Restaurant Group Monthly KPI Pack

Template — not legal advice, and not financial advice. Blank on purpose: no benchmarks are included. Compare each location with its own budget, its own last year, and its sister units. If you show sample numbers to explain the format, label them EXAMPLE DATA.

Company: _____ Month: _____ Prepared by: _____ Sent to board on: _____

1. Sales and profit by location

Location	Sales	vs. budget	vs. last year	Prime cost %	Occupancy cost %	Unit-level profit	Comment
Group total							

2. Cost detail (group)

Measure	This month	Budget	Last year	Year to date
Cost of goods sold (food and beverage)				
Labor cost (wages, payroll taxes, benefits)				
Prime cost				
Group overhead				

3. Food safety and licensing by location

Location	Last inspection date	Result	Repeat findings?	Liquor license renewal date	Open issues

4. People

Measure	This month	Last month	Comment
Headcount (front of house / back of house)			
Open key positions (general manager, chef)			
Staff turnover (as defined below)			
Tip and service-charge policy exceptions			

Template from Prepared Board (preparedboard.com/for/hospitality). Practice template, not legal or financial advice. Your governing documents, contracts, and counsel control.

5. Incidents

Tier	Count this month	Open	Summary (no guest or staff private details)
Tier 1			
Tier 2			
Tier 3			

6. Cash and capital

- Cash on hand: _____ Debt covenant status: _____
- Capital projects (new locations, remodels): spent vs. approved: _____

Definitions (keep these the same every month)

- **Sales:** net sales after discounts and comps, before tax and tips.
- **Cost of goods sold (COGS):** beginning inventory + purchases − ending inventory, for food and beverage.
- **Labor cost:** wages, salaries, payroll taxes, and benefits for location staff. State whether management pay is included.
- **Prime cost:** COGS + labor cost. **Prime cost %** = prime cost ÷ sales.
- **Occupancy cost %:** rent, common-area charges, and property taxes the location pays ÷ sales.
- **Unit-level profit:** what the location contributes before group overhead. State which costs are included.
- **Staff turnover:** write down how you count it (for example, separations ÷ average headcount) and keep it constant.
- **Incident tiers:** as defined in the group's incident-escalation policy.

Related: Restaurant group board governance (https://preparedboard.com/guides/restaurant-group-board-governance) · Restaurant new location approval memo (https://preparedboard.com/templates/restaurant-new-location-approval-memo) · Incident-escalation policy (https://preparedboard.com/templates/hospitality-incident-escalation-policy).

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