

SAMPLE
BAR SURVEY
“PRO-ACTIVE”

A survey was conducted on the above-mentioned establishment. The facts are contained in the following report.

DATE OF SURVEY: 01/26/04
DAY OF SURVEY...: Monday
TIME OF SURVEY.: 6:00 PM

LOCATION I.D.#: 7555

REPORT REF.#..: 04002
MS&S Lic. No. PI 13688

I. = EMPLOYEES/SCENE
II. = SERVICE/DISPOSITION
III. = DRINK PREPARATION/SALES
IV. = MAINTENANCE/COMMENTARY

I. EMPLOYEES/SCENE

Bartender/Manager: Rudy (overheard, no nametag), Male, Dark complexion, mid 30's, 5'9", short black hair

Cocktail Server #1: Ericka (nametag), Female, Caucasian, mid 20's, 5'4", medium-length black hair, pierced tongue

Cocktail Server #2: Angie (nametag), Female, Caucasian, early 20's, 5'4", medium-length black wavy hair

Cocktail Server #3: Jenn (nametag), Female, Caucasian, mid 20's, 5'4", medium-length blonde hair

The employees were appropriately attired and presented clean, neat and well-groomed appearances. The entire staff was friendly and professional.

The volume of business increased during the survey. On the agents' arrival, approximately four customers were seated directly at the bar, while one guest was seated at a lounge table. Two customers were seated at the bar and an estimated nine guests were seated at the lounge tables upon the agents' departure. Multiple television sets were tuned to a college basketball game and set to a muted volume. Dance music played at a comfortable volume. The lighting and temperature controls were set at comfortable levels. Rudy provided chips and salsa to the agents at no charge.

II. SERVICE/DISPOSITION

Rudy promptly acknowledged the agents upon their arrival at the bar. Rudy suggested the ordering of a Cadillac Margarita to the agents. When they decided on a soda instead, Rudy asked if he should make it a large. The agents' drink order was prepared and served onto napkins without delay. ***Rudy did not offer the agents refill service upon the completion of their original drink order.***

Newly arriving customers were provided with prompt drink service. ***Established customers were not offered refill services.*** The Cocktail Servers circulated the lounge tables in a prompt manner.

Rudy was polite and professional in his interactions with the agents. He made direct eye contact when thanking the agents after their transaction and when they departed from the bar. Rudy smiled and initiated conversation with the agents as well as with other guests during the survey. All other employees appeared to be polite and professional in their interactions with customers and with other employees.

III. DRINK PREPARATION/SALES

Rudy used a jigger in his drink preparations. No trailing was observed and the bar equipment was handled in a sanitary manner. No alcohol was spilled during the survey.

During the survey Rudy made a Cadillac Margarita for Jenn. Jenn returned the drink, stating the customer wanted a different flavor. Rudy threw the drink away, then replaced it with the correct variety. The agents did not see a recording made for the drink that was discarded.

One register, located at the back of the bar, was in use during the survey. The agents were unable to view the amounts on the register display due to the small size of the font.

For the customers receiving tab service, the tab receipts were kept in a shot glass in front of each patron.

The Cocktail Servers were overheard verbalizing orders to Rudy throughout the survey. Rudy asked them to stop, and said he needed a receipt for each order. He indicated things needed to be done "by the book."

The following are observed transactions:

At 6:24 PM Angie took an order for a Cadillac Margarita and a Sprite. Rudy prepared the beverages then Angie delivered them to the ordering customers.

At 6:36 PM Rudy accepted an order for two blended Cadillac Margaritas from customers seated at the bar. Rudy prepared and served the drinks then made a recording at the register. A tab receipt was generated and placed into a shot glass in front of the ordering customers.

Throughout the evening, the guests ordered a regular Cadillac Margarita as well as two Rum & Cokes. Rudy made a recording after each order and placed an updated tab receipt into the glass. When the patrons were ready to leave, they provided Rudy with their cash payment. Rudy collected the money and placed it into the register drawer. Rudy issued a final receipt when he returned the guests' change.

At 6:40 PM Angie took an order for two Draft Beers as well as a Goblet of Beer. Rudy prepared the beverages then Angie delivered them to the ordering patrons.

At 6:52 PM Ericka took an order for two Cadillac Margaritas. Rudy prepared the beverages then Ericka delivered them to the ordering customers.

At 7:07 PM Mike Rudy accepted an order for two Cadillac Margaritas from customers seated at the bar. Rudy prepared and served the drinks then made a recording at the register. A tab receipt was generated and placed into a shot glass in front of the ordering customers. The customers had not yet closed their tab by the time the agents departed. The method of payment was not observed.

IV. MAINTENANCE/COMMENTARY

The exterior of the establishment was clean and well maintained. The bar area was clean and well maintained. Used glassware was immediately cleared from the bar top. The bar counter was wiped dry when necessary during the survey.

Rudy accidentally broke a Margarita glass while preparing to salt it. Rudy threw the glass away. No recording of the breakage was made. Rudy dumped all of the salt of the salting tray and washed it thoroughly to ensure there were no glass slivers mixed in with the salt.

Rudy was observed drinking Pineapple Juice from a small metal can during the survey. The agents did not see Rudy initially open the can of juice.

No employees were observed drinking any beverages, eating any food items, or overheard to use profanity. No money was exchanged between the tip container and the register, nor was any money placed into an employee's pocket during the survey.

During the survey Rudy was observed requesting identification from two guests who appeared to be in their early twenties, before serving them alcohol.

**THE SUBSEQUENT PAGES DETAIL THE AGENTS' TRANSACTION
INFORMATION**

The following details the agents' transactions. The information may compromise the anonymity of our agents. The success of future surveys is dependent on our agents remaining unidentifiable.

Please do not show the following information to your employees.

The agents were asked to observe Bartender Lisa. Lisa did not show up for work, therefore; Rudy, the Manager, attended to the bartender duties the evening of the survey.

TEST: At 6:07 PM the agents ordered a Coors Light and a Diet Pepsi. The agents asked Rudy if they could have their Beer at half price, since the appetizers were half price. Rudy said only Cadillac Margaritas were on special. Rudy served the drinks promptly then made a recording of the sale at the register. A tab receipt was generated and placed into a shot glass in front of the agents.

At 6:10 PM the agents placed an order for the Fiesta Platter. Rudy accepted the order, recorded the sale and placed an updated receipt into the glass. At 6:11 PM the agents added a Carne Asada Burrito. Again, Rudy recorded the sale and placed an updated receipt into the glass.

Rudy served the Burrito and the Fiesta Platter at 6:20 PM. The Fiesta Platter contained quesadillas, flautas, chicken wings, nachos and a burrito. All items were fresh, hot, and delicious. Rudy provided paper napkins and silverware.

TEST: At 7:35 PM the agents provided Rudy with a twenty-dollar bill as payment. Rudy collected the money and took it to the register. While Rudy was placing the money into the drawer, the agents asked for another Coors Light. Rudy returned the twenty-dollar bill to the agents. He then served the beer, and made a recording at the register. Rudy provided the agents with an updated tab receipt. He then collected the money and took it to the register where he processed the payment transaction. Rudy provided the agents with an accurate receipt listing the check number as 4120, as well as the proper amount of change.