket.

Ways to guide the conversation:

How does each individual's avg. ticket compare to the others?
Is there anything that sticks out with net discounts?

Key Takeaways

1. Employee sales - You are able to track and rank each employee based on their net sales performance
2. Average ticket - Shows who is upselling and using master cashing techniques
3. Discounts - High value of discounts could be a red flag of employee theft

Growth Report

Question:

What day is an opportunity for overall sales? What day is an opportunity with traffic? What day is an opportunity for avg. ticket? Each correct response is worth \$5,000.

Sales Growth Phelpstown Mall, WP #S-711, Pasadena, CA Monday 09/17/2018 thru Sunday 09/23/2018 Comparison Dates: Monday 09/18/2017 thru Sunday 09/24/2017				
Date	Current Net Sales	Last Year Net Sales	Net Change	Net Change %
9/17/2018	\$1,467.71	\$1,426.40	\$41.31	2.90%
9/18/2018	\$1,418.56	\$1,685.64	-\$267.08	-15.84%
9/19/2018	\$1,795.65	\$1,698.12	\$97.53	5.74%
9/20/2018	\$2,061.32	\$2,058.69	\$2.63	0.13%
9/21/2018	\$2,501.59	\$2,390.95	\$110.64	4.63%
9/22/2018	\$3,229.25	\$3,114.61	\$114.64	3.68%
9/23/2018	\$2,456.78	\$2,348.41	\$108.37	4.61%
Totals	\$14,930.86	\$14,722.82	\$208.04	1.41%

Tuesday was the only day sales were down vs. last year

Customer Growth Phelpstown Mall, WP #S-711, Pasadena, CA Monday 09/17/2018 thru Sunday 09/23/2018 Comparison Dates: Monday 09/18/2017 thru Sunday 09/24/2017				
Date	Current Invoice Count	Last Year Invoice Count	Net Change	Net Change %
9/17/2018	198	196	2	1.02%
9/18/2018	211	195	16	8.21%
9/19/2018	210	196	14	7.14%
9/20/2018	230	254	-24	-9.45%
9/21/2018	305	297	8	2.69%
9/22/2018	373	354	19	5.37%
9/23/2018	289	275	14	5.09%
Totals	1898	1767	131	7.41%

Thursday was a low growth traffic day vs. last year

Average Invoice Growth Phelpstown Mall, WP #S-711, Pasadena, CA Monday 09/17/2018 thru Sunday 09/23/2018 Comparison Dates: Monday 09/18/2017 thru Sunday 09/24/2017				
Date	Current Average Invoice	Last Year Average Invoice	Net Change	Net Change %
9/17/2018	\$7.41	\$7.28	\$0.14	1.86%
9/18/2018	\$7.60	\$8.64	-\$1.04	-12.08%
9/19/2018	\$8.50	\$8.66	-\$0.16	-1.89%
9/20/2018	\$8.18	\$8.11	\$0.07	0.92%
9/21/2018	\$8.62	\$8.05	\$0.57	7.08%
9/22/2018	\$8.66	\$8.80	-\$0.14	-1.57%
9/23/2018	\$9.24	\$8.54	\$0.70	8.20%
Totals	\$8.41	\$8.33	\$0.08	0.93%

Tuesday's avg. ticket was significantly down vs. last

Ways to guide the conversation:

1. Where do we see our highest or lowest growth days for sales, traffic, and average ticket?

Key Takeaways

1. Sales and Traffic Growth - Able to identify days where your growth was lower/higher than others, identify reasons why, and help guide decisions to increase growth in the future
2. Average Ticket - Able to identify low/high average ticket days. Is this due to certain employees being scheduled that day that are not upselling? Is the warming unit being properly stocked to encourage purchase of high ticket items

Top 25 Products Report

Question:

You want to ensure that your team is appropriately using Master Cashier techniques and driving attachments, while also stocking the warming unit appropriately with popular items. Use the Top 25 Products report to identify 4 opportunities. Each correct opportunity found is worth \$5,000.

Top 25 Products Phelpstown Mall, WP #S-711, Pasadena, CA Saturday 09/22/2018 thru Saturday 09/22/2018						
Rank	Concept	Type	Kind	Size	Net Quantity	Net Sales
1	Wetzel's Pretzels	Wetzel Bitz	Original Bitz	Each	49	\$238.02
2	Wetzel's Pretzels	Wetzel Bitz	Cinnamon Bitz	Each	44	\$238.91
3	Wetzel's Pretzels	Cheese Pretzel	Pepperoni Twist	Each	43	\$185.69
4	Wetzel's Pretzels	Original Pretzel	Orig Salt	Each	35	\$119.16
5	Wetzel's Pretzels	Soda		Large	18	\$50.69
6	Wetzel's Pretzels	Cheese Pretzel	Jalaroni	Each	16	\$70.24
7	Wetzel's Pretzels	Wetzel Bitz	Pizza Bitz	Each	15	\$84.26
8	Wetzel's Pretzels	Wetzel Dog	Dog Bites	Each	13	\$75.27
9	Wetzel's Pretzels	Wetzel Bitz	No Salt Bitz	Each	13	\$64.87
10	Wetzel's Pretzels	Soda		Regular	13	\$30.59
11	Wetzel's Pretzels	Dip		Each	12	\$15.25
12	Wetzel's Pretzels	Lemonade	Frozen Strawberry Lemonade	Large	11	\$49.39
13	Wetzel's Pretzels	Lemonade	Fresh Original Lemonade	Regular	11	\$38.39
14	Wetzel's Pretzels	Original Pretzel	Orig No Salt	Each	9	\$31.07
15	Wetzel's Pretzels	Flavored Pretzel	Sinful Cinnamon	Each	8	\$31.90
16	Wetzel's Pretzels	Lemonade	Frozen Original Lemonade	Large	7	\$31.43
17	Wetzel's Pretzels	Granita	Blue Raspberry Granita	Large	7	\$31.43
18	Wetzel's Pretzels	Cheese Pretzel	Jalapeno Cheese Melt	Each	7	\$29.85
19	Wetzel's Pretzels	Wetzel Dog	Cheesy Dog Bites	Each	7	\$41.52
20	Wetzel's Pretzels	Wetzel Dog	Wetzel Dog	Each	6	\$28.14
21	Wetzel's Pretzels	Lemonade	Frozen Original Lemonade	Regular	6	\$23.94
22	Wetzel's Pretzels	Lemonade	Fresh Original Lemonade	Large	5	\$21.45
23	Wetzel's Pretzels	Wetzel Dog	Cheese Dog	Each	4	\$19.96
24	Wetzel's Pretzels	Lemonade	Frozen Strawberry Lemonade	Regular	4	\$15.96
25	Wetzel's Pretzels	Granita	Blue Raspberry Granita	Regular	3	\$11.97
Total						366 \$1,579.35

Pizza Bitz sales look low. Should be above Pepperoni Twist

There is a low number of dips being sold

Selling more regular lemonade than large

Cheesy Dog Bites are low on the list

Ways to guide the conversation:

1. What opportunities do you see for upselling?
2. Are there any products that look low on the list?

Key Takeaways

1. Product Ranking - Able to identify opportunities with upselling. Drinks (including upselling the size) and Dips.
2. Warming Unit - Should be stocked appropriately including most popular high ticket items (i.e. Pizza Bitz being low on the list could be an indication that it is not being stocked in the warming unit)

Red Flag Report

Question:

You noticed that sales are not performing as well as they used to and you are concerned about employee theft. Review the red flag report and find 2 areas that need a deeper dive. Each correct opportunity found is worth \$5,000.

Red Flag Report															
Phelpstown Mall, WP #S-711, Pasadena, CA															
Monday 09/17/2018 thru Sunday 09/23/2018															
Date	Net Sales	Invoices w/ Deleted Items	Value of Deletions	Cancelled Invoices	Value of Cancellations	Net Cancellations %	Net Refunds	Net Refunds %	Override Price Amt	Net Discount %	Net Avg Invoice	Invoices < 1 %	No Sales	Credit Card Sales	Credit Card %
9/17/2018	\$1,467.71	13	\$56.75	3	\$17.67	1.2%	\$0.00	0.0%	\$0.00	4.5%	\$7.72	1.6%	0	\$711.84	48.5%
9/18/2018	\$1,603.74	22	\$86.66	2	\$24.34	1.5%	\$0.00	0.0%	\$0.00	4.6%	\$7.60	2.4%	0	\$830.74	51.8%
9/19/2018	\$2,091.21	23	\$131.96	3	\$125.42	6.0%	\$0.00	0.0%	\$0.00	2.6%	\$8.20	2.7%	0	\$1,141.80	54.6%
9/20/2018	\$2,061.32	22	\$118.12	2	\$17.96	0.9%	\$0.00	0.0%	\$0.00	3.0%	\$8.18	1.6%	0	\$1,152.28	55.9%
9/21/2018	\$2,630.02	43	\$212.40	7	\$99.21	3.8%	\$12.47	0.5%	\$0.00	5.3%	\$8.62	3.3%	2	\$1,543.82	58.7%
9/22/2018	\$2,587.62	38	\$181.29	4	\$19.76	0.8%	\$0.00	0.0%	\$0.00	2.8%	\$8.66	1.3%	1	\$1,837.21	71.0%
9/23/2018	\$2,882.86	24	\$102.54	6	\$26.24	0.9%	\$0.00	0.0%	\$0.00	3.6%	\$9.24	2.6%	1	\$1,539.45	53.4%
Total	\$15,324.48	185	\$889.72	27	\$330.60	2.2%	\$12.47	0.1%	\$0.00	3.7%	\$8.41	2.2%	4	\$8,757.94	54.9%

High Value of Cancellations

High Credit Card %

Ways to guide the conversation:

1. Is there anything that looks off when looking at the value of cancellations each day?
2. Are there any days that seem significantly off regarding CC % compared to the weekly average?

Key Takeaways:

1. Cancellations - High value of cancellations can indicate employee theft
2. Credit Card % - High CC % shows cash is not making its way into the drawer

Hourly Sales Report

Question:

You want to optimize your sales and labor schedule on Saturdays. You decide to review the Hourly Sales report to identify opportunities. Find 3 areas for opportunities in sales and staffing. Each correct opportunity found is worth \$5,000.

There is an opportunity to capture sales before mall opening hours

Hourly Sales Report										Mall Hours: 10AM - 9PM	
Phelpstown Mall, WP #S-711, Pasadena, CA											
Saturday 09/22/2018 thru Saturday 09/22/2018											
Hour	Gross Sales	Net Discounts	Total Sales	Net Refunds	Net Sales	Net Sales %	Net Invoices	NetAvg Invoice	Avg Num Emps Checked In	Labor Cost	
8:00 AM	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.0%	0	0	1.0	\$6.47	
9:00 AM	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.0%	0	\$0.00	1.0	\$12.99	
10:00 AM	\$77.81	\$1.70	\$76.11	\$0.00	\$76.11	4.1%	13	\$5.85	1.0	\$13.00	
11:00 AM	\$175.31	\$9.78	\$165.53	\$0.00	\$165.53	9.0%	18	\$9.20	2.0	\$23.47	
12:00 PM	\$119.60	\$2.40	\$117.20	\$0.00	\$117.20	6.4%	13	\$9.02	2.0	\$23.50	
1:00 PM	\$190.67	\$2.10	\$188.57	\$0.00	\$188.57	10.3%	23	\$8.20	2.0	\$23.50	
2:00 PM	\$165.37	\$7.58	\$157.79	\$0.00	\$157.79	8.6%	26	\$6.07	2.0	\$17.24	
3:00 PM	\$203.41	\$4.67	\$198.74	\$0.00	\$198.74	10.8%	28	\$7.10	2.0	\$23.19	
4:00 PM	\$263.34	\$1.14	\$262.20	\$0.00	\$262.20	14.3%	25	\$10.49	3.0	\$32.25	
5:00 PM	\$159.90	\$1.41	\$158.49	\$0.00	\$158.49	8.6%	19	\$8.34	3.0	\$32.25	
6:00 PM	\$237.28	\$2.42	\$234.86	\$0.00	\$234.86	12.8%	28	\$8.39	3.0	\$32.25	
7:00 PM	\$235.15	\$0.76	\$234.39	\$0.00	\$234.39	12.8%	28	\$8.37	3.0	\$32.25	
8:00 PM	\$40.21	\$5.02	\$35.19	\$0.00	\$35.19	1.9%	5	\$7.04	5.0	\$53.75	
9:00 PM	\$6.11	\$1.00	\$5.11	\$0.00	\$5.11	0.3%	1	\$5.11	5.0	\$53.75	
Total	\$1,874.16	\$39.98	\$1,834.18	\$0.00	\$1,834.18	100.0%	227	\$8.08	2.5	\$379.86	

Low sales during last hour

There is a high number of clocked in staff during low sales periods

Ways to guide the conversation:

1. Looking at the sales by hour, is there an opportunity to capture additional sales during certain times?
2. Are there any red flags for employee theft?
3. Do you see opportunities to manage labor during slow sales hours?

Key Takeaways

1. Hourly Sales - Identifying opportunities throughout the day
2. Labor - Managing your schedule to peak and low sales hours

Exceptions Report

Question:

You are investigating a potential loss prevention issue you found using a combination of the Daily Report and the Red Flag report. Find 4 anomalies within the Exceptions Report that could indicate a loss prevention issue. For each anomaly found, add \$5,000.

Exceptions Report Phelpstown Mall, WP #S-711, Pasadena, CA Monday 09/22/2018 thru Sunday 09/22/2018				
Cash Outs				
Time	Station	Employee	Type	Total - Starting Drawer
9/22/2018 15:21	Workstation 1	Gary Granita	Cash Out	\$88.60
9/22/2018 16:00	Workstation 2	Benny Bitz	Cash Out	\$290.81
9/22/2018 16:00	Workstation 1	Benny Bitz	Cash Out	\$0.00
9/22/2018 16:32	Workstation 1	Gary Granita	Final Cash Out	\$0.00
9/22/2018 21:08	Workstation 1	Lois Lemon	Cash Out	\$308.00
9/22/2018 21:31	Workstation 2	Debbie Dip	Cash Out	\$241.52
9/22/2018 21:42	Workstation 1	Denny Dogg	Final Cash Out	\$950.04
9/22/2018 21:48	Workstation 2	Lois Lemon	Final Cash Out	\$0.00
9/22/2018 21:52	Workstation 2	Debbie Dip	Final Cash Out	\$0.00

Voided or Modified Invoices			
Time	Invoice	Employee	Description
9/22/2018 10:56	31575		Dip - Each voided from POS
9/22/2018 10:56	31576		Original Pretzel - Orig Salt - Each voided from POS
9/22/2018 11:26	31585		Flavored Pretzel - Sinful Cinnamon - Each voided from POS
9/22/2018 11:40	31588		Wetzel Bitz - Original Bitz - Each voided from POS
9/22/2018 11:57	31593		Soda - Regular voided from POS
9/22/2018 11:58	31594		Lemonade - Fresh Original Lemonade - Large voided from POS
9/22/2018 12:01	31595		Original Pretzel - Orig Salt - Each voided from POS
9/22/2018 13:34	31617		Dip - Each voided from POS
9/22/2018 13:35	31617		Dip - Each voided from POS
9/22/2018 13:47	31624		Wetzel Bitz - Original Bitz - Each voided from POS
9/22/2018 14:51	31652		Soda Regular voided because invoice was voided. Void from POS
9/22/2018 14:51	31652		Soda Regular voided because invoice was voided. Void from POS
9/22/2018 15:00	31658		Lemonade - Frozen Strawberry Lemonade - Large voided from POS
9/22/2018 15:00	31658		Wetzel Bitz - Original Bitz - Each voided from POS
9/22/2018 15:13	31665		Wetzel Dog - Dog Bites - Each voided from POS
9/22/2018 15:13	31665		Wetzel Dog - Cheese Dog - Each voided from POS
9/22/2018 15:45	31679		Original Pretzel - Orig Salt - Each voided from POS
9/22/2018 16:28	31701		Original Pretzel - Orig Salt - Each voided from POS
9/22/2018 16:42	31703		Original Pretzel - Orig Salt - Each voided from POS
9/22/2018 17:40	31722		Original Pretzel - Orig Salt - Each voided from POS
9/22/2018 17:40	31722		Original Pretzel - Orig Salt - Each voided from POS
9/22/2018 17:40	31722		Original Pretzel - Orig Salt - Each voided from POS
9/22/2018 17:56	31729		Wetzel Bitz - Original Bitz - Each voided from POS
9/22/2018 19:45	31779		Original Pretzel - Orig Salt - Each voided from POS
9/22/2018 19:58	31786		Dip - Each voided from POS
9/22/2018 20:00	31788		Original Pretzel - Orig Salt - Each voided from POS
9/22/2018 21:15	31811		Wetzel Bitz - Pizza Bitz - Each voided from POS

High Number of Original pretzel voids in a row

Other Tracking		
Time	Employee	Description
9/22/2018 9:09	Gary Granita	Gary Granita exited Cash Count without making changes at 9:09:00 AM
9/22/2018 11:04		Unknown employee opened the cash drawer manually at 11:04:08 AM
9/22/2018 12:48	Gary Granita	Gary Granita exited Cash Count without making changes at 12:48:08 PM
9/22/2018 12:48		Unknown employee opened the cash drawer manually at 12:48:08 AM
9/22/2018 12:52		Unknown employee opened the cash drawer manually at 12:52:08 AM
9/22/2018 15:12	Gary Granita	Gary Granita left the cash drawer open for 34 seconds at 3:12:42 PM
9/22/2018 15:12	Gary Granita	Gary Granita used modify checkout to change a shift time for Gary Granita at 3:12:47 PM
9/22/2018 15:21	Gary Granita	Gary Granita used modify checkout to change a shift time for Gary Granita at 3:21:47 PM
9/22/2018 16:06	Debbie Dip	Debbie Dip left the cash drawer open for 32 seconds at 4:06:19 PM
9/22/2018 16:22	Lois Lemon	Lois Lemon left the cash drawer open for 35 seconds at 4:22:08 PM
9/22/2018 16:44	Lois Lemon	Lois Lemon left the cash drawer open for 32 seconds at 4:44:35 PM
9/22/2018 18:32	Peter Pretzel	Peter Pretzel left the cash drawer open for 43 seconds at 6:32:00 PM
9/22/2018 19:48	Peter Pretzel	Peter Pretzel left the cash drawer open for 37 seconds at 7:48:13 PM
9/22/2018 21:09	Debbie Dip	Debbie Dip left the cash drawer open for 251 seconds at 9:09:16 PM
9/22/2018 21:26	Debbie Dip	Debbie Dip left the cash drawer open for 172 seconds at 9:26:05 PM

Gary Granita modified his checkout time

Unknown drawer entries

Debbie Dip left the drawer open for a long time

Ways to guide the conversation:

1. Are there any out of the ordinary activities by any of the employees?
2. Do you see potential issues with any employee's timekeeping?

Key Takeaways:

1. Void or Modified Invoices - Look for patterns
2. Other tracking - Keeps track of potential theft with modified clock in/out times and any abnormalities with the cash drawer

GROUP DISCUSSION CARDS - TALKING POINTS

QUESTIONS	TALKING POINTS TO ASSIST THE DISCUSSION (FEEL FREE TO ADD YOUR OWN)
How & where do you find quality talent in a tight labor market? Add \$5,000	Where do you post job listings? What traits do you screen for to identify quality employees during an interview process?
How often do you increase prices? What items and by how much? Add \$5,000	Before the holidays, once or twice a year? All items or select items? How do you determine the price increase?
How do you monitor and prevent employee theft and fraud? Add \$5,000	What clues help you identify product or cash missing? POS reports or other tools? Is there anything specific you look at?
Everyone go around the table and share what POS reports you currently use to help manage your business. Add \$5,000	Any answer works. Do any FZs create their own reports to help manage the business?
How do you use data and analysis to make good decisions that improve profitability? Add \$5,000	Any answer works. Do you look at data from Treatware, bank statements or custom reports? How often do you create and review your P&L?
How do you market your store to drive sales on slow days? Add \$5,000	Mall marketing, promos during slow times, master cashiering, catering events, etc.
How often do you meet with your store managers to discuss business health and brainstorm ideas? Add \$5,000	Being present and engaged in the business, and with employees, shows leadership and control. What do you discuss when meeting with manager/team members?
How do you plan and manage your labor schedule during slow periods? Add \$5,000	Are you scheduling appropriately and making adjustments to reduce labor hours during slow days/times and making sure the location is staffed for high volume days?
How do you manage and maintain your inventory levels to avoid spoilage and over ordering? Add \$5,000	First in first out inventory method. Knowing what inventory levels are needed to maintain product until the next delivery date, inventory on the shelf is cash on the shelf.
What methods do you use to manage food costs? (i.e.: waste management, employee meal policies etc.) Add \$5,000	Not letting the dough dry out. What's your employee meal policy? Overstocking warming unit during slow hours?