

Case Studies in Food Service Management Sampler

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Violence in the workplace erupts between a dining room server and the club's assistant executive chef. The club's general manager handles the immediate situation, sorts through the events, and plans disciplinary actions. The GM wants to be decisive but fair and send the right message to the rest of the staff. What should he do?

Dom's Dilemma: Dealing with Employee Theft **71**

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Follow the Leader

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(2 pages)

In this “you are there” case, readers are invited to take on the role of chairperson of a search committee looking for a chief executive officer to head a national hospitality organization. Who should you choose? The case presents quotes from the five finalists for the position. How do the candidates' words reveal their respective leadership styles? Which leadership style is right for the organization? The choice is yours!

MENU PLANNING

The Perils of Menu Planning

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Case Number: 4655CA (4 pages)

The Madison Avenue Grill, a large casual-dining chain, is experiencing falling customer counts and decreased overall revenues. Corporate executives meet to identify new menu items. Discussion focuses on the advantages and disadvantages of each suggested menu item based on the control points of purchasing, receiving/storing/issuing, production, and service. Which of the suggested menu items is the best solution to the Madison Avenue Grill's declining customer base?

Anatomy of a Restaurant Promo, or How Seymour Learned to Love Seafood

83

Case Number: 3492CA (4 pages)

Headquarters of a casual dining chain decides to freshen its menu with a series of new promotional test items. Feedback from guests, unit managers, and staff will determine which items become permanent additions to the chain's menu. Seymour, a unit manager, is less than enthusiastic about the new menu items, and his presentation to the service and kitchen staff leads to a less-than-successful roll-out to guests.

Membership Migration Changes More than Menus

87

Case Number: 603CC (3 pages)

A smaller portion and a better price for one menu item in the grill sets off a slow, but steady, membership migration through the Juno Riding Club's food and beverage outlets. Diners who used to eat in the formal dining room take over the grill, requesting (and receiving) a more formal atmosphere. This displaces the casual diners and families, sending some to the poolside snack shop. When the food and beverage manager finds members at the pool ordering out for pizza, she knows something has to be done.

Jack Jinxes the New Menu

91

Case Number: 603CE (3 pages)

Changing a menu at a private club is not the straightforward process it can be in the world of commercial restaurants, as new club GM Jack Silverton found out the hard way. He arrived at the Thornvalley Country Club to find an underutilized dining room and a club president eager

to take decisive action to resolve the problem. So, Jack fired the chef and hired a new one who quickly introduced a trendy, nutrition-oriented menu. Jack waited for the accolades but what he got instead taught him a valuable lesson in the dynamics of club operations.

PURCHASING

When Life Hands You Lemons ... Better Check the Specs **95** Case Number: 4656CA (3 pages)

The kitchen manager of the Wagon Wheel Restaurant guesses on a produce order to cover a busy weekend. Pressed to reduce costs, the kitchen manager also drops to a different quality of produce and fails to communicate the change. When delivery of the produce is refused, food costs skyrocket during the busy weekend as the restaurant pays retail prices for produce from the local grocery store. The case focuses on standard purchasing control practices that would have avoided the situation and that could reduce produce costs in the future.

Pushing the Envelope on Settings and Supplies **99** Case Number: 4657CA (5 pages)

Reuben Diaz thought he had prepared well for the Fiesta Grill's first off-premises catered event. But, on the night of the event, the Grill's restaurant and banquet rooms are full to overflowing. While guests complain, the staff scrambles for dishes, cups, glasses, and smallwares. The case focuses on how the shortage problems could have been avoided and on how similar shortages could be prevented in the future.

Supplies Surprise **105** Case Number: 3495CA (4 pages)

Tight capital and a renovated banquet facility at the independent mid-scale restaurant, Pete's Eats, force managers and staff to juggle supplies between outlets. Witness the effects of scrimping on supplies on restaurant operations, watch how managers and staff cope during a difficult shift, and explore ways to avoid similar crises.

Clean with an In-House Crew or Outsource to a Contract Cleaning Service? **109** Case Number: 3496CA (4 pages)

If you want a job done right, what do you do? The answer in this case is not as clear as in some. The manager of Emma's Family Restaurant experiments with assigning cleaning duties to in-house staff instead of using an outside contract cleaning service. Help find out what's the best course of action.

Case Study

"I Never Wanted to Be a Supervisor Anyway"

John is a food server at the Lakeside Inn, a 200-room hotel with a coffee shop and a full-service restaurant called Hummingbirds. Two years ago, John started out as a busperson in the coffee shop, but because of his outstanding performance he was quickly transferred to Hummingbirds as a food server.

John's excellent record continued in his new position. John was always prompt, was great with the customers, and was a real team player. When the buspersons fell behind, he helped

them catch up without being asked. When another server needed help, John was always willing to take on tables in addition to his own. He even got along with the cooks. Within weeks in his new position, he knew everyone's name and was usually the center of attention in the employee breakroom. As time went by, he won employee of the month so many times it became somewhat embarrassing.

Phil Brown, the dining room supervisor at Hummingbirds, was John's boss. Because John got along with the staff so well, Phil asked John to fill in for him every Wednesday—Phil's day off and the slowest day of the week for the restaurant. John seemed to do a good job in this role. Serious problems seldom came up on Wednesdays, and if one did, John would tell Phil about it on Thursday morning so Phil could take care of it.

When Phil was made general manager of a restaurant at another hotel in the chain, he encouraged John to apply for his position. "I think you'd make a great supervisor. The job will be posted internally for three days, and I'm not sure who's going to apply, but you can count on me for a glowing recommendation." Phil not only thought this would be good for John, but knew that the company encouraged promotion from within and it would be a feather in Phil's cap if one of his employees took over his position.

At first, John was not enthusiastic about the supervisor job—"I really enjoy what I'm doing," he told Phil—but, bolstered by Phil's confidence in him, he finally decided to apply. His interview was with three people: Phil; Phil's boss, Alan, the restaurant's general manager; and Susan, the hotel's human resources director. John was outgoing and personable during the interview and, after John left the room, Phil cited John's initiative, high energy level, leadership skills, and high quantity and quality of work as reasons John should get the nod. Although Alan and Susan were concerned about John's lack of formal supervisory training, they decided, given John's excellent record, to give him a chance.

The next day, John went with Phil to Phil's new restaurant and spent a week in training. At the beginning of the week, Phil went over a checklist of supervisory skills John needed to acquire and gave him some training materials to study. Throughout the week, Phil helped John fill out the paperwork a dining room supervisor must deal with. At the end of the week, Phil wished John good luck, gave him a pep talk, and told him to call anytime he had a problem.

John reported for work at Hummingbirds the next morning, uncomfortable in his new suit and tie but feeling confident and determined to do a good job. It didn't take him long to discover that the biggest adjustment he faced was in relating to his former co-workers. When he was a food server, everyone was his friend and he had enjoyed all the during-work and after-hours socializing the employees did together. But now he was left out. In this and many other ways, his former co-workers made him feel that he wasn't "one of them" anymore. That was bad enough, but he began to suspect that his friends, now his employees, were taking advantage of him. For one thing, they didn't really treat him like a manager. When Alan walked through the kitchen, all the servers and cooks snapped to attention; when John walked through, they just looked around—"Oh, hi, John"—or didn't acknowledge him at all and continued casually chatting. Because they knew John so well, they constantly asked him for favors: "Can I trade nights with Lisa?" "May I have tomorrow off?" "Can Sam and I switch table assignments?" "You remember I'm a bowler, right? Could you please not schedule me

Thursday nights? The league's starting up next week." The requests went on and on. John soon learned that, try as he might, he couldn't write a schedule that pleased everybody or didn't have to be changed constantly. The few times he couldn't give employees the day off they wanted, some of them called in sick. John wondered if they were lying, of course, but he couldn't prove anything and he didn't want to think they would betray him like that. All he knew for certain was that he felt abused and taken advantage of by the very people he used to be close to.

Despite these feelings, John wanted to preserve his relationships with his staff, and he wanted to please his new boss, too. So he didn't let Alan know about the pressures he was feeling, and he granted almost every employee request. This often meant that John found himself doing his old job of serving customers, clearing tables, even filling in for dishwashers, while his employees either called in with an excuse and didn't show up, or didn't put forth the effort John thought they should. Too many times John found himself waiting tables, fretting about the mountain of paperwork on his desk, and watching other servers working at what he considered half speed.

As the first few weeks went by, he also became disappointed in Martha's performance. Martha was the senior server on the staff, and she had inherited John's old role as the "head server," the person John counted on to be a team leader and fill in for him on his day off. But Martha never did the little things that would have really helped him out, never went the extra mile for anyone. Why doesn't she just volunteer and pitch in like I used to do? John thought.

That Monday morning started out like most Monday mornings at Hummingbirds—extremely busy. The normally big breakfast crowd was swelled even larger by several busloads of sales executives who had just arrived at the hotel for a four-day meeting. John was at his desk, hurrying through some reports he had promised Alan would be finished yesterday. He knew it was only a matter of time before he'd be called into the dining room. His three six o'clock servers were trying to take care of the rapidly increasing crowd, and Janice, one of his three seven o'clock servers, had called him the night before to tell him she wouldn't be in till eleven—her basement had flooded and she had to meet with a cleaning crew and an insurance adjuster in the morning. So today of all days he would have to serve the breakfast crowd one server short.

When John's telephone rang right at 7:00, his heart sank. Sure enough, Sally, another of his seven o'clock servers, was calling to say she was sick and wouldn't be coming in. She was a good employee who had never called in sick before, so he fought back his feeling of panic and told her to take care of herself and not worry about a thing. He no sooner thanked her for calling and hung up when the phone rang again. It was Rich, the third seven o'clock server, calling in sick, too. This was the fourth time Rich had called in sick in the two months John had been supervisor, and John knew that Rich had a habit of drinking too much on the weekend—in fact, John used to help Rich think of excuses to tell Phil back when Phil was in charge. But he really did sound sick this time, so John put aside his suspicions and told Rich to come in later if he felt better.

John gave up all thoughts of catching up on his reports and grabbed the schedule. The only people he might be able to call in were Wendy and Maria. No answer at Wendy's house. Maria

was home, but she couldn't come in because she was a chaperon that morning for her daughter's sixth-grade field trip. She was very sorry.

"That's okay," John said wearily, and with exaggerated carefulness placed the receiver back in its cradle. It was all he could do to keep from throwing the phone across the room. Instead of six servers for the morning, he was down to three, with a bigger crowd than usual and no one he could turn to for help. Even Alan was unavailable—he was in a staff meeting with the hotel's resident general manager. John grimly straightened his tie and headed for the dining room.

Hurrying through the kitchen, he was assaulted by the sounds of a staff under pressure: cooks yelling orders, dishes clattering violently, oven doors slamming. He charged through the double swinging doors into the dining room just in time to see Steve, one of his buspersons, heading for the restaurant's entrance, holding a towel tightly wrapped around his right hand.

"What happened to him?" John asked Martha.

"He was hurrying too much, broke a glass, and cut himself. I sent him to the doctor—looks like he'll need stitches."

Great, John thought as he surveyed the situation. Every table was packed, and the roar of a hundred conversations made it almost as noisy in the dining room as it had been in the kitchen. John couldn't remember the restaurant ever being so crowded, and there was a line of guests extending from the restaurant's entrance into the hotel lobby, waiting for a table.

Taking a deep breath, John threw himself into the fray. He tried to be everywhere at once, waiting tables, pouring coffee, seating guests, running the cash register, all the while trying not to notice the frowns from guests angry at the inevitable delays in service. Each guest complaint muttered within earshot—"What kind of a place is this?" "Great service around here"—hit him like a lash. John fought down the waves of helplessness and frustration he felt and threw encouraging words at harried staff members whenever he rushed past one of them. He was in the middle of yet another long apology to an irritated guest when, out of the corner of his eye, he saw Martha at the cash register, standing on tiptoe and waving to him furiously above a long line of guests waiting to pay their bills.

He excused himself with a strained smile and hurried over to Martha. "What's the problem?"

"I don't know," Martha said breathlessly, "the register just stopped working."

John stared in frustration at the silent machine; he didn't have a clue about how to get it working again. "What did you do?" he barked at Martha.

"I didn't do anything!" Martha wailed. "It's not *my* fault."

"It's not *my* fault either," John snapped. "Damn it, think! Did you do something just before it quit?"

"Hey!" one of the guests back in the middle of the line called up to John, "I had to wait for my food, wait for my check, and now I have to wait to give you my money? Get your act together, will you?!"

"I'm trying to correct the problem, sir," John said through clenched teeth.

“Well, do it now, ‘cause I’m tired of this crap.” There was a murmur of agreement from the other guests in line.

John grabbed Martha by the arm much harder than he intended and half shoved her toward the kitchen. “Go to my office and get my calculator, now!”

Martha pulled her arm away. “I don’t know where it is.”

John slammed his fist down on the counter. “Damn it, do I have to do everything myself?!” he bellowed.

A hush fell over the restaurant. Everyone froze; all eyes turned toward John. Martha blinked back tears and was starting to say something when her gaze shifted past John’s shoulder and her eyes widened. John turned around to see his boss, Alan, looking around the restaurant incredulously. “What in the world is going on here?!” he demanded.

Later that day...

Alan looked across his desk at John and sighed. What could have gone so wrong? This morning’s incident was just the latest in a series of problems he’d had with John ever since John took the supervisor job. John didn’t seem to understand budgets and was not keeping up with the administrative aspect of the job—late reports, botched purchase orders, unsigned invoices—the list was rather lengthy. John didn’t even seem to be handling the people-skills part of his job very well. Several employees had come to Alan with complaints that John was playing favorites when it came to scheduling. And grabbing Martha this morning—Alan just hoped she wouldn’t cause the hotel any problems because of that.

It had taken a while, but Alan had gotten Hummingbirds under control again with the help of George, the coffee shop manager. After the crisis was past, Alan had left George in charge of the restaurant and had taken John to his office for a long-overdue counseling session. But now he wasn’t sure where to begin.

“John,” he said finally, “what happened? I couldn’t believe my eyes when I saw you ranting and raving in front of a room full of guests.”

“Look,” John said defensively, “I had my hands full. You weren’t around, we were working short-handed, the register went dead—I didn’t know what to do. I was doing the best I could. I was never trained for that kind of situation.”

“But John, you had training. You spent a week with Phil; he said you were ready. You worked in the restaurant for two years. I don’t know what else we could have done for you.”

“You never prepared me for an emergency like that,” John muttered.

“No one could have foreseen what happened this morning!” Alan exclaimed. “Besides, managers are supposed to be able to cope with all the crazy things that go wrong. That’s why we put you in that position; we thought you could handle it.”

“Well, maybe you were wrong!” John blurted out. “Maybe you shouldn’t have promoted me in the first place.” John looked down at his feet and mumbled, “I never wanted to be a supervisor anyway.”

This case, revised for this text by William P. Fisher, Ph.D., University of Central Florida, was originally developed by Philip J. Bresson, Director of Human Resources, Renaissance New York Hotel, New York, New York; and Jerry Fay, Human Resources Director, Aramark Corporation, Atlanta, Georgia.

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“I Never Wanted to Be a Supervisor Anyway”

Points for Instructors

Classroom Discussion Questions

1. Would you ever promote a person who is unsure whether he or she really wants the promotion? What extra responsibility, if any, is placed on you if you do?
2. Are “Employee of the Month” programs beneficial? What are the advantages and disadvantages to such a program? (Disadvantages include: poor administration, favoritism, a “whose turn is it this month?” mentality, etc.)
3. Which do you delegate: responsibility or authority? (You can never absolve yourself from responsibility when you delegate. When you delegate, you create another level of responsibility, so now you both have the responsibility, but the person delegated to has been given authority by you. As the person in the higher-level position, you have the higher-level responsibility.)
4. What are the advantages and disadvantages to a “promotion from within” policy?
5. What does “posting a position” mean? (Organizations list job openings for current employees so they can see if they want to apply for the positions. A posting is usually for a week or two.)
6. Do good professionals (John was a terrific server) always make good managers? What are the differences between people who function as professionals and those who function as managers?
7. Should a boss ever be interrupted? (Alan was in a meeting when the chaos was happening in the dining room.)
8. Is it ever appropriate to embarrass an employee in public, as John did when he yelled and pushed Martha?
9. Did John compromise his personal integrity when he helped Rich think up excuses for not reporting to work when they were both servers? Would you ever lie on behalf of another employee?
10. If staff members are uncomfortable in their work uniform or clothing (John felt uncomfortable in his suit), how do you think that might affect their work performance?
11. John rose from the ranks, so to speak. Does that mean he is above the rank and file, or just apart from them, due to his new management responsibilities?

12. If you are a supervisor, is it more important to keep your employees happy or get the job done for the organization?
13. Should profanity ever be allowed in the workplace?
14. Should Phil have done anything differently to prepare John for his new position?
15. Should Alan have done anything to prepare John for his new position?
16. Should Susan, the human resources manager, have done anything differently?
17. What should be done at this point with John? Some alternatives: demote him, fire him, transfer him to another property in the organization, place him back with Phil for more mentoring, give him more training at the current property, transfer him to the coffee shop (an environment with less pressure).
18. Were Phil and Alan good mentors for John?

Discussion Questions from the Case Developers

The discussion questions and answers in the following section were created by the same industry experts who developed the case. Their answers can shed light on many of the issues raised by the classroom discussion questions. You may wish to pose these additional questions to your class, discuss them, and then read the experts' answers aloud or convey the main points of their answers in your own words. Alternatively, you may photocopy this section and use it as a handout to give to students after the class discussion. (For that reason, these discussion questions start on a new page, for convenience in photocopying.)

“I Never Wanted to Be a Supervisor Anyway”

Discussion Questions from the Case Developers

1. Did Phil and Alan make a mistake in promoting John? Why or why not?

Phil and Alan may have made a fundamental mistake in promoting John; namely, assuming that an employee who is great at performing line-level responsibilities will perform just as well as a supervisor. Phil might have mistaken John's superior social skills for superior leadership skills. Phil might also have reconsidered promoting John in the face of John's initial reluctance.

On the other hand, the mistake may not have been in the promotion itself, but in promoting John and leaving him at Hummingbirds. It is very difficult for an employee to be promoted from the ranks and asked to supervise his former co-workers. It is especially difficult for a person, like John, who has not been given extensive supervisory training and may not be aware of the role conflict new supervisors inevitably face. Perhaps the best strategy would have been to promote John, but send him to a different restaurant in the hotel chain and have a different dining room supervisor take over for Phil at Hummingbirds. Because Phil

and Alan did not do this, in a sense they set John up for failure—or at least made it much more difficult for him to succeed.

And then there's the question of John's training. Phil's "training program" consisted of giving John a checklist, handing him some materials to study, and closely supervising him for a week. This may have worked with dining room supervisors in the past, and may have been the way Phil himself was trained, but that doesn't mean it's an ideal training method. Again, the mistake may not have been in the promotion, but in the follow-up training provided.

2. What should Alan do about John?

The answer to this question depends on a lot of organizational and interpersonal factors that Alan must weigh before he makes a decision:

- Losing control in front of customers and grabbing Martha are very serious offenses; many companies would consider them grounds for immediate dismissal. On the other hand, John has been a good employee and the company has invested a lot of time and effort in him.
- Was John's outburst an aberration, a momentary lapse that will probably never happen again? Or does it reveal a fatal flaw in John—that he cannot control his temper, or that he will always snap under extreme pressure?
- What are the company's policies regarding misconduct such as John's?
- How stable is the restaurant? That is, if John is retained as the supervisor, is the restaurant solid enough to withstand the mistakes John will make as he climbs the learning curve? Or is the restaurant somewhat shaky and really needs an experienced dining room supervisor?
- Can John be transferred to another hotel? Should he be transferred? Would John be likely to adjust and flourish in a new environment, or would a transfer ultimately turn out to be just a relocation of the problem?
- Is the hotel's environment calm enough, the pace slow enough, so that Alan has the time to retrain John?
- Does Alan have the resources to give John more training?
- Does Alan have the mentoring skills to help John cope with the fallout from this incident? If not, does Susan, the hotel's human resources director?
- Can John's relationships with his co-workers be mended? Can John regain their respect?
- How much political clout does John have within the company? The allies a person can claim within a company makes a difference in how that person is treated. For example, if the hotel general manager happens to really like John, then Alan's options for dealing with John may be more limited.

3. Assuming Alan decides to keep John on as supervisor, what are the immediate steps Alan should take with John?

There are several things Alan should do immediately with John if he decides to retain John as dining room supervisor. Alan should:

- Wait until the next day to talk to John about the incident; everyone involved needs a cooling-off period.
- Assure John that he will live through this—“the sun will come up tomorrow.”
- Hold a counseling session with John to get to the bottom of the problem: why did John lose control?
- Make sure John understands the seriousness of what he did; losing his temper in front of customers and grabbing Martha were very serious mistakes.
- Give John a chance to vent; let him get all his frustrations out—with his co-workers, with his lack of training, even with Alan himself. Alan might even take on some of the responsibility for the incident—“Perhaps your training program was a little hurried.”
- Help John work through any feelings of embarrassment he might feel. Alan might say something like the following: “Go ahead and be embarrassed—we’ve all been embarrassed at some point in our lives, and we’ve all survived. You’ve got to deal with it as best you can and move on. Maybe the best thing to do is tell your staff: ‘I blew it, guys, and I’m sorry.’ For sure you should apologize to Martha for losing control with her. Just remember: everyone in that restaurant has made mistakes, me included.”
- Go over a mentoring plan with John: this is how I’m going to help you with scheduling; this is how I’m going to help you with budgeting and other restaurant paperwork; here are some supervisory training seminars I will send you to this year. Knowing that Alan firmly supports him and has a plan for his development should go a long way to restore John’s confidence in his own potential as a supervisor.

4. If John stays on as supervisor, what are the immediate steps Alan and John must take with other people affected by John’s outburst?

Alan and John must practice damage control with all those who were directly or indirectly affected by John’s outburst:

- The hotel’s sales manager
- The hotel’s general manager
- The sales executive group’s meeting planner
- The bus tour company
- Those individual guests who complain to various hotel staff

Some of the actions Alan and John might take include the following:

- Meet with the hotel’s sales manager and general manager, acknowledge the problem, and explain what steps they are taking to rectify the situation.
- Write letters of apology to (1) the meeting planner who booked the sales executives in the hotel, (2) the president of the bus company, and, later (3) individual guests who take the time to write complaint letters.

- Apologize to various hotel staff members (like front desk agents) who will have to listen to guest complaints about the incident.
- Apologize to guests who complain directly to John or Alan.
- For the rest of the week, offer food and beverage discounts to guests dining at Hummingbirds.