2215 Guest Data

Product Book · https://kb.jeffreysummers.com/docs/2215-guest-data/

Want to know if you're remembered? Stop coming in.

The Guest who wonders whether they matter to the operation already has the answer. They stop coming and wait. If nobody notices — no call, no follow-up, no "we haven't seen you in a while" — the experiment is over. The relationship was transactional the whole time. The Guest was a cover count, not a person.

Nothing communicates indifference more completely than making a Guest who has been in two dozen times feel like a stranger. No bad meal, no slow service, no wrong order sends that message as clearly as the absence of recognition. Those are failures. This is something worse — it tells the Guest that the relationship they thought they were building was entirely one-sided. They remembered the operation. The operation didn't remember them.

The operation that cannot feel the absence of a Guest it should know by name does not have Guest data. It has traffic data.

Satisfaction Is Not the Goal

Before building the system, the operator needs to be clear on what the system is building toward — because the wrong target produces the wrong data.

Satisfied Guests and loyal Guests are not the same animal. Satisfied Guests negotiate price. Loyal Guests consider overall value. Satisfied Guests point out problems. Loyal Guests forgive occasional mistakes. Satisfied Guests are easily tempted by the operation down the street. Loyal Guests think of you first — for birthdays, anniversaries, first dates, last dates, celebrations, consolations, every occasion in their life that deserves a room worth being in.

Satisfied Guests don't talk about you. Loyal Guests refer you to everyone they know.

Satisfaction is a transactional outcome. The Guest came in. The food was correct. The service was adequate. The transaction cleared. They may or may not be back — depends on whether something more convenient presents itself first. Loyalty is a relational outcome. The Guest came in, felt something, built something with the operation over time, and now the operation is the

default answer to a question they ask themselves regularly: where do I want to be tonight?

Guest data built toward satisfaction produces metrics. Guest data built toward loyalty produces relationships. The system the operator builds must be aimed at the second target or the data it generates is the wrong kind.

Two Kinds of Data

Guest knowledge lives at two levels — and most operators only build one of them.

The in-visit read is what the cast member gathers in real time. How the table ordered. What they responded to. Whether they're celebrating or decompressing. Whether they want engagement or space. This data is perishable — it lives in the cast member's head and disappears when the shift ends unless someone captures it. It costs nothing to gather. It requires only attention.

The accumulated record is what the operation owns across visits. Visit frequency, check trajectory, preferences, occasions, relationships, patterns. This is what makes the Guest feel known rather than just seen. The Guest who arrives and is greeted by name, whose usual order is remembered, whose anniversary the operation noted and acknowledged — that Guest is experiencing the accumulated record working correctly. They are not starting over. The operation picked up where it left off.

The gap between in-visit intelligence and accumulated record is the capture discipline. Every piece of knowledge the cast member gathered at the table needs to move from their head into a system the operation owns before the shift ends. The cast member who knew that Guest for three years and then left took the Guest's history with them. Without capture, every departure is a data loss event.

The 3x5 Card Standard

Early in my career I had every server fill out a 3x5 card on every Guest. After every visit, they were required to note something new. Over time those cards became the foundation of something most restaurants never build: actual knowledge of the people walking through the door. Not data. Knowledge.

That system cost nothing. It required cast members who understood that their job wasn't just to take an order — it was to build a relationship. One card at a time.

The technology has changed. The principle hasn't. Reservation platforms, POS systems, CRM tools, Guest Data Platforms — all of them are containers. What fills them is attention. The most sophisticated Guest data platform in the market produces nothing without the cast culture that feeds it. The operator who installs the technology without building the culture gets an expensive database of strangers. The operator who builds the culture first and then adds the technology gets a compounding intelligence system that gets more valuable with every visit.

Use whatever tool works for your operation. A note in the reservation system. A running log the host keeps. A brief post-visit entry in a Guest profile. The tool is not the point. The discipline of observation and capture is the point.

What to Capture

The data that builds loyalty is not demographic. Demographics tell you who the Guest is. Behavior tells you what they want. Only one of those produces marketing and experience design that works.

At the in-visit level: occasion, party composition, ordering patterns, engagement level, what landed and what didn't, any personal detail shared. The cast member who knows a Guest mentioned their son's graduation is not running a surveillance program — they are paying attention. That is the job.

At the accumulated level: visit frequency and trajectory, check average and trend, preferred seating, dietary preferences, key occasions — birthdays, anniversaries, professional milestones. Relationships within the Guest's network — who do they bring, what occasions do they mark here, who referred them.

Beyond the transactional record: values overlap. The Guest who shares the operation's community involvement. The Guest whose kids go to the same school the operation sponsors. The Guest who is active in the same cause the operation supports. Where the operation's values and the Guest's values intersect, the relationship deepens beyond transaction entirely. You don't have a restaurant relationship anymore. You have a community relationship. That is the most durable kind.

The Callback Program

The most underleveraged discipline in the industry is the direct follow-up call.

Call Guests back within 24 hours of their visit. Not with a survey link. Not with an automated email. A call — or a personal message — from someone who can have an actual conversation. Ask real

questions. Not "was everything okay" — that is a blow-off question and Guests know it. Ask what they liked. Ask what they would change. Ask what would bring them back sooner. Ask what occasion you could help them celebrate next.

Operators who run this discipline consistently report doubling their sales. The number is not surprising once you understand what the call is doing. It is not a satisfaction survey. It is a relationship continuation — the operation reaching back into the Guest's life after the visit to demonstrate that the relationship did not end when they walked out the door.

The Guest who is called back and asked real questions by someone who sounds like they genuinely want to know does not experience a marketing tactic. They experience evidence that the operation cares. That evidence compounds directly into return frequency and referral behavior.

Experiential Proof

Calling the Guest is the first move. Acting on what they tell you is the second. Telling them you acted on it is the third. All three are required. The first without the second is a performance. The second without the third is invisible.

The Guest who told you the booth was uncomfortable and came back to find it replaced has proof. Not a promise — evidence. The operation listened. The operation acted. The operation valued the relationship enough to change something because of it. That proof is more powerful than any loyalty program because it is personal, specific, and unreplicable. No chain can systematize that experience at scale. The independent who builds the culture to produce it owns something that compounds indefinitely.

Guests will give you more feedback the more they see you act on it. The relationship between feedback and action is self-reinforcing — the Guest who has been heard opens further. The Guest who has been ignored closes permanently. The difference between an operation that deepens its Guest relationships year over year and one that churns through the same first-time visitors forever is almost always traceable to this one discipline: did the operation prove it was listening?

The formal discipline for capturing and acting on Guest feedback at scale is the Voice of the Guest program — see 1.MA.10.

The Influencer Read

You do not need to know five thousand Guests deeply. You need to know which ones move the room.

Every Guest base has an architecture of influence. Some Guests influence dozens of people in their network. Their recommendation carries disproportionate weight. Their departure produces disproportionate downstream churn. Their advocacy produces referral chains the operation never has to pay for. These are not necessarily the highest-spending Guests or the most frequent ones — they are the ones other Guests listen to.

The operator who identifies their influencers and invests in those relationships proportionally is reading the architecture of how their Guest base actually works and deploying relationship investment where it produces the highest return.

The depth of relationship you build with a Guest should match the depth of influence they carry.

The Technology Layer

The modern Guest intelligence stack pulls from multiple sources simultaneously — POS transaction data, reservation platform history, online order behavior, WiFi login data, review platform sentiment, loyalty program activity, survey responses, website behavior. A Guest Data Platform aggregates these disparate sources into a unified Guest profile that the operation can act on.

The value of that unified profile is the same as the 3x5 card — it tells you who this specific Guest is, what they value, how their relationship with the operation is trending, and when they need attention. The technology extends the discipline. It does not replace it.

56% of independent restaurants do not use technology to manage all aspects of their business. Every disconnected system is a decision made blind. The operator managing Guest relationships across disconnected systems or on gut feel is not managing Guest relationships. They are hoping Guests come back and calling it retention.

What Changes Tomorrow

Pull the names of your ten most frequent Guests from your POS or reservation system. If you cannot name ten Guests without looking them up, you do not have Guest data — you have transaction data. Start there. Build a profile on each of those ten. Note what you know. Identify

what you don't. Assign a cast member to learn one new thing about each of them on their next visit and capture it. That is the 3x5 card discipline applied to your ten most valuable relationships. Build from there.