

Restaurant Critical Path

From Concept to Opening Day

Fabrizio De Togni



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INTRODUCTION

Before the first decision

Most restaurant books begin with a story: a grandmother's kitchen, a meal that changed everything, a moment of clarity in a market somewhere warm. The story is usually true, and the feeling behind it is real. But a story is not a plan, and a feeling is not a process. Somewhere between the first inspiring chapter and the reality of fitting out a commercial kitchen, negotiating a lease, and paying a team every month, a gap opens. This book is written to close it.

What follows is not a celebration of the restaurant trade, though there is much in it worth celebrating, and it is not a warning, though there is much worth knowing. It is a method: a complete guide to taking a restaurant from its first idea to its first paying guests and through its first ninety days of trading, with enough explanation along the way to understand not only what to do, but why it matters and what happens when it is done late or badly.

It was written from the experience of many openings, to give an operator what we would have wanted at the start of our own: a complete map of the work, from the first idea to the first months of trading, that respects the intelligence of the reader, tells the truth about the hard parts, and always moves towards what has to be done next.

Who This Book Is For

This book is for anyone preparing to open a restaurant. Some readers will be doing it for the first time, with no experience of an opening to draw on. Some will have opened before and want a complete method instead of the one improvised under pressure last time. Others have worked in restaurants for years and are now building one of their own, and are discovering that knowing how a restaurant runs is not the same as knowing how to build one from nothing.

What these readers share is the intention to open a restaurant and the wish to do it well. The work is the same whatever the background: the same decisions, the same dependencies, and the same mistakes that cost the most money and the most time. This book maps all of them.

How the Book Is Built

The book follows the life of an opening, from the idea to the end of the first quarter of trading. It is divided into a chapter on the concept, five phases of work, and a chapter on the first ninety days.

Building Your Concept

Everything starts here. Before any money is spent, the idea is turned into a written concept: who the restaurant is for, what it offers, how it feels, what it costs the guest,

and why a guest would choose it. The chapter is a method, not a list of tasks, and the concept document it produces is the reference for every decision that follows.

The five phases

The opening itself is divided into five phases. Each one is defined by the work it contains and by the point at which it ends — a condition that must be true before the next phase can start on solid ground.

Phase 1 — Decide & Prepare. From the concept on paper to a business plan and the first professionals of the project. It ends when the business plan has been written and checked by the accountant, and the accountant, the attorney, the insurance and real estate brokers, and the graphic designer are appointed.

Phase 2 — Find & Secure. From the first site brief to the signed contracts. It ends when the lease and the construction contract are signed, and the budget has been rebuilt on real prices.

Phase 3 — Build. From the signed contracts to the finished works. It ends when the works are finished and the equipment is installed.

Phase 4 — Set Up. From the finished works to the handover of the building. It ends when the building has been taken over, every member of the team has a contract, and the menu has been approved in writing.

Phase 5 — Final Preparation. From the team's first day to the opening. It ends with the training and the soft opening completed, and the opening date confirmed.

First 90 Days

The opening ends on opening day; the work of running a restaurant begins the morning after. The last chapter covers the period that most opening guides leave out: the first figures, the adjustments, the team after the excitement has gone, the first reviews, and the decisions that close the opening period and set the next quarter.

Inside each phase

Every phase is built in the same way, so that a reader always knows where to find what they need.

The introduction explains what the phase is for, what it depends on, and when it ends.

Key Moments describe the milestones of the phase, the points at which the project changes.

Who Is Involved lists every person and professional who works in the phase, and what each one does in it.

The categories group the tasks by area of work — Concept, Finance & Funding, Legal, Permits & Insurance, Site & Lease, Design & Construction, Equipment & Purchasing, Technology, People, Food & Beverage, Operations, Marketing & PR — each opened by

a short explanation of how its work flows. Every task names who is responsible for it and who verifies it.

What Might Go Wrong describes the mistakes that are easy to make in the phase, and what they cost.

The Deep Dives go deeper into the subjects we consider most important in the phase, and set out, step by step, the method to follow.

The Phase Checklist lists, one line for each task, what must be done before the phase can be considered closed.

The Working Files list the templates of the toolkit that belong to the phase.

The Deep Dives

A Deep Dive goes further than the task it supports. The Deep Dive on the lease, for example, explains how a lease is built, which clauses to push back on, and what never to accept. Each one ends with something concrete — a decision taken, a document built, a figure calculated — and each one can be read on its own.

If a Deep Dive shows that a piece of work needs knowledge or experience the operator does not have, that is the right conclusion, not a failure. The answer is to engage a professional who has it, and the Deep Dive explains what to ask them.

The Toolkit

Many of the methods in the book have a companion file in the downloadable toolkit: spreadsheets for the budget, the cash flow model, the break-even point, the staff cost, the recipe costing, the par levels, and the cash reconciliation, and documents such as the job descriptions, the Standards of Service, and the construction contract. Each template carries the number of its phase — T1.1 belongs to Phase 1 — and is named in the Deep Dive it supports and in the list at the end of its phase. The book teaches the method; the template is where the reader applies it. Neither depends on the other, and the book can be read and used without a single download.

At the end of the book

After the last chapter, a short Closing Note looks beyond the first ninety days. Appendix A gives a short profile of each professional and consultant of the opening: what they do, when to appoint them, the work they carry out for the opening, what to ask before appointing them, and what to agree in writing. Appendix B then gathers every task of the book by category, so that everything concerning one area — Design & Construction, People, Marketing & PR — can be seen in one place, whatever the phase it belongs to. The Template Index lists every file of the toolkit, with what each one does. The Glossary defines every term that a first-time operator may not know.

What This Book Is Not

It is not a book about passion. There are enough of those. Passion is a necessary

condition for opening a restaurant, but not a sufficient one, and it is not something a book can give or take away. What a book can give is a method.

It is not a collection of case studies. Case studies explain what happened to someone else; this book is concerned with what has to happen next in our own project.

It is not a substitute for professional advice. An attorney reviews the lease, an accountant reviews the financial model, a licensing specialist handles the liquor licence. The book explains what those professionals need, what to ask them, and how to recognise advice that is not good enough. It does not replace them.

It is not a workbook. It is a book, written to be read. The toolkit exists for those who want it, and the operator manages the opening with whatever tools they already use — a spreadsheet, a shared folder, a whiteboard. What the book provides is the knowledge that makes those tools useful: the reasoning, the dependencies, and the practical detail that separate a prepared opening from an improvised one.

And it does not promise a successful restaurant. It promises that the restaurant will not fail for reasons that could have been foreseen.

A Note on Time

The phases are stages of work, not dates. Some openings move quickly through the early phases and slowly through the build; others wait months for a site and then move fast. What matters is not how long a phase takes, but that it is substantially complete before the next one begins: that the lease is not signed before the architect has assessed the space, and that no equipment is ordered before the lease is signed.

Inside each phase, the tasks are grouped by area of work, not listed in order. Many of them run in parallel, and the right order depends on the project — the site, the market, the people. The introduction of each phase explains the dependencies that cannot be broken, and the end of each phase states what must be true before moving on.

Openings rarely go exactly to plan. Planning permission arrives late, a contractor falls behind, a key hire changes their mind. The value of the structure is not that it will match the experience exactly, but that it gives a reference against which to measure the difference: when something slips, we know what it affects further on, and what accepting the delay will cost. A restaurant that opens well is not one that had no problems. It is one whose problems were found before the first guest arrived.

The Critical Path

In project management, the critical path is the chain of pieces of work that depend on one another and together decide the earliest date on which a project can finish. Every task on that chain that slips moves the end date with it. Every task off the chain has some margin: it can start later or take longer without delaying anything else.

A restaurant opening has a critical path too, and it runs through all five phases. Most of the tasks in this book can be moved, combined, or done in a different order to suit the project. The links below cannot. When one of them is late, the opening is late, whatever

happens elsewhere.

The concept is written before any money is spent, and the business plan is checked before anyone is paid for a site, a design, or a building.

The architect assesses a site before we commit to it, and the design and the contractor's price exist before the lease is signed. The lease and the construction contract are the last signatures of the search, not the first.

No order for equipment, furniture, or works is placed before the lease is signed.

The insurance is active before anyone works on the premises.

The equipment and the furniture are ordered early enough to arrive when the works need them, because the last trades cannot finish around a missing counter or a late cold room.

The technology is chosen before the walls are closed, so that every cable is inside them. The applications with the longest lead times — the liquor licence above all — are submitted as soon as the site allows it.

The General Manager and the Executive Chef are hired while the works are still running, early enough for them to plan the team, the menu, and the systems before the building is finished.

The building is tested, inspected, and taken over before the team works in it, and the kitchen is commissioned before the menu is tasted in it.

The menu is costed before it is approved, and approved before the POS is programmed, the menus are printed, and the team is trained on it.

The HACCP system is in force before the first delivery of food, and the POS knows the menu before the first day of training.

The training comes before the mock services, the mock services before the soft opening, and the opening date is confirmed, after the training has been reviewed, before the reservations open.

The slowest links — the site, the lease, the permits and licences, the construction, the long-lead equipment, the key hires and their notice periods — are the ones to start first and to watch every week. When one of them slips, do not hope to recover the time further on: work out what it moves, and decide at once whether to accept the delay, add resources, or change the scope.

The toolkit includes a planner, in the form used in project management, that lays out every task of the book with its dependencies, so that the critical path of each opening can be built on its own dates.

A Note on Roles

The book uses the same cast of people throughout: the operator, the General Manager, the Executive Chef, the heads of department, the accountant, the attorney, the architect, and the other professionals and consultants of the opening, each of them described in Appendix A. In larger openings there may be further internal roles — a

finance manager, a human resources manager, a purchasing manager — who take on tasks that this book gives to the General Manager or the Executive Chef. In a small independent opening, one person may carry responsibilities that a larger structure would split between several.

The book is written around the tasks, not around the organisation chart. Read the responsibilities assigned to each person and ask, for each one: in our opening, who owns this? The answer will differ from one reader to another. What matters is that every task has a named owner.

Before You Begin: Are We Ready?

Before the concept, before the first professional is appointed, there is a question about the person who is about to open the restaurant. Opening is among the most demanding things a person can choose to do in business — financially, operationally, and personally — and the start of the project is the cheapest moment to discover a gap that could have been filled in advance.

The questions below cover five areas: the money, the people, the operations, our personal circumstances, and the concept. This is not a test, and there is no score to reach. Read each statement and answer honestly whether it is true today.

The money

Opening a restaurant usually costs more than expected and takes longer than expected to make a profit, and in between there is a period in which more cash goes out than comes in. The question is not whether there is enough money to open, but whether there is enough to keep going until the restaurant pays for itself.

- I know what it will cost to open this restaurant, from real quotes and not from an approximation.
- I have a contingency on top of the budget, not hidden inside it.
- I know how much money the restaurant needs to cover its fixed costs — the rent, the payroll, the utilities — until it reaches its break-even point.
- I can cover my personal expenses for a long period without taking anything from the restaurant.
- If things go worse than expected, I know what the second plan is: more capital, a line of credit, an investor ready to step in.
- I have spoken to an accountant who works with restaurants, not only to a general accountant.

The people

A restaurant depends on people more than almost any other business, and the staff cost is one of its largest. The difficulty is not only the cost, but the complexity: opening a restaurant means becoming the employer of people with their own expectations, problems, timetables, and reasons for being there. The ability to hire well, train, correct, and when necessary let people go decides whether the business survives.

- I have hired and managed staff in a professional setting — employees with contracts, not friends or family.
- I know how to run an interview that produces useful information, not just a pleasant conversation.
- I have let someone go, and I know how to handle that conversation professionally, legally, and without being knocked off balance by it.
- I can give negative feedback directly and constructively, without avoiding the conversation and without overreacting.
- I know the employment rules that apply to restaurant staff where I will open: working hours, overtime, holidays, employer contributions.
- I have a clear answer to the question: why would a good person choose to work here rather than somewhere else?

The operations

Every service is a piece of logistics: the ingredients arrive, are stored, prepared, and served at the right moment, to the right guest, at the right temperature. When the machine works it is invisible; when it breaks, the guest sees it at once — in the food, in the wait, in the faces of the team.

- I have spent real time inside a working restaurant, not as a guest, but watching the kitchen and the floor from the inside.
- I can read a restaurant profit and loss account and understand its key lines: food cost, beverage cost, staff cost, operating profit.
- I know how many covers my service model can serve in one service, and how many people it needs to serve them.
- I know what happens when a supplier does not deliver, a machine breaks down, or several people call in sick on the same day.
- I know what the food safety law requires where I will open, and what HACCP means.
- I know who will run the restaurant day to day when I am not there, and that person either exists already or is part of the hiring plan.

Our personal circumstances

This is the section nobody wants to complete. It is not about skills but about character and circumstances. Opening a restaurant is physically and emotionally demanding in ways that most people underestimate — not because it is a secret, but because it is hard to imagine before living it.

- I am prepared for very long weeks during the opening and the first period of trading, including evenings, weekends, and public holidays.

The people closest to me understand what is about to change in my life, and have agreed to it knowing what it means, not only with vague encouragement.

- I can manage stress without taking it out on the team or on the people I live with.
- When things go wrong, I know where to find support, both practical and personal.

- I have decided, concretely, the results and the moment at which I would close the restaurant if it did not work.
- My reason for opening is not only “I have always dreamed of having a restaurant”, but something more specific — an idea, a guest, a format, a product — that I have tested in some form.

The concept

A successful restaurant is more than good food and good service. It is a clear idea of whom it serves, why that guest should come here rather than elsewhere, and how the experience is delivered in the same way every time. That clarity drives every decision that follows: the menu, the location, the team, the price, the communication.

- I can describe my restaurant in two sentences without using words such as “authentic”, “quality”, or “welcoming”.
- I know exactly who my guest is: not “everyone who loves good food”, but a specific person with specific habits, a specific budget, and a specific reason to go out.
- I have recently eaten, as a paying guest, in many restaurants comparable to mine in the market where I will open.
- I know why a guest would choose my restaurant over what already exists in the same street.
- My concept can be built with the money I have — not in its ideal version, but in the version I can actually open.
- I have tested at least part of the concept: a dinner, a pop-up, an event, honest feedback from people who have no interest in telling me it is a good idea.
- If every question has been answered honestly and the weak areas are clear, we are ready to start: not in the sense that everything is solved, but in the sense that we know where we are exposed and have a plan for each point.

How to Use This Book

Read Building Your Concept first, and write the concept before anything else. Then read each phase before its work begins, not when a problem arises. The chapters are preparation, not reference: a chapter read in advance gives time to act; a chapter read in the middle of a crisis explains what we needed to know a few weeks earlier.

Read each Deep Dive before the task it supports, and open its template when the method is clear. Use the Phase Checklist to close each phase: its items are not targets to aim for, but the minimum that must be true for the next phase to begin on solid ground. An item that is not done does not disappear; it becomes the first problem of the next phase. When the project is under way and something has to be found quickly, Appendix A shows what to expect from each professional, Appendix B shows every task by area of work, and the Glossary explains every term.

Before We Begin

The failure rate of new restaurants is real, the margin for error is narrow, and the hours are not what most people expect. None of this is written to discourage. It is written because the operators who open well — who build something that trades at a profit and that they are proud of — are almost always the ones who started with a clear picture of what they were taking on: not the optimistic version, not the fearful one, but the accurate one.

The work that follows does not require perfection. It requires attention, discipline, and the willingness to do the unglamorous work — the paperwork, the meetings with lawyers, accountants, and licensing officers, the debrief after the mock service that shows the kitchen is not ready — before the first guest walks through the door. Everything before that moment is preparation; everything after it is operations. This book covers both.

BUILDING YOUR CONCEPT

From a raw idea to a fully defined restaurant concept

Introduction

A restaurant begins as an idea, and an idea is not yet something anyone can work from. It cannot tell the architect what kind of room to design, the accountant what revenue to project, or the chef what kind of kitchen they will run. The space between the idea and a written concept is where many of the most expensive mistakes of an opening are made — not because the idea was wrong, but because it was never translated into precise decisions before the money started to move.

This chapter makes that translation. It starts from the first impulse and works it, step by step, into a documented concept: a specific and coherent description of the restaurant and the guest it serves, of what it offers and how it feels, and of the reason a guest would pick it over every other place available. That document becomes the reference against which every later decision is tested, and the brief from which every professional starts their work.

The work comes before everything else in this book, not alongside it. The financial projections need a price level and a service format to be credible. The search for a site needs a guest and a number of covers. The kitchen needs a food philosophy before anyone can choose its equipment. None of these decisions can be made well on an idea; all of them can be made on a concept that is already written.

What a Concept Is

A restaurant concept is the complete answer to one question: what is this place? It covers the food, the style of service, the atmosphere, the price, the guest it is designed for, and the reason that guest should choose it over the alternatives. It is not a type of cuisine, a mood, or a mission statement. It is the sum of all these decisions, made deliberately and in order, so that together they create one coherent experience.

The reason to write it down carefully before anything else is practical. Every significant choice of the opening — the location, the budget of the fit-out, the structure of the menu, the profile of the team, the tone of the marketing — should be tested against the concept: does this choice serve it, or contradict it? Without a written concept there is nothing to test against, and decisions pile up according to personal preference, outside pressure, or convenience. The result is a restaurant that feels inconsistent, not because any single choice was bad, but because the choices were never measured against the same standard.

The concept is also a briefing tool. The architect, the interior designer, the chef, the General Manager, and any lender or investor need to understand what is being built before they can help to build it well. A concept that is specific and coherent produces

better work from every one of them. A vague one produces a misunderstanding that comes to the surface at the worst possible moment: during the fit-out, during recruitment, or in the first week of service.

What a concept is not

A mission statement. A mission describes a purpose; a concept describes an experience. A mood or an aesthetic. The look of the restaurant follows from the concept; it does not define it.

A cuisine category. “An Italian restaurant” is a category. The concept is the particular Italian restaurant that exists in this place, for this guest, at this price.

A fixed document. The concept changes as decisions are made and as reality imposes its limits. The aim is not a perfect document, but a living reference that keeps every decision aligned.

The Origin

Every restaurant starts with an impulse: a meal remembered, a gap noticed, a place visited abroad that suggested a different way of doing things, a personal story worth telling through food. The first task is to capture that impulse precisely enough that it can be examined, tested, and built on.

The danger at this stage is deciding too early. A chef who wants to cook the food of her grandmother’s village has an impulse, and that impulse could become many different restaurants depending on the place, the guest, the price, and the format. The impulse is the raw material; the concept is what disciplined thinking makes of it.

The three questions that test an idea

Before developing an idea any further, we test it against three questions.

Is there a guest for it? Not “would some people eat this”, but “can we name a group of people whose current options do not serve them the way this restaurant would?” An idea without a guest is an aesthetic project, not a restaurant.

Can it work commercially at the place and price we have in mind? A concept built on rare seasonal produce, sold at a mid-market price in a high-rent street, cannot. The concept has to stand up to the numbers from the beginning.

Can we sustain it? A concept that depends entirely on the founder being in the kitchen every night, on the founder’s personal charm, or on a supply that cannot be guaranteed is fragile. Test whether it survives the founder having a bad week.

The origin statement

Before any other part of the concept, write one short paragraph on where the idea comes from: not the restaurant as it will be run, but the impulse that started it. This paragraph is the emotional anchor of the concept, and everyone involved in the project should be able to read it, from the lender to the interior designer.

The test of a good origin statement is that a reader can guess the general direction of

the restaurant before seeing anything else. If the same paragraph could describe many different restaurants, it is not yet specific enough.

The Guest

The definition of the guest is the most consequential decision of the whole concept. It sets the price, the style of service, the kind of location, the marketing channels, and the look of the restaurant. A concept developed without a precise guest is developed for nobody in particular, and it produces a restaurant that appeals to nobody in particular.

The occasion

The definition starts from the occasion: the specific moment in the guest's week or year that brings them to this restaurant. The same person goes to different restaurants for different occasions, and a business lunch on a Tuesday, a celebration on a Saturday, and a family meal on a Sunday call for completely different concepts. We choose the main occasion the restaurant is designed for, and design everything else to serve it.

Regular and habitual. The guest comes every week or more often. The restaurant needs variety on the menu, consistency, and booking and arrival without friction.

The spend is usually moderate.

Business. The guest is on someone else's time, and often on someone else's budget. The restaurant needs efficiency, discretion, and a format that respects a working day.

Destination. The guest travels specifically to find the restaurant. It needs a clear reason to make the journey: an offer found nowhere else, a particular chef, a unique format.

Casual and spontaneous. The guest walks in without planning. The restaurant needs to be visible, welcoming, and able to work without a reservation.

Special occasion. The guest comes for a birthday, an anniversary, a promotion. The restaurant needs a sense of occasion, attentive service, and a format that supports a celebration. The spend is usually high.

The spending decision

Knowing how the guest decides what to spend is more useful than knowing their income. Some guests make a simple judgement of value: is it worth it or not? Others compare consciously with the alternatives. Others leave the decision to the occasion: it is a celebration, so the price comes second. The concept is designed for the way its main guest decides, not for the price the operator would like to charge. A high price imposed on a guest whose occasion is casual and habitual produces a restaurant they visit once and do not come back to.

The guest as a person

Describe the main guest along four dimensions. Where they live or work, and how far they will travel. Their age, their household, and their income, used as an indication of behaviour, not as an assumption about taste. How often they eat out, for which occasions, and where they go today — the named places that are their current alternatives, and

what those places give them and fail to give them. And what they value, what irritates them, and what they feel when they find the right place.

Then write one paragraph that describes the guest as a single, specific person rather than a category: where they live, what they do, where they eat now, what they are looking for and not finding, and what would bring them back every week.

Some concepts also have a secondary guest: a different group that the restaurant can serve without spoiling the experience of the first — the office workers at lunch in a restaurant designed for dinner, for example. If there is one, describe it in the same way, and write down how the restaurant serves it without diluting what it offers its main guest.

Who the restaurant is not for

Saying clearly who the concept is not designed for is as useful as saying who it is for. A restaurant built for a long evening is not for the guest who wants a quick lunch; a late, lively room is not for families with young children. Writing it down prevents the design and service decisions that try to please everyone, and end up satisfying nobody.

The Guest Experience

Once the guest is defined, describe what they experience, in order, from their point of view: not what the team does, but what the guest sees, hears, and feels. This description is the first brief for the architect, because every moment of the visit needs a space that supports it, and the first brief for the General Manager, who will turn it into service and training.

Arrival. How the guest arrives — on foot, by car, by taxi — what they see from the street, and what the entrance tells them before they open the door.

Reception. Who greets them and how, whether they wait and where, where the coats go, and what they see, hear, and smell in the first moment inside.

The table. The atmosphere at the table: the light, the noise, the distance from the next table, what they notice about the room around them.

Ordering. How choosing feels: formal or relaxed, quick or unhurried, guided or left to the guest.

The meal. The pace of the dishes, the way they are presented, how present the team is during the meal, and what the guest notices about the food and the drink.

The bill and the departure. Who brings the meal to its end, how the bill arrives, and the last impression the guest takes home.

▲ *Describe the experience in the guest's words, not in operational language. "The bill arrives without being asked for" is a brief; "the server brings the bill after dessert" is a procedure, and procedures come later.*

The Format

The format is the physical and operational shape of the experience. It is not the cuisine and it is not the atmosphere: it is the set of practical decisions about how the restaurant works, which decide what the guest meets from arrival to departure. Every one of them has a direct consequence on the cost structure, the team, the design of the kitchen, and the revenue the restaurant can reach.

The format decisions

The style of service: table service, counter service, sharing plates, a set menu, à la carte, or a combination. Each one changes the kitchen, the team, and the experience.

The seating: tables for two, larger tables for groups, seats at the bar or at a counter, communal tables. The seating plan tells the guest the social register of the place before anyone speaks.

The meal periods and the days of opening: lunch, dinner, all day, brunch, and which days the restaurant is closed. Each period has its own staffing, its own preparation, and its own guest.

The number of covers. It sets the ceiling of the revenue and the size of the team. Too few covers make the numbers impossible; too many make the quality of the experience impossible to hold. Decide also the minimum number below which the concept does not work, because it is the figure that rules out a site.

The reservation policy: only by booking, only for guests who walk in, or a mix of the two, and in that case how the mix is balanced.

The length of the visit, from sitting down to leaving, and how many times each table is used in a service. A quick lunch at a counter and a long tasting menu need completely different kitchens and floors.

The bar and the drinks: central to the concept, a support to the dining room, or minimal; and whether guests can drink at the bar without eating. The answer changes the layout, the team, the licences, and the mix of revenue.

Takeaway, delivery, and private dining, if they are part of the model. Each one changes the kitchen, the storage, and sometimes the entrance and the flow of service. These decisions must agree with the guest. A fine-dining format at a casual price produces a confused experience and a business that does not work. A counter service in a neighbourhood that expects table service sets the concept against its own guests. Every decision of the format is tested against the guest before it is confirmed.

The Food and Drink

The food and drink concept defines what the restaurant cooks and serves at the level of approach, not of dishes. Dishes change with the seasons, the produce available, and the growth of the kitchen team; the approach is the frame within which all of them are decided.

The food philosophy

Every credible food concept has a point of view: an answer to the question “why do we cook this way and not another?” It does not have to be ideological. It can be as simple as “the best version of a neighbourhood Italian, made with what is available locally”, or as specific as “one tasting menu built entirely on game, wild plants, and old grains of the region”. What it cannot be is absent: a kitchen without a point of view writes a menu that looks like every other menu of its kind.

The philosophy should fit in a few sentences that can brief a chef and be told to a guest. If it needs a long paragraph to explain, it is not yet distilled enough.

The structure of the menu

Before any dish is developed, decide the shape of the menu: how the guest orders — à la carte, set menu, tasting menu, sharing — and how many sections it has; the arc of the meal, from light to rich or from cold to hot; whether the dishes are shared, plated for one, or both, which changes both the mood of the table and the production of the kitchen; how often the menu changes, every day, every season, or rarely, which decides the workload of the kitchen and the kind of supplier it needs; and what the menu offers as standard to guests who are vegetarian, vegan, or need to avoid gluten.

The signature territory

Every menu needs dishes that cannot easily be found elsewhere. At this stage we do not choose the dishes, but the territory they will come from: whole animals carved at the table, fresh pasta made in the room, vegetables cooked over wood as the centre of the plate rather than the side. The territory gives the chef a direction and gives the restaurant something to be known for.

Provenance and sourcing

The sourcing philosophy belongs to the food concept; it is not a decision to take later. How local the produce is, whether its origin matters to the guest’s experience of eating it, and whether a particular supplier is central to the identity of the restaurant — a farm, a fish market, a specialist importer — all affect the cost, the flexibility of the menu, the work of the kitchen, and the story the restaurant can tell about itself. Be honest here: a sourcing promise the cost base cannot pay for will be broken in the first difficult month.

The drinks

The drinks say as much about the concept as the food. Decide what the list is meant to express and how it relates to the food: a short wine list chosen for the dishes, a by-the-glass selection that changes often, a cellar led by a sommelier; a cocktail list, a small signature selection, or none; and the offer for guests who do not drink alcohol, which more and more guests now judge as seriously as the wine list.

The Service Culture

The service register is the tone of the exchange between the team and the guest: not a list of procedures, but the quality of the relationship. It has to agree with everything else — a relaxed, informal register in a room of white tablecloths feels like a mistake, and so does a choreographed service in a neighbourhood bistro.

Describe it in a few sentences, as the guest would feel it: whether the team is formal or relaxed, whether guests are called by name, how much the team talks about the food, how present it is during the meal. Then write two short lists. What the team always does — greet every guest at the door, introduce every dish, notice a glass before it is empty. And what it never does — interrupt a conversation to ask if everything is fine, clear a plate before everyone at the table has finished, bring the bill before it is asked for, or the opposite, if the concept wants it so.

At the level of the concept, describe also which people the guest meets: whether there is a host or a maître d' at the door, a sommelier, a chef who comes to the table, a kitchen open to the room. These choices change the experience, the team, and the plan of the building, and they belong to the concept before they belong to the organisation chart.

Positioning

Positioning, in a concept, means the place the restaurant takes among the places that already exist: where it sits, which space it occupies, and why that space is worth occupying. It is decided on three dimensions.

The price. Not only the average spend, but what the price tells the guest. The same spend means one thing at a counter in a market hall and another in a room with linen tablecloths, and it must agree with everything else in the concept.

The register of the experience: how formal it is, how the guest is expected to behave, how the team behaves, which unwritten rules the room follows. It ranges from highly formal to completely informal, and it must be the same in the service, the furnishings, the language of the menu, and the way the team speaks.

The cultural position: the references the concept draws on, the world it belongs to, the taste it reflects. It decides who feels at home and who does not. That is not a problem to solve; it is a choice to make on purpose.

The gap

A position is most valuable when it fills a gap rather than joining a crowd. A restaurant that occupies a gap starts with a structural advantage; one that joins a crowded space has to win on execution alone, which is a harder place to start.

The gap does not have to be dramatic. It may be as plain as “nobody in this neighbourhood serves this kind of food, at this price, with this care”. The test is whether the position is truly different from the alternatives, not whether it is revolutionary. Once the area is chosen, the gap is checked against the real competitors of the street, and the position is confirmed or corrected.

The positioning statement

Summarise the position in one plain sentence that anyone on the team could repeat: for this guest, this restaurant is the kind of place that offers this specific reason to choose it over everything else available. Then name the one thing the restaurant must be known for, because it will have to be present in every message the restaurant sends.

The Name

The name is one of the most important and most difficult decisions of the concept. It is permanent, or nearly so; it speaks before the guest arrives; and it has to work everywhere — said aloud in a recommendation, typed into a search, written on a sign, on a social profile, on a printed menu.

What a good name does

It is easy to say, to spell, and to remember. A name that has to be explained or corrected every time it is heard creates friction in the most basic form of marketing: word of mouth. It is available as a website address and as a handle on the social channels, and if possible as a registered trademark. Check all three before falling in love with it.

It suggests something of the experience without explaining it. It does not have to describe the cuisine, but it must not contradict the register of the concept.

It works both as a whisper between friends and on a large sign above the door.

What to avoid

Generic names — The Grill, The Kitchen, The Table — that cannot be found in a search and are not remembered.

Names that date: references to a trend or a moment that feel modern today and will feel old in a few years.

Names that promise too much, with superlatives the restaurant cannot keep every night.

Names that the main guest finds hard to pronounce or to spell, a real risk when the name comes from a language the market does not speak.

How to choose it

Write a long list of names without judging any of them. Then apply the filters of availability and suitability, and reduce the list to a few candidates. Test each candidate name with people who match the guest, and write down their first associations. Choose the name whose associations come closest, most consistently, to the restaurant we intend to open.

The Visual Identity

The visual identity translates the concept into a visual language. The logo and the colours are its results, not its starting point: the starting points are the concept, the guest, the format, and the cultural position decided so far. An identity designed without them produces decoration, not communication.

The brief and the execution

The most common mistake is confusing the brief with the execution. The brief describes, in words, the effect the restaurant should have: “warm, tactile, slightly worn — as if it had always been here”. The execution is what the designer produces in response: the typefaces, the colours, the materials. The brief comes from the operator; the execution comes from the designer.

The elements of the identity

The logo: how the name is drawn. It can be the name written in a chosen typeface, a symbol, or both, and it must work at every size, from a small profile picture to the sign on the façade.

The colours: a small palette used consistently everywhere — one dominant colour, an accent, a neutral for backgrounds and text — that feels intentional on a menu, on a website, and on a paper bag.

The typography: one or two typefaces for everything the restaurant prints and publishes. A serif suggests tradition and formality, a sans-serif modernity and accessibility, and the choice must agree with the register of the experience.

The materials and textures: the surfaces of the room and the paper of the menus should speak the same language. Raw linen and untreated wood say something different from polished marble and lacquer.

The photographic style: the light, the framing, the colour temperature, and the subjects of every image the restaurant publishes. It is usually decided last, yet it has the greatest daily effect, because every post is an expression of it.

To these the restaurant adds a voice: the way it writes on its website, its menus, its messages, and its social profiles. Describe it in a few words — warm, knowledgeable, understated, or playful, direct, confident — and say what it is not, which is often just as useful to whoever will write for it. An identity works when every element supports every other: the typeface agrees with the colours, the colours with the materials, the materials with the format and the price. When one element contradicts the rest guests notice it at once, even when they cannot say why.

The Moodboard

A moodboard is a collage of images that shows the intended look of the concept. It is the bridge between the written concept and the decisions of the designers, the architect, the photographer, and the chef. A good moodboard is not a collection of images the operator likes; it is an argument, made with images, for one visual direction.

The six territories

Space and atmosphere: rooms and places that capture the feeling of the dining room we want. They do not have to be restaurants; a hotel lobby, a private house, a film set, or a market can describe an atmosphere more precisely.

Colour: images in which the relationship between colours is what speaks — a market

stall, a fabric, a painting, a landscape. Colour seen in context says more than a sample card.

Texture and material: close-ups of the surfaces and objects of the restaurant's physical world — linen, concrete, brass, oak, ceramic, leather, paper.

Typography and graphic language: typefaces, layouts, menus, signs, and printed pieces that match the register of the concept, often found more easily in editorial, fashion, and architecture than in the food world.

Food and plating: the visual approach to the food — the style of plating, the shapes of plates and bowls, the colours on the plate, the use of empty space.

The guest: people in places that match the social register of the concept. Not an advertisement, but a suggestion of the ease, the occasion, and the sense of belonging.

How to build it

The moodboard is built in four stages. First, gather without editing: collect many images across all six territories, without judging them, looking for range rather than precision. Second, edit without mercy: keep only the images that clearly belong to the same world as the others, asking not “do I like this?” but “does this belong here?”. Third, arrange the selected images together, on a digital canvas or on a physical board, so that images placed side by side reinforce each other, and look for the colour, texture, or shape that returns from one image to the next. Fourth, name the tension.

Every strong moodboard holds a productive tension: two qualities that seem slightly in conflict but together create something more interesting than either alone. Rough and refined. Warm and austere. Local and cosmopolitan. Naming that tension is the last step of the moodboard and the first step of the brief. Where the materials are central to the concept, keep a physical board of real samples — fabrics, papers, finishes — next to the digital one. A material seen on a screen and the same material in the hand are often two different things.

What a moodboard is not

A wish list of expensive finishes and luxury references that have no relation to the budget or to what the restaurant can really build.

A collection. In a moodboard every image is chosen and belongs with the others; what separates the two is editorial judgement.

The brief itself. The designer needs to understand the concept and the reasons behind the images, not only to see them. The operator's personal taste. The moodboard expresses the logic of the concept, which is often not the same as the way the operator would furnish their own home.

From the Moodboard to the Brief

The moodboard is a visual argument; the creative brief translates it into instructions for the people who will carry it out. A moodboard without a brief is a set of references that every designer interprets differently. A brief without a moodboard is a set of instructions

without a shared picture. Together they give a direction that can be executed.

What the creative brief contains

The concept in one paragraph, written for someone who has never heard of it.

The guest the identity must attract, described by behaviour and attitude rather than by statistics: the guest who sees the identity should feel at once that this restaurant was made for them.

The visual direction: the productive tension of the moodboard, expressed as a pair of qualities — “refined but lived-in”, “technical but warm”, “cosmopolitan but rooted”. This pair is the spine of the brief.

The non-negotiables: the few constraints that cannot be compromised, practical, conceptual, or of direction — the logo must work in one colour, no photographs on the printed menu, no bright colours anywhere.

The deliverables: the exact list of what is being commissioned, so that no part of the restaurant is left without a design.

The Concept Document

Everything decided in this chapter is collected in one document, the concept document. It is the working file of the operator: it holds the origin, the guest, the experience, the format, the food and drink, the service culture, the position, the name, and the identity, with the reasons behind each decision.

It is never finished in one sitting. Expect to rewrite it several times, as the thinking develops and as the first real decisions — the site, the budget, the team — force compromises with the original idea. Give every version a number and a date, and keep the earlier ones: a concept document that is never revised belongs to a concept that was never really tested.

The restaurant brief

From the concept document comes the restaurant brief: the version written for the people who will design, build, and run the restaurant. It does not replace the concept document; it translates it into the language each collaborator can act on, and it adds what they need to know about the project around it — the budget available, as precisely as it is known, the target dates, and the status of the site and of the key appointments. Every recipient works from the same version. When a significant decision changes the concept — a site that changes the number of covers, a chef whose style moves the food in a new direction — update the brief, give it a new version number, and send it again to everyone. A field left blank in the brief is a decision left to a collaborator, and their assumption and our intention may not be the same.

Working Files from the Toolkit

T0.1 — CONCEPT DOCUMENT

T0.2 — RESTAURANT BRIEF

Concept Checklist

1. Origin statement written, specific enough to suggest the direction of the restaurant.
2. Idea tested against the three questions: a guest, commercial viability, sustainability.
3. Main occasion defined.
4. Spending decision of the main guest described.
5. Main guest described along the four dimensions and as one specific person.
6. Secondary guest described, if there is one, with how the restaurant serves it without diluting the main experience.
7. Who the restaurant is not for written down.
8. Guest experience described in its six moments, in the guest's words.
9. Style of service, seating, meal periods, and days of opening confirmed.
10. Number of covers confirmed, with the minimum below which the concept does not work.
11. Reservation policy, length of visit, and table use confirmed.
12. Role of the bar and drinks confirmed, with takeaway, delivery, and private dining if they are part of the model.
13. Food philosophy written in a few sentences.
14. Structure of the menu defined: ordering, sections, arc, sharing, frequency of change, dietary offer.
15. Signature territory identified.
16. Sourcing position confirmed, honestly matched to the cost base.
17. Drinks concept defined, including the offer without alcohol.
18. Service register described, with what the team always does and never does.
19. People the guest meets decided: host, sommelier, chef at the table, open or closed kitchen.
20. Price, register, and cultural position confirmed and coherent with each other.
21. Gap identified among the alternatives the guest would otherwise choose.
22. Positioning statement written, and the one thing the restaurant must be known for named.
23. Name chosen, tested with people who match the guest, and checked for website, social handles, and trademark.
24. Aesthetic brief written, with its productive tension.
25. Elements of the visual identity and the voice of the restaurant described.
26. Moodboard completed across the six territories.
27. Creative brief written, with non-negotiables and deliverables.
28. Concept document written, numbered, and dated.
29. Restaurant brief written and sent to every collaborator in the same version.

PHASE 1

DECIDE & PREPARE

From the concept on paper to a business plan and a team of professionals

Before this phase begins, the concept is already written: what the restaurant is, who it is for, its price level, and why a guest would choose it. The concept does not answer two questions that every operator must answer before spending serious money. First: is there enough money to open this restaurant and keep it running until it pays for itself? Second: if the restaurant fails, can we survive the loss? Until both answers are written down and checked, we should not pay for anything else — not a site, not a designer, not a contractor. Any money we spend on them goes into a project that may still turn out to be impossible.

The phase works on two fronts at the same time. The first is the numbers. We calculate the cost of opening: the building work, the equipment, the professional fees, and the costs that start before the first guest arrives, such as rent and salaries. We work out in which month each of those payments falls due. We estimate the running costs of the restaurant once it is open — food, staff, rent, utilities — and the sales it needs every week to cover them. The second front is the professionals. The accountant comes first, because every figure depends on knowing how much restaurants really cost in our market. The attorney follows, to set up the company. Then come the ones the next phase cannot start without: a commercial real estate broker to search for the site, an insurance broker, and a graphic designer.

This is the phase in which a mistake costs least to correct. If the numbers show that the concept cannot work, we can still change it, because nothing has been signed. The phase ends when two things are done: the business plan is written and checked by the accountant, and all these professionals are appointed, so the search for a site can begin.

Key Moments in Phase 1

The first conversation with a lender rarely goes the way we rehearsed it. We expect questions about the concept. Instead, the lender asks about our personal finances, our experience, and what happens if the first year goes badly. Treat the meeting as research, not as a pitch. During the meeting, write down every document the lender mentions and every figure they ask for. Then write the business plan so that it answers those questions.

When the accountant reviews our projections for the first time, they usually lower the expected sales. It feels like a vote against the project. It is the opposite: if a figure convinces the accountant, it will convince a lender. Ask the accountant to explain

each change in writing. Then correct the assumption that produced the figure — the number of covers, the table turns, or the average spend — instead of simply typing in a new total.

The personal exposure exercise (Deep Dive 1.1) ends with one figure: the most money we could lose if the restaurant fails. Show that figure to the people we live with before any lender or investor sees it, and show them the worst case next to it. If the household decides together to go ahead, that decision holds up through the hard months much better than a decision taken alone and explained afterwards.

Halfway through the phase, lenders start asking who is on the team, and we feel pressure to appoint the first credible candidate for every role. Put a date in the calendar for each appointment, meet at least two candidates for each role before that date, and appoint on the day.

Who Is Involved in Phase 1

Operator

Takes the one real decision of this phase: whether to go ahead with the restaurant, at what size, and with how much personal money at risk.

Accountant

The first professional appointed. Checks every figure against what restaurants really cost and earn in this market, and builds the cash flow model with us.

Attorney

Sets up the company together with the accountant, and checks the business plan for legal problems. The attorney will advise us until opening day and after, so how quickly they respond matters as much as what they charge.

Lenders and Investors

Not appointed, and not yet asked for money. In this phase we talk to them only to learn what they finance, what they need to see from us, and how long their process takes.

Insurance Broker

Appointed now, to list every insurance policy the restaurant will need before we have a site to insure.

Commercial Real Estate Broker

Appointed now, so that the broker can start searching for a site on our behalf as soon as the next phase begins.

Graphic Designer

Appointed now, so that the logo, colours, and typefaces are ready before the architect and the interior designer start their work.

Concept

Briefing the professionals we will hire

The concept document is written for us, and it is long. The professionals we are about to contact need something shorter: one page that tells them what we are building, roughly how much it will cost, where, and what we need from them. Every candidate receives the same page, so we can compare their answers and their fee estimates fairly.

We find the candidates through people, not through directories. Operators who have opened recently, landlords, suppliers, and local industry associations know which accountants understand restaurants and which architects have built kitchens that work. A small network of contacts, built at the start, helps with every appointment that follows. It also gives us information about the local market that no professional will offer on their own.

Write the one-page project brief.

Responsible: Operator

Summarise the concept, the estimated investment, the target area, the timeline, and the scope of work the professional would handle. The concept part is the Restaurant Brief reduced to a few lines. Use the same page for every discipline and change only the scope section. A clear brief shows each candidate that the project is organised and serious. It also allows them to give a fee estimate we can compare with the others, before the first meeting.

Build the referral network.

Responsible: Operator

Identify the industry associations, trade events, and local hospitality groups in the target area, and the operators who have opened a restaurant there in the last few years. Meet at least two of these people early in the phase. Ask three questions about every professional they mention: who did you use, would you use them again, and who would you avoid? Keep a short list of names for each role the project will need.

Finance & Funding

Costs, cash flow, break-even and the business plan

We build the numbers in four steps, each more precise than the one before. First, a rough figure for the total cost of opening, so that we know the size of the project. Second, the same figure broken down into its individual items, each with a source. Third, the month in which each of those payments falls due. Fourth, the sales the restaurant must make every week, once it is open, to cover its running costs. Only when these four answers exist can we write a business plan that says something useful.

We look for funding after we have the numbers, not before. Early in the phase we list every possible source of money, and we speak to at least one lender while the business

plan is still a draft. We do not ask anyone for money until the accountant has reviewed our projections. A lender who sees a plan with weak numbers remembers it, even after the numbers have been corrected.

Appoint the accountant.

Responsible: Operator

The accountant is the first professional appointment of the opening. Before we can make the cost estimate reliable, check which public funding programmes we qualify for, or talk to a lender with any credibility, we need someone who knows what restaurant openings cost in this specific market. Choose one with hospitality clients, appoint before the business plan is written, and confirm scope and fee in writing before the first piece of work begins.

Build the cost estimate.

Responsible: Operator • Verified by: Accountant

Start with a rough figure for the total cost of opening, divided into the seven areas listed below. It only needs to be accurate enough for the first conversations with lenders. Then break each area down into its individual items, and give each item a figure and a source: an accountant's benchmark, a ballpark from a commercial contractor for the type and size of space we have in mind, a supplier's indicative price. These are still estimates, not quotes, but none of them is a guess. Deep Dive 1.2 sets out the method.

Reference Range

Typical share of total project cost by area — starting ranges to check with the accountant against the local market. Construction and fit-out: 35–50%. FF&E — kitchen and bar equipment, furniture, and fixtures: 15–24%. OS&E — smallwares, tableware, glassware, cutlery, linen, and uniforms: 5–10%. Technology: 2–5%. Pre-opening costs — rent, staff, stock, and marketing before the first service: 10–18%. Professional fees and permits: 5–10%. Working capital reserve: 10–15%. The areas do not all reach the top of their range at once; the condition of the site and the quality of the finishes decide where each project falls.

Build the pre-opening cash flow model.

Responsible: Accountant • Verified by: Operator

The cost estimate tells us whether we have enough money in total. The cash flow model tells us whether the money will be in the bank in the month each payment is due. Map every expected payment month by month, from now to opening day — fees, deposits, rent from the lease signature, construction stage payments, equipment orders, payroll from the first hires — against the capital available at each point. Deep Dive 1.4 sets out the method.

Estimate the break-even point.

Responsible: Operator • **Verified by:** Accountant

The break-even point is the level of sales at which the restaurant covers all its running costs, without making a profit or a loss. Before writing the business plan, estimate it and check that the restaurant can realistically reach it. Express the result in covers per week and as a share of the restaurant's maximum weekly capacity. If the restaurant would need to be almost full at every service just to break even, the concept has to change now, while nothing is signed. Deep Dive 1.5 sets out the method.

Write the business plan.

Responsible: Operator • **Verified by:** Accountant

The plan serves two readers: a bank, an investor, or a partner deciding whether to back the project, and the operator and team, who will use it as their reference for every decision that follows. Both need an honest document with specific numbers and clear logic. It has six sections: the concept; the market; the financial projections, in three scenarios; the funding — total cost, sources of money, and repayment; the team; and the risks, with three to five things that could go wrong and our response to each.

The team section includes a one- or two-page profile of the operator: not a CV, but a focused account of relevant experience, previous business ownership, and the skills brought to running a restaurant. Where restaurant experience is limited, describe the transferable skills honestly, say openly what we do not yet know, and name the people who will cover those gaps.

In practice:

Write the financial projections last. The other five sections can be drafted from what we already know; the projections need the accountant's review first.

Have the accountant review the projections.

Responsible: Accountant • **Verified by:** Operator

Before any lender or investor sees them, the accountant reviews the projections line by line: the sales assumptions — number of covers, table turns, average spend, how full the restaurant will be — against what this concept can achieve in this market; food and staff costs against similar restaurants; the total capital needed, including the contingency and the working capital reserve; and the taxes that follow from the type of company we chose.

Map the funding options.

Responsible: Operator • **Verified by:** Accountant

List every realistic source before filtering any: personal savings, family and friends, bank lending, public programmes for small businesses or first-time entrepreneurs, and private investors. For each, note roughly how much might be available, on what conditions, and how long it takes. If family or friends lend or invest money, put it in

writing from the start: either as a loan with clear terms, or as a defined share of the company. Public programmes vary widely by country and region; the accountant or a local business adviser is the fastest route to a reliable list.

For bank lending, look for lenders who already finance restaurants. A lender used to mortgages and ordinary business loans sees the uneven income of a restaurant as a risk.

Open a first conversation with a lender or investor.

Responsible: Operator

At this stage we need one conversation, not a loan application. Ask two questions: do you finance restaurant businesses, and what would you need from us to start a formal review? The answers tell us how the lender's process works and how long it takes, and they show us what the business plan must include.

If a private investor is part of the plan, prepare a one-page summary of the opportunity: the concept, the investment, the return the investor can expect, and the role we are offering them. This summary is not the business plan. Its only purpose is to show whether a longer conversation is worth having.

Legal, Permits & Insurance

Setting up the company and appointing its first professionals

In this phase, the legal work is about setting up the company, not about contracts. Before anything can be signed in the name of the restaurant, the restaurant must exist as a company. The type of company is one of the few decisions of this phase that are expensive to undo: changing it later means new contracts, new bank accounts, and often a new tax position, so it is worth taking slowly and only once.

We also appoint the insurance broker early. We do not need any policy yet. But the first policies are needed on the day we sign a lease or a construction contract, and a broker who knows hospitality needs time to prepare them.

Shortlist and appoint the attorney.

Responsible: Operator

We need an attorney who has handled restaurant leases, company formation, and licensing before; a general business attorney may miss problems that a hospitality specialist would spot immediately. Ask other operators who they use and confirm experience with openings of a comparable scale. At appointment, confirm in writing the scope for the whole opening, the fee structure, who in the firm will handle the work day to day, and the response time for urgent questions. During an opening, urgent legal questions come up often.

Select the legal entity structure.

Responsible: Attorney, Accountant • **Verified by:** Operator

The type of company determines how the business is taxed, how liability is shared between owners, and how capital can be raised or the business sold. Decide it with the attorney and the accountant together. The attorney knows the legal consequences of each option, the accountant knows the tax consequences, and advice taken in two separate meetings often has to be corrected later, at a cost.

The usual options are a sole trader, with full personal liability; a partnership, which needs a written agreement; a limited company, which separates the business from personal assets and is the norm for any significant opening; and a structure with separate entities for the operating business and the property, used when the building is owned or more sites are planned.

Open the company's bank account as soon as the company exists.

In practice:

For a first restaurant on a single site, a limited company is usually the right starting point: it protects personal assets without unnecessary complexity. Confirm it with the attorney and the accountant before filing anything.

Shortlist and appoint the insurance broker.

Responsible: Operator

Shortlist two or three brokers who place insurance for restaurants regularly. A restaurant needs several kinds of cover, some of them specific to hospitality, and a general broker will not know the requirements or the typical premiums. At appointment, ask the broker to list every policy the restaurant will need, so that quotes can be requested as soon as we have a site.

Site & Lease

Choosing the broker who will find the site

The search for a site starts in the next phase, but we choose the broker who will lead it in this one. A broker who specialises in food and beverage property brings what no listing offers: properties that never reach the open market, relationships with landlords, and the history of the street — which units have failed, which landlords are difficult, why the corner unit has been empty for two years.

We appoint the broker early because finding the right site usually takes longer than any other part of the opening, and it cannot be rushed. A broker chosen in a hurry, when the money is almost in place and we are impatient to start, is chosen because they are available, not because they are good.

Shortlist and appoint the commercial real estate broker.

Responsible: Operator • **Verified by:** Accountant

Find two or three candidates through other operators and commercial landlords and confirm their experience with restaurant leases. A general commercial broker shows us every property that is available; a hospitality specialist shows us only those that could work as a restaurant. At appointment, confirm in writing that the broker acts for us, who pays the broker and how, and what happens to the fee if we find a site through another route.

Marketing & PR

Appointing the designer of the brand

The visual identity — logo, colours, typefaces — is the first part of the restaurant that people see, on a hoarding, a website, or a social media post, long before the restaurant opens. It also affects the building more than most operators expect: it guides the colours and materials chosen by the interior designer, the positions the architect must leave for signs, and the façade design the landlord will be asked to approve.

That is why we appoint the graphic designer now, with the other professionals, and not when the opening campaign begins. The designer works from the concept document and starts early enough for the identity to guide the design of the restaurant instead of being added at the end.

Shortlist and appoint the graphic designer.

Responsible: Operator

Shortlist two or three designers who have worked for restaurants and can show complete identities — applied to menus, signs, uniforms, and digital channels — not just logos. At appointment, confirm scope and fee in writing, and confirm that the restaurant will own the final identity and receive every source file.

What Might Go Wrong in Phase 1

- Asking the accountant to make the numbers work. An accountant who wants the project to be funded may, without meaning to, start making the plan look better than it is, and the money is borrowed against sales the restaurant will never reach.
- Spending on visible things before the decision is taken. A logo, a website domain, a deposit on equipment seen at a trade fair: each one feels like progress, but each one commits money to a project that has not yet passed its own financial test. In this phase, the only thing we pay for is advice.
- Keeping the working capital reserve in the same bank account as the construction budget. When construction costs more than planned, the extra money is taken from whatever cash is available, and by opening day the reserve has disappeared, just when the first months of trading need it.
- Choosing the type of company only to pay less tax in the first year. The structure that saves the most tax at the start may be the one that makes it hardest later to bring in a partner, open a second restaurant, or sell.
- Letting one chain of recommendations build the whole team. The broker recommends the attorney, the attorney recommends the accountant, the accountant recommends the contractor. Each may be competent, but each owes something to the others, and none of them will point out the mistakes of the person who recommended them.
- Keeping two business plans. With an optimistic version for the bank and a more cautious one for ourselves, the bank lends money for a restaurant we are not actually building, and every later difference between plan and reality is measured against the wrong figures.

Deep Dives — Phase 1

The five Deep Dives of this phase share one purpose: to give the decision to open a financial foundation that a lender, a partner, and we ourselves can trust. The first looks at the operator rather than the restaurant: how much we can afford to lose. The other four look at the project. They show what it will cost to open, when each payment will fall due, what the restaurant can earn once it is trading, and the level of sales it needs to cover its running costs.

The methods build on one another. The personal exposure sets the limit of the risk we can accept. The opening budget gives the total cost of the project, and the cash flow model spreads that cost over the months before opening. The P&L projection supplies the cost ratios that the break-even calculation uses, and the break-even, in turn, tells us whether the working capital reserve in the budget is large enough. Each method has a downloadable template that turns it into a working document. The book explains the reasoning; the template is where the work is done.

DEEP DIVE 1.1

How to assess your personal financial exposure

TEMPLATE AVAILABLE FOR DOWNLOAD: T1.6 — CAPITAL PLAN

When to read this. First in this phase, before any estimate or funding conversation. The aim is not to discourage the project. It is to make sure that we decide to go ahead knowing exactly how much we could lose.

Step 1. Map every asset at risk

List every personal asset of material value: savings, investments, the part of a property we own outright, pension funds, vehicles. For each, note the current value and whether it would be protected or exposed if the business failed. Protection depends on the asset and on the jurisdiction. Assets held inside a limited company are generally out of reach of personal creditors, but a personal guarantee removes that protection for the obligation it covers. Pension funds are often protected; the family home may or may not be, depending on how it is owned. This list is not a legal opinion: the attorney confirms which assets are really protected.

Step 2. List every liability we accept

An opening creates personal liabilities that are not all obvious at the start. The capital we put in is lost if the business fails. A personal guarantee on a bank loan lets the bank pursue us for the balance. A personal guarantee on the lease lets the landlord pursue us for the remaining rent — often the largest single liability in a restaurant failure. Loans from family or friends become formal debts the moment the business cannot repay them. If we lend money to our own company during the opening and the company fails, we are repaid only after the other creditors. The total of all these items is the most we could lose if the business failed completely, before anything is recovered.

Step 3. Define the survivable loss

The survivable loss is the most we could lose without permanently damaging our financial position: without losing the home, without emptying the retirement fund, without a debt that takes more than a set number of years to clear. It is an uncomfortable figure to write down, and it is the most important number of this phase, because it sets the limit of how much money we can really put at risk. If the most we could lose (Step 2) is larger than the survivable loss, the project needs a different funding structure — less personal liability and more money from other investors — or a complete rethink.

In practice:

Go through this with the accountant or an independent financial adviser before presenting the project to any funder. When someone else lays out the numbers, we see them more clearly than when we assess ourselves.

Step 4. Measure the income gap

Opening a restaurant usually means a period without a salary, or with much less than before, and it can last from several months to two years. Calculate how much money we need each month for our personal fixed costs — housing, loan repayments, household costs, dependants — and how long our personal reserve can cover them without income from the restaurant. If the answer is under twelve months, the business must pay a salary from an earlier point, or the reserve must be built up before the project starts.

▲ *Put a modest owner's salary into the plan from the first months of trading, as a real cost the model must carry. Operators who leave it out often start taking money informally from the working capital reserve when their personal finances get tight. That uses up the cash that is meant to protect the business when it is most vulnerable.*

Step 5. Test the worst case, not the base case

The worst case is not unusual: revenue well below plan in the first year, a fit-out that runs over budget, and a major piece of equipment that fails in the first months. All three have happened together to operators who did not plan for them. Apply that case to the map from Steps 1 and 2. If the business fails at month eighteen with eight years left on the lease, what is our personal liability, what remains, and how long does recovery take? If the honest answer is unacceptable, the project needs a different structure that carries less personal risk — not necessarily a smaller project. This is not a forecast of failure. The exercise confirms that, if the worst does happen, we can survive it, and that the consequences do not fall on people who never chose to take the risk.

At the end of this exercise we hold three figures: the most we could lose, the loss we can survive, and how long we can live without a salary. Together they set the limits within which every other decision of this phase must stay — the budget, the funding, every guarantee we are asked to sign. Fixed now, with a clear head, they protect the project from the decisions that will later be taken under pressure.

DEEP DIVE 1.2

How to build the opening budget

TEMPLATE AVAILABLE FOR DOWNLOAD: T1.1 — OPENING BUDGET

When to read this. When the rough cost estimate is being broken down into individual items. The most common budget error is not underestimating a line; it is leaving out whole categories of cost that begin before the first service.

Step 1. Build the seven areas, line by line

Every line carries three figures over the life of the project: the estimate, the committed amount once a contract or order is signed, and the final actual after opening. At this stage only the estimate exists, but the structure must be complete, because any cost missing from the budget will also be missing from the funding.

Construction and fit-out. Structural work, including load-bearing alterations, roof, and façade; mechanical, electrical, and plumbing work, including any power upgrade, the gas connection, the extraction system, and air conditioning; kitchen construction — wall and floor finishes, drainage channels, the grease trap; front-of-house finishes, the bar structure, and fixed seating; and the contractor's preliminaries — site management, temporary power and water, waste removal, site insurance — which are often quoted separately and often forgotten.

FF&E — furniture, fixtures, and equipment. Everything that is not part of the building structure but is installed or placed in it for the life of the restaurant: kitchen cooking, refrigeration, dishwashing, and preparation equipment; bar refrigeration, glass washer, ice machine, coffee machine; dining room tables, chairs, banquettes, and service stations; decorative lighting and loose fixtures.

OS&E — operating supplies and equipment. The items the team uses and replaces during service: kitchen smallwares and utensils; crockery, glassware, and cutlery; table and kitchen linen; uniforms; bar tools. Price them per cover and multiply by the par level, typically three times the cover count.

Technology. Point of sale and card terminals, the reservation system, the network, security cameras, and the music system.

Pre-opening costs. Costs that depend on time, not on work done, and that start before the first guest arrives: rent from the lease signature, net of any rent-free period; the salaries of the General Manager and Executive Chef, who join months before opening, and of the team, who join weeks before for training; the opening stock, usually three to four weeks of projected usage; pre-opening marketing; first consumables; utilities and software subscriptions from the day they start.

Professional fees and permits. Legal work — company formation, lease, shareholders' agreement, employment contracts; accountancy; design — architect, interior designer, kitchen designer, engineers; and every licence, application fee, and inspection charge.

There are always more professionals involved than expected, and each one's work is broader than first assumed.

Working capital reserve. The cash that pays the restaurant's bills during its first months of trading, while sales are still growing. Size it at ninety days of fixed operating costs: rent, salaries at the planned staffing level, loan repayments, utilities, and insurance. It is not an investment in the restaurant. It is a safety margin: it keeps a restaurant that is trading well, but has not yet reached break-even, alive long enough to prove itself.

Step 2. Apply the contingency where overruns happen

Apply the contingency only to construction and FF&E, because those are the areas where costs usually overrun. Professional fees are largely fixed at appointment; pre-opening costs and the reserve are managed on their own terms. The contingency is not money to spend, and it is not a fund for upgrades. It is money set aside for the cost of our estimates being wrong.

Reference Range

Contingency on construction and FF&E: at least 10% on a site that has been a restaurant before; around 15% on a blank retail or office unit that needs full mechanical and electrical installation; up to 20% on a listed building or a structurally complex site.

▲ *Never present a budget with the contingency already allocated to specific items. Once the contingency has been given a specific purpose, it is no longer a contingency.*

Step 3. Give every figure a source

Each line states where its number comes from: a contractor's ballpark, a supplier's quote, the accountant's benchmark, a comparable recent opening. At this stage estimates are normal, but a figure with no basis at all is not acceptable. A lender will ask where each major figure came from, and an honest source is more credible than a polished total. Writing the source down also forces us to check it.

In practice:

Before the budget goes into the business plan, ask the accountant to point out any category that looks out of range for a project of this type and size. A line 40% below the market price is not a saving. It is an overrun that will appear later.

The result is not yet a budget we can spend from, but a complete map of what the opening will cost, with no category missing and every figure traceable to its source. It will change many times: each quote, contract, and order will replace an estimate with a real figure. What must not change is its structure, because every cost that is not in it now will be missing from the funding too.

DEEP DIVE 1.3

How to build a P&L projection for the first twelve months

TEMPLATE AVAILABLE FOR DOWNLOAD: T1.2 — TWELVE-MONTH P&L PROJECTION

When to read this. Before writing the financial projections of the business plan. Some projections list the costs first and then invent a sales figure big enough to cover them: that is wishful thinking. This method starts from what the restaurant can realistically sell.

Step 1. Build revenue from four drivers

Revenue = covers × table turns × average spend × trading sessions. Each of these four figures can be researched and justified separately.

Covers. Before we have a site, we calculate the number of covers from the size of space we are looking for and the type of service. A working assumption for table service is 1.5 to 1.8 square metres of dining room per cover: less in a tight urban format, more in a spacious one. The figure is revised once a site exists.

Table turns. One turn is a full cycle at a table, from arrival to departure. A relaxed dinner-only restaurant may start at one turn per service and grow towards 1.5; a business-district lunch may reach two; an all-day café, three or four across the day. Use a conservative figure for the first months, and reflect high and low seasons, holidays, and local events.

Average spend per head. Total revenue divided by covers, food and drink included — not the average price of a main course. Not every guest orders a starter or a dessert; most order something to drink. Take the figure from similar restaurants — their menus, their prices, a meal eaten there with the bill read line by line: what they actually take per guest is the most reliable benchmark available, and the analysis of the competitors in the next phase will confirm it. Use the figure net of sales tax and any service charge: neither is revenue of the restaurant.

Trading sessions. A dinner-only restaurant open five evenings has five sessions a week, not five trading days. Multiply the weekly sessions by fifty-two (the weeks of the year) and reduce the result by 10–15% for seasonal variation, private events, holidays, and unplanned closures.

In practice:

Put each driver in its own input cell. Then a single change — for example, table turns from 1.4 to 1.1 — immediately shows its effect on sales, and the model can be tested. If the drivers are hidden inside formulas, it cannot.

Step 2. Apply the three cost ratios

Three costs, each expressed as a percentage of sales, define how the restaurant operates: food and beverage cost, staff cost, and occupancy cost. Food cost is measured against food revenue, not total revenue. Staff cost includes salaries, employer taxes, and

contributions. It is the cost that suffers most when sales are lower than planned: if sales fall by 10%, staff cost as a share of sales rises, unless working hours are cut — and a small team often cannot cut them. Include the owner's own work at its market value, so that the model shows whether the restaurant makes a profit without the owner working for free. Occupancy cost — rent, service charge, and local property taxes — is fixed: it does not fall when sales fall. A rent that is affordable at the planned sales becomes a problem if sales reach only 70% of plan.

Reference Range

Food cost: 25–28% of food revenue for casual and mid-market concepts, 33–35% where ingredients are premium. Staff cost: around 32% of total revenue, management included. Food and staff together: 57–65% of revenue at stable trading; above 65% leaves too little to cover fixed costs. Total occupancy cost: up to 10–12% of revenue in full service, up to 8–10% in fast casual, counter service, and café formats.

Step 3. Build the fixed cost base

Then add the costs that do not change with sales: utilities, insurance, accountancy and bookkeeping, bank charges, software, repairs and maintenance, waste. Loan repayments are not an operating cost, but they affect the cash position directly and belong in the model. Sales, minus the three cost ratios and minus these fixed costs, give the EBITDA — Earnings Before Interest, Tax, Depreciation, and Amortisation. It is the figure lenders and investors look at to judge whether the restaurant can make money.

Step 4. Build three scenarios from the drivers

The conservative, realistic, and optimistic scenarios are not the base revenue multiplied by 80%, 100%, and 120%. Each scenario is built by changing the four drivers and the cost ratios.

Conservative: turns 15–20% lower and each cost ratio at the top of its range.

Realistic: our best estimate of how the restaurant will perform once it is established.

Optimistic: average spend 10% higher and each ratio at the bottom of its range.

Each scenario must include the ramp-up: a new restaurant does not reach its normal level of sales on the first day.

Reference Range

Ramp-up of a new restaurant, as a share of stable revenue: 40–55% in months one to three, 60–70% in months four to six, and the stable level from month seven, usually 70–85% of the restaurant's capacity.

In practice:

Ask the accountant one specific question about the realistic scenario: does it match what similar restaurants in this market actually achieve? If it needs performance well above theirs, it is not the realistic scenario. It is the optimistic one.

A projection built this way does not promise what the restaurant will earn; it shows what it must achieve, and on which assumptions. Every figure can be traced back to a driver that can be checked — in the competitors' dining rooms, with the accountant, and later in the first weeks of trading. When reality differs from the plan, we will know exactly which assumption was wrong, and that is what turns a forecast into a tool for running the business.

DEEP DIVE 1.4

How to build the pre-opening cash flow model

TEMPLATE AVAILABLE FOR DOWNLOAD: T1.3 — PRE-OPENING CASH FLOW MODEL

When to read this. At the same time as the cost estimate, not after it. A project can have enough money in total and still run out of cash before opening, if the money arrives later than the payments fall due.

Step 1. Set up the structure

One column per month, from now to opening day. Three input areas: the money coming in — the owner's equity, loan drawdowns, investor tranches, each in its own row; the payments going out, by cost category; and the running balance, which is the opening balance plus money in minus money out, month by month.

▲ *Revenue is zero until opening day. Do not add projected trading income to the pre-opening model. The model answers one question only: will the money hold out every month until opening? If we add expected sales, it no longer answers that question clearly.*

Step 2. Place every payment in the month it falls due

Each budget line goes into the month its invoice is paid, not the month the work is done. Professional fees start with the first appointments and run monthly or by milestone; confirm each schedule at appointment and enter it at once. When the lease is signed, there is first a deposit — often several months of rent paid in one month — and then the monthly rent; show any rent-free months clearly. Construction is paid in stages tied to the programme, usually a few weeks after the work; the retention released after completion is not a pre-opening payment. Kitchen equipment and long-lead materials usually require a deposit of 30–50% at order and the balance on delivery. Salaries start on each hire date and include employer costs. Opening stock, marketing, uniforms, and training materials are all paid in the last few weeks before opening.

If the budget is net of sales tax, add the tax paid on each invoice in the month it is paid, and the refund only in the month it is expected to arrive; on a fit-out, the gap can last several months.

Reference Range

The most expensive month usually comes when a construction stage payment, the equipment deposits, and the first rent are all due at the same time; that single month can require 15–25% of the total project cost. The second most expensive period is the last few weeks before opening, when salaries, opening stock, final deliveries, and launch marketing are all paid together.

Step 3. Map the inflows and set a minimum buffer

The owner's own money is usually available from the start. Loan drawdowns follow the lender's terms, either in one release or at project milestones; investor money follows

the investment agreement. Every month, the balance at the end of the month must stay positive and above a minimum safety margin. Funding received as a single sum at the start rarely causes problems. Funding received in instalments must arrive the month before it is needed, not in the same month.

In practice:

Set the minimum safety margin at one month of average payments. Falling below it is a warning. Reaching zero is a crisis. A negative balance means the project needs more capital, or a different payment schedule, before that month arrives.

Step 4. Close every gap in the right order

If the balance falls below the safety margin in any month, there are four responses, to be tried in this order. Move a payment: most contractors and suppliers will shift a milestone by a few weeks if asked early. Bring money in earlier: draw down part of the loan, or put in our own money, sooner. Postpone a cost that nothing else depends on. Only then, increase the total capital. Moving payments is cheaper and faster than raising more money, but it works only if we ask months before the problem, not in the week the payment is due.

Step 5. Keep it alive

The first version is made almost entirely of estimates. It becomes more useful every time a real cost replaces an estimate: a fee letter, a signed construction contract with its payment schedule, a confirmed equipment deposit. Make one person responsible for the model — the accountant or the operator — and review it at every meeting with the accountant and every time an important contract is signed.

▲ *A model that has not been updated for two months gives a false sense of security. Treat it as unreliable until it is brought up to date.*

Kept up to date, the model becomes the most practical tool of the opening: it shows, months in advance, the moment when the money could run short, while there is still time to move a payment or bring funding forward. Projects rarely fail for lack of money in total; they fail because the money is not there in the month it is needed. This model is how we see that month coming.

DEEP DIVE 1.5

How to estimate the break-even point

TEMPLATE AVAILABLE FOR DOWNLOAD: T1.4 — BREAK-EVEN CALCULATOR

When to read this. After the P&L projection, to check that the concept can work at all. This estimate is accurate enough to test whether the concept can work, but not to run the business with. The final figure is calculated later, when the real costs are known.

Step 1. Calculate the maximum weekly capacity

Maximum weekly sales = covers × table turns per service × services per week × average spend. Use the number of covers in the concept, without inflating it. A casual restaurant with a meal of about an hour typically turns 1.5 to 2.0 times a service; fine dining with a meal of two hours, 1.0 to 1.25. If unsure, use 1.0. Take the average spend from similar restaurants, excluding sales tax, not from the prices we plan to charge. A restaurant open six evenings runs six services a week; one open for lunch and dinner every day runs fourteen.

Step 2. Separate fixed from variable costs

Using the cost ratios from Deep Dive 1.3, divide every cost into one of two groups. Variable costs go up and down with sales: food, beverage, and the part of staff cost that changes with the number of covers. Fixed costs stay the same however many covers are served: rent, core management salaries, insurance, professional fees, and the fixed cost base. Other running costs — utilities, marketing, maintenance, cleaning, linen, software — typically add 8–12% of revenue at this stage.

Step 3. Calculate the break-even

Break-even revenue = fixed costs ÷ (1 – variable cost ratio). With weekly fixed costs of 6,000 and variable costs at 65% of revenue, 35% of every sale is left to pay the fixed costs, and the break-even is $6,000 \div 0.35 = 17,143$ a week. Divide this figure by the average spend to express it in covers: at 45 a head, 381 covers a week. The team thinks in covers, not in sales totals, so this is the figure that matters day to day.

Step 4. Read it against capacity

Express the break-even as a share of maximum weekly capacity, then run it at three levels of utilisation: 65% for the realistic case, 50% for the conservative case, 80% for the optimistic case. A business that covers its costs at 50% is strong enough to survive a slow start. One that loses a lot of money at 50% needs a larger reserve to get through the ramp-up.

Reference Range

A break-even at 55–65% of capacity leaves room for the restaurant to grow into its sales and still cover its costs. Above 80%, there is almost no margin for error: the concept, the cost structure, or the pricing has to change before going further.

Step 5. Test the working capital reserve

Using the conservative scenario and the ramp-up from Deep Dive 1.3, add up the weekly losses from opening day until the restaurant reaches break-even, then add 20%. If the result is larger than the ninety-day reserve in the budget, either the reserve must grow or the plan must change: lower fixed costs — rent, fewer staff at opening, postponed expenses — a higher average spend, or more capital. All three levers are available now. None of them is available once the lease is signed and the fit-out has started.

The break-even point is the figure that closes the work of this phase. It brings together the budget, the projection, and the reserve, and answers the question the whole phase was built to answer: can this restaurant, at this size and this price, pay for itself in a time we can afford? If the answer is yes, the business plan can be written with confidence. If it is no, this is the cheapest moment to change the concept, because nothing has yet been signed.

Phase 1 Checklist

1. One-page project brief written and used with every candidate.
2. Referral network in place, with a short list of names for each role.
3. Accountant appointed, with scope and fee in writing.
4. Cost estimate complete across the seven areas, every figure with a source.
5. Pre-opening cash flow model built, with one person responsible for it and a minimum safety margin.
6. Break-even estimated in covers per week and as a share of capacity.
7. Business plan written in six sections, including the operator's profile.
8. Projections reviewed and signed off by the accountant.
9. Funding options mapped, with amounts, conditions, and timing for each.
10. At least one conversation held with a lender or investor; investor summary written where relevant.
11. Attorney appointed, with scope, fee, and response times in writing.
12. Type of company chosen with the attorney and the accountant together.
13. Insurance broker appointed, with every required policy mapped.
14. Commercial real estate broker appointed, acting for us, with the fee arrangement in writing.
15. Graphic designer appointed, with ownership of the identity confirmed.

Working Files from the Toolkit

- T1.1 — OPENING BUDGET
- T1.2 — TWELVE-MONTH P&L PROJECTION
- T1.3 — PRE-OPENING CASH FLOW MODEL
- T1.4 — BREAK-EVEN CALCULATOR
- T1.5 — BUSINESS PLAN TEMPLATE
- T1.6 — CAPITAL PLAN
- T1.7 — REVENUE BY SERVICE PERIOD

PHASE 2

FIND & SECURE

From the first site brief to the signed contracts

At the end of Phase 1 we have a written business plan and a team of professionals. In this phase we find the site and commit to it, with two signatures: the lease, and the construction contract with the builder. Until both are signed, we can still change any decision; it costs us time, but little money. Once they are signed, almost every change costs real money.

Three pieces of work run in parallel, and each depends on the others: finding the site, designing the restaurant, and pricing the construction. We cannot judge a site without the architect, we cannot design without a site, and we cannot price the build without a design. That is why we appoint the architect and the interior designer before we start visiting sites seriously, and why the lease is the last thing we sign, not the first. An operator who signs a lease to secure a space, and only then finds out what it will cost to build the restaurant in it, has done things in the wrong order. From that moment, every negotiation — with the contractor, the suppliers, the lender — starts from a position of weakness.

The kind of decisions we take changes during the phase. At the start we compare options: this site or that one, this architect or that one. At the end we take final decisions. Either a site can support the restaurant we planned, or it cannot, however attractive the street looks. Either the contractor's price fits the budget, or we must decide what to remove from the project. The phase ends when the lease and the construction contract are signed, and the budget has been recalculated with real prices instead of estimates.

Key Moments in Phase 2

The first visit to the site we end up wanting will feel different from the others. The light is right, the room has the proportions we imagined, and the broker mentions another party that is interested. On this visit, decide as little as possible. Agree nothing, discuss no terms, and leave with a date for a second visit with the architect. Then write the site summary in the car, before calling anyone, while we can still separate the facts from our enthusiasm.

Sooner or later the architect's written assessment comes back with a problem on the site we prefer: an extraction route that has to cross a neighbour's roof, a power supply that needs a utility upgrade. The temptation is to ask the architect for a clever design solution. The useful questions are simpler: how much will it cost to fix, and

how long will it take? Add that cost to the total investment and recalculate the sales-to-investment ratio the same day. If the ratio is still above the minimum, the problem is just an extra cost. If it falls below, the site cannot work, and we should walk away. The contractor's bid will almost always arrive above the estimate. Do not read it alone, and do not start from the total. Sit with the architect and go through it line by line, and end the meeting with a written list of decisions: which lines are reduced in scope, which are accepted as they are, and where the extra money will come from. In the days before the lease is due to be signed, there is often a reason to sign faster: another tenant, a landlord about to travel, a rent-free period that "may not be available next week". At this point, pressure to sign is a negotiating tactic; it does not mean the deal is really at risk. Ask the landlord for forty-eight hours of exclusivity in writing while the attorney completes the review.

Who Is Involved in Phase 2

Operator

Takes the two final decisions of this phase: which site to choose, and on what terms to commit to it.

Commercial Real Estate Broker

Works from the written site brief and presents only properties that meet it. Valuable for market knowledge, rents, and availability. The broker is paid only if a lease is signed: remember this when the broker's opinion and our numbers disagree.

Architect

First gives us a written opinion on whether each leading site can work; only then designs the restaurant. Remains responsible for the kitchen layout, even when a specialist kitchen designer draws it.

Interior Designer

Proposes the design direction, then turns it into a full specification of materials, finishes, furniture, and lighting, working with the architect from the first meeting.

Kitchen Designer

Where engaged, often through the equipment supplier, draws the kitchen under the architect's coordination, working from a map of how food, people, and waste move through the kitchen, not just from a list of equipment.

General Contractor

Walks the leading site, prices the final design, and signs the construction contract that governs the build.

Attorney

Confirms whether each leading site can be licensed for alcohol, builds the permit

register, drafts the shareholders' agreement where needed, and reviews the lease and the construction contract before anything is signed.

Accountant

Updates the financial model with every real cost as it arrives, and checks the new budget before the lease is signed.

Insurance Broker

Asks insurers for quotes on every policy the restaurant will need, so that the real costs can go into the financial model.

Marketing & PR*Reading the local market before choosing a site*

Before we judge any site, we need to know the local market: not the market in general, but the handful of restaurants our guests would choose instead of ours for the same kind of evening. Their prices show the most our guests are willing to pay. Their weaknesses show where we can do better.

This work runs alongside the site search and ends with one written conclusion: where our concept sits in this market, and why a guest would choose us over the places we have visited. We use that conclusion as the reference for every later decision about the menu, prices, service, and the opening campaign.

Analyse the competition as a paying customer.*Responsible: Operator*

First decide which restaurants count as competitors: five direct competitors at our price point and occasion, plus two or three indirect ones. Visit each direct competitor twice, at a busy and a quiet time, and eat a full meal. For each venue, record the menu and prices, the spend per head, the service model, how full the room is, who the guests are, and one thing they do better than anyone and one thing we would do differently.

Compile one page per venue, read their recent online reviews for patterns, and write the positioning statement: one or two sentences on where our restaurant fits in this market, and why guests will choose it. Share the file with the Executive Chef, the General Manager, and the marketing team as each comes on board. Deep Dive 2.1 sets out the method.

Site & Lease*From the site brief to the signed lease*

The search for a site works like a funnel: we start with many properties and end with one. It begins with a written brief the broker can work from: the area, the size, the rent ceiling, and the technical requirements the restaurant cannot do without: a route for the kitchen extraction, enough electrical power, gas, and permission to operate as a

restaurant. Every candidate is screened against that brief on paper before anyone visits. The properties that pass this first check are judged on two things at once: how much it would cost to open and run the restaurant there, and how much it could realistically earn — covers, bar revenue, the sales-to-investment ratio, and the availability and cost of a liquor licence.

Only one site, our first choice, goes through the full set of checks, called due diligence. That is where we pay for specialist inspections. Any one of them can reveal a problem serious enough to cancel the deal, and it is far cheaper to discover that before signing than after. We then negotiate the lease with the attorney, using what those checks revealed. Two conditions decide whether we sign: the architect's written confirmation that the final design fits the building, and a contractor's bid we can afford.

Write the site brief.

Responsible: Operator • **Verified by:** Commercial Real Estate Broker

The brief turns the concept into measurable requirements: the target area and its boundaries, the size range, the number of covers the space must hold, the maximum total occupancy cost, and the technical minimums — three-phase power, a feasible extraction route, gas if the menu depends on it, drainage, ceiling height, and planning permission to operate as a restaurant.

The broker applies it to every property before presenting it. The architect uses it as the technical checklist for every visit. If the brief changes halfway through the search, we have to revisit properties we could have excluded the first time.

In practice:

Give the broker a rent ceiling 10–15% below the real one. Whatever figure the broker hears will become the landlord's starting point in the negotiation.

Calculate the sales-to-investment ratio for every candidate site.

Responsible: Operator • **Verified by:** Accountant

The sales-to-investment ratio answers one question: will this site earn back the money we put into it while we still hold the lease? Divide the annual sales projected for that site in the realistic scenario of the financial model by the total investment required to open there: construction, FF&E, OS&E, technology, pre-opening costs, professional fees, and the working capital reserve. The result tells us how much the restaurant sells each year for every unit of money invested.

The thresholds come from the profit a restaurant can realistically keep. A well-run restaurant typically keeps around 10% of its sales as profit before tax. At a ratio of 1.5:1, an investment of 1,000,000 produces sales of 1,500,000 a year and a profit of about 150,000, so the investment is recovered in six to seven years — comfortably inside a ten-year lease. At 1:1, the same restaurant needs ten years to recover the investment, and the lease may end before the money is back. Below 1:1, the site almost certainly

cannot work.

Run the calculation on paper before any visit, using the details the broker sends with each property: the floor area gives an approximate number of covers, and the condition of the space gives an approximate cost of the works. The result is rough, but it removes the sites that cannot work before we spend time visiting them. Repeat it after the visit and the architect's assessment, with a realistic seating plan and a better estimate of the works, and once more for the leading site when the contractor's bid arrives. We sign the lease only if the ratio is still above 1.5:1.

Visit and assess the candidate sites.

Responsible: Operator • Verified by: Architect

Judge each site on how guests will find and reach it — search visibility, parking, approach, frontage — and on the technical installations it already has: power, gas, drainage, extraction. Never visit a site unless the architect is with us, or has told us beforehand what to check. After every visit, write a summary of the facts, not just our impressions. Deep Dive 2.2 sets out the method.

Obtain the architect's written feasibility assessment for each leading site.

Responsible: Architect • Verified by: Operator

The architect visits each leading candidate and states in writing whether the space can work: electrical capacity, structural constraints, extraction route, mechanical and plumbing infrastructure, and permitted use. This is not a design proposal. Our choice of site is based on this document, and we do not start negotiating the main terms of the lease on any site until we have it.

Confirm liquor licence availability for each leading site.

Responsible: Attorney • Verified by: Operator

A liquor licence is attached to the premises, not to the operator. The site's history, its location, and local licensing policy all affect whether a licence can be obtained and on what conditions. Ask the attorney, for each address: is a licence available, is there an existing one that can be transferred, what restrictions apply — hours, outdoor service, capacity — and what is the realistic cost and timeline?

Test the seating plan against the revenue model.

Responsible: Operator • Verified by: Architect

How we arrange the seats decides how much the restaurant can earn, so it is a financial decision before it is a design one. Sketch two or three configurations on the floor plan, varying the balance between dining seats and bar seats, and calculate the maximum revenue per service for each. We give the architect the layout whose revenue comes closest to the figures in our financial model.

Review the existing building: floor plan, structure, and floor levels.

Responsible: Architect • **Verified by:** Operator

Ask the landlord for the existing floor plan with load-bearing walls, columns, and any element that cannot be moved. A plan that looks open can hide a grid of columns that makes a proper kitchen impossible. If no current plan exists, commission a measured survey; it costs little and can stop us signing a lease on a space that cannot work.

Walk the floor with a level. A significant slope, common in older buildings, can make accessible entry and seating expensive to achieve. Ask the architect what the correction would cost before going further.

Obtain the code requirements for this building in writing.

Responsible: Operator • **Verified by:** Architect

Ask the local authority for the full building, fire, safety, and accessibility requirements that apply to a restaurant at this address. Get them in writing and hand them to the architect as a design input. Do not rely on what the landlord says: they may not know, and the inspector will apply the official version, not theirs.

Commission the technical inspections on the leading site.

Responsible: Operator • **Verified by:** Architect

Before the final design is ready, check that the building can support it. Confirm that the electrical supply and three-phase power can carry the planned kitchen and bar equipment. Have a gas engineer check pipe diameter, pressure, the condition of the pipework, and the position of the meter. Have a plumber assess water pressure, capacity, and pipe condition. Commission a roof report and a pest inspection, and inspect interior and exterior lighting, including the car park.

Every defect found at this stage must be either added to the budget or negotiated with the landlord before signing — for example, through a lower rent or repairs at the landlord's expense. If the same defect is found after signing, we pay for it.

Negotiate and sign the lease.

Responsible: Operator • **Verified by:** Attorney

When our first-choice site has passed all the checks, agree the heads of terms — a short document listing the main commercial terms — and then the full lease. The heads of terms fix the annual rent and any stepped increases, the lease length and break clauses, the rent-free period, a permitted use that covers restaurant and alcohol service, any landlord contribution to the fit-out, the service charge, and the right to transfer the lease to someone else. The attorney reviews both documents before signature.

Before signing, ask the landlord in writing whether any health authority notices or unpaid utility debts are attached to the premises. Deep Dive 2.3 sets out the method.

Obtain the landlord's approval requirements in writing.

Responsible: Attorney · Verified by: Operator

Most commercial leases require the landlord's written consent for structural alterations, changes to the façade, and signage. Get written confirmation of exactly what needs approval, how the process works, and how long it takes, then obtain approval of the drawings and the exterior design before any work starts. Approval sought during construction causes delays, and sometimes work that has to be undone.

Design & Construction

Design team, final design and construction contract

Three professionals create the physical restaurant. The architect decides whether the space can work, the interior designer decides how it feels to the guest, and the contractor tells us whether both can be built for the money we have. Operators often choose them separately, and the three meet for the first time only when something goes wrong. We choose all three because they have built restaurants that work. We put them in the same room from the first meeting, and we agree in writing where each one's responsibility ends and the next one's begins.

The design develops in two steps: first a general direction, then a detailed specification. Once we know our first-choice site, the architect and the interior designer develop the final design for it, within the limits found by the site checks and set by the regulations. The final design then becomes the reference for everything else: the contractor prices it, the inspections check the building against it, and the FF&E list is based on it. Finally, the construction contract turns the design and the price into legal obligations, dates, and payments.

Shortlist and appoint the architect and the interior designer.

Responsible: Operator · Verified by: Attorney

Shortlist two or three firms for each role, or two or three studios that offer both, choosing only firms that have completed restaurant projects. Appoint the two together, with scope and fee confirmed in writing: what each is responsible for, what they are not, how changes to the brief are handled, and how they are paid. When the architect and the interior designer belong to the same studio, the two appointments become one letter, with the scope and the fee of each written separately.

At the appointment meeting, decide who draws the kitchen: the architect's own team, or a specialist kitchen designer working under the architect's coordination, often provided by the equipment supplier. Either way, the architect remains accountable for the kitchen layout.

Shortlist and appoint the general contractor.

Responsible: Operator • **Verified by:** Attorney

Look specifically for contractors who have fitted out restaurants. A contractor with restaurant experience knows how to organise work that depends on other work: for example, the kitchen extraction cannot be installed until the structure is modified, and the structure cannot be modified until a fire engineer has approved it. A contractor who builds houses does not. Give every shortlisted firm the same written description of the work, so that their answers can be compared, and ask each one to walk a candidate site with us. What they notice — how materials will get in, in what order the work must be done, where problems are likely — tells us more about their competence than any reference.

Deep Dive 2.5 sets out the method.

Build the regulatory requirements into the design.

Responsible: Architect • **Verified by:** Operator

Three legal requirements affect the layout, and must be part of the design from the start, not added later. The kitchen fire suppression system — an automatic system above the cooking line, which also cuts the gas supply in case of fire — is sized according to the cooking equipment, and the fire authority must approve it. The number and position of fire exits and emergency lights depend on how many people the restaurant will hold and on the building itself; an exit required in the wrong place can split a dining room or block a service route. Accessible entrances, seating, and toilets cost far less if they are built in from the start than if they are added afterwards.

Develop and deliver the final design.

Responsible: Architect, Interior Designer • **Verified by:** Operator

The architect and the interior designer produce the final design together: the layout of the rooms and the routes staff and guests will follow; the kitchen with equipment positions and the extraction route; the bar; the dining room with table positions and service stations; the office and back-of-house; the exterior. If a kitchen designer is involved, brief them with a map of the kitchen flows. Deep Dive 2.4 sets out the method. The interior design must be complete in every detail, not just as an idea: materials, finishes, furniture, and lighting described precisely enough to be priced and ordered.

Finalise the exterior design and submit it to the landlord.

Responsible: Architect • **Verified by:** Operator

Façade treatment, entrance, signage positions, awnings, windows, and any access ramp are agreed as one concept, with the architect, the interior designer, and the graphic designer in the same meeting. The design then goes to the landlord for approval before the contractor starts any work on the outside of the building.

Design and cost the terrace, if the concept includes one.

Responsible: Interior Designer • **Verified by:** Operator

Outdoor seating needs its own permit in most jurisdictions and its own design: accessibility, protection from wind and rain, heating, and lighting. Design it, cost it, and start the permit now, so that it opens with the restaurant rather than a season later.

Obtain quotes for the FF&E.

Responsible: Interior Designer • **Verified by:** Operator

The final design fixes the FF&E: the kitchen and bar equipment, the furniture, and the fixtures. The designer who drew the kitchen prepares the schedule for the kitchen and the bar; the interior designer prepares it for the furniture and the fixtures. Each schedule lists every item with its model, quantity, and position. Ask at least three suppliers to price each package against the same schedule, and compare delivery, installation, and warranty as well as the price.

Record the lead time of every item: some equipment and some furniture take months to arrive, and the construction programme will have to allow for it. Nothing is ordered yet. The quotes go into the budget, and the orders wait until the construction contract is signed.

Obtain and review the contractor's bid.

Responsible: General Contractor • **Verified by:** Operator, Architect

The contractor prices the final design, with the site address and every technical requirement already confirmed. Read the bid item by item, trade by trade, not just the total: what is included, what is excluded, what the preliminaries cover, how much the contractor has added for unexpected costs, the programme, and the payment terms. Confirm the cost of demolition and strip-out — high in a former restaurant, with old equipment, extraction, and grease traps to remove — and whether it is inside the bid or a separate line. Deep Dive 2.5 sets out the method.

Sign the construction contract.

Responsible: Operator • **Verified by:** Attorney

The contract governs the whole build. It defines the scope of work; the programme, with start date, key milestones, and the contractual completion date; a payment schedule tied to verifiable milestones; the procedure for variations; the defects liability period, during which the contractor must repair defects free of charge; and the retention, a part of the price we hold back until the work is finished and the defects are repaired. The attorney reviews it before signature.

In practice:

Most disputes begin in the payment schedule. "Payment on completion of the kitchen floor screed" can be verified. "Payment at the end of week six" cannot.

Finance & Funding

Rebuilding the budget on real prices

In Phase 1 we built the financial model mostly from industry averages and estimates. In this phase, real figures start to replace them: insurance quotes, the costs specific to the site we choose, the contractor's price. Each real figure can change the result of the model. The rule is simple, and easy to forget: every new figure goes into the model the week it arrives, and the accountant checks the model again.

By the end of the phase, the budget is based on real prices, not estimates. From then until opening, every spending decision must fit inside it, and it is the basis of the final business plan. If the real figures show that the plan no longer works, we choose now between three responses — reduce the project, find more money, or choose a different site — because after signing, the third is no longer possible.

Have the accountant test the model against every real cost.

Responsible: Accountant · Verified by: Operator

Each time the accountant reviews the model, they answer three questions: are the sales assumptions still credible for the locations we are considering, do the costs include everything specific to this site, and do we still have enough money in total?

Rebuild the opening budget on the contractor's bid.

Responsible: Accountant · Verified by: Operator

For each cost category, show the original estimate, the confirmed cost, and the variance. Replace every estimate with the most reliable figure available — a signed contract, then a selected bid, then a single quote — and mark any line that is still an estimate as a risk. A category that comes in higher needs an immediate answer: reduce the scope, find additional funding, or both. If a category costs less than estimated, keep the difference as a reserve; it is not an invitation to spend more elsewhere.

Recalculate the contingency on the real construction and FF&E costs. If the higher bids have already used part of it, top it up before construction starts. In the same exercise, update the pre-opening cash flow model with the contractor's payment schedule and the expected FF&E deposits, and share it with the lender, so that each drawdown request arrives when expected.

▲ *The contingency is not negotiable. Removing it to make the budget balance means spending money that we will almost certainly need later.*

Finalise the business plan.

Responsible: Operator · Verified by: Accountant

Replace the last estimates with actual figures: projections updated with the construction cost, the FF&E quotes, and the OS&E and technology estimates, capital requirements reflecting the confirmed funding structure, the market section rewritten from the

competitor analysis, and the risk section reviewed with the attorney and the accountant for any risk linked to this site or to our company structure. This is the version presented to a lender or investor. Deep Dive 2.6 sets out the method.

Prepare the personal financial statement.

Responsible: Operator · Verified by: Accountant

Banks, and some landlords, ask for a simple statement of personal assets and liabilities. Update it if one was prepared earlier. Ask the accountant which format the lender prefers; using the lender's own template saves a round of corrections.

Legal, Permits & Insurance

Permits, insurance quotes and the partners' agreement

Most legal work in this phase prepares permit applications that we cannot submit yet. The most important permits are issued for a specific address, and we only have an address once the lease is signed. What we can do now is know exactly what will be required, from whom, and how long each approval takes, so that the applications that depend on the lease are ready on the day it is signed.

Insurance works the same way. We do not buy any policy until we have a site and a contractor, but we need the quotes now, because the cost of insurance must appear in the financial model that a lender will read. And where the business has more than one owner, the agreement between them comes before the lease: partners who disagree about a fifteen-year commitment should find out before they make it.

Build the permit register.

Responsible: Attorney · Verified by: Operator

Contact every public authority that must approve a new restaurant at the target address, and ask what it requires, how long each approval takes, and whether anything is specific to the location. Record each approval with its authority, its lead time, the documents it needs, the latest date to apply, and the person responsible. Mark which applications can start now and which can only be filed once the lease is signed. Deep Dive 2.7 sets out the method.

Decide whether the liquor licence needs a specialist agent.

Responsible: Attorney · Verified by: Operator

In some jurisdictions the liquor licence process is so complex, or so often challenged by objections, that a specialist licensing agent handles it faster than a general attorney. Ask the attorney directly whether they handle licensing themselves. Where approvals are slow or frequently challenged, the agent's fee is usually recovered in time saved.

Collect insurance quotes.

Responsible: Insurance Broker · Verified by: Operator

With a site and a construction programme to quote against, the broker approaches at

least three insurers for each policy on the list prepared when the broker was appointed. Nothing is bound yet.

Among the quotes that offer proper cover, choose the best value, not simply the lowest premium. Enter each policy in the financial model — annual premium and monthly figure — with the source and date of the quote, so the attorney and the accountant can verify it.

- Building and contents — fire, flood, theft, and damage. Check the lease: the building may be the landlord's responsibility.

- Public liability — claims from guests or visitors injured, or whose property is damaged, on the premises.

- Employers' liability — claims from staff for injury or illness at work. A legal requirement in most countries.

- Liquor liability — claims arising from the service of alcohol. Often a condition of the licence.

- Business interruption — lost income and fixed costs if an insured event forces closure.

- Construction all-risks — the works and materials during the build. Usually arranged by the contractor; confirm the scope.

Sign a shareholders' agreement, if the business has more than one owner.

Responsible: Attorney · Verified by: Operator

The agreement covers every situation in which partners disagree or circumstances change: the ownership split and how it was calculated, which decisions need unanimity and which a majority, day-to-day roles, salaries and profit distribution, what happens if a partner wants to leave, dies, or becomes incapacitated, and how disputes are resolved.

What Might Go Wrong in Phase 2

- Paying to reserve a site. If we pay a deposit, or sign a letter of intent, to keep a property off the market before the checks are complete, we lose negotiating power, and sometimes money.

- Lease dates and construction dates that do not meet. The rent-free period starts at signing, but the contractor may not be able to start for weeks, waiting for the landlord's consent or a building permit. Every week of that gap is rent paid on an empty site.

- Treating the landlord's contribution to the construction costs as a gift. The landlord usually gets it back through higher rent, a longer lease, a contractor of their choosing, or a stricter obligation to restore the premises when we leave.

- Assuming a former restaurant is ready to use. The extraction may not meet current standards, the grease trap may be undersized, and if the previous tenant lost its licence because of how it operated, a new licence may be harder to obtain. A former restaurant is cheaper to fit out only once these have been checked.

- Setting the maximum rent on the expected sales. Rent does not fall when sales do: if

sales stay at the conservative level, the rent takes a larger share of them every month, for the length of the lease.

—Designing for the opening, not for the third year of trading. Storage and staff areas are the first spaces cut when the plan is tight, and they become the first problems once the restaurant gets busy: stock in the corridors, a dry store in the office, deliveries every day.

Deep Dives — Phase 2

The tasks of this phase say what has to be done before we sign the lease and the construction contract. The Deep Dives that follow explain, step by step, the methods behind the most important of those tasks. Four of them concern the choice of the site: how to analyse the competitors around it, how to assess the building, how to plan the kitchen it must hold, and how to negotiate the lease. The other three concern the project once the site is chosen: how to read the contractor's bid, how to present the project to a bank or an investor, and how to organise the permits the restaurant will need.

In this phase we deal, for the first time, with people who know their trade far better than we do: a broker, a landlord, an architect, a contractor, a lender. Each of them will put figures, drawings, and contract terms in front of us, and each of them has interests that are not entirely ours. These methods let us check their work instead of simply trusting it: what to look at, what to ask, and which numbers to recalculate ourselves.

DEEP DIVE 2.1

How to conduct a local competitor analysis

TEMPLATE AVAILABLE FOR DOWNLOAD: T2.1 — LOCAL COMPETITOR ANALYSIS

When to read this. Before visiting any competitor, and alongside the site search. Done well, the analysis tells us exactly what every guest will compare us with.

Step 1. Define the competitive set

Not every restaurant nearby is a competitor. The competitive set is the group of businesses competing for the same guest, at the same price, for the same occasion, at the same meal period. A fine-dining room does not compete with a quick lunch counter on the same street. Before visiting anything, divide competitors into two groups. Direct competitors share our price tier, occasion, and meal period: they are where our guest goes instead of coming to us. Indirect competitors offer a different format for the same occasion: a wine bar and a bistro can compete for the same couple on the same evening. Five direct and two or three indirect competitors make a workable set. With more, the information becomes confusing; with fewer, it is incomplete.

Step 2. Visit as a customer

Eat a meal from the main menu and pay the bill. Experience the whole visit: arrival, greeting, seating, ordering, waiting, the food, the pace, and how the team handles the end of the meal. Visit each direct competitor twice, once at peak and once at a quiet time. A team that handles a full Saturday well and a team that loses control tell us very different things. A half-empty room on a Thursday, when the competitors are busy, tells us something too.

In practice:

Take notes after leaving, not at the table. Writing during the meal changes the experience and tells the staff the visit is not an ordinary one. A three-minute voice memo in the car captures everything that matters.

Step 3. Collect five dimensions

Menu and pricing. Photograph the menu with its prices. Note how many dishes per course, how broad or focused the offer is, and whether the descriptions focus on ingredients, on cooking techniques, or on the occasion. Calculate the spend per head for two or three courses with one drink: it is the single most useful comparison in the file.

Service model. How many staff for how many covers? Is there a host, or does the team share the door? Do servers work sections or the whole floor? How long from sitting down to first contact, and from order to first course? The way service is organised shows what the operator cares about and how they control costs.

Covers and utilisation. Estimate the total covers and how full the room is at each visit. A

competitor consistently busy on a Friday has more demand than it can serve, and some of those guests could come to us.

One that is half-empty in a busy location needs explaining before we draw any conclusion: the cause may be the concept, the execution, or the site itself.

Customer profile. Who is in the room: age, couples, groups, families, solo diners, the apparent occasion, how long tables stay. It tells us whether the operator has found its audience or is still looking for one.

One strength and one weakness. Be specific. “Good food” is not useful. “Pasta made in house, generous portions, strong value at a mid-range ticket” is. The strength shows the standard we must at least match; the weakness shows a gap we could close.

Step 4. Read the reviews as operational data

Ignore the average score. Read the most recent reviews of each direct competitor and note two kinds of pattern: what guests praise often enough to matter, and what they criticise consistently. One review about cold pasta is noise. Ten reviews over six months about slow service at busy times is a fact about that business.

Step 5. Draw the conclusions

Compile one page per venue covering the five dimensions and the review patterns. Then ask three questions across the whole set. Where is the market crowded? Opening in a segment that is already well served, without a clear difference, is the riskiest choice. Where are the gaps — a price tier without a strong operator, an occasion nobody executes well, a cuisine missing despite obvious demand? What do guests here value consistently? Whatever it is, our concept has to deliver it.

The result is the positioning statement. It is not an advertising slogan: it is a plain description that anyone on the team can repeat.

Done properly, the analysis does two jobs. It tells us whether the concept, as it is, has a place in this market, while it can still be adjusted at no cost. And it gives everyone who works on the restaurant — the designers, the chef, the marketing — the same answer to the question every guest will ask without saying it: why here, and not next door?

DEEP DIVE 2.2

How to assess a site

TEMPLATE AVAILABLE FOR DOWNLOAD: T2.2 — SITE SELECTION BRIEF

When to read this. Before the first site visit. A visit with a method takes under two hours and produces data; a visit without one produces impressions that fade once we sit down with the numbers.

Step 1. Prepare before the visit

Ask the broker or landlord in advance for the floor plan with dimensions and ceiling heights, the current permitted use, the electrical supply capacity in amps or kVA, the service charge and any known forthcoming costs, and how long the property has been empty.

Follow up the vacancy question directly. If a property on a busy street has been empty for a long time, there is usually a reason. Ask why the previous tenant left and how many operators have looked at the space. If the answer is vague, ask the neighbouring businesses, or ask the attorney to check the planning history. If the landlord is hiding a problem, asking the right people usually brings it out.

Step 2. Assess how guests will find the location

The guest almost always chooses where to eat on their phone, before leaving home. Assess the location on three dimensions before drawing any commercial conclusion.

Visibility in online searches. Stand outside the site and search on Google Maps for the category of restaurant we plan — the category, not a name. See how dense the results are and where the cluster ends. A site inside a cluster of results appears in the searches people are already making. A guest searching on a phone sees the restaurants in that cluster first; a site a few streets away may never appear on the screen. Note the walking time the map shows from the nearest transport stop: a four-minute walk and a twelve-minute walk are different decisions for many guests.

Arrival by car. Outside dense city centres, parking within a short walk is essential for any restaurant more formal than fast casual. Find the nearest car park, its size and evening cost, and the street parking within 200 metres. Walk the route from the parking to the door: is it lit, direct, and signed? Then drive past the site. Can a driver see the frontage early enough to decide to stop? Is the restaurant on the side of the road where the evening traffic and the parking are?

Footfall. Count pedestrians only where guests decide on impulse, as they walk past: tourist streets, transport hubs, market and retail corridors, fast casual. There, observe for at least twenty minutes at peak, and again on another day. Elsewhere, footfall is a secondary signal. A busy pavement does not compensate for a dead zone on the map, and a quiet street does not disqualify a site that is easy to find and easy to reach.

Step 3. Assess the infrastructure

Mechanical, electrical, and plumbing infrastructure is where most unexpected construction costs come from. Electrical supply: a commercial kitchen typically needs 100 to 200 amps of three-phase power; a former shop often has single-phase at 60 to 100. An upgrade needs an application to the utility provider, can take months, and is a site-specific cost, not a contingency item. Gas: a site that has never been a food business may have no connection at all. Adding one needs an application to the utility provider, months of lead time, and significant cost; for a concept that depends on gas, it may decide whether the site can work at all. Extraction: the kitchen must exhaust outside, through a rear wall or up to the roof. In a multi-storey building the duct route can need structural work, landlord consent, and planning permission. It is the most common source of late cost surprises; confirm it before shortlisting. Drainage: design the kitchen and the bar around the drainage positions shown in the drawings, because moving drains once they are installed is expensive.

The result of this step is a preliminary gap list: what exists, what is missing, and an order of magnitude for each gap. Precise figures come later. What we need now is whether this site carries a normal fit-out cost or a much higher one.

Reference Range

A former restaurant or café typically costs 20–35% less to fit out than a blank retail or office unit, because gas, extraction, drainage, and enhanced power already exist. A higher rent on an infrastructure-ready unit is often better value than a lower rent on a unit that needs everything installed.

Step 4. Confirm the permitted use

Most jurisdictions assign each property a use class, and a restaurant use is usually distinct from retail or office. If the site does not have it, a change-of-use application takes time, costs money, and can fail. Ask the attorney to confirm the current use, and to check restrictions on opening hours near homes, separate licensing for outdoor seating, and any listed-building or conservation constraints on signage and alterations.

▲ *Do not rely on the broker's word on permitted use. Confirmation comes from the attorney, not from the person who benefits from the lease being signed.*

Step 5. Read the competitive density

Walk five minutes in every direction and note each food and beverage business: concept, price point, and how full it looks. Extend to ten minutes for direct competitors at our price tier. This is not the full competitor analysis; it tells us whether this location is a dining destination, a convenience corridor, or an underserved area — each with different consequences for how quickly a customer base builds and how much the launch will cost.

Step 6. Write the summary

Before leaving, or immediately after, record the findings in three outputs: the infrastructure gap list with orders of magnitude, the permitted use position, and the competitive context. Together with the commercial terms, these are what the attorney and the architect need to advise us.

In practice:

Bring a building services engineer or an experienced kitchen designer to at least one visit before shortlisting. They will see in ten minutes what might take us three visits to notice, or what we would never notice at all. Their day rate is a fraction of the cost of finding an extraction problem after signing.

A site that looks right from the street can still be the wrong one, and the reasons are rarely visible on a first visit: the power, the extraction route, the drainage, the permitted use. Assessed this way, every candidate is judged on the same criteria, and the choice rests on what each building can support and what it will cost to make it work — not on the charm of the street or the urgency to start.

DEEP DIVE 2.3

How to negotiate a commercial lease

When to read this. Steps 1 to 4 before shortlisting any site; Steps 5 to 7 once a leading site has been identified. The lease is the one commitment that cannot be renegotiated if the business underperforms, and our negotiating power starts to weaken as soon as we fall in love with a space.

Step 1. Set the rent ceiling before viewing anything

Total occupancy cost is everything we pay to occupy the premises: rent, service charge, and local property taxes. The financial model tells us what share of sales the restaurant can spend on it; multiplied by the annual sales of the conservative scenario, that share gives the most we can pay. If the model allows 11% and the conservative scenario projects sales of 2,000,000 a year, we can pay up to 220,000 a year in total. Calculate this figure before the first visit, and reject any site that costs more, however reasonable its rent looks on its own.

Occupancy is the one cost that cannot be reduced without the landlord's agreement. If it is too high, the difference comes out of food, staff, or profit, every month for the length of the lease.

Step 2. Compare total cost, not rent

Identify the three components for every candidate. Base rent is the figure in the advertisement, usually quoted per square metre or square foot, and the asking figure is a starting position, not the market price. The service charge covers shared building costs and can be substantial in multi-tenant buildings: ask for the current figure and whether it is capped. Local property taxes are a fixed cost from the first day. A lower rent with a high service charge can cost more than a higher rent with none.

Step 3. Write down the minimum acceptable terms

Before any negotiation, define in writing the terms below which we will not proceed: the minimum lease length that justifies the fit-out, the break clauses we need, the maximum personal guarantee, the reinstatement position, and the rent-free period that covers the fit-out. This document stays internal. Its purpose is to give us a fixed reference when the negotiation creates pressure to accept terms we would refuse on a calmer day.

Step 4. Brief the attorney before heads of terms

Heads of terms summarise the commercial agreement before the lease is drafted. Once they are signed, the main points are treated as settled, and negotiating power passes to the landlord. The attorney — ideally with commercial property experience in hospitality, or supported by a specialist who has it — must be briefed before substantive discussions begin. Their value lies less in reviewing the final lease than in advising what

to ask for before it is written.

Step 5. Negotiate the financial terms

Rent-free period. Negotiate it first, before any other concession. It must cover the fit-out: if the build takes four months, we need at least four months rent-free, or we pay rent on a space that cannot trade. The rent-free period should start when the works can actually begin — when the landlord gives consent or the building permit arrives — not on the day we sign. In markets with high vacancy, more is achievable; in strong markets the answer may be no, but asking costs nothing.

Rent review. Open-market reviews reset the rent to the market at each review point and carry the most risk. Index-linked reviews with a cap, or fixed stepped increases, make future rent predictable, which the cash flow needs.

▲ *Upward-only rent reviews let the rent rise at review but never fall. A drop in market rents then gives us no relief. This clause is worth significant effort to remove or cap.*

Personal guarantee. Landlords often ask the owner to guarantee personally what the company owes, which means paying years of rent ourselves if the company fails. Cap the period, typically at three years, or cap the total amount. An unlimited guarantee on a fifteen-year lease is not an acceptable term for a first-time operator.

Holding deposit. If the landlord asks for a deposit or a letter of intent to take the property off the market, make it refundable in writing and conditional on the inspections and the architect's assessment.

Landlord's contribution. Treat any contribution to the construction costs as a loan: compare the total cost of the lease with it and without it.

Step 6. Negotiate the structural terms

Length and breaks. Five years is generally the minimum to justify a full fit-out; most operators aim for ten to fifteen with breaks. In a ten-year lease, push for tenant-only breaks at years three and five, and limit the conditions for using them to two: the rent is paid up to date, and we hand back the empty premises. A break clause that requires us to have complied with every obligation in the lease can be blocked by the landlord over a minor detail.

Permitted use. "Use as a restaurant" is enough. A clause that names a cuisine or a format restricts how the concept can evolve. If late trading, private events, or takeaway are part of the model, they must be written in.

Alterations and reinstatement. The lease defines what we may alter, what needs consent, and whether we must strip the fit-out and restore the original condition when we leave. Full reinstatement can be very expensive. Negotiate a partial or full waiver at the start: a working kitchen often makes the unit easier to re-let. The waiver belongs in the lease, not in a side letter.

Assignment. The right to transfer the lease, with consent that cannot be unreasonably

withheld, is what makes the business saleable. A lease that forbids assignment, or leaves it to the landlord's discretion, reduces the value of everything we build.

Step 7. Know what we will not accept

However well a site performs on every other measure, these terms are removed or substantially amended before signing: upward-only reviews without a cap; an uncapped service charge; an unlimited personal guarantee; a break clause conditional on full compliance; and a clause that removes our legal right to renew the lease at the end, unless the lease is long enough or the landlord gives a real concession in return. Confirm that last point with the attorney before agreeing to it.

The lease is the longest commitment of the whole opening, and very often the one that outlives the restaurant's first concept. Each term negotiated now — a cap on the rent review, a rent-free period long enough for the works, a break clause without traps, the right to assign — is worth more over the life of the lease than almost any saving made during construction. It is the one negotiation in which time spent, and the attorney's fee, pay back the most.

DEEP DIVE 2.4

How to design the kitchen flow

When to read this. Before shortlisting a site and before briefing the architect or the kitchen designer. Drainage, extraction, and the position of the pass cannot be changed once the contractor starts; they are settled while the space is still empty.

Step 1. Apply the forward-march principle

Product moves forward: from delivery, through storage, preparation, and cooking, to the pass. Nothing moves backward against the flow, and clean and dirty never share a path. This is the *marche en avant*, the foundation of every functional kitchen. In a restaurant kitchen, following this rule perfectly is rarely possible; the goal is a single dominant forward direction, and the one crossing that must never happen — waste against production. Test any layout with one question: does a cook at any station have to move toward the delivery door or the waste exit to finish their work? If so, the sequence is wrong.

Step 2. Map the four flows and sequence the six zones

Draw four flows on the floor plan as arrows before placing any equipment. Goods-in runs from the delivery entrance to storage and stops there, without crossing the cooking area or the pass. Preparation-to-service runs from storage through preparation to the cooking stations. Pass-to-table runs from the pass into the dining room through its own exit. Waste runs in the opposite direction to goods-in, ideally through a separate exit, and never crosses clean production or service. Where two arrows cross, the conflict is resolved by design, not accepted.

Then place the six zones in the order the flows require: intake beside the service entrance; cold and dry storage immediately after it; preparation between storage and the line; the cooking stations in the sequence the menu needs — cold, hot, finishing; the pass at the end of the line, reachable from every station without leaving it; and wash and waste at the end of the sequence. A dishwash placed between preparation and the line forces dirty plates through production.

Reference Range

A full-service kitchen needs roughly 0.4–0.5 m² of working kitchen per cover: 24–30 m² for 60 covers, before storage, staff areas, and the dishwash, which add a further 20–30% to the back-of-house. A kitchen below this either limits the menu or limits the covers. That is a site problem, not a design one, and it cannot be solved after signing.

Step 3. Establish the structural constraints

Four physical facts are settled before any layout is drawn. Drainage: map existing drains and place the dishwash and wet preparation around them where possible. Extraction: every heat, steam, or grease source needs a direct duct route outside; in a multi-storey

building, confirm the route with the owner and a structural engineer. Power and gas: map the incoming supply and existing gas points, because they constrain where high-draw equipment can stand. Ceiling height: a commercial canopy usually needs 2.8 to 3.0 metres clear above the finished floor at the cooking line.

▲ *A designer briefed without these four constraints will design on assumptions, and some of them will be wrong. Revising a layout after equipment is ordered is expensive. Revising it before a line is drawn costs nothing.*

Step 4. Design the pass for speed and control

Every dish crosses the pass, and the chef who runs it controls the pace and quality of service. There is no standard size: plan it with the kitchen designer according to the menu and the way the kitchen will work. Two tests apply to every kitchen: the pass must hold all the plates of one table's order at the same time, without stacking them, and the chef at the pass must be able to see the whole line. Heat lamps or lighting above it keep dishes hot and make plating mistakes easy to see. The pass needs its own exit to the dining room, never shared with goods-in or waste. Where space allows, give returning servers a separate door from the one food goes out through; two doors remove one of the most common collisions in a busy service.

Step 5. Brief the designer with a flow map

A designer briefed with an equipment list produces a layout that fits the equipment. A designer briefed with the floor plan and ceiling heights, the four structural constraints, the four flows, the zone sequence, the cover count, the menu format, and the pass specification produces a layout that works. Review the first draft against the flow map, not the equipment list. If the zones are in the right order, single pieces of equipment can easily be moved later; if the zones are in the wrong order, moving equipment will not fix the problem.

In practice:

Walk a full service through the proposed layout, step by step. Follow a delivery to storage, a dish from storage to the dining room, and the waste out of the building. Wherever we meet a collision, a backward movement, or a shared doorway, the layout needs to change.

A kitchen designed around its flows does its work quietly: deliveries go in without crossing service, dishes leave the pass on time, and the team spends its energy on cooking rather than on getting around each other. Once the walls, the drains, and the extraction are built, the flow can no longer be changed — only worked around, every service, for years. That is why it is decided now, on paper, while a line on a drawing still costs nothing to move.

DEEP DIVE 2.5

How to compare contractors and read a bid

TEMPLATE AVAILABLE FOR DOWNLOAD: T2.3 — CONTRACTOR TENDER BRIEF •

T2.4 — SAMPLE CONSTRUCTION CONTRACT

When to read this. Before issuing the written scope to the shortlisted contractors, and again when the appointed contractor's bid arrives. A bid is not a price: it is a statement of what one contractor will do, under what conditions, by when, and for how much.

Step 1. Give every contractor the same written brief

Contractors can only be compared if they answer the same question. The brief describes the site and its current state, the concept and cover count, the scope of works, the technical requirements already confirmed — electrical specification, extraction route, drainage positions, fire suppression — the programme required, the payment structure we propose, and what each response must contain. The scope is the critical part. “Full fit-out” is not a scope. A list of trades — demolition, structural, mechanical and electrical, kitchen construction, finishes, signage — each with the standard required, is.

In practice:

Have the architect draft the brief. An operator's wording leaves room for interpretation, and contractors interpret it in the way that suits their own costs.

Step 2. Understand the four parts of a bid

The price, broken down by trade or work package. A single total cannot be assessed; ask for the breakdown as a condition of considering the bid. The programme: start, completion, and milestones. A contractor who cannot meet the opening date is not an option at any price. The exclusions: what the price does not cover. This is where the real differences between contractors hide. The preliminaries: the cost of running the site — management, temporary services, waste, insurance, scaffolding.

Reference Range

Preliminaries typically represent 10–18% of the bid. Unusually low preliminaries tend to return later as variation claims; unusually high ones deserve a question about what they include.

Step 3. Compare the shortlist on scope, not on price

Build a comparison with one row per item of scope and one column per contractor, marking each item as included, excluded, or conditional. Estimate the cost of every excluded item and add it to that contractor's total: a bid that leaves out the fire suppression or the builder's work for equipment installation only looks cheaper. Ask, for each exclusion, whether the work is needed and who will price and manage it. Then compare what remains: programme, payment terms, the named project and site

managers, and comparable restaurant work.

▲ *Never choose a contractor on price alone. A price well below the others means either something significant has been missed, or the margin will be recovered through variations during the build. Both cost more than the saving.*

Step 4. Read the appointed contractor's bid line by line

When the appointed contractor prices the final design, read the bid with the same method: breakdown, exclusions, preliminaries, programme. Then compare each trade with the earlier estimate, not the total with the total. A trade that has moved significantly needs an explanation, and a decision on scope, before the budget is rebuilt on it.

Step 5. Agree the payment structure

Fit-outs are paid in stages: a mobilisation payment at signature, then payments at defined milestones — structural completion, first fix (pipes and cables inside the walls), second fix (fittings and connections), practical completion. A retention, a share of each payment, is held back after completion and released when the defects list is cleared. The retention is our main lever once the contractor is on site; make sure it is in the contract with clear release conditions. The variation procedure, the delay and penalty clauses, and the dispute mechanism matter as much as the price, and the attorney's review of them is one of the most valuable hours in the project.

The cheapest bid is rarely the cheapest building. What decides the final cost is what each bid leaves out, how changes will be priced, and what we still hold back when the work is finished. A contractor chosen on a complete comparison, with a payment structure that keeps the retention in our hands, starts the works knowing that every promise in the bid will be checked — and that is the best protection against the extras that follow a low price.

DEEP DIVE 2.6

How to present the project to a bank or investor

TEMPLATE AVAILABLE FOR DOWNLOAD: T1.5 — BUSINESS PLAN TEMPLATE · T1.6 — CAPITAL PLAN

When to read this. Once the business plan is final and before the first formal funding meeting. A good plan poorly presented loses funding: the meeting is where the funder decides whether to trust us, and that is decided in the first fifteen minutes.

Step 1. Know what each funder is assessing

A bank is assessing one thing: the probability that the loan will be repaid. Every question it asks — experience, concept, projections, security — is a way of answering that question. It is not investing in our idea; it is deciding whether we are a safe borrower. What reassures it is personal financial strength and credit history, realistic projections, the security available, and evidence that we know what the downside looks like and have planned for it.

A private investor is assessing three things: the return, the risk of losing the investment, and whether they want to be in business with us for the next five to ten years. Because they share in the profits, they look harder at the concept, the market, and our ability to execute. And they are rarely silent partners. Decide before the meeting how much involvement we are prepared to accept.

Step 2. Prepare the document set

Before any formal meeting, assemble: an executive summary of two pages at most — concept, market, team, financial summary, amount required, and use of funds; the full business plan; the projections in three scenarios with their assumptions visible, the realistic one first; the personal financial statement; and the profile of the operator and of each other key person. Send only the executive summary in advance and bring the rest, printed and digital.

In practice:

Banks run their own credit checks and may ask for tax returns, bank statements, and details of existing loans. Have them organised before they are requested. A funder who has to chase documents twice loses confidence in the operator, whatever the quality of the plan.

Step 3. Prepare the questions every funder asks

“Why will guests choose you over the restaurants already there?” The answer names the specific alternatives and explains, in operational terms, why we are the better choice for our guest. Passion for food is not an answer; a specific advantage is.

“What happens if revenue in year one is 30% below plan?” The answer gives the monthly cash burn at that level, how long the working capital reserve lasts at that burn, and what we would change — hours, staffing, marketing. “That won’t happen” fails the question. “At 70% of plan we burn this much a month, the reserve lasts this many months, and

we would close one day a week and cut part-time cover” passes it.

“What is your restaurant experience?” Name the experience we have, name the gaps, and name the professionals appointed to cover them. Honesty about what we do not know, with a plan for it, is more credible than overstated experience.

“What security are you offering?” For a loan, usually a personal guarantee, a charge over personal assets, or both. Decide the maximum we will offer, with the attorney and the accountant, before the meeting, not across the table.

For an investor, add the equity conversation: the percentage on offer and the valuation behind it, and the rights that come with it — a board seat, approval of major decisions, dividend policy, exit. A vague answer to “what are you offering me?” usually ends the investor’s interest.

Step 4. Know what not to say

Four statements damage credibility at once. “There is no real competition” tells the funder the market analysis is incomplete. “The food will speak for itself” tells them there is no plan to bring in the first guests. “We just need to get through the first year” is not a recovery plan. “Our projections are conservative” sends them looking for the version we considered realistic. Label the scenarios for what they are and let the numbers make the case.

▲ *Never overstate experience, hide a known risk, or present a projection as something it is not. Funders check. What is found to be inaccurate after the meeting does not produce a delayed refusal; it produces a permanent one, and word travels among lenders.*

A funder does not decide on the restaurant alone, but on the person presenting it. A project explained with honest numbers, clear risks, and a precise request shows an operator who knows what they are building and what could go wrong — and that is what a lender or an investor is really asked to trust. Even when the answer is no, a well-prepared meeting leaves the door open for the next conversation.

DEEP DIVE 2.7

How to build and use a permit register

TEMPLATE AVAILABLE FOR DOWNLOAD: T2.5 — PERMIT & LICENCE REGISTER

When to read this. Before contacting the local authority or the attorney about permits. A list says what is needed; a register says when to apply, how long it takes, what the application requires, and who is responsible — and that is what prevents an opening date from slipping.

Step 1. Research authority by authority

If we research permits one type at a time, we will miss some. Identify instead every authority with jurisdiction over a new restaurant in the area and ask each one what it requires. Typically: the local authority or municipality (business licence, food business registration, outdoor seating, signage, sometimes music); building control (occupancy permit, structural sign-off); the fire authority (fire safety certificate, suppression system); the licensing authority (liquor licence); and, depending on the concept, environmental health (noise, extraction, waste). Ask each: what do you require from a new restaurant at this address, what is the current processing time, and is there anything specific to this location? The last question surfaces what published guidance never mentions: licensing policy areas, proximity to schools, conservation constraints.

In practice:

Ask the attorney to open the conversation with the licensing authority. An attorney's call is more likely to produce a straight answer and a named contact, and that contact is the person to call whenever a question arises during the application.

Step 2. Separate site-dependent from site-independent applications

This is the most important distinction in the register. Some applications can be prepared, and sometimes filed, before an address exists: food business registration in many jurisdictions, music licences that cover the operator rather than the premises, employer and tax registration, and personal licences to sell alcohol held by an individual. Others cannot be filed until the lease is signed: the premises licence for alcohol, which needs the address, the floor plan, and usually a public notice at the premises; the occupancy permit and fire safety certificate, which follow inspection of the completed fit-out; the outdoor seating licence; and, in most places, the food safety permit. Mark every entry as one or the other.

Step 3. Give every entry a lead time, a deadline, and an owner

Confirm the processing time with the issuing authority itself; published guidance is often out of date, and timings differ widely between countries and even between neighbouring districts. Calculate the latest submission date backwards: target opening date minus processing time. If the opening date is not fixed yet, use the first day of the

target month. Name the person who prepares and submits each application.

Step 4. Map the liquor licence as its own sequence

The liquor licence has the longest lead time, the most complex process, and the heaviest consequence if late: a restaurant that cannot serve alcohol on opening day has a revenue problem no service can fix. Break it into steps with their own durations: preparation of the documents — floor plan, operating schedule, the designated supervisor, proof of the right to occupy — two to three weeks; submission, which starts the clock and needs the signed lease; the public notice period, where the jurisdiction requires one, during which objections can be made; the authority's review and decision; and compliance with any conditions attached, such as hours, noise management, or age-verification policy. Add the steps up with the durations the authority itself confirms, and check that the target date for signing the lease leaves enough time before opening. Where objections are likely or late-night trading is planned, add a generous margin.

▲ *An application with errors is rarely returned for a quick correction. In many jurisdictions it is withdrawn and has to be resubmitted, and the clock restarts. Have the attorney or a licensing agent review it before submission.*

Step 5. Keep the register alive

At any moment the register should show which applications are overdue, in progress, approved, or blocked by a dependency. That needs eleven fields per entry: permit and authority; site-dependent or not; documents required; processing time; submission deadline; date submitted; expected decision date; date approved; conditions attached; status; and the person responsible. Updated whenever something moves and reviewed every month, it takes five minutes, and prevents the discovery that an application went in three weeks too late.

Permits rarely stop an opening because they are refused; they stop it because they are late — an application submitted after the date it was needed, a document missing, a dependency nobody saw. The register turns a list of authorities into a calendar that everyone can read, and it keeps working long after the opening, when every licence has to be renewed on time. It is a modest document, and it protects the opening date as much as any contract.

Phase 2 Checklist

1. Competitor file complete, with a written positioning statement shared with the team.
2. Site brief written and in use by the broker and the architect.
3. Sales-to-investment ratio calculated for every site candidate; sites below the threshold eliminated.
4. Architect's written feasibility assessment received for each leading site.
5. Liquor licence availability and realistic cost confirmed for the leading site.
6. Seating configuration tested against the revenue model.
7. Existing floor plan, structure, and floor levels of the leading site reviewed.
8. Building, fire, safety, and accessibility requirements obtained in writing.
9. Technical inspections completed; every defect priced or negotiated into the lease.
10. Architect, interior designer, and general contractor appointed, with scopes and fees in writing.
11. Final design delivered, with fire suppression, exits, and accessibility designed in.
12. Exterior design submitted to the landlord; terrace designed and costed where applicable.
13. FF&E quotes collected against the final design, with the lead time of every item.
14. Contractor's bid read line by line; demolition cost confirmed.
15. Sales-to-investment ratio recalculated with the bid and still above the threshold.
16. Opening budget rebuilt on the bid, with the contingency intact and the pre-opening cash flow model updated with the payment schedule.
17. Business plan finalised; personal financial statement up to date.
18. Insurance quotes collected and entered in the model.
19. Permit register built, with site-dependent applications ready to file; decision taken on a licensing agent.
20. Shareholders' agreement signed, where the business has more than one owner.
21. Lease signed after the attorney's written review.
22. Landlord approval requirements confirmed in writing; drawings and exterior design submitted.
23. Construction contract signed.

Working Files from the Toolkit

- T2.1 — LOCAL COMPETITOR ANALYSIS
- T2.2 — SITE SELECTION BRIEF
- T2.3 — CONTRACTOR TENDER BRIEF
- T2.4 — SAMPLE CONSTRUCTION CONTRACT
- T2.5 — PERMIT & LICENCE REGISTER

PHASE 3

BUILD

From the signed contracts to the finished works

Phase 2 ended with the lease and the construction contract signed, and with a budget built on real prices. From the first day of this phase the contractor is on site, the rent-free period starts to run out, and money leaves the account every few weeks. The project stops being a set of decisions on paper and becomes a building site. On a building site, a decision that we do not take on time is taken by someone else, usually the contractor, and usually in the way that costs the contractor least.

The building work is the centre of the phase, but it cannot move on its own: other work has to reach it at fixed moments. Before anyone starts work on the premises, the insurance must be active. Before the second stage of the works can be planned, the equipment and furniture must be ordered, because their delivery dates decide when the finishes can start. Before the walls are closed, the technology must be chosen, because every terminal, screen, and speaker needs a cable inside the wall. If one of these moments is missed, the trades that follow stop and wait. Alongside the build, four pieces of work prepare the next phase: the liquor licence application, the tax registrations, the recruitment of the General Manager and the Executive Chef, who start working for us while the contractor is still on site, and the brand identity and marketing plan that the opening campaign will use.

Most of the budget is spent in this phase, and most unplanned costs appear in it. Many of them are not caused by the contractor: they come from our own decisions that change after the work has started, such as a socket moved, a finish replaced, or a piece of equipment swapped for another. The phase ends when the works are finished and the equipment is installed. The building is not yet ready to open: the final inspections, the tests, and the handover still have to follow.

Key Moments in Phase 3

The contractor will ask to close the walls on a Friday afternoon, with the plasterers booked for Monday morning. Do not agree on the phone. Walk the site that same day with the architect and the electrical drawings, room by room, and agree to plastering only in the rooms we have walked. If that means the plasterers start in one room instead of three, the programme loses a day; a cable found in the wrong place after plastering costs far more.

On a site visit, the contractor points out that the specified floor tile is out of stock and offers another one that is “just as good” and available tomorrow. Do not answer on

the spot, even if the alternative looks right. Ask for it in writing, with a sample, the price difference, and the effect on the programme, and give the answer in writing once the interior designer has seen the sample.

In the first days after the General Manager joins, the contractor, the suppliers, and the designers will keep calling the operator, out of habit. On the first day, decide which subjects pass to the General Manager — deliveries, suppliers' visits, the back of house, the first recruitment. When the next call on one of those subjects comes to us, pass it to the General Manager instead of answering it. Give the General Manager the authority the role needs.

The strongest candidate for Executive Chef will want to change the kitchen. At the final interview, put the drawings and the list of equipment already ordered on the table, and ask what they would cook in this kitchen, not what they would change in it. A chef who can only work in a kitchen they designed themselves will spend the opening asking for changes the budget cannot pay for.

Who Is Involved in Phase 3

Operator

Approves every payment, every change to the works, and every senior hire of this phase, and keeps the written record of every decision.

General Contractor

Runs the site and builds to the programme agreed before work starts. Asks for every change and every payment in writing.

Architect

Inspects the works at each stage, confirms each milestone in writing before it is paid, and decides with us when each wall can be closed.

Interior Designer

Supervises the second stage: checks the finish materials as they arrive and decides when each area is ready for the next trade.

IT Consultant

Checks what technology vendors claim, helps us choose the systems, and turns them into positions on the drawings before the walls close.

Insurance Broker

Places the builder's risk and public liability policies, so that both are active when work starts, and the employers' liability policy before the first employee joins.

Attorney

Files the liquor licence application and follows it until the licence is issued. Checks who must insure the works under the construction contract.

Accountant

Files the tax registrations, decides which accounting software the restaurant will use, and records every payment against the budget.

General Manager

Takes over from the operator everything that concerns the running of the restaurant: deliveries, suppliers, the back of house, and the first recruitment. From then on the operator can concentrate on the construction, the brand, and the marketing.

Executive Chef

Takes responsibility for the kitchen: checks the equipment as it is installed, and starts planning the menu and the kitchen team.

Graphic Designer

Completes the brand identity and its guidelines, and prepares the artwork for the signage.

Marketing Consultant

An agency or an independent consultant with restaurant experience. Writes the marketing plan with us and, if we keep them on, runs the opening campaign.

Design & Construction*Building the restaurant in two stages*

The contractor builds the restaurant in two stages. The first stage covers everything that will end up hidden: the strip-out, the structural work, and the services — pipes, cables, ducts, and drains — inside the walls, floors, and ceilings. The second stage covers everything the guest will see: plaster, tiles, floors, joinery, the bar, and the lighting. The two stages meet at one moment, when the walls and ceilings are closed. After that moment, a mistake in the first stage can only be corrected by breaking finished work. The second stage depends on deliveries. Finishes can start only when the materials are on site, so the programme is built around confirmed delivery dates, not around the order the contractor would prefer. The inspections made by the authorities follow the same logic as the works: each one has to take place before the work it checks is covered. The architect and the interior designer check the work at every stage; our job is to make sure their checks happen, and to keep a written record of every decision.

Agree the two-stage construction programme and track it every week.

Responsible: General Contractor • **Verified by:** Operator

Before work starts, ask the contractor for the programme in its final form: the two stages, the start and finish of each trade, the milestones that trigger payments, and the date the works will be finished. Build the second stage around the confirmed delivery dates of the FF&E and of the finish materials. Any item that does not yet have a confirmed delivery date is marked in the programme as a risk.

From the first week, the weekly site meeting checks progress against the programme, and every delay is recorded with its cause. Deep Dive 3.1 sets out the method.

Schedule the statutory inspections.

Responsible: Architect • **Verified by:** Operator

List every inspection the authorities will make before the restaurant can open, and place each one in the programme at the moment it has to happen. Some take place during the works and must come before the work they check is covered: the drainage before the floor is laid, the structure before it is boxed in, the gas pipework before it is concealed. Others take place on the finished building: building control, fire, electrical, gas, and the health authority. Book the dates now: if an inspector is not available when the work is ready, the next trade cannot start.

In practice:

Ask the health authority whether it offers an advisory visit before the formal inspection. A problem found on an advisory visit can be corrected during the works; the same problem found at the formal inspection can delay the opening.

Inspect the structure and the services before they are covered.

Responsible: Architect • **Verified by:** Operator

The strip-out comes first. Agree in writing with the contractor what is removed, what is kept, and how the waste leaves the site, and be on site in the first days. When the walls come down, earlier alterations, hidden pipes, and structural elements that do not match the drawings appear, and each of them needs a decision. Then come the structural work and the services: electrical installation, plumbing and drainage, gas pipework, extraction ducts, and the grease interceptor, which the engineer sizes for the kitchen's output and places where it can be emptied easily.

No wall or ceiling is closed until the services behind it have been checked against the drawings, tested, and approved by the architect and by the specialist who installed them. Check every socket, data point, drain, and gas outlet in its exact position, and photograph each wall before it is closed, with a tape measure in the picture. A cable in the wrong position found now takes an hour to move; found after plastering, it means breaking a finished wall.

Connect the utilities and transfer the accounts.

Responsible: General Contractor • **Verified by:** Operator

Transfer the electricity, gas, and water accounts to the company from the date we take over the premises, and choose the provider wherever the market offers a choice. The permanent supplies — the final metered connections, not the temporary power the contractor uses on site — each need an application, an installation by a qualified installer, and a certificate. Ask the contractor to place every connection and every certificate in the programme.

Test the water as soon as the permanent supply is connected. Hard water damages dishwashers, coffee machines, combination ovens, and ice machines, and the test shows whether we need a softener or a filter. Order the treatment equipment as soon as the result arrives, so that it is installed before any equipment is used for the first time.

Check the finishes, the joinery, and the bar against the drawings.

Responsible: Interior Designer • **Verified by:** Operator

The second stage moves room by room once the walls are closed, in a fixed order: plaster, then tiles in the kitchen and the washrooms, then floors, then joinery and decoration, so that no trade damages the work of the one before. Each area has its own floor: non-slip in the kitchen and service areas, the specified finish in the dining room and the bar. The bar counter, the service stations, and the reception desk are usually made off site; confirm their production dates at the start of the stage, because a late bar counter holds up every trade that follows it in the bar.

The interior designer checks every delivery of finish material against the specification and approves each area before the next trade starts on it. The back of house is checked with the same care as the dining room: the staff changing rooms, lockers, and rest area, which most jurisdictions require by law, and the delivery entrance, with a bell and a viewer outside and the right door hardware inside.

In practice:

Keep a dated photo record of every area at every stage. If a dispute arises about whether work was done to specification, it is the most reliable evidence we have.

Install the fire suppression, alarm, and safety systems.

Responsible: General Contractor • **Verified by:** Architect

A certified specialist installs the kitchen fire suppression system once the canopy and the cooking line are in place, and connects it to the gas supply so that it cuts the gas when it operates. The intruder alarm, the smoke detectors, the emergency lighting, and the panic hardware on every exit door are installed in the same period. Fire extinguishers go in the positions the fire authority specifies, with the right type for each area: carbon dioxide near electrical equipment, wet chemical in the kitchen.

In this phase the systems are installed, not yet tested: they are tested and certified together with the final inspections. Ask each specialist now which dates they need and which documents they will issue.

Complete the exterior works.

Responsible: General Contractor • **Verified by:** Architect

Paving, canopies, painting, landscaping and, where there is one, the car park with its lighting, line marking, and accessible bays. Exterior works come last in the programme, so they are the first to be squeezed when it slips, yet they are the first thing a guest sees. Give them their own dates in the programme and review them at the site meeting like

any other trade.

Produce and install the signage.

Responsible: General Contractor • Verified by: Operator

The graphic designer prepares the artwork for the main sign from the approved brand identity and the exterior design; the general contractor installs the sign only once the signage permit has been granted. The operational signs go up at the same time: opening hours, delivery instructions, accessibility information, and parking. Inside, the signs required by law — fire exits, washrooms, handwashing in every food preparation area — follow the local rules on size, language, and position. Order them early: the inspectors will look for them.

Technology

Choosing the systems before the walls close

Every system in the restaurant needs something from the building: a cable in the wall, a power socket in the right place, a fixing for a screen or a speaker. That is why the technology is chosen during the first stage of the works, not at the end. Once the walls are closed, a terminal in the wrong place means breaking finished work, and a missing cable means a visible channel across a new wall.

The work follows one order. An independent consultant first maps all the systems the restaurant will use and checks that they can exchange data. The POS is chosen within that map. The consultant then turns the chosen systems into a list of positions — power, data, fixings — and the architect adds them to the drawings in time for the electricians. The hardware itself arrives later, once the building is finished.

Shortlist and appoint an independent IT consultant.

Responsible: Operator

Look for a consultant with restaurant experience who is not tied to any vendor: their job is to check what vendors claim, not to repeat it. Meet at least two candidates and appoint one in the first days of the phase, because the technology has to be decided before the walls are closed. Brief the consultant with the concept, the number of covers, and the final design, and confirm the scope and the fee in writing.

Map the technology stack before buying any system.

Responsible: IT Consultant • Verified by: Operator

List every system the restaurant will use — POS, accounting software, reservations, inventory, staff timekeeping, CCTV, and access control — and record which other systems each one must exchange data with. Ask the accountant which accounting software they will use: it sets the first requirement for the POS, which must send its sales to the accounting software in the categories the accountant reports on. Only the POS is chosen now; the other systems are chosen later, from the options the map shows

to be compatible. Deep Dive 3.2 sets out the method.

Select the POS system.

Responsible: Operator • Verified by: IT Consultant

Ask other operators in this market which system they use and whether they would choose it again, and shortlist three. At each demonstration, check the specifications against what the restaurant needs, and ask the vendor to show the integration with the accounting software: the sales of each day must arrive there automatically, sorted in the categories the accountant reports on. Check what local support is available, and at what hours. Then confirm the hardware: how many terminals, card readers, printers, and kitchen screens, and where each one goes.

Give the hardware positions to the architect before the walls close.

Responsible: IT Consultant • Verified by: Architect

Every POS terminal, card reader, printer, kitchen screen, camera, access reader, speaker, and network point needs a position on the drawings, with its power and data. The IT consultant prepares the list with the interior designer, and the architect adds it to the electrical drawings before the electricians start. These positions are the item most often forgotten in a restaurant design, and the hardest to move once the walls are plastered.

Install the cabling and the sound system.

Responsible: General Contractor • Verified by: IT Consultant

The contractor runs every cable, power point, and fixing in the technology list while the walls are still open. The sound system follows the same rule: speaker positions agreed with the interior designer, cables run to the amplifier, and volume controls placed where the team can reach them during service.

When the works are finished, the IT consultant walks every position in the list and confirms that it is ready to receive its hardware. A missing socket found at this point is a quick fix; found on the day the hardware is installed, it delays everything that comes after it.

Install a dedicated data line for the POS and card payments.

Responsible: General Contractor • Verified by: IT Consultant

Card payments need their own internet connection, separate from the guest Wi-Fi and the office. If a shared connection fails during a busy service, the restaurant cannot take card payments until it comes back. Order the line as soon as the POS is chosen, because the provider's installation date is outside our control, and have it installed while the works are still open and the cables are easy to run.

Equipment & Purchasing

Ordering the FF&E and bringing it into the building

The FF&E is ordered at the very start of the phase, because the longest deliveries decide when the second stage of the programme can be fixed. Nothing is ordered for a kitchen layout that is still changing: equipment ordered for one layout may not fit another, and suppliers rarely take back commercial kitchen equipment.

Deliveries are the second half of the work, and they follow the building, not the suppliers' convenience: each item arrives when the room that will hold it is ready for it. Every delivery is checked on arrival, because a damaged item accepted without comment becomes our problem, not the supplier's.

Order the FF&E against the construction programme.

Responsible: Operator • Verified by: General Contractor

Choose the supplier for each package from the quotes, and order the long-lead items first: walk-in refrigeration, extraction canopies, specialist cooking equipment, and bespoke furniture. Give the confirmed delivery dates to the contractor, so that the second stage of the programme can be built around them. Ask each supplier for the services every item needs — power, gas, water, drainage, ventilation — and for its weight where the floor must carry it. Agree payment terms that keep part of the price until the item has been delivered and inspected: a deposit with the order, and the balance after delivery. The cooking line is the part of the kitchen where the Executive Chef's opinion matters most. If the chef has already accepted the offer, ask the chef to review the cooking line before it is ordered. Refrigeration, extraction, and the dishwash area follow the design and do not need to wait.

Receive, inspect, and install the kitchen and bar equipment.

Responsible: General Contractor • Verified by: Operator

Check every delivery against the order — item, specification, quantity, condition — and report any damage to the supplier before the driver leaves. Before each item is installed, the contractor confirms that its connections are ready and agrees the installation order with the supplier. No gas appliance is connected until the gas installation has its certificate.

Order the operating supplies and equipment (OS&E).

Responsible: General Manager • Verified by: Executive Chef

Tableware, linen, uniforms, and smallwares are ordered as soon as the General Manager and the Executive Chef take up their roles, because each has its own lead time. Order samples of every key piece of tableware, lay a table, plate a dish on it, and judge it there: a plate that looks right in a catalogue can be too light, too small for the portion, or wrong under the restaurant's lighting. Check that the dishwasher and the glasswasher baskets suit every piece, and allow for breakage and for the pieces that are in the wash

during service.

Decide first whether the linen will be rented from a laundry service or bought and washed outside, because the number of sets depends on how often it comes back. Order the uniforms from the brand guidelines in a range of sizes based on the planned team, from a supplier who can deliver further sizes quickly once the team is hired. The Executive Chef specifies the kitchen and dishwash smallwares; the General Manager the bar tools and the tableware.

Legal, Permits & Insurance

Insurance for the works and the first applications

Two pieces of work in this area have deadlines set by the building: the insurance for the works, and the permit for the sign. Both are short tasks, and both stop the works if they are late.

The other two have deadlines set by the opening. The authorities' processing time for the liquor licence and for the tax registrations starts only when each application is filed, so we file them early in the phase and follow them until they are granted. They run in the background while the building takes shape, and they are easy to forget until they are late.

Put the construction insurance in place before work starts.

Responsible: Insurance Broker · Verified by: Operator

Two policies must be active before the first person works on site. Builder's risk insurance covers the building, the work in progress, and the materials on site during the works. Public liability insurance covers anyone injured on the premises, including during deliveries and inspections. The broker places both from the quotes already collected, and confirms in writing the date each one starts. Employers' liability insurance, compulsory in most jurisdictions from the first day of employment, must also be active before the first employee — usually the General Manager or the Executive Chef — starts work.

▲ *Check the construction contract with the attorney: some contracts make the contractor responsible for builder's risk insurance, others make it ours. If each side assumes the other has arranged it, the works start without cover.*

Submit the liquor licence application.

Responsible: Attorney · Verified by: Operator

File the application in the first days after the lease is signed. It is tied to the address, not to the state of the premises. Before filing, the attorney, or the licensing agent if we decided to use one, checks that the form is complete and every supporting document is attached, and tells us whether a public notice period applies and when it starts.

Then follow the application until the licence is issued. Ask the authority for its status at regular intervals, and answer every request for documents within the week. If the expected issue date moves close to the opening, tell the attorney at once.

Apply for the signage permit.

Responsible: Architect • Verified by: Operator

In most jurisdictions an exterior sign needs a permit, especially an illuminated or projecting sign, or one above a certain size. Apply as soon as the brand identity is approved, using the exterior design the landlord has accepted, so that the permit is granted before the sign is ready to install. Processing usually takes several weeks.

Register the company for every tax it will pay.

Responsible: Accountant • Verified by: Operator

Ask the accountant to list every registration the restaurant needs — sales tax or VAT, employer and payroll taxes, local business taxes — and to file them all now. Some take several weeks to process, and without them the restaurant cannot pay an employee or issue a receipt. The registration as an employer comes first, because the first people are hired well before the opening. Follow each application until its number is issued.

Finance & Funding

Controlling every payment during the works

During the works, money leaves the account faster than in any other phase: stage payments to the contractor, deposits and balances to the FF&E suppliers, fees to the designers. Each payment is made against a document someone else has written — a payment request, an invoice, a price for a change — and each one has to be checked against what was agreed before it is paid.

This control only works if it starts on the first day: every payment is matched to a line of the budget, and every change to the works is approved in writing before it is built. The contingency pays for what is discovered on site, not for changes of mind.

Open a separate account for the construction payments.

Responsible: Operator • Verified by: Accountant

Pay everything that belongs to the opening budget — construction, FF&E, fees, pre-opening costs — from one dedicated account, separate from the account the restaurant will trade from. The accountant can then compare total spending with the budget at any moment, and lenders and investors can see where their money went. Set up dual authorisation from the first day: above an agreed amount, a payment needs the approval of two people, usually the operator and the accountant.

In practice:

Set the dual-authorisation threshold at a level that is useful: set too low, it makes routine payments wait for a second signature; set too high, it lets large payments pass without one.

Approve every stage payment and variation against the budget.

Responsible: Operator • **Verified by:** Accountant

Pay a stage payment only when the architect has confirmed in writing that the milestone has been reached to specification: a payment made for unfinished work cannot be recovered. Treat every change to the works in the same way. Before it is built, ask for its price and its effect on the programme in writing, decide, and record the decision. Enter each payment and each approved change in the budget and in the cash flow model in the same week.

Check how much of the contingency is left after every approved change. If it falls faster than the works progress, review the remaining work with the architect while there is still money to choose with. Deep Dive 3.1 sets out the method.

People

Recruiting and bringing in the two leaders

The General Manager and the Executive Chef are the two most important hires of the opening, and the longest to find. A good candidate is usually employed and has to give notice, so the search starts at the beginning of this phase and ends with a signed offer. Both take up their roles during the second stage of the works, on a date taken from the construction programme: late enough that there is a building to show them, early enough that they check the kitchen, the bar, and the dining room before the works end and are ready to lead the next phase from its first day.

Finding the right person and waiting for their notice period can take as long as the works themselves. Both searches run at the same time, and both start with a written profile, not with an advertisement. The best candidates for these roles rarely answer advertisements; they come through industry referrals and through direct approaches to managers and chefs whose work we know.

Agree the job descriptions and the employment contracts.

Responsible: Operator • **Verified by:** Attorney

Before making the offers, write a job description for each role: what the person is responsible for, whom they report to, how much they can spend and whom they can hire without asking, and how their work will be judged. The job description goes with the offer, so that both know from the start what is expected of them.

The offer states the role, the salary and any bonus, the start date, the probation period, and the notice the candidate has to give. Give both the same start date, taken from the construction programme, so that they build the team together instead of one inheriting the other's choices. A notice period of several weeks is normal for senior roles. The attorney turns each accepted offer into an employment contract under local employment law, and the accountant checks the full cost of each salary, including employer contributions, against the budget. If the programme moves, move the start

date before the contracts are signed, not after.

Recruit the General Manager.

Responsible: Operator

The General Manager runs the restaurant as a business: the team, the guests, the costs, and the figures we read every week. Write the profile from what this restaurant needs: the type and size of operation the candidate has run, the number of covers and the average spend, the size of the team they managed, whether they have opened a restaurant before, and the salary range. Experience of an opening counts for more than the prestige of the last address. Running a restaurant that already works and building one from nothing are different jobs.

Search through referrals and direct approaches to managers whose restaurants we know. Interview the shortlist at least twice. The first interview is about experience and numbers: ask each candidate for the sales, the staff cost, and the food cost of the restaurant they run now, and what they changed to improve them. A manager who does not know their own figures will not manage ours. The second interview takes place in a working restaurant, during service: watch what the candidate notices, how they speak to the staff, and what they would change.

Take up references from people who worked under the candidate as well as from those they reported to. The first tell us how the candidate leads; the second, whether they deliver what they promise. Before choosing, ask whether we would let this person take decisions in our name, because from their first day they will.

In practice:

Before the second interview, ask the finalists to prepare one page on the time between their arrival and the opening: what they would do first, whom they would hire, and in what order. It shows how they think better than any answer given in an interview.

Recruit the Executive Chef.

Responsible: Operator

The Executive Chef decides what the restaurant tastes like and how much every plate costs. The profile starts from the concept — the cuisine, the style of service, the number of covers, and the price level — and adds what an opening demands: experience of running a kitchen of this size, of building a brigade, of costing a menu against a food cost target, and of opening a kitchen from empty rather than taking over one that already works. A chef who has always worked under a strong head chef may cook very well and still find it hard to lead.

The best chefs are usually employed and rarely looking, so search through referrals and direct approaches. Interview the shortlist twice. In the first interview, ask how they develop a menu, how they cost it, and how they would organise the kitchen team for our number of covers. The second is a practical trial: a short tasting of dishes in the style of the concept, cooked in a kitchen we provide. Taste the food, and watch the

method: how the candidate sets up the station, how clean they work, and how they use their time.

Take up references from cooks who worked in the candidate's brigade as well as from the owners they worked for. The cooks tell us how the chef leads under pressure; the owners, whether the food cost the chef promised was the food cost the kitchen delivered.

In practice:

Pay for the ingredients of the trial and agree a fee for the day in advance. A chef worth hiring is employed elsewhere and is giving up a day off to cook for us.

Onboard the General Manager and the Executive Chef.

Responsible: Operator

Brief both in writing on their first day: the concept, the budget and the cash flow model, the construction programme, the marketing plan, the authority each of them has, and what we expect from them before the opening. From then on they attend the weekly site meeting. In their first days, they also write the job descriptions of the Floor Manager, the Bar Manager, and the Sous Chef, agree the pay for each role with us, and open the search for the three, collecting and screening the first candidates. These managers have notice to give, and a search started later brings them in too late to prepare the opening. Alongside the search, their first priority is to check the building they will run while it can still be corrected. The Executive Chef reviews the kitchen and its equipment as they are installed; the General Manager does the same for the dining room, the bar, and the back of house. Every point they raise goes to the architect in writing, through the site meeting, never as an instruction to the contractor on site.

Marketing & PR

Fixing the brand and planning the launch

The brand identity has been in development since the graphic designer was appointed, and it has already guided the exterior design. In this phase it is finished and fixed, because every branded item the restaurant needs — signs, menus, website, uniforms — has its own production time, and none of that production can start until the identity is final.

The marketing plan comes second, built on the identity and on the positioning statement written during the competitor analysis. It decides whom we want to reach, through which channels, with what budget, and in what order, from the first announcement until the restaurant has been trading for three months. We write it in this phase so that it is ready when the people who will carry it out arrive.

Approve the brand identity.

Responsible: Graphic Designer • ***Verified by:*** Operator

Judge the identity against the concept and the guest it is meant for, not against personal

taste, and judge it where it will actually be used: on the sign above the door, on an embroidered apron, on a receipt, on a phone screen. Approve it in writing together with the brand guidelines, the document every supplier will work from. Once approved, the identity is fixed, and any later change becomes a new project with its own budget. Deep Dive 3.3 sets out the method.

Write and approve the marketing plan.

Responsible: Marketing Consultant · Verified by: Operator

The plan sets out the positioning, the target guest, the channels, the timeline of the pre-opening campaign, the budget, and the first ninety days after opening. Few operators have written one before, so have it written by a marketing consultant or agency with restaurant experience, chosen from at least two candidates. We provide the concept, the positioning statement, the target guest, and the budget; the consultant turns them into channels, a campaign, and a timeline. Approve the plan in writing, with a date and a version number, because the website, the photography, social media, and the press work will all start from it. Deep Dive 3.4 sets out the method.

What Might Go Wrong in Phase 3

- Letting the designers stop visiting the site. Once the drawings are delivered, the architect and the interior designer may reduce their visits. The contractor then interprets the drawings alone, and the differences come to light only when the work is finished and expensive to change.
- Moving into the building before the works are finished. Furniture and stock stored on a site where the contractor is still working get damaged or stolen, and the contractor gains a reason to blame the delays on us.
- Paying suppliers in full before delivery. Some suppliers of equipment and furniture ask for the whole price before the goods leave the factory. Once they are paid, we have no leverage left if an item arrives damaged, late, or different from the approved sample.
- Signing a technology contract to get a discount. Vendors often offer a lower price for signing before the end of the month. A system signed in a hurry may not exchange data with the others, and the staff hours spent moving data by hand every week soon cost more than the discount saved.
- Announcing the opening date as soon as the end of the works is confirmed. The final inspections, the tests, the handover, and the training all come after the last trade leaves the site, and each can bring its own delay. A date announced too early has to be moved in public, with bookings already taken.
- Losing the General Manager or the Executive Chef before the opening. A counter-offer from their current employer, a better offer elsewhere, or a disagreement over the concept can take one of them away in the months before the opening.

Deep Dives — Phase 3

The four methods of this phase have one thing in common: each turns our decisions into instructions that other people will carry out — the contractor on site, the technology vendors, the graphic designer and every supplier who will print the brand, and the people who will run the opening campaign. An instruction that is vague, given verbally, or given too late is carried out in whatever way suits the person carrying it out. These methods make the instructions precise, written, and on time.

Each method covers what its task cannot: the site meeting and the written record that keep the contract under control; the choices that decide whether the systems work together, and keep working when the connection fails; the technical decisions behind a logo, its colours, its typefaces, and its tone of voice; and a campaign built in three stages, from the first contacts collected during the works to the bookings of the opening weeks.

DEEP DIVE 3.1

How to manage the construction contract

TEMPLATE AVAILABLE FOR DOWNLOAD: T2.4 — SAMPLE CONSTRUCTION CONTRACT

When to read this. Before the first day on site. The habits described here are easy to set up on the first day and very hard to introduce halfway through the works.

Step 1. Hold a site meeting every week

The weekly site meeting is the main control we have over the works. It starts in the first week and continues without a break until the works are finished, with the same people every time: the operator, the contractor's site manager, and the architect, joined by the interior designer once the second stage begins and by the General Manager and the Executive Chef once they have joined. The agenda never changes: progress against the programme, problems found, decisions needed, changes in progress, and the work planned for the following week.

Every meeting produces a written record, sent to everyone within twenty-four hours. The record shows what was discussed, what was decided, and who will do what by when. If a dispute arises months later, these records are the most important documents we have.

In practice:

Name one person as the only contact for instructions to the contractor. A contractor who receives instructions from several people will follow the one that suits their costs.

Step 2. Give every instruction in writing

Most construction disputes begin with a verbal instruction given on site. The operator says "yes, go ahead" about a small change, the contractor understands something larger, and a few weeks later a claim arrives for work we did not know we had approved. Neither side acted in bad faith; they simply remembered the conversation differently. The rule has no exceptions: every instruction that changes the scope, the specification, the programme, or a material is given in writing. On site, the answer to any request is "I will confirm by email". A change follows four steps: the contractor describes it and prices it in writing, with its effect on the programme; the architect checks the price; we approve or refuse it in writing; the change and its cost are recorded. A small change approved verbally in the second week sets the pattern for the rest of the works.

Step 3. Check every payment request before it is paid

A payment request is the contractor's view of what is owed. Before paying, compare it with three documents. The architect's written confirmation that the work for that milestone is complete and meets the specification. The contract, for the amount of that milestone and the retention to be deducted from it. The register of approved changes: a change appears on a payment request only if we approved it in writing beforehand.

Keep a running total of everything paid, everything approved and not yet paid, and what remains of the contract price. If the total paid moves ahead of the work done on site, stop and find out why before the next payment, not at the end of the works.

Step 4. Track the programme against the end date

At every site meeting, compare the progress on site with the programme agreed before work started. When an activity slips, ask two questions: what caused the delay, and how will the time be recovered? A contractor who cannot answer the second question is not managing the programme.

Some activities decide the end date directly: the structural work, the services before the walls close, the kitchen installation, and the work the inspectors must see. A delay to any of them moves the end of the works by the same amount, however fast the other trades progress. Mark them in the programme and discuss them first at every meeting.

▲ *Be wary of a delay that the contractor promises to recover in the finishes. Time recovered by rushing the second stage usually comes back later as defects.*

Step 5. Record defects while the works are in progress

Ask the architect to inspect the quality of the work at every stage, not only at the end, and to record each defect in a log opened in the first week. A defect found while the trade is still on site is corrected as part of the works, at no cost and without the pressure of an opening date. A defect found only at the end has to be corrected while every other trade is finishing, and some are no longer visible because later work has covered them. When the works are finished, the defects log does not start again from zero: every defect still open goes into the list for the handover, with its date and its photograph. Together with the meeting records and the register of approved changes, it shows what was agreed, what was built, and what is still owed. These are the documents we bring to the handover.

A construction contract is not managed by being on site every day, but by keeping a written record of everything that matters: the programme, the approved changes, the payments, and the defects. Kept this way, the works reach the handover with no surprises about cost or quality, and every disagreement with the contractor is settled on documents rather than on memory. It is the difference between a building that is delivered and one that has to be argued over.

DEEP DIVE 3.2

How to build the technology stack

TEMPLATE AVAILABLE FOR DOWNLOAD: T3.1 — TECHNOLOGY STACK MAP

When to read this. Before the first meeting with any technology vendor. Systems chosen one at a time, without a view of the whole, are the most common cause of manual work that costs management hours every week of trading.

Step 1. Map the systems and the data between them

A restaurant runs on data: sales by category, hours worked, stock by ingredient, bookings by service. Each system produces part of it, and the stack works only if the systems pass that data to one another without a manager retyping it. The POS is the centre: it records every sale. The accounting software turns the daily sales into the profit and loss account. The reservation platform manages bookings and tables. The inventory system compares what was sold with what was used and prepares the purchase orders. The timekeeping system records when each member of staff comes on and goes off duty, and passes the hours worked to payroll; the rota itself is written by the managers, not by the system. CCTV and access control rarely exchange data with the others, but they need cables, cameras, and door readers, so they are planned now with the rest. Draw the stack as a map: one box for each system, one arrow for each flow of data between two of them.

Step 2. Confirm every integration in writing

The systems in the stack must pass data to one another automatically. The POS sends the day's sales to the accounting software and to the inventory system; the reservation platform shares tables and covers with the POS; the timekeeping system sends the hours worked to payroll. Each link works either directly, through a connection the vendor maintains, or through a third-party connector, which adds a cost and depends on another company's service. Where there is no link at all, someone has to move the data by hand every week. Ask each vendor to confirm in writing which links work today, and mark them on the map of the stack before any contract is signed.

Step 3. Choose the systems in the right order

Each choice limits the next, so the order matters. The accounting software comes first: use the one the accountant already works with for restaurants, because they will configure it and they know its limits. The POS comes second, chosen first of all on how well it sends sales to that accounting software in the agreed categories, then on its features and local support. The reservation platform, the inventory system, and the timekeeping system come last, chosen only among those that connect directly to the chosen POS.

In practice:

If the preferred POS connects to only one inventory system or one reservation platform, that may be acceptable, or it may show that it is the wrong POS. Decide by looking at the whole stack, not at the POS alone.

Step 4. Decide how the POS will work when something fails

Most POS systems today run in the cloud: the software and the data sit on the vendor's servers, and the terminals in the restaurant reach them through the internet. Others keep a local server on site. The cloud is simpler to run and to update; its weak point is the connection. Ask every vendor what happens when the internet drops in the middle of a service: whether the terminals keep taking orders, whether the orders still reach the kitchen, whether cards can still be accepted, and what happens to those payments when the connection returns. Choose a system that keeps working offline.

Two hardware choices follow. The card terminals should be integrated with the POS, so that the amount goes from the bill to the terminal instead of being typed by hand: there are no typing errors, and at the end of the day the card payments match the sales without a manual check. In the kitchen, orders arrive either on screens or on printers. Screens show how long each order has been waiting and use no paper; printers are simpler and cheaper. Where printers stand near the cooking line, use impact printers: the heat of the line turns thermal paper black.

Step 5. Design the network before the cables are run

Every fixed device — terminals, printers, kitchen screens, cameras, the office computer — is connected by cable, not by Wi-Fi: a cable does not drop when the room fills with guests and their phones. Wi-Fi is for the devices that move, such as handheld order-taking terminals and portable card readers. If the service uses handhelds, have the Wi-Fi coverage tested in every corner of the dining room, the bar, and the terrace before the walls are closed.

The network is divided into separate networks that cannot see one another: one for the POS and card payments, one for the office, one for the guests. The card industry's security standard, PCI DSS, expects payment systems to be kept apart from the other networks; a guest on the Wi-Fi must never be able to reach the till. All the cables end in one communications cabinet. Put it somewhere dry and ventilated, away from the heat of the kitchen and from water, and connect it, together with the POS terminals, to an uninterruptible power supply: a battery that keeps them running long enough to close the open bills during a power cut. A second internet connection from a different provider, often a mobile one, takes over automatically if the main line fails.

Step 6. Calculate the cost and read the contracts

Almost every system is paid by subscription, and the total is usually higher than expected when each system is judged on its own. Add up the monthly subscriptions,

the hardware, the fees on card payments, the support contracts, and any connector fees, and express the total as a monthly figure and as a share of projected monthly sales. Then read every contract for four things before signing. How long it lasts, and what it costs to leave. Whether the hardware is bought, rented, or tied to the contract. How the card fees are calculated: a single rate on every payment, or the bank's own cost plus a fixed margin, which is easier to compare between providers. And whether all our data — sales, menu, guests — can be exported in a standard format if we change system. A vendor that keeps our data when we leave makes leaving almost impossible.

Step 7. Draw the technology points and hand over the technology file

Ask the IT consultant for a drawing of the technology points: a plan of the restaurant that shows where every device in the stack goes, network switches included, with its power supply, its data connection, its fixing, and its height. The architect adds these points to the electrical drawings, and we check that every one of them is there before the first cable is run.

In practice:

Invite the POS vendor and the CCTV installer to the site before the walls are closed, to confirm that their requirements are met. The visit costs nothing and prevents most installation problems.

Before the hardware arrives, the IT consultant hands over the technology file: the map of the stack, the drawing of the points, the network settings and passwords, and, for every system, the contract, the support number, and the hours it is answered. The General Manager keeps it. In the first weeks of trading, every fault starts with the question of whom to call, and the file answers it.

Guests never see the technology stack, but they feel every weakness in it: an order that does not reach the kitchen, a card payment that fails, a booking that was never recorded. Chosen together, wired before the walls are closed, and documented in one file, the systems become what they should be — invisible tools that let the team concentrate on the guest. Most technology problems of an opening are decided in this phase, long before the first device is switched on.

DEEP DIVE 3.3

How to develop and approve the brand identity

TEMPLATE AVAILABLE FOR DOWNLOAD: T3.2 — BRAND IDENTITY REVIEW AND APPROVAL

When to read this. While the graphic designer develops the identity, and again before the meeting at which the final version is presented. An identity that looks right on a presentation slide can fail when it is printed, embroidered, painted, or lit.

Step 1. Know what the identity is made of

A brand identity is a system, not a logo. It has five parts: the logo in all its versions; the colours; the typefaces; the tone of voice, which is how the restaurant writes; and the rules that hold them together. Each part is judged on two levels: whether it expresses the concept and speaks to the guest the restaurant wants to attract, and whether it works when it is applied — on a sign, a menu, an apron, a phone screen.

Step 2. Follow the logo from the first sketches to the final versions

A logo takes one of four forms: a wordmark, the name written in a designed typeface; a lettermark, the initials; a symbol, an image without words; or a combination of symbol and name. For a new restaurant the name has to be read, so the wordmark or the combination is the usual choice; a symbol alone works only once the guest already knows the brand.

Ask the designer to present the first proposals in black and white. Colour can make a weak shape look attractive; a logo that holds up in black and white will hold up in any colour. Choose one direction, refine it in two or three rounds, and then ask for the complete set of versions: the primary logo; a horizontal or stacked version for spaces of a different shape; a small mark, such as a monogram, for the uses where the full logo does not fit, like a social media profile or the button of a uniform; and each of them in full colour, in one colour, and reversed, white on a dark background. Test every version at its smallest size, embroidered on an apron or printed at the corner of a receipt, where thin lines and small letters are the first to disappear, and at its largest, on the sign. The final logo is drawn as a vector file, which can be enlarged to any size without losing quality.

Step 3. Specify every colour in every system it will be used in

The same colour has to be described in different codes, because each production process makes colour in a different way. Pantone references identify ready-mixed inks, matched by number anywhere in the world; they are used for printing where the colour must be exact, and as the reference for signmakers and embroiderers. CMYK values describe the same colour as a mixture of the four inks of ordinary printing — cyan, magenta, yellow, and black — used for menus, leaflets, and business cards. RGB values, and the HEX code that is the same thing written for the web, describe colour as light,

for screens: the website, social media, and digital menus. For walls, the façade, and painted signs, the colour also needs a paint reference, from RAL or the system used by local paint makers.

These systems do not cover the same range of colours. Some bright colours on a screen cannot be printed in CMYK, and a Pantone colour looks different on coated and uncoated paper, so the guidelines give one reference for each. Before approving, ask for printed samples on the real papers and fabrics, and look at them under the restaurant's own lighting: the warm light of a dining room changes colours that looked right in a studio. Check the contrast between text and background as well. Text that cannot be read in a dim room or on a phone in the sun is a design fault, not a matter of taste.

Step 4. Choose the typefaces and secure their licences

Typefaces fall into a few families: serif typefaces, with small strokes at the ends of the letters, read as classic; sans serif typefaces, without them, read as modern and stay clear at small sizes and on screens; script and display typefaces have strong character and are hard to read in more than a few words. An identity uses two typefaces at most: one with character for names and headings, one that is easy to read for everything else, menus included. A menu is read in low light, often by guests who left their glasses at home, so the typeface for its text needs open letter shapes, enough size, and enough space between the lines.

A typeface is software, and it is licensed, not owned. The licence states where it may be used: on the computers that produce printed material, embedded in the website, in an app, on digital screens in the restaurant. Each use may need its own licence, and some are priced by the number of computers or the website's visitors. Ask the designer for the list of typefaces with the licence each one needs, buy the licences in the company's name, not the designer's, and keep the licence documents with the brand files.

Step 5. Define the tone of voice

The identity also covers words. The tone of voice sets how the restaurant writes everywhere: how dishes are described on the menu, how the website and the social media posts sound, what the signs and the staff say. It is set out in a few rules, each with an example of what to write and what not to write: whether the restaurant addresses the guest formally or informally, how long a dish description may be, which words it never uses. Without these rules, the menu, the website, and the posts are written by different people in different voices, and the restaurant sounds like three places.

Step 6. Check the guidelines and the final files

The guidelines are the document every supplier works from: the printer, the signmaker, the web developer, the uniform supplier. A complete document covers every version of the logo, with its minimum size and the clear space around it; the colours, with their references in every system; the typefaces, with their uses and licences; the tone of voice;

the uses that are not allowed; and examples of the identity applied to the menu, the sign, a uniform, and a social media post. With the guidelines come the final files: the logos as vector files for production and as image files for screens, each in every version.

Step 7. Fix the identity and brief every supplier from it

Approval closes the design work: from that day any change is treated as a separate design job, with its own brief and budget, because every new round of revision delays all the work that depends on it. There is one exception: a practical failure found while the identity is being applied, such as a logo that cannot be embroidered at the size required or a typeface without the licence we need. That is a problem to solve; a general feeling that it could be better is not.

From then on, every supplier is briefed with the guidelines and the final files. Keep the current files in one shared location and send every supplier there. If a supplier delivers work that does not match the identity, the guidelines show in writing what they were asked to do.

An identity is judged not on the day it is approved, but over years of use: on every menu, sign, apron, and post, made by different suppliers, often without the designer in the room. Developed from the concept, tested where it will actually be used, and fixed in clear guidelines, it stays consistent however many hands apply it. That consistency is what makes a new restaurant recognisable before a guest has tasted anything.

DEEP DIVE 3.4

How to build the marketing plan

TEMPLATE AVAILABLE FOR DOWNLOAD: T3.3 — MARKETING PLAN · T3.4 — SOCIAL MEDIA & WEB PRESENCE GUIDE

When to read this. Before briefing the marketing consultant, and again when the first draft of the plan arrives. The consultant writes the plan; this method is what we use to brief them and to judge what they deliver.

Step 1. Turn the positioning into one message

Every decision in the plan follows from the positioning statement of the competitor analysis: who the guest is, for which occasion they come, and why they choose us over the places they would otherwise go. A positioning that could describe any restaurant — “great food, warm service, a lovely atmosphere” — gives the consultant nothing to work with. One that names the guest, the occasion, and the reason tells them whom to look for and what to say.

From the positioning, write the message in one sentence: the single thing that, if a guest remembered nothing else, would be enough to bring them in. Then choose three proofs that make it believable — a dish, a feature of the place, a person — because guests believe what they can see, not what we claim. Every post, every article, every sign of the campaign shows one of the three proofs and carries the message.

Step 2. Find out where the guest looks, then choose the channels

Describe the guest precisely enough to find them: where they live or work, when they eat out, how they discover a new restaurant, and what convinces them to book. Do not guess. Ask twenty people who match the profile how they found the last new restaurant they tried, and what made them book. The answers usually point to two or three channels: maps and online reviews for guests who decide on the day; social media for guests who follow places before they try them; the press and booking platforms for guests planning an occasion; the people around the site — residents, offices, hotels — for a neighbourhood restaurant.

Choose two or three channels and give each one an owner and a weekly rhythm that can be kept for months. A channel used every week brings more guests than four channels used when there is time.

Step 3. Set the target in covers, then divide the budget

The plan has to answer one question: how many covers do the opening weeks need, and where will they come from? Take the covers forecast for the first weeks from the financial model, subtract the guests who will walk in without booking, and the rest is the number of bookings the campaign has to produce before the doors open. That figure is the target, and every activity in the plan is judged by how many of those bookings it can bring.

The marketing budget is already in the opening budget, within the pre-opening costs; the plan decides how to spend it. It pays for photography and video, the website, public relations, paid advertising, the opening events, and printed material. It does not pay for the reservation system, the hosting of the website, or the hours the team spends on social media: those are running costs, and mixing them in makes the budget impossible to check. Spend where the target is met at the lowest cost per booking. Photography, for example, is not a social media expense: its images serve every channel for years.

Step 4. Run the pre-opening campaign in three stages

The first stage builds an audience while the restaurant is still a building site. Reserve the name on every channel the day the identity is approved, and create the restaurant's business profile on the maps the guests use, marked as opening soon. There is no food to show yet, so the campaign shows the people and the making: the chef at the tastings, the materials arriving, the room taking shape. Every post, the site hoarding, and the website carry the same invitation: leave a contact to be the first to know when bookings open. That list of contacts is the main result of the first stage, worth more than any number of followers. The same weeks are the time to meet the neighbours who can send guests: the residents' association, the offices nearby, the concierges of local hotels. The second stage is the day reservations open, the most important moment of the campaign. The opening date is announced only when it is certain, and the booking link goes live on the same day on every channel. The contact list hears first, a day before everyone else, so that the people who waited feel they were first. A short press release with the professional photographs goes the same day to the few journalists and writers who matter for this guest.

The third stage fills the opening weeks. Count the bookings against the target every week. If they fall short, use the channel that is working harder instead of opening a new one, and go back to the neighbours and the contact list before buying advertising. Avoid launch discounts: they bring guests who come for the price, and teach the others what the restaurant will cost when it is quiet. Invite the press after the first weeks, when the kitchen and the service are steady, not on the first night.

Step 5. Turn the plan into a calendar with owners

A plan becomes useful when every action has a date, an owner, a cost, and a measure. Build the calendar backwards from the day reservations open, and respect the order in which one piece of work depends on another. The photographs of the dishes need the final menu, and the photographs of the rooms need the finished building; until then the content shows the construction and the team. The website needs the photographs, and the booking system has to work before the opening date is announced. Ask the consultant for the calendar week by week, with these dependencies visible, and check that the dates match the construction programme.

Step 6. Plan the first ninety days after opening

After the opening the plan has three jobs. The first is reviews. Decide who answers every online review, and within how long. A good answer thanks the guest, responds to the specific point, and never argues; it is written for the next readers as much as for the guest who wrote the review.

The second is the second visit. Most new guests will not come back unless they are given a reason. With the guest's consent, as data protection law requires, the reservation system keeps the contact of everyone who booked. Use it: a thank-you after the first visit, then an invitation when there is something new to show — a seasonal dish, a wine evening, a menu change.

The third is measurement. Add a question to the booking form — “how did you hear about us?” — and read the reservation sources every week. After a month the figures show which channels bring guests and which only bring attention, and the budget moves to the ones that work.

In practice:

Judge the consultant by bookings, not by followers, likes, or articles. Agree at the start which figures will be reported every week — bookings by source, the contact list, the cost per booking — and review the plan with them at the end of the first month of trading.

A marketing plan does not need to be large; it needs to be followed. Built on one message, a few chosen channels, and a budget measured against real bookings, it turns the months of construction into an audience waiting for the opening, and the opening into guests who come back. The restaurant that opens with a list of people ready to book starts trading in a very different position from the one that opens and hopes to be found.

Phase 3 Checklist

1. Two-stage construction programme agreed, built on confirmed delivery dates, and reviewed every week.
2. Statutory inspections listed and booked in the programme.
3. Structure and services inspected, tested, and photographed before every wall and ceiling was closed.
4. Utility accounts transferred; permanent supplies connected and certified; water tested and treatment ordered.
5. Finishes, joinery, bar, and back-of-house areas approved area by area by the interior designer.
6. Fire suppression, alarm, and safety systems installed, with dates and documents for their tests agreed.
7. Exterior works complete.
8. Signage installed under the permit; statutory interior signs in place.
9. Independent IT consultant appointed.
10. Technology stack mapped, with every integration confirmed in writing by the vendors.
11. POS system selected and its hardware specified.
12. Hardware positions on the electrical drawings before the walls were closed.
13. Cabling and sound system installed; every position checked and ready for its hardware.
14. Dedicated data line for the POS and card payments installed.
15. FF&E ordered, with every delivery date built into the programme.
16. Kitchen and bar equipment delivered, inspected, and installed; no gas appliance connected before the gas certificate.
17. Operating supplies and equipment ordered: tableware, linen, uniforms, and small wares.
18. Builder's risk and public liability insurance active before work started; employers' liability active before the first employee started.
19. Liquor licence application filed and followed up.
20. Signage permit granted.
21. Tax registrations complete, with the employer registration first.
22. Separate construction account open, with dual authorisation.
23. Every stage payment confirmed by the architect, and every change approved in writing, before payment.
24. Job descriptions written and employment contracts signed, with the same start date for both.
25. General Manager selected, with references taken up.
26. Executive Chef selected after a practical trial, with references taken up.
27. General Manager and Executive Chef onboarded, briefed in writing, and attending the site meetings; search for the Floor Manager, the Bar Manager, and the Sous Chef open.

28. Brand identity and guidelines approved in writing.
29. Marketing plan written by the marketing consultant and approved, with a date and a version number.

Working Files from the Toolkit

- T3.1 — TECHNOLOGY STACK MAP
- T3.2 — BRAND IDENTITY REVIEW AND APPROVAL
- T3.3 — MARKETING PLAN
- T3.4 — SOCIAL MEDIA & WEB PRESENCE GUIDE
- T3.5 — JOB DESCRIPTION — GENERAL MANAGER
- T3.6 — JOB DESCRIPTION — EXECUTIVE CHEF
- T3.7 — LEADERSHIP INTERVIEW SCORECARD

PHASE 4

SET UP

From the finished works to the handover of the building

Phase 3 ended with the works finished and the equipment installed. This phase does not wait for that moment: it starts on the day the General Manager and the Executive Chef take up their roles, while the contractor is still working, and for a while the two phases run side by side. From that day the project has two leaders who will run the restaurant, and the work changes nature. Until now we have been building a place. From now on we are building the business that will work inside it: the people, the menu, the suppliers, the systems, and the written standards that say how each job is done.

The three pieces of work that matter most in this phase depend on one another. The building must be tested, inspected, and taken over from the contractor before the team can work in it. The menu must be drafted before the suppliers can be chosen, and the kitchen must be commissioned before the menu can be tasted. The team must be planned from the opening hours and the floor plan, and its managers must be hired first, because they write the procedures, interview their own staff, and prepare the training. Around these three, the systems, the accounts, the permits, and the first stage of the campaign each wait for one of them: the reservation platform for the floor plan, the website for the photographs, the first-year budget for the team and its pay.

This is also the phase in which the payroll grows, long before there are any sales. Every manager we hire early is paid before the restaurant earns anything, and every week of delay in the building or the menu is a week of salaries spent waiting. The phase ends when three things are true at the same time: the building has been taken over at practical completion, every member of the team has signed a contract with the same start date, and the menu has been approved in writing. With those in place, training can start.

Key Moments in Phase 4

On the day of practical completion, the contractor hands over a bunch of keys, a folder, and the alarm code, and the site team is gone within the hour. Before they leave, walk the building with the contractor's site manager and the General Manager: read and photograph every meter, test the alarm code, and try every key on the list in its door. Then book the locksmith and the alarm company for the same afternoon. From that night, anything that goes missing in the building is our loss.

The Floor Manager, the Bar Manager, and the Sous Chef start on the same morning,

halfway through the phase, and their work is already waiting for them. They complete the selection of the rest of the team. They check every delivery of OS&E as it arrives. They prepare the ingredient list with the Executive Chef and the General Manager. They enter the first data into the recipe system and complete the recipes as they are finalised. And they organise the training plan. None of this can wait for the rest: all of it starts on their first day.

A beverage supplier offers a free coffee machine, a branded fridge, and the parasols for the terrace, in exchange for an exclusive contract. The offer arrives when every expense hurts, and it is tempting to accept on the spot. Ask for the contract and read three clauses first: how long the exclusivity lasts, the minimum volume we must buy, and what we owe if we leave early. Then compare the price of their products over the whole contract with the best alternative. The equipment is rarely free: it is paid for in the price of every bottle.

At the last tasting, the dish everyone at the table likes best has a food cost well above the target. Do not judge it on its percentage alone. A menu works when it is balanced: some dishes with a high food cost but a high margin on each plate, which bring in the most money every time they are sold, and others with a low food cost and a lower margin, which keep the overall percentage down. Look at where this dish sits in that balance before deciding whether it stays.

Who Is Involved in Phase 4

Operator

Approves the management structure, the senior hires, the menu, the budget, and the date of practical completion. From this phase the operator manages through the two leaders, not around them.

General Manager

Leads the work of the phase on the operating side: the team, the standards, the systems, and the suppliers' terms. Takes over the building from the contractor together with the architect.

Executive Chef

Writes and develops the menu, chooses the food suppliers, commissions the kitchen, and builds the kitchen team.

Floor Manager

Joins halfway through the phase. Completes the recruitment of the floor team, writes the Standards of Service and the checklists of the dining room with the General Manager, and prepares the training of the floor.

Bar Manager

Joins at the same time as the Floor Manager. Builds the beverage list with the General

Manager, specifies the bar equipment, recruits the bar team, and prepares its training.

Sous Chef

Joins with the other two managers. Cooks at the tastings, writes the checklists of the kitchen, and recruits the cooks with the Executive Chef.

Architect

Organises the tests and the final inspections, leads the snagging inspection, checks the final account, and certifies practical completion.

Interior Designer

Checks each finished area against the specification before the formal snagging inspection.

General Contractor

Completes the last finishes and details of the works, repairs the defects on the snagging list, hands over the building documents, and remains liable for faults in its work for the period set in the contract.

IT Consultant

Oversees the hardware installation, tests every link between the systems, and hands over the completed technology file.

Accountant

Costs the team, designs the accounting system with the General Manager, and builds the first-year trading budget.

Attorney

Files the remaining permit applications and reviews the employee handbook and the employment contracts.

Insurance Broker

Places the policies that cover the building, its contents, and the team from the day of practical completion.

Marketing Consultant

Leads the campaign's first stage, commissions the photography, and has the website built.

PR Consultant

Appointed only if the marketing consultant does not deal with journalists. Prepares the press kit for the day reservations open.

Graphic Designer

Designs the stationery, the exterior menu display, and the vouchers from the brand guidelines.

Design & Construction

Taking over the building

The works end with a building that looks finished, but a finished building is not yet ours to run. Before we take it over, every system is tested in the conditions of a full service, the authorities inspect it, and the defects are listed and given a date for repair. Practical completion is the moment the building passes from the contractor to us: from that day the risk, the insurance, and the running costs are ours, and the contractor's main incentive to finish quickly is gone.

The order is fixed. The tests come first, because an inspector will ask for their certificates. The snagging list follows the tests, because a test often reveals a defect. The documents are collected before the certificate of practical completion is signed, because after that day the contractor has little reason to send them. The cleaning comes last, and nothing that belongs to the operation enters the building before it.

Test the building systems under full load.

Responsible: Architect · Verified by: Operator

The building systems — the kitchen extraction and ventilation, the heating and air conditioning, the hot water, the electrical supply, the gas, the drainage, and the refrigeration — behave differently when the restaurant is full. Ask the architect to organise the tests with the engineers and the specialist installers, and to run each one in the conditions of a busy service: the extraction with the whole cooking line on, the air conditioning with the dining room full, the hot water with the dishwasher and every hand basin running, the electrical supply with every piece of equipment switched on at once, the drains with every sink open.

The fire suppression, the fire alarm, the emergency lighting, and the intruder alarm are tested and certified by their installers in the same days, and the monitoring company receives the right contacts. Every test ends with a written result. A system that fails is repaired and tested again before the inspections. Deep Dive 4.1 sets out the method.

Pass the final inspections.

Responsible: Architect · Verified by: Operator

The inspections booked during the works are now carried out on the completed premises: building control, the fire authority, and the inspections of the electrical and gas installations. Each inspector looks for the certificates of the tests, the signs required by law, and the work exactly as it was approved. Walk the building with the architect the day before each visit, with the inspector's list in hand.

Every inspection ends with a certificate or with a list of conditions. Give each condition to the contractor in writing with a date, and book the return visit at once. Some authorities will not issue the next certificate until the previous one is in place, so one condition left open can hold up all the others.

Agree the snagging list with the contractor.

Responsible: Architect · **Verified by:** Operator

As each area is finished, the interior designer walks it and records what does not match the specification, so that the contractor can correct it before the formal inspection. Then the architect, the interior designer, the contractor, the General Manager, and the Executive Chef walk the whole building together, room by room, and record every defect with its location, its description, and a photograph. The open items of the defects log kept during the works go into the same list.

Both sides sign the list, and the contractor gives a date for every item. Defects that affect safety, the inspections, or the ability to serve are repaired before practical completion; the others follow a programme agreed in writing. The architect checks every repair and closes it on the list. Deep Dive 4.1 sets out the method.

Collect the building documents from the contractor.

Responsible: General Contractor · **Verified by:** Architect

Before practical completion, the contractor hands over the documents we will need to run the building and to repair it: the as-built drawings, which show where every pipe, cable, and duct actually runs; the operating and maintenance manuals; the warranties, registered in the company's name; every test certificate; and the list of keys, codes, and passwords. Every shut-off valve and every circuit on the distribution boards is labelled with what it controls, and each one is tested before it is labelled.

The architect checks the documents against the list in the contract. The General Manager keeps one complete set in the office and a second set outside the building.

Certify practical completion and take over the building.

Responsible: Architect · **Verified by:** Operator

Practical completion is certified by the architect when the building can be used for its purpose: the inspections are passed, the systems work, the documents are handed over, and the defects still open do not prevent the restaurant from operating. From the date on the certificate, the building is ours. The defects liability period begins, the retention stays in our hands until it ends, and the contractor is no longer responsible for the security of the premises.

Agree the date in advance with the insurance broker, so that the building is insured from that day, and receive every key from the contractor in a signed list. Change the locks and the alarm codes the same day: during the works, more keys and codes were in circulation than anyone has recorded.

▲ *Do not accept practical completion while a defect prevents part of the restaurant from operating, however close the opening date is. Once the certificate is signed, the retention is the only leverage left to get that defect repaired.*

Have the building cleaned before anything moves in.

Responsible: General Manager • **Verified by:** Operator

At the end of the works, every surface is covered in fine dust, adhesive, and paint. A specialist construction clean removes it from floors, walls, glass, ducts, and the inside of cupboards and equipment; dust left in the extraction and the ventilation comes back for weeks. Book the cleaning company early, because construction cleans are in demand at the end of every project, and book the same company for a second, deep clean just before the team arrives for training.

People

Building the team

The team is built from the top down. The opening budget already contains an estimate of the staffing level and of the pay, made when we wrote the business plan. The General Manager and the Executive Chef now turn that estimate into a structure — each role, the number of people in it, and its pay — and correct the budget wherever the two differ. Each manager who will run the floor, the bar, or the kitchen is recruited first: the search opened in the first days of the two leaders, and the three join halfway through this phase. From then on they complete the recruitment of their own teams, write the procedures those teams will follow, and prepare the training.

Recruitment takes longer than it seems: good candidates are usually employed and have notice to give. For the rest of the team, it starts only when the headcount, the pay, and the job descriptions are set, and it ends only when every contract is signed, all of them starting on the first day of training. Alongside it, two pieces of work must be finished before that day: the documents a new employee receives, and the training plan. If they are written while the team is already waiting, every day of delay is a day of salaries paid for nothing.

Define the management structure.

Responsible: Operator • **Verified by:** General Manager

One of our first conversations with the General Manager is about who manages what. Write down who is responsible for each function of the business — the floor, the bar, the kitchen, purchasing, payroll and personnel, the accounts — and who each manager reports to. In most independent restaurants the General Manager takes personnel and the accounts, the Executive Chef takes the purchasing of food, and no dedicated manager is needed for any of them. A larger operation may need a dedicated HR, finance, or purchasing manager; if so, recruit them now, with the floor, bar, and kitchen managers.

Record the decision and give it to the accountant, who needs to know who will send the payroll, approve the invoices, and answer their questions.

Plan the headcount and check it against the staff cost.

Responsible: General Manager • **Verified by:** Accountant

Start from the staffing level estimated in the opening budget, and check it against the service, not against a ratio taken from another restaurant. For each service, count the positions to fill at its peak — the stations in the kitchen, the sections on the floor, the bar, the reception, the dishwash — then convert the positions into people, with enough cover for days off, holidays, and absences. Hire above the minimum: some people leave during training, and some in the first weeks of service.

Turn the headcount into an organisation chart, with each role, its manager, and its start date. Then cost it with the accountant, including employer contributions, and compare it with the staff cost in the P&L projection. If the team costs more than the projection allows, change the plan now — the service model, the opening hours, or the projection itself — not after the contracts are signed. Deep Dive 4.2 sets out the method.

Confirm the pay rates and benefits for every role.

Responsible: General Manager • **Verified by:** Accountant

Before any offer is made, confirm what each role pays, by the hour or by the year, starting from the pay assumed in the opening budget, and what comes with it: meals on duty, uniforms and their laundry, paid holidays above the legal minimum, service charge or tips and how they are shared, any bonus. Check the local market by asking candidates and other operators, not by reading advertisements. Ask the accountant to confirm what the law requires in this market — minimum wage, overtime, holiday pay, how tips are treated — and the full cost of each role.

Pay must be the same for the same role. A difference negotiated by one candidate becomes known to the whole team within weeks, and everyone else will ask for the same.

Write the job descriptions for every role.

Responsible: General Manager, Executive Chef • **Verified by:** Operator

Each job description states the title and the reporting line, the purpose of the role in one sentence, the five to eight things the person will do most often, what is required and what is preferred, the hours and the pattern of shifts, and the pay and benefits. The General Manager writes those for the floor, the bar, and the reception; the Executive Chef those for the kitchen and the dishwash.

The descriptions of the Floor Manager, the Bar Manager, and the Sous Chef were written when their search opened; the others are written now, once the headcount and the pay are set.

Write the description for the role the restaurant actually needs. A server's description that asks for ten years of experience attracts few candidates, and the few it attracts will leave for a better offer. The job description also becomes the basis of the advertisement and of the interview.

Hire the Floor Manager, the Bar Manager, and the Sous Chef.

Responsible: General Manager, Executive Chef • **Verified by:** Operator

The candidates come from the search the General Manager and the Executive Chef opened in their first days. Each manager is chosen by the person they will report to: the Floor Manager and the Bar Manager by the General Manager, the Sous Chef by the Executive Chef. Interview each candidate twice. The first interview covers their experience and how they run a team: the size of the service they ran, how they trained new staff, and what they did the last time a service went wrong. The second is a practical test: a service on the floor, a set of drinks behind a bar, a shift on a kitchen line. Take up references from someone they managed and from someone they reported to.

The operator approves each offer. The three join halfway through the phase, and from their first day they do four things at once: they complete the recruitment of their teams, take part in the tastings, write the checklists for their stations, and prepare the training of their departments.

Recruit the team and sign every contract.

Responsible: General Manager • **Verified by:** Operator

Start recruiting the operational staff once the headcount, the pay rates, and the job descriptions are set, and advertise every role through several channels at the same time. Each manager interviews the candidates for their own team together with the General Manager or the Executive Chef.

Make each offer in writing, check the right to work and the references before the start date, and have every contract signed before training begins. Everyone starts on the same day, the first day of training. Keep the names of the strongest candidates who were not chosen: some of those who accept will not arrive. Deep Dive 4.2 sets out the method.

▲ *Do not hire a candidate we have doubts about because the headcount must be reached. A wrong hire costs more management time than an empty position, and usually leaves anyway.*

Write the employee handbook.

Responsible: General Manager • **Verified by:** Attorney

The handbook sets out the terms that apply to everyone: working hours and breaks, how the schedule is published, holidays and absence, uniforms and personal presentation, the staff meal, the use of phones, conduct, the disciplinary and grievance procedures, and the rules on health, safety, and food hygiene. The staff meal policy belongs here: what the team eats, when, and how it is recorded, because an informal staff meal becomes a food cost that no report shows.

The attorney reviews the handbook and the employment contracts against local employment law before any contract is signed.

Plan the pre-opening training.

Responsible: General Manager, Executive Chef • **Verified by:** Operator

Training starts on the first day the team is together, so it is planned before that day: the skills each role needs by the opening, the programme of the training days, who trains whom, the mock services, and how each person's readiness will be checked. The managers write the training material for their departments from the documents already prepared: the checklists, the Standards of Service, the recipe cards.

Book the suppliers who will train the team on their products and equipment, and add the cost of the training days — salaries, food, and drink — to the opening budget if it is not already there. Deep Dive 4.3 sets out the method.

Food & Beverage

Developing and approving the menu

The menu starts as a draft, written early enough to produce the list of ingredients that the suppliers need to quote against. The draft does not have to be final; it has to be specific. A dish called “fish of the day, to be confirmed” cannot be costed or ordered.

From the draft, the menu is cooked, tested, costed, and changed until it is right, and then it is fixed. It is tested in the restaurant's own kitchen, on the commissioned equipment, by the people who will cook it in service, because a dish that works on a development stove may fail on the line. The approval is the last step of this phase, and everything that follows — the final prices, the POS, the printed menus, the photographs, the training — starts from the approved version.

Write the first draft of the menu.

Responsible: Executive Chef • **Verified by:** General Manager

The Executive Chef writes the complete draft from the concept: the sections of the menu, the number of dishes in each, every dish described by its main ingredients, and the price level it must sit at. The General Manager checks it against the positioning decided in the competitor analysis and against the covers forecast.

From the draft, the chef lists every ingredient with its specification. That list is what the suppliers quote against: prices, quality, and terms. Deep Dive 4.4 sets out the method.

Build the beverage list.

Responsible: General Manager • **Verified by:** Operator

The beverage list covers everything the guest can drink: wine, beer, spirits, cocktails if the concept includes them, coffee and tea, and the soft drinks. For wine, decide the number of references, the balance of styles and origins, and the price ladder, with a house wine at the entry level. For spirits and beer, decide which brands are poured as standard and which are premium. Coffee and soft drinks are often left to the last moment, yet they are served to most guests: choose the coffee and its machine together,

because many roasters lend or lease the machine and train the team.

The list is built with the Bar Manager and with the suppliers who will provide it. Where the concept pairs drinks with the dishes — the wines by the glass, a cocktail created for a dish — those drinks are tasted with the food at the menu tastings; the rest of the list is tasted separately by the General Manager and the Bar Manager. Each reference carries its cost and its proposed selling price, so that the list can be checked against the beverage cost target before it is approved.

Test the menu at two or more tastings and approve it in writing.

Responsible: Executive Chef • Verified by: Operator

The first tasting covers the whole menu, food and drink, cooked in the restaurant's kitchen by the chef and the Sous Chef. The operator, the General Manager, and the department managers score each dish independently, with its cost card on the table, on taste, presentation, fit with the concept, and value for the guest at its price, before any discussion. The Executive Chef presents the dishes. The tasting ends with a decision recorded for every dish: each dish is kept, changed, or removed.

Each following tasting covers only what was changed, and the tastings continue until every dish has been kept or removed. The operator then approves the menu in writing, with a date and a version number. A dish that is still not right is removed, not approved with reservations. From the approved menu, the chef calculates the weekly quantity of every ingredient, using the recipe cards and the covers forecast, and gives it to the chosen suppliers. Deep Dive 4.4 sets out the method.

Equipment & Purchasing

Equipping the restaurant and choosing the suppliers

Several kinds of purchase meet in this phase. The kitchen and bar equipment, installed during the works, is commissioned. The operating supplies and equipment — tableware, linen, uniforms, and smallwares — ordered as soon as the General Manager and the Executive Chef took up their roles, are received and checked once the building is clean. And the suppliers are chosen for everything the restaurant will buy regularly: food and drink, cleaning products and disposables, and the services it pays for every month, such as software subscriptions, telephone and internet, and laundry.

Each purchase has a moment. Goods delivered before the contractor hands over the building need a safe place to be stored. The kitchen is commissioned before the first tasting. The suppliers need the ingredient list, and their accounts must be open before the first tasting.

Arrange secure storage for the goods that arrive before practical completion.

Responsible: General Manager • **Verified by:** Operator

Tableware, linen, smallwares, and the first dry goods start to arrive while the contractor is still working. Find a clean, dry, and lockable space for them, inside the building in an area the contractor has finished and handed over, or nearby, large enough for everything that will arrive before practical completion.

Receive every delivery there against its order, and keep a list of what is stored and where. Move nothing into the restaurant until the room it belongs to has been cleaned.

Commission the kitchen and bar equipment.

Responsible: Executive Chef • **Verified by:** General Contractor

Each supplier commissions its own equipment once it is connected: it switches it on, checks every function against the specification, sets it up, and shows the Executive Chef and the Bar Manager how to use, clean, and look after it. Combination ovens, dishwashers, ice machines, coffee machines, and refrigeration all need a supplier's technician, not only an electrician or a plumber.

Bring every refrigerator, freezer, and cold room down to its working temperature and record it for several days with a probe thermometer before any food goes in. Fill in the warranty registrations in the company's name and keep every manual in the office. Finish the commissioning before the first tasting.

Receive and check the operating supplies and equipment (OS&E).

Responsible: General Manager • **Verified by:** Executive Chef

The tableware, linen, uniforms, and smallwares ordered when the two leaders took up their roles arrive in this phase. Check every delivery against its order as it arrives: open the cartons, count the pieces, and report any breakage or wrong item to the supplier at once, while there is still time for a replacement to arrive before training.

Everything delivered before the building is clean goes to the secure storage. Once each room has been cleaned, the goods move to their place: the linen and the uniforms to their stores, the smallwares to the kitchen, the bar, and the dishwasher.

Select the suppliers and open the accounts.

Responsible: Executive Chef • **Verified by:** General Manager

From the ingredient list, compare at least three suppliers in every category of product, on the same products, at the same specification, for price per usable unit, quality, delivery days, order cut-off times, minimum order, and payment terms. Taste the samples blind. Agree the terms in writing and open the accounts with a standard credit application, so that the restaurant does not fill in a different form for every supplier.

Choose a main supplier and a backup for every category and record them in the vendor list, with the contact, the agreed terms, and the delivery schedule. The Executive Chef

chooses the food suppliers; the General Manager agrees the terms and the payment. Deep Dive 4.5 sets out the method.

Operations

Writing down how the restaurant will run

A restaurant that opens without written standards runs on the habits of whoever is on shift. In this phase the managers decide how the restaurant will work and write it down: when it is open, where every table is, how bookings are taken, how a guest is received and served, and what each station must do before, during, and after service. The main document is the Standards of Service, which describes the guest's visit step by step. Together with the station checklists, it becomes the training material, and after the opening it is the reference for every shift.

The work starts with the management office, from which the managers run everything else. Then come the opening hours and the floor plan, because almost everything depends on them: the headcount, the reservation platform, the POS, the website, and the profile on the maps. The Standards of Service, the reservations policy, and the station checklists follow, written by the managers together with the team. The service contracts close the work: the guest never sees them, but each of them is needed before the team arrives.

Set up the management office and the safe.

Responsible: General Manager · Verified by: Operator

The managers need a working office from the day the building is taken over: a desk, a computer connected to the restaurant's systems, a printer, a telephone, and a lockable cabinet for personnel files. The office also holds the documents of the building, the technology file, and the copies of every certificate.

Order the safe early, because it must be delivered and fixed before any cash is handled during training. Choose one rated for fire and burglary, sized for what it will hold, and bolted to the floor or the wall. Limit the code to the managers who handle cash, and change it whenever one of them leaves.

Set the opening hours for each day and each service.

Responsible: General Manager · Verified by: Operator

Set the hours as a commitment, not an intention, for each day of the week separately: when the kitchen opens for preparation, when service starts, when the last order is taken, and when the restaurant closes. Check the hours against the conditions of the licence and the lease.

Once set, the hours go to the team plan, the reservation platform, the website, and every online listing. Changing them after the opening confuses guests.

Finalise the floor plan, the table numbers, and the sections.

Responsible: General Manager • **Verified by:** Operator

Fix the final position of every table and chair on the drawing, with the number of covers at each table, and test it with the real furniture in the room: walk the service routes with a full tray, from the kitchen pass to the furthest table and back.

Number every table and divide the room into sections, one for each server. The POS, the reservation platform, and the training material all use the same numbers. A number changed after the POS is programmed means reprogramming the floor plan and retraining the team.

Write the Standards of Service.

Responsible: General Manager • **Verified by:** Operator

The Standards of Service describe, step by step, the service given to the guest from the moment they arrive to the moment they leave: how they are greeted and seated, when the menus and the water arrive, how the order is taken and sent, how the dishes are presented, when the table is checked and cleared, how the bill is presented and paid, and how the guest is seen out. For each step, write what is done, by whom, and within how long.

Include what to do when something goes wrong — a late dish, a complaint, an allergy declared at the table — and how a guest's comment is recorded and passed to the managers. Write the Standards of Service with the Floor Manager and test them in the room. They are the base of the floor training. Deep Dive 4.7 sets out the method.

Write the reservations policy.

Responsible: General Manager • **Verified by:** Operator

Decide how guests will book and how the tables will be managed: bookings only, walk-ins only, or both, and how many tables are kept for walk-ins; how far ahead a booking can be made; how long each table is held at each service; whether a card guarantee or a deposit is required, and for which bookings; the cancellation and no-show terms; and how a guest waiting for a table is told it is ready.

Write the policy down and apply it the same way for everyone. A policy that exists only in the General Manager's head is applied differently by every host, and the guests who are treated differently will say so in their reviews.

Write the checklist for every station.

Responsible: Executive Chef, Floor Manager • **Verified by:** General Manager

Every station — every section of the kitchen line, the bar, the reception, the service stations, the dishwash, and the manager on duty — has a checklist in three parts: what must be ready before service, what is checked during service, and what is done before the station is closed. The side duties that keep the restaurant running outside service, such as polishing glasses, restocking, and cleaning the coffee machine, go into the same

checklists, assigned to the opening, the service, or the closing, and rotated across the team.

Appoint the service contractors.

Responsible: General Manager · Verified by: Operator

Several services start before the opening and continue for as long as the restaurant trades: cleaning, the cleaning of the extraction canopy and ducts, the emptying of the grease interceptor, pest control, waste and recycling collection, linen and laundry, the maintenance of the refrigeration, the dishwasher, and the air conditioning, the supply of cleaning chemicals, the sharpening of the kitchen knives, and the collection of cash if the bank does not provide it. Where the concept and the location require it, add door security. Compare at least two contractors for each service, and agree in writing the frequency, the scope of each visit, and the response time for an emergency call.

Pest control starts before the first food delivery, and the extraction cleaning before the first service, because the insurer and the fire authority will ask for the certificates. Put every contractor, with its emergency number, in one contact list kept in the office and at the reception.

Technology

Completing the stack

The map of the stack and the POS were decided before the walls were closed. The other systems — reservations, inventory, and staff timekeeping — are chosen now, only among those the map shows to connect with the chosen POS. Their configuration needs decisions taken in this phase: the reservation platform needs the floor plan and the reservations policy, and the timekeeping system needs the roles and the pay rates.

The hardware is installed in the clean building, in the places wired for it during the works, and every link between the systems is tested with real data before the team uses it. The POS is the exception that waits: its programming brief is written now, but the POS is programmed only once the menu is approved and priced.

Choose and set up the reservation, inventory, and timekeeping systems.

Responsible: General Manager · Verified by: IT Consultant

Choose each system from the options the map of the stack shows to connect directly with the POS, and ask each vendor to show the connection working. Configure the reservation platform with the floor plan, the table numbers, the opening hours, and the reservations policy, then book, change, and cancel a table as a guest would, on a phone. Configure the timekeeping system with the roles and the pay rules, so that the hours worked reach the payroll without being typed again.

The inventory system is set up with the suppliers and their products now; the recipes are loaded once the menu has been approved. Read every contract for its length and the

export of our data before signing.

Install the hardware and test every system.

Responsible: IT Consultant · Verified by: General Manager

Once the building is clean, the IT consultant coordinates the installation of the hardware on the positions prepared during the works: the POS terminals, the card readers, the printers and kitchen screens, the network equipment, the cameras, and the access readers. Then test every link with real transactions: a sale that reaches the kitchen, the card terminal, and the accounting software; a booking that reaches the POS; a shift that reaches the payroll.

Finally, cut the internet connection on purpose during a test service, and check that the backup line takes over, the terminals carry on, and the kitchen keeps receiving the orders. The IT consultant updates the technology file with every setting and hands it to the General Manager.

Write the POS programming brief.

Responsible: General Manager · Verified by: IT Consultant

The brief lists everything the POS must contain: the floor plan and the table numbers; the menu structure, with every item, its modifiers, and its kitchen printer or screen; the sales categories agreed with the accountant; the tax rates; the payment methods; the discounts and complimentary items, with the reasons that must be recorded; the user roles and what each one may do; and the reports the managers will read every day.

Write the structure now, fill in the items and the prices once the menu is approved and costed, and agree with the vendor the dates of programming and training. A brief prepared in advance turns the programming into a few days of work instead of a few weeks.

Finance & Funding

Closing the build and setting up the accounts

Two pieces of financial work overlap in this phase. The first closes the construction: the contractor's final account is agreed, the last stage payment is made, and the retention is held until the end of the defects liability period. The second opens the restaurant's own accounts: the accounting system is built so that every sale, invoice, and salary is recorded in the right place from the first day of trading.

The order matters. The accounting system is designed from the P&L the managers will read at the end of every period, and it is connected to the POS before the first sale.

Agree the contractor's final account.

Responsible: Operator · Verified by: Architect

The final account is the total value of the whole job: the contract sum, plus or minus every approved variation. The balance due is that total, less every payment already

made and the retention. Ask the contractor for it at practical completion, and have the architect check every line against the contract, the register of approved changes, and the payment certificates. A variation that was never approved in writing is not paid. Agree the figure in writing, pay the balance due, and record the date on which the retention will be released. Enter the final cost of the works in the opening budget and in the cash flow model, so that the money left for the rest of the opening is known exactly.

Set up the accounting system.

Responsible: Accountant · Verified by: General Manager

The accountant designs the system with the General Manager: the format of the P&L for each period; the chart of accounts that produces it; the accounting periods, calendar months or thirteen periods of four weeks; who keeps the books, an in-house bookkeeper or an external service; and how the POS, the bank, the card payments, and the payroll feed the accounting software.

Before the first trading day, test the whole chain with real transactions, from a sale on the POS to its line in the P&L, and have the accountant review the system and its controls. Deep Dive 4.6 sets out the method.

Set the first-year trading budget.

Responsible: Accountant · Verified by: Operator

The trading budget is the plan for the first year, period by period, against which every result will be measured. Build it from the P&L projection, now that the real figures are known: the team and the pay rates, the opening hours, the rent and the service contracts, the subscriptions of the systems, the insurance premiums. Keep the ramp-up of the projection: the first weeks of trading do not reach the sales of a stable restaurant. Agree the budget with the General Manager, and give each manager the lines they are responsible for: the staff cost of each department, the food and beverage costs, the controllable expenses.

Legal, Permits & Insurance

The remaining permits and the cover for the building

We filed the applications with the longest processing times while the building was under construction. What is left in the permit register now are the approvals that need the finished premises or the operator's final details: the food business registration, the business licence where the local authority requires one, the licences for music and for the outdoor seating. Each has its own authority and its own processing time, and none of them can be left to the last weeks.

The insurance changes at practical completion. The policies that covered the works end, and from that day the building, the equipment, and the people working in it must be covered by the restaurant's own policies. The broker prepares them in advance so that there is no day without cover.

File the remaining applications in the permit register.

Responsible: Attorney • **Verified by:** Operator

Go through the permit register with the attorney and file every application that is still open: the registration of the food business with the health authority, which in many jurisdictions must be made a set number of days before trading starts; the business licence; the licences for playing recorded and live music, which in many markets are issued by the organisations that collect royalties for musicians and composers, not by the local authority; the permit for the terrace or the outdoor seating; and any other approval specific to this location.

Record the filing date and the expected decision date of each one in the register, and follow each application until it is granted.

Put the property and employers' liability insurance in place before practical completion.

Responsible: Insurance Broker • **Verified by:** Operator

Ask the broker to place, from the quotes already collected, the policies that start at practical completion: the buildings or tenant's improvements cover required by the lease, the contents and equipment, business interruption, and public and product liability for the trading restaurant. Check that the employers' liability policy, compulsory in most jurisdictions from the first employee, covers the whole team that will join for training.

Give the broker the date of practical completion as soon as it is fixed, and receive the written confirmation of each policy before that date. Read the conditions of each policy: some insurers require the extraction cleaning, the fire suppression service, or an intruder alarm with monitoring, and do not pay a claim if the condition was not met.

Marketing & PR

The first stage of the campaign

The marketing plan is approved, and its first stage is under way: the restaurant does not yet have food to show or a date to announce, so the campaign builds the list of people who want to be told when bookings open. In this phase the material for the next stage is prepared: the photographs, the website, the printed material, and the relationship with the press that will carry the announcement.

Each piece waits for something else. The photographs of the rooms wait for the clean building; the photographs of the dishes wait for the approved menu; the website waits for the photographs; the press release waits for an opening date that can no longer move. The work of this phase is to have everything ready, so that the day reservations open needs nothing more than a decision.

Appoint the PR consultant.

Responsible: Operator • Verified by: Marketing Consultant

If the press is not part of the marketing consultant's work, appoint a PR consultant who has opened restaurants before, after meeting at least two. The PR consultant knows the food writers, journalists, and guides that matter for this guest, and prepares the press kit: the concept on one page, the biographies of the chef, the General Manager, and the operator, a selection of the menu, the professional photographs, and the reservation details.

Agree in writing what the consultant will deliver, how the results will be measured, and the fee. Nothing is sent to the press yet: the press release goes out on the day reservations open, and no journalist is invited before the team has served its first guests.

Run the first stage of the campaign.

Responsible: Marketing Consultant • Verified by: Operator

The marketing consultant runs the first stage of the plan with the General Manager: the profiles on the channels the plan has chosen, the listing on the maps, the hoarding, and the content of the stage — the team, the furnishing of the room, the suppliers, the first dishes in development. Every post asks the reader to leave a contact.

Count the contacts every week against the target in the plan. The General Manager now meets in person the offices, hotels, and residents' groups nearby that the plan identified.

Commission the professional photography.

Responsible: Marketing Consultant • Verified by: Operator

Brief one photographer for two sessions. The first takes place once the building is clean and furnished: the exterior, the dining room, the bar, the details, and the team. The second takes place once the menu is approved: every dish exactly as it will be served, plated by the kitchen on the restaurant's own tableware. Agree in writing that the restaurant may use the images on every channel, in print, and for the press, without limits of time.

The images serve the website, the maps, social media, the press kit, and the menus for years.

Build the website, ready to go live the day reservations open.

Responsible: Marketing Consultant • Verified by: Operator

The single page used in the first stage is replaced by the full website, built by the web developer from the brand guidelines: the concept, the menu as a page that can be read on a phone, the opening hours, the address with a map, the reservation link, the contact details, and the information on allergens. Agree the delivery date in writing, and add the photographs and the final menu as soon as they exist.

Test the whole journey on a phone before the site goes live: find the restaurant, read the

menu, and book a table.

Produce the printed material and the gift vouchers.

Responsible: *Graphic Designer* • **Verified by:** *Operator*

From the brand guidelines, the graphic designer prepares the printed material the restaurant needs before it opens: business cards and stationery, the exterior menu display if the concept has one, and the gift vouchers, in a printed and a digital version. The menus themselves are printed later, from the approved and priced version.

Agree with the accountant how vouchers are recorded: a voucher sold is money owed to a guest, not a sale, until it is used. The POS is programmed for their sale and their redemption together with the rest of the menu.

What Might Go Wrong in Phase 4

- Giving candidates an opening date before it is certain. Candidates resign from their jobs and plan their lives around the date they are told. When the date moves, the best of them take another job, and the others have to be paid to wait.
- Letting each manager hire only people they have worked with before. The team arrives already loyal to its manager rather than to the restaurant, with habits from another place. If that manager leaves, part of the team leaves with them.
- Letting the warranties start on the day of delivery. Equipment delivered during the works may have used a large part of its warranty before the restaurant serves its first meal, and the first failures of the trading year then fall outside it.
- Approving dishes that do not belong to the concept, or that depend on an uncertain ingredient. A dish that tastes good can win the tasting even when it belongs to another restaurant, or when it needs an ingredient that no supplier can guarantee every week at the same quality and in the quantity the service needs. Once on the menu, the first blurs what the restaurant stands for; the second is changed or taken off at short notice, and the team serves a dish it has not been trained on.
- Letting each vendor set up its system on its own. The POS vendor names the sales categories one way, the inventory system another, the accountant a third. The data passes from one system to the next, but nothing matches, and the reports of the first months cannot be compared with one another or with the budget.
- Publishing information in one place and forgetting the others. The opening hours, the menu, or the phone number change on the website but not on the maps, the booking platforms, or the social profiles. Guests arrive when the kitchen is closed or ask for a dish that no longer exists, and the first reviews say so.

Deep Dives — Phase 4

The seven methods that follow have a single aim: each one turns a piece of the restaurant into something that can be checked before the doors open. A building that has been tested under load, a team counted against the staff cost, a training plan with a test at the end, a menu approved on its cost cards, suppliers compared on the same products, an accounting system that has already recorded a test sale, a service written step by step and tested in the room. Each of them replaces an impression with a written result. The methods follow the order of the phase.

DEEP DIVE 4.1

How to take over the building

TEMPLATE AVAILABLE FOR DOWNLOAD: T4.1 — PUNCH LIST & HANDOVER

When to read this. When the contractor gives the date on which the works will be finished, and again before the snagging inspection. What we accept at practical completion is what we will run for years.

Step 1. Prepare the inspection before walking the building

A snagging inspection finds what it is looking for, so it starts at the desk. Collect the final drawings, the interior design specification, the list of equipment with its positions, the register of approved changes, and the defects log kept during the works. Each defect still open in the log goes onto the new list from the start, with its original date and photograph. Agree with the contractor the day, the people present, and the order of the rooms, and ask for every service to be switched on and every room to be unlocked. Prepare the list itself as a table that both sides will sign: a number for each item, the room, the exact position, the description, the photograph, the trade responsible, the category, and the date for repair. A list written in free text during the walk becomes a list of disputes afterwards.

Step 2. Walk every room in the same order

Walk each room from the door, always in the same sequence: the ceiling, the walls, the floor, then the fixtures and fittings. Operate everything that moves or switches. Open and close every door and window, and check that each door closes by itself where it should. Switch on every light circuit and every dimmer. Test every socket with a plug-in tester. Run every tap and every shower until the water is hot, and watch the drain. Flush every toilet. Check every floor drain with water, not by eye.

Look at the finishes in the light the guest will see. Repairs to walls and joinery that are invisible at midday under work lights appear in the evening under the restaurant's own lighting, so walk the dining room and the bar a second time with the final lighting scenes switched on. Photograph every defect with something in the frame that shows where it is. A defect without a photograph and a position will be disputed.

Step 3. Classify every defect and agree its date

Not every defect has the same weight, and treating them alike lets the important ones wait behind the cosmetic ones. Use four categories. Safety and compliance: anything an inspector would refuse, such as an emergency light that does not work or a fire door that does not close. Operation: anything that stops part of the restaurant from working, such as a drain that backs up or a cold room that does not hold its temperature. Guest-facing: what the guest will see or touch, such as a scratched bar top or an uneven tile in the dining room. Minor: everything else.

The first two categories are repaired before practical completion. Guest-facing defects get a date before the training starts. Minor defects follow a programme agreed with the contractor, with access at times that do not disturb the training. Both sides sign the list, and every item is closed only when the architect has checked the repair and recorded the date.

Step 4. Test the systems in the conditions of a full service

A system that works in an empty building can fail when the restaurant is full. Run the extraction with every appliance on the cooking line at full heat for at least an hour, and check three things: the smoke and steam are captured by the canopy, not spilling under its edges; the replacement air comes in without a draught on the cooks; and the kitchen stays at a slightly lower pressure than the dining room, so that the smells stay in the kitchen. The engineer measures the air flows and compares them with the design.

Then test the other services at their peak. Hot water: the dishwasher, the glasswasher, and every hand basin running at once, and the temperature at the furthest tap. Electricity: every piece of equipment switched on together, with no circuit breaker tripping. Gas: every burner lit, with the pressure checked at the last appliance on the line. Drainage: every sink emptied at once, and the grease interceptor checked after the test. Refrigeration: every unit pulled down to its working temperature and holding it overnight. Each test ends with a written result signed by the person who ran it.

Step 5. Collect every document before signing

The contract lists the documents the contractor must hand over; ask for the list well before the expected date and check each item as it arrives. The set normally includes the as-built drawings for the building and for each service; the operating and maintenance manuals for every installed system; the warranties, registered in the company's name, with their start dates; the test and commissioning certificates for the electrical installation, the gas installation, the fire alarm, the emergency lighting, the fire suppression, and the extraction; the completion certificate from building control; and the schedule of keys, codes, and passwords.

Ask also for the spare materials: a box of each floor and wall tile, the paint references for every colour, the spare lamps, the filters. Matching a tile that is no longer produced is one of the most common problems of the first year. Before the installers leave, ask each of them to show the General Manager how their system is operated, how it is reset after a fault, and how it is shut down in an emergency: the extraction and the ventilation, the air conditioning, the fire alarm, the fire suppression, the intruder alarm, and the hot water. A system that only the installer knows how to reset stops the restaurant until the installer can come back.

Step 6. Know what changes at practical completion

Practical completion does not mean that every defect is repaired; it means the restaurant

can open and work. On the date of the certificate several things change at once. The building becomes our responsibility, so it must be insured from that day. Any damages for delay set in the contract stop running. The defects liability period begins: for its duration, the contractor must repair at its own cost any defect caused by its work. The retention is held until the period ends and the defects are repaired.

Before the architect signs, check four conditions: every inspection has been passed, every system test has been passed, every safety and operation defect is repaired, and every document is in our hands. If one of them is missing, the date moves. A certificate of practical completion signed by the architect before these conditions are met saves a few days on the programme and takes away the reason for the contractor to come back.

Step 7. Manage the defects after we move in

Once the team is in the building, new defects appear: a door that sticks when the heating is on, a joint that cracks, a drain that is slow under real use. Record each one on the same list, with the same details, and send it to the contractor in writing as soon as it is found. Agree the hours when the contractor's trades may work, outside service and training.

Book the final inspection with the architect before the defects liability period ends. From then on, the same list becomes the restaurant's maintenance log: every fault, the date it was found, who repaired it, and what it cost. After the first year, the log shows which systems fail most often and which contractors are worth keeping, and it is the first document to read before any renovation.

The handover is the last moment in which the contractor still has a reason to come back quickly. Taken over with every system tested, every inspection passed, every document in our hands, and every defect on a list with a date, the building becomes ours without hidden debts. Accepted in a hurry, it becomes a series of problems the restaurant will pay for during service, when they are hardest and most expensive to solve.

DEEP DIVE 4.2

How to recruit the team

TEMPLATE AVAILABLE FOR DOWNLOAD: T4.2 — TEAM PLAN & STAFF COST · T4.3 — JOB DESCRIPTION TEMPLATE · T4.4 — TEAM INTERVIEW SCORECARD

When to read this. Before calculating the headcount, and again before the first interview. Most of the problems of a new team are decided at recruitment: who was hired, at what cost, and how they were chosen.

Step 1. Count the positions in the busiest service

Start from the service, not from the number of staff in another restaurant. For each service of the week, list the positions that must be filled at the busiest moment: each section of the kitchen line, the pastry, the dishwash, each section of the dining room, the runners, the bar, the reception, and the manager on duty. A section of the dining room is as many tables as one server can look after at the standard of service the concept promises, and that number is decided by the Standards of Service, not by a general rule. Then write the weekly plan of every position as a grid: the days, the services, and the hours of each shift, including the time before and after service for preparation and closing. The grid shows where the busy services need extra people and where a quiet service can be run with fewer.

Step 2. Turn positions into people

Add up the hours each role must cover in a week, and divide by the contracted hours of one full-time employee. The result is the number of people needed before holidays, sickness, and training. Then add the cover. For example: the dining room needs four servers at eleven services a week, each shift six hours long, which makes 264 hours. With contracts of 40 hours, that is 6.6 people. With paid holidays and an allowance for absence, the restaurant needs seven or eight servers, some of them part-time.

Hire above that figure. A team planned at the exact minimum cannot open the restaurant if two of them do not arrive. The extra people are the first to have their hours reduced if everyone stays.

Step 3. Cost the team and bring it within the budget

Cost every position with the accountant: the gross pay, the employer's contributions, the paid holidays, the staff meal, and any bonus or share of service charge that the restaurant pays. Add the managers, who are paid before the rest of the team. Then set the total against the staff line of the projection, for a stable week and for the first weeks of trading, when sales are lower and the team is already complete.

When the total cost is too high, the answer is a decision, not a hope, and there are three to choose from. Reduce the opening hours where the forecast is weakest: a quiet lunch with a full kitchen and floor team can cost more in salaries than the sales it brings in; closing it removes a whole shift from the plan. Simplify the service model — fewer

courses served at the table, a shorter menu at lunch — so that each service needs fewer people. Or accept a higher staff cost, and show in the budget which other cost will be lower to pay for it. Decide before the contracts are signed. Once the team is hired, the only way to reduce its cost is to cut hours, and when hours are cut the best people leave first, because they are the ones who find another job most easily.

Step 4. Advertise the job the candidate will actually do

An advertisement is written for the candidate, and it says two things: who we are and who we are looking for. Who we are: the restaurant, its concept, and what makes it worth joining — a new opening, the team, the training. Who we are looking for: the role, the experience it needs, and the start date; the pay, the shifts, and the days off. Other conditions are explained at the first interview.

Use several channels at once and record where each candidate came from. Referrals from the managers' own networks and from the team already hired usually bring the best candidates, followed by direct approaches and catering schools. Recruitment agencies are worth their fee for the managers, rarely for the rest of the team.

Step 5. Interview with the same questions for everyone

Start with a short telephone call to check the essentials: the right to work, the availability on the first day of training, the shifts the candidate can work, and the pay they expect. Only those who pass come to a second interview. The second interview is led by the manager of the department together with the General Manager or the Executive Chef, and every candidate for the same role answers the same questions, so that the answers can be compared.

Ask about what the candidate has done, not what they would do: the busiest service they have worked and what they did when it went wrong, the last time they disagreed with a manager, why they left their last job. Score each answer straight after the interview, before discussing the candidate with anyone else.

Step 6. Check the references with previous managers

Before making an offer, call at least one previous manager or employer of every candidate, and, for the three department managers, two: someone they managed and someone they reported to. Ask specific questions about the work, not general ones: which station the cook ran and at what volume, how many tables the server looked after in a full service, whether the bartender ran a busy bar alone, how the candidate behaved when a service went wrong. End with one question: would you hire this person again? A hesitation in the answer says more than the rest of the call.

Step 7. Make the offer, then keep the candidate

Check the right-to-work documents, and make the offer in writing: the role, the pay, the hours, the start date, which is the first day of training for everyone, and the probation period. Ask for the contract to be signed and returned within a few days.

Between the signature and the first day there are often weeks in which a better offer can arrive. Keep in touch with every new hire. Keep a reserve list of the good candidates who were not chosen, in order, and call the first of them as soon as someone withdraws.

A team is not hired in one day; it is built, one decision at a time, from a plan that fits the service and the budget. Each person chosen with the same method — the right description, a structured interview, a practical test, a clear offer — arrives on the first day knowing what is expected. A restaurant can be rebuilt, re-equipped, or redecorated; the people who welcome the first guests are the part of the opening that guests remember most.

DEEP DIVE 4.3

How to plan the pre-opening training

TEMPLATE AVAILABLE FOR DOWNLOAD: T4.5 — PRE-OPENING TRAINING PLAN

When to read this. As soon as the department managers are hired, well before the rest of the team signs. The training is run in the last phase; everything it needs is prepared in this one.

Step 1. Define what each role must be able to do on the first night

A training plan starts from the result, not from the timetable. For each role, write the list of things the person must be able to do without help by the opening: a server takes an order with every modifier and allergy correctly entered in the POS, describes every dish and suggests a wine for it, and follows each step of the Standards of Service; a cook prepares the mise en place of the section to the checklist and cooks every dish of the section to the recipe card within the time set at the pass; a host takes a booking, seats a walk-in, and manages a waiting list on the reservation platform.

Each item on these lists is written so that it can be checked by watching the person do it. “Knows the menu” cannot be checked. “Describes every dish, its main ingredients, and its allergens without notes” can.

Step 2. Build the programme backwards from the soft opening

The training programme lasts eighteen days, or as long as the operation requires, and it is built from the last day backwards. The final days are the mock services and the soft opening, with real guests. Before them come the full rehearsals of service in the restaurant. Before those come the training at the stations and on the systems. At the start come the days that the whole team spends together: the concept, the restaurant, the standards, health and safety, food hygiene, and the menu.

Write the programme as a timetable for each department, day by day, with the session, the trainer, the place, and the material. Check that each session needs only what will be ready on that day: the kitchen cannot train on the menu before the food is delivered, and the floor cannot practise on the POS before it is programmed.

Step 3. Write the material from the documents that already exist

The training material for each role is a short manual that brings together, in the order the person will use them, the documents the managers have already written: the checklists of their station, the Standards of Service, the recipe cards, the beverage list with its descriptions, the reservations policy, the handbook. The manual refers to these documents and explains them; it does not copy them, so that a change to a recipe or a checklist does not leave the manual out of date.

Add to it what the documents do not contain: a photograph of each dish as it must leave the pass, the allergen chart of the whole menu, the description of each dish and

drink as the team will give it to the guest, and a short written test for each part. Write the manuals, the allergen chart, and the tests in plain language, and make sure every member of the team understands them. Where the team speaks several languages, translate at least the allergen chart and the safety rules.

Step 4. Decide who trains whom

Each department manager trains their own team: they wrote the standards, and the team must learn to follow them from the person who will check them. The General Manager and the Executive Chef run the sessions that concern everyone, and attend part of each department's training. Some of the suppliers train the team on their own products and equipment: the wine supplier on the list, the coffee roaster on the machine and the coffee, the chemical supplier on the dishwasher and the cleaning products, the POS vendor on the system.

Step 5. Plan the mock services

The mock services are the only part of the training in which the whole restaurant works together. Plan them in rising order of difficulty: first a service with the managers as guests, then services with invited guests on a reduced menu, then services on the full menu with a full room. Invite the guests in advance, and tell them what feedback is expected of them.

After each mock service, the managers meet for a short debrief: what went wrong, why, and what changes before the next service. The checklists and the Standards of Service are corrected the same night.

Step 6. Decide how each person will be judged ready

At the end of the training, every person is checked against the list of their role: by a written test on the menu and the allergens, and by the department manager watching them do each task. Record the result on a sign-off sheet for each person, signed by the manager and by the employee.

Decide in advance what happens to someone who is not ready: more training, a different role, or no place on the opening rota. A person who is not ready and works the first night alone is a risk for the guests and for the rest of the team.

Step 7. Prepare the logistics before the first day

A training day without its materials is a day of salaries spent waiting. Before the first day, check that the building is clean, the equipment commissioned, and the systems installed; that the uniforms are ready and the schedule of the training days given to every person; that the food and drink for the kitchen and bar training are ordered; and that the cost of the training — salaries, food, drink, and the suppliers' time — is in the opening budget.

The training is prepared in this phase so that, on the first morning, nothing has to be invented: the programme, the trainers, the materials, and the way each person will be judged are already decided. What happens next belongs to the team. Its starting point is set here, because a team trained from a written plan begins from the same standard, while one trained from improvisation begins from as many standards as there are trainers.

DEEP DIVE 4.4

How to develop and test the menu

TEMPLATE AVAILABLE FOR DOWNLOAD: T4.6 — MENU TASTING & APPROVAL · T4.7 — RECIPE & BEVERAGE COSTING · T4.8 — MENU PRICING & WRITING GUIDE

When to read this. Before the Executive Chef writes the first draft, and again before the first tasting. The menu decides what the restaurant buys, what equipment the kitchen uses at its limit, how many cooks it needs, and most of its margin.

Step 1. Start from the constraints, not from the dishes

Before any dish is chosen, write down the limits the menu must respect. The concept and the guest set the style and the price level. The P&L projection sets the food cost target and the average spend. The kitchen sets what can be produced: the equipment on each section, the space for preparation and storage, and the number and skill of the cooks. The covers forecast sets how many dishes leave the pass at the busiest moment. These limits decide the size of the menu. Every dish added means more ingredients to buy and store, more preparation, more stock at risk of waste, and more for the team to learn. A short menu that the kitchen can cook perfectly at full capacity is the best decision for the first weeks of trading.

Step 2. Draft the structure before choosing the dishes

Draw the menu as a structure first: the sections, the number of dishes in each, and the price range of each section. Then place each dish on the section of the kitchen that will cook it, and check the balance: if most dishes come from the grill, the grill becomes the bottleneck of every service while the other sections wait.

Check also the ingredients across the menu. An ingredient used in two or three dishes is bought in larger quantities, turns over faster, and is less likely to be thrown away. An ingredient used in only one dish, especially a perishable one, should earn its place.

Step 3. Develop each dish for the section that will cook it

A dish is ready for the menu when it can be produced in service, not only when it tastes right. For each dish, decide what is prepared in advance and how it is held, what is cooked to order, and how long it takes from the order to the pass at the busiest moment. Cook it on the restaurant's own equipment, and have it cooked by the cook who will make it in service, not only by the chef. Cook it several times: a dish that comes out differently every time will come out differently in service.

Step 4. Write the recipe card while the dish is developed

Every dish has a recipe card, written during development, not afterwards from memory. The card states the yield of the recipe, the weight of each component per portion, the method in numbered steps, the plating, with a photograph, and the allergens. In the UK and the EU, fourteen allergens must be declared to the guest, and the card records

which of them each component contains, including those in the bought-in ingredients, such as stocks, sauces, and bread.

Step 5. Cost every dish against the target

The cost of a dish is the cost of its ingredients as they are served, not as they are bought. Each ingredient is priced at the supplier's price divided by its yield: a fish bought whole that loses half its weight when filleted costs twice its purchase price per kilo of fillet. Add every component of the portion, including the garnish and the sauce, to find the cost of the plate. The percentage is only half of the picture. What pays the rent and the salaries is the gross margin of each dish: its selling price before tax, less the cost of its ingredients, in money. The plate that costs 4.20 and sells for 15.00 leaves 10.80. A plate that costs 7.50 and sells for 22.00 runs at 34%, above the target, but leaves 14.50 every time it is sold. Judge each dish on both figures. A balanced menu combines dishes with a high food cost and a high margin, which bring in the most money on each plate, with dishes with a low food cost and a lower margin, which keep the percentage of the whole menu on target.

Step 6. Run the tastings as decisions

A tasting is a working meeting, not a dinner. Serve each dish as it will leave the pass, on the restaurant's tableware, with its recipe card and its cost card on the table. Each person has a tasting sheet with the name of each dish and scores each dish alone, before any discussion, on four points: taste, presentation, fit with the concept, and value for the guest at its price. Then discuss the dishes with the lowest scores first.

Every dish leaves the first tasting with one of three decisions written next to it: keep, change, or remove, and for each change, what must change. Each following tasting serves only the changed dishes, cooked by the brigade, not by the chef alone, until every dish has been kept or removed.

Step 7. Fix the approved menu

Once the operator has signed the approved version, the menu is fixed. Every later change starts a chain of work: a new costing, a new POS entry, a new print, new training, new photographs. Changes before the opening are made only to correct a real problem found in training or in the mock services, never because a new idea arrived. The seasonal changes and the improvements wait until the restaurant is trading and the first sales figures show which dishes work.

A menu developed this way reaches the opening already tested on the restaurant's own equipment, by the people who will cook it, against the cost the business can afford. Every dish on it has a reason to be there, a recipe card, and a margin. What the menu still lacks is the judgement of the guests, and that comes only with trading: it is the starting point of the first review, not a verdict on the work done here.

DEEP DIVE 4.5

How to choose the suppliers and agree the terms

TEMPLATE AVAILABLE FOR DOWNLOAD: T4.9 — SUPPLIER COMPARISON & VENDOR LIST

When to read this. As soon as the first draft of the menu exists. The suppliers chosen now decide the quality of the food, the reliability of every service, and a large part of the cost of sales.

Step 1. Turn the draft menu into a specification

A supplier can quote only for a product that is described precisely. From the ingredient list, write a specification for each product: the name, the variety or cut, the size or grade, the origin if it matters, the pack size, the state in which it is delivered — whole, portioned, peeled, frozen — and the estimated weekly quantity, calculated from the covers forecast and the recipe cards. Group the products by category: fresh produce, meat, fish, dairy, dry goods, bread, beverages, cleaning chemicals, and disposables.

Step 2. Find at least three suppliers for each category

Ask other operators, the Executive Chef's network, and the suppliers already chosen, who usually know their competitors well. For fresh products, distance matters: a supplier far from the restaurant delivers less often and is harder to reach when an order is wrong. Visit the main suppliers of fresh products before choosing them: the state of the warehouse, the temperature of the vehicles, and the way the goods are handled show more than a price list.

Step 3. Compare like with like

Send the same specification to every supplier and compare the offers in one table. Compare the price per usable unit, not per unit bought: a cheaper product with more waste, or a lower price for a larger pack the restaurant cannot use before it spoils, may cost more. Taste the samples blind, without the price or the supplier's name. Then compare what does not appear on the price list: the delivery days, the order cut-off time, the minimum order, the policy on substitutions and returns, the food safety certification, and how the supplier handles a product recall.

Step 4. Agree the terms in writing

Agree with each chosen supplier: the prices and how long they are fixed; how a change of price is notified, and how far in advance; the payment terms and the credit limit; the delivery days and times; what happens when a product is missing — a substitution only with our approval; and the procedure for goods rejected on delivery, with a credit note issued within an agreed time. Terms agreed on the phone are forgotten by the person who replaces the sales representative.

A new company has no trading history, and many suppliers will ask for payment on delivery or for a deposit on the first orders. Ask when the terms will be reviewed, and

agree the date: after a period of regular payments, most suppliers offer credit.

Step 5. Open the accounts with one standard document

Almost every supplier asks for the same information before opening an account. Prepare it once, in a standard credit application: the company's legal name and registration number, the trading and registered addresses, the tax registration number, the bank details, the name and contact of the person who approves invoices and payments, and two trade references where the company has them. Send the same document to every supplier, and keep a copy of each account agreement in the office.

Step 6. Build the vendor list and keep a backup for every category

The vendor list is the only list of suppliers from which the restaurant may order. For each category it gives the main supplier and the backup, the contact of the sales representative and of the office, the agreed terms, the delivery days, and the cut-off times. Open the account with the backup supplier now and place a small order with them before the opening: a backup without an open account cannot deliver on the morning the main supplier fails.

State who may place orders and who approves new suppliers. A supplier added without approval brings prices and terms that nobody agreed.

Suppliers chosen on a fair comparison, with terms agreed in writing and a backup ready for every category, turn purchasing from a daily negotiation into a routine. The kitchen knows what arrives, when, and at what price; the accounts know what each product costs; and a supplier who fails one morning is a phone call, not an empty section on the menu. It is a quiet part of the opening, and one of the first that guests would notice if it went wrong.

DEEP DIVE 4.6

How to set up the accounting system

When to read this. Before the accountant configures the accounting software. The way the accounts are built decides which questions the figures can answer once the restaurant is trading.

Step 1. Agree the P&L layout before anything else

The accounting system exists to produce one report that the operator and the managers will read every period: the profit and loss account. Agree its layout first, with the accountant and the General Manager. A restaurant P&L shows the sales of food and of beverages separately; the cost of each, as a value and as a percentage of its own sales; the gross profit; the staff costs by department, including the employer's contributions; the other operating costs, grouped so that each group has one person responsible for it; the occupancy costs; and the operating profit before interest, tax, depreciation, and amortisation.

Use the same lines as the P&L projection. When the first results arrive, each line can then be compared with the line it was planned against, and a difference can be traced to its cause.

Step 2. Build the chart of accounts from the P&L

The chart of accounts is the list of categories in which every transaction is recorded. Build it from the P&L down, not from a standard template. The sales accounts follow the sales categories of the POS: food, beverage, and any other category the restaurant reports. The cost of sales accounts follow the same categories, so that the cost of each can be divided by its own sales. The staff costs are split by department. Service charge and tips have their own accounts, because the law in many markets treats them differently from sales.

Step 3. Choose the accounting periods

The accounts can be closed by calendar month, or in thirteen periods of four weeks. Calendar months are simpler and match the bank and most supplier statements, but a month with five Saturdays is not comparable with a month with four. Four-week periods each contain the same number of every day of the week, so one period can be compared directly with the one before. Decide with the accountant, and keep the choice: changing it after the first year makes every comparison with that year harder.

Step 4. Connect the systems that feed the accounts

Most entries should reach the accounting software without being typed. The POS sends the sales of each day, split by category, tax rate, and payment method. The bank feed brings in the payments and the receipts. The card provider's settlements are matched with the card sales of each day, after its fees. The payroll sends one entry per pay run,

split by department. The supplier invoices are captured and matched with the deliveries before they are approved for payment.

Each link is a point where a figure can be lost or counted twice. For each one, decide who checks it and how often: the card settlements and the cash deposits every day, the bank every week, the supplier statements every period.

Step 5. Decide who keeps the books

The books can be kept by a bookkeeper employed by the restaurant or by an external service, usually the accountant's own office. Either way, write down who does each task and when: who enters and approves the invoices, who reconciles the bank and the cards, who prepares the payroll, who closes each period and by when after it ends. The General Manager approves the invoices; the person who approves a payment is never the person who makes it.

Step 6. Test the whole chain before the first sale

Before the first trading day, process a set of test transactions on the restaurant's own POS, in its training or test mode where the system has one, and follow each of them through the link to the accounting software, until it appears on its line of the P&L that the accounting software produces: a food sale and a drink sale paid by card, a sale paid in cash, a refund, a cancelled item, a complimentary dish, a staff meal, a service charge, and the sale and the use of a gift voucher. A voucher sold is a liability until it is used, and a complimentary dish is a cost, not a discount on a sale. Each test that lands in the wrong account shows a setting to correct. Once the tests are complete, the accountant removes them from the accounts, so that the first trading period starts from zero.

Then ask the accountant to review the whole system: the settings, the links, the division of tasks, and the controls on cash and payments. It is the last chance to correct an error before every transaction of the first period is recorded with it.

An accounting system set up before the first sale does more than satisfy the tax authority. It turns every day of trading into figures the operator can read: what was sold, what it cost, where the money went. Built correctly now, it produces from the first month a P&L that can be compared with the projection, line by line. Built later, it produces months of figures that nobody trusts, at the very moment when they matter most.

DEEP DIVE 4.7

How to write the Standards of Service

TEMPLATE AVAILABLE FOR DOWNLOAD: T4.10 — STANDARDS OF SERVICE

When to read this. As soon as the Floor Manager joins, and before the first mock service. The Standards of Service turn the concept into what the guest actually receives, table by table, and they are the document the floor team is trained and judged on.

Step 1. Choose the style of service from the concept

Before any step is written, decide how the food and drink reach the table, because every standard follows from it. Plated dishes, served one course at a time, need a different team and a different timing from dishes brought to the centre of the table to share. Decide who takes the order and who carries the plates: the same server for the whole visit, or a server who looks after the guests while runners bring the food from the pass. Decide who serves the wine and the drinks: the server, a sommelier, or the bar. Decide how many tables make a section.

These choices are not a matter of style alone. They set how many people the floor needs at each service, and they must match the staffing level the budget allows. A service model that cannot be staffed at the budgeted cost is changed now, not after the team has been trained on it.

Step 2. Follow the guest from the door to the door

Write the visit as a sequence of moments, in the order the guest lives them: the arrival and the greeting; the walk to the table and the seating; the menus, the water, and the first drinks; the order; the time between the order and the first dish; each course arriving and being cleared; the checks during the meal; dessert and coffee; the bill and the payment; the goodbye. Add the moments that happen to some guests only: a guest waiting for a table, a booking that arrives late, a child at the table, a guest who comes alone.

Each moment becomes one standard. A moment that is not written down is handled in a different way by every member of the team, and the guest notices the difference before the managers do.

Step 3. Write each standard as something that can be seen

A standard describes what a member of the team does, not how the restaurant wants to feel. “Warm and attentive service” cannot be taught or checked. “Every guest is greeted at the door and shown to the table by the host; water is offered as soon as the guests are seated; the server introduces themselves and the menu before taking the first order” can.

For each moment, write three things: what is done, who does it, and within how long. Set the times from the concept and the length of the meal: a lunch for office workers

runs to a different clock from a tasting dinner. The times are what the managers watch during service and during the mock services, and they are what makes two servers deliver the same visit.

Step 4. Write how the floor and the kitchen talk to each other

Most problems at the table start between the floor and the kitchen. Write how an order travels: entered in the POS at the table or at the station, with every modifier and every allergy recorded in the order itself, never only said aloud. Write how the courses are timed: whether the kitchen sends each course on its own clock, or waits for the floor to call it when the table is ready. Write who runs the pass during service, how a dish waiting too long is reported, and how the floor is told that a dish has run out. Allergies need their own rule. An allergy declared at the table is entered in the POS, repeated at the pass when the order is sent, and confirmed again when the dish leaves. Every person who touches the order knows it, and nobody relies on memory.

Step 5. Write what to do when something goes wrong

Every service has a late dish, a wrong order, a complaint, a guest who is unhappy without saying why. Write the sequence the team follows: listen to the guest without interrupting, apologise for the experience, put it right, tell the manager on duty, and record what happened. Write who may offer what to put it right — a drink, a dessert, a dish taken off the bill — so that a server knows what they can decide alone and when to call the manager.

Add the rare situations that need a fixed answer: a guest who feels unwell, an allergic reaction, a dispute about the bill, a guest who has drunk too much. In these moments nobody has time to think, and the right action must already be written down.

Step 6. Record what the guests say

Every comment a guest makes, good or bad, is information. Write how it is recorded: in the reservation system against the guest's name, in a book at the station, or in the manager's report at the end of the service. Write who reads it, and when. A comment that reaches the managers changes the next service; a comment that stays with the server is lost.

Step 7. Test the standards in the room and keep them short

Walk through the whole document with the floor team before the training starts, in the room, with the tables laid. Each standard that cannot be done as written — a route that is too long, a timing that the kitchen cannot meet, a task given to someone who is somewhere else at that moment — is corrected on the spot. During the mock services, the managers time each moment and compare it with the standard.

Keep the document short enough to be read in one sitting, with one page for each role that lists only that role's part of the visit. A long document is read once at training and never again. A short one is opened before every service and stays the reference long after the opening.

The Standards of Service turn the guest experience imagined in the concept into the work of every person on the floor. Written with the team, tested in the room, and kept short enough to be used, they make the welcome, the pace, and the care the same whoever is on duty. That consistency is what guests remember: not one perfect evening, but the certainty that the next one will be just as good.

Phase 4 Checklist

1. Building systems tested under full load, with a written result for each test.
2. Final inspections passed, with every certificate on file.
3. Snagging list signed by both sides, with a date for every item.
4. Building documents received and checked: as-built drawings, manuals, warranties, certificates, keys, and codes.
5. Practical completion certified, locks and alarm codes changed, building taken over.
6. Construction clean done before anything moved in; deep clean booked for the eve of training.
7. Management structure decided and given to the accountant.
8. Headcount and organisation chart agreed, and the team costed against the staff cost in the projection.
9. Pay rates and benefits confirmed for every role.
10. Job description written for every role.
11. Floor Manager, Bar Manager, and Sous Chef interviewed twice, tested, and hired, with references taken up.
12. Every member of the team recruited, each with a signed contract starting on the first day of training.
13. Employee handbook written and reviewed by the attorney.
14. Pre-opening training planned, with the material written and the suppliers booked.
15. First draft of the menu written, with its ingredient list.
16. Beverage list built and costed.
17. Menu tested at successive tastings and approved in writing, with a date and a version number.
18. Secure storage arranged for the goods delivered before practical completion.
19. Kitchen and bar equipment commissioned, with refrigeration temperatures recorded.
20. Operating supplies and equipment received and checked against their orders.
21. Suppliers selected, terms agreed in writing, and accounts open, with a backup for every category.
22. Management office set up and the safe installed.
23. Opening hours set for each day and each service.
24. Floor plan, table numbers, and sections finalised.
25. Standards of Service written and tested in the room.
26. Reservations policy written.
27. Checklist written for every station.
28. Service contractors appointed, with pest control active before the first food delivery.
29. Reservation, inventory, and timekeeping systems chosen and set up.
30. Hardware installed and every link between the systems tested, including the failure of the internet connection.

31. POS programming brief written, waiting for the approved and priced menu.
32. Contractor's final account agreed, with the release date of the retention recorded.
33. Accounting system set up and tested from the POS to the P&L.
34. First-year trading budget agreed, with each manager's lines assigned.
35. Every remaining application in the permit register filed.
36. Property, contents, public liability, and employers' liability insurance active from the date of practical completion.
37. PR consultant appointed, if the press is not handled by the marketing consultant.
38. First stage of the campaign running, with the contacts counted every week.
39. Professional photographs taken of the rooms, the team, and the approved dishes.
40. Website built and tested, ready to go live the day reservations open.
41. Printed material and gift vouchers produced.

Working Files from the Toolkit

- T4.1 — PUNCH LIST & HANDOVER
- T4.2 — TEAM PLAN & STAFF COST
- T4.3 — JOB DESCRIPTION TEMPLATE
- T4.4 — TEAM INTERVIEW SCORECARD
- T4.5 — PRE-OPENING TRAINING PLAN
- T4.6 — MENU TASTING & APPROVAL
- T4.7 — RECIPE & BEVERAGE COSTING
- T4.8 — MENU PRICING & WRITING GUIDE
- T4.9 — SUPPLIER COMPARISON & VENDOR LIST
- T4.10 — STANDARDS OF SERVICE
- T4.11 — STATION CHECKLISTS

PHASE 5

FINAL PREPARATION

From the team's first day to the opening

Phase 4 ended with the building in our hands, a team whose contracts all begin on the same morning, and a menu approved in writing. Until now the restaurant has existed on paper and in empty rooms. In this phase it starts to work. Food arrives and the kitchen organises itself around it, the systems carry real orders, the team learns its jobs in the place where it will do them, the restaurant announces itself to the public, and the first guests sit down.

At the centre of the phase is the training. What the team learns in these weeks, and how well, is what the guest will find on the first night and in the weeks that follow, and the impression formed then is hard to change. A training that is compressed to recover the delays of the works, improvised by managers who have not prepared it, or run on systems that are not ready, sends a group of new hires into service instead of a team. Poor training is among the main reasons new restaurants fail, and unlike the market or the location, it depends entirely on us.

Everything the first day of training needs must therefore be ready before the team arrives. The HACCP system in force before any food is delivered, the stores and the stations set up, a POS that already knows the menu, payments that work, licences and policies confirmed. This is also the most expensive stretch of the whole opening: the full payroll runs, food is bought and cooked for guests who do not pay, and every system and supplier is now a monthly cost. The phase ends with the soft opening completed and the restaurant ready to open on the date we announced. While the team trains, the restaurant introduces itself to the market: the website and the social profiles go live, the reservations open, and the campaign gives the public a reason to book before the doors open. A restaurant that the market does not yet know opens to empty tables, however well its team has been trained.

Key Moments in Phase 5

The training is where the standards stop being documents and become the way the restaurant works. The Standards of Service, the recipe cards, the bar specifications, and the station checklists were written in the previous phase; in these weeks every department learns them, practises them, and is checked against them, until the guest receives the same service whoever is on duty. Each head of department teaches the standards to their own team and corrects every deviation as it happens, because what is tolerated in training becomes the habit of the house after the opening. This is

the moment that decides whether the restaurant opens with one standard or with as many as there are people on the team.

The first delivery is the moment the kitchen stops being a set of empty rooms and starts handling food. From that morning the HACCP system is no longer a document: every product is received against its order and its temperature, stored in its place, labelled, and recorded, and the team learns by doing it that these checks are part of the work, not something added to it. The habits set with the first boxes are the ones the kitchen will keep, and the ones an inspector will find.

The day reservations open is the restaurant's first appearance in public. The website and the social profiles go live together, the announcement reaches everyone who left their contact during the campaign, and the first bookings arrive. From that moment the opening date is a promise made in public, and everything a guest reads — the hours, the menu, the address, the booking link — must be the same on every channel. For most guests, the first contact with the restaurant is the page they open, long before the first plate.

On the third evening of the soft opening, one of the invited guests is a well-known food writer. The temptation is to move the best server to the table, change the order of service, and send out extra dishes. The General Manager tells the team and changes nothing: the table receives exactly the service written in the standards, and the kitchen sends exactly the dishes ordered. A writer who receives a special evening describes a restaurant that the next guest will not find.

Who Is Involved in Phase 5

Operator

Approves the final menu prices and layout and the opening rota against the budget, attends the mock services, and confirms the opening date.

General Manager

Runs the phase: the training programme, the systems, the cash procedures, the launch, and the first services with guests. Leads the restaurant on the floor from the first guest.

Executive Chef

Puts the HACCP system into force, organises the stations and the flow of the kitchen, runs the yield tests, places the opening orders, trains the kitchen, and holds the standard of every plate from the first mock service.

Floor Manager

Trains the floor and the reception, sets up the room for service, and checks every server against the Standards of Service.

Bar Manager

Sets up the bar, its stock, and its preparations, trains the bar team, and takes part in the cash procedures for the bar.

Sous Chef

Receives the deliveries, sets up the stations, writes the prep lists, and keeps the HACCP records every day.

The team

Joins on the morning training begins. Learns the standards of each role, takes the tests, and serves the first guests.

Suppliers

Deliver the opening stock and run the sessions on what they supply: the wine, the coffee, the cleaning chemicals, the equipment, the POS.

IT Consultant

Supports the programming of the POS, tests the network under load, connects the reservation channels, and stays on call during the first services.

Accountant

Runs the first payroll, reviews the budget forecast on the confirmed costs, sets the weekly targets with the General Manager, and shows the operator how much cash is left before the opening.

Attorney

Reviews the permit register a last time and confirms that nothing the restaurant needs is missing.

Insurance Broker

Confirms the cover of the restaurant in writing before the first guest.

Marketing Consultant

Puts the full website and the social profiles online the day bookings open, and leads the campaign from that day to the opening.

PR Consultant

Advises the operator on the timing of every invitation to journalists and influencers, and follows each visit.

Graphic Designer

Lays out the menus for print and for the QR code version from the approved and checked text.

Food Safety Consultant

Gives the team its HACCP course and checks, before the opening, that the set-up and the procedures of the kitchen comply with the law.

Food & Beverage

From the approved menu to a kitchen that can serve it

Before any goods are received, the walk-in chillers, the freezers, and the refrigerators must be cleaned, organised, and labelled, and the HACCP system must be in force. The Executive Chef implements the rules of the system and makes sure that each check they require is recorded in the HACCP documentation and kept in the office.

This is also the moment of the heaviest work in the kitchen. The approved menu is a list of dishes; the kitchen has to turn it into a way of working. Every dish is given to a station, every station is set up and given its prep list, and the recipe book is printed and kept in the kitchen, with each station holding the recipes of the dishes it prepares. The bar does the same for its drinks. Only then do the final recipes enter the systems, and the menu is checked one last time, printed, and published.

Put the HACCP system into force before the first delivery.

Responsible: Executive Chef • **Verified by:** Food Safety Consultant

The kitchen applies the HACCP rules in full, as the law of the country and the health authority set them. The Executive Chef imposes them on the whole kitchen and checks every day that they are respected; the Sous Chef keeps every form and record the rules require complete and up to date, ready for an inspector. Before the opening, an external food safety consultant checks that the set-up and the procedures of the kitchen comply with the law.

▲ *No food enters the kitchen until the HACCP records are in place and the person receiving it knows the rules. An inspector can visit in the first weeks of trading and will ask to see the records from the first delivery.*

Set up the kitchen stations.

Responsible: Executive Chef • **Verified by:** General Manager

The kitchen was designed on the forward-march principle: the food moves from the goods entrance to storage, preparation, cooking, and the pass, and never travels back. The stations follow this order. Each one has within reach the equipment and the mise en place its dishes need, and sends them to the pass without crossing the work of another station.

For each station, write the prep list: everything that must be prepared before service, in the quantity the covers forecast requires, each preparation labelled with its shelf life. The Sous Chef checks the list every day against the bookings and what is left over. Print the recipe book and give each station its own section.

Run the yield test on the first deliveries.

Responsible: Executive Chef • **Verified by:** General Manager

The recipe cards were costed on the suppliers' quotes and on yields estimated during the

development of the menu. The first deliveries give the real ones. For every product that is cleaned, trimmed, boned, filleted, or cooked before it is served, weigh it as delivered, weigh what is usable after each step, and record the yield on a test sheet: a whole fish, a cut of meat, a case of vegetables, a stock reduced to its final volume. Use the same tests to confirm the size of each batch and how long each preparation keeps its quality.

Repeat the test on more than one delivery and on every new product when a supplier changes. Correct the quantities on the recipe cards and the cost of every dish that moves, and tell the General Manager which margins have changed.

Set up the bar: its preparations, batches, and pouring standards.

Responsible: Bar Manager • Verified by: General Manager

The bar is set up as a station of its own. List its preparations — the juices, the syrups, the infusions, the garnishes — with their recipes, their shelf life, and the quantity each service needs, and decide which cocktails are batched in advance and how the batches are labelled and stored.

Fix the pouring standards: the measure of every spirit, the glass and the ice of every drink, and the tools that guarantee them. The recipe book of each drink is kept at the station with its photograph, so that every bartender makes it the same way.

Load the recipes into the systems.

Responsible: Executive Chef, Bar Manager • Verified by: General Manager

Enter every recipe card into the inventory system with its ingredients and their quantities, as corrected by the yield tests, and link each recipe to its item in the POS. Check every recipe in the system against its card before the servers begin to train. A recipe missing from the system is a dish whose cost nobody will ever see.

Check the menu before the final print.

Responsible: General Manager • Verified by: Operator

Before the menu goes to print, check its text against the POS and the recipe cards. Two people, separately, read the version number of the approved menu, every price, every allergen, and the spelling of every name and of every word of every description.

The operator then approves the final prices and the layout in writing, and only then does the graphic designer prepare the files for print. Print a small first run: the first weeks of trading always change something, a price, a dish, or a description.

Publish the QR code menu with the photographs.

Responsible: General Manager • Verified by: Marketing Consultant

The QR code menu carries the same text, prices, and allergen information as the printed menu, with the photographs of the dishes taken on the approved plates. Publish it on a page that loads quickly on a phone, in the languages of the guests, and with the allergen information one tap away from each dish. Place the code where the guest needs it: on the table, at the entrance, and on the website.

Decide who updates it and when. The QR menu is changed in the same hour as the printed menu and the POS, never alone; a guest who orders from the phone a dish that the kitchen has stopped serving complains about the restaurant, not about the website.

Equipment & Purchasing

Stocking the restaurant for its first services

Buying for an opening is different from buying for a restaurant that trades. There is no history of sales to order from, the storage is empty, and the first services are smaller than a normal week. The order of the work protects against both waste and shortage: the stores are made ready first, the par level of every product follows, then the opening orders, and the deliveries arrive in agreed windows, to a procedure that someone in the kitchen applies every time.

The restaurant also needs what the guest never notices until it is missing: the paper goods and the disposables, the clean tableware on every station, the locks on the stores, and the number to call when a machine stops. The work ends with the opening stock counted. That count is the first figure of the first food cost, and if we skip it, we cannot know what the first weeks really cost.

Clean, organise, and label the stores before any goods arrive.

Responsible: *Executive Chef* • **Verified by:** *General Manager*

Before the first delivery, have every cold unit, the dry store, and the bar store cleaned, and give each its order. Every product has a fixed place, and every shelf carries the name of the product and its par level. Raw food is stored below ready-to-eat food, chemicals away from food, and the oldest stock in front of the newest.

Check that every cold unit holds its temperature for a full day before it receives any food, and record the result as the first entry of its temperature log.

Set the par levels.

Responsible: *Executive Chef, Bar Manager* • **Verified by:** *General Manager*

For the high-consumption products of the kitchen and the bar, set the par level: the stock each store needs after a delivery to last until the next one. Calculate it from three figures — the quantity each dish uses, the covers expected at the first services, and the days between two deliveries — and add a small reserve for the products whose absence would take a dish off the menu. Deep Dive 5.2 sets out the method.

These first par levels are an estimate. Review them after the first services against what was actually used.

Place the opening orders.

Responsible: *Executive Chef* • **Verified by:** *General Manager*

Place the first orders from the par levels, for what the restaurant will actually serve: the training sessions, the mock services, and the soft opening, not a full week of trading. Stagger them over several days, so that the stores are filled one category at a time and

each delivery is checked properly.

Order little and often in the first weeks. A product that runs out can be replaced the next day; perishables bought for guests who have not yet come are thrown away, together with the cash we paid for them.

Agree the delivery schedule with every supplier.

Responsible: Executive Chef • Verified by: General Manager

Agree with every supplier the days of delivery, the window of time, the entrance, and the cut-off time for each order. Place the windows where someone from the kitchen can receive them: before the preparation starts, never during a service or a training session. Write the schedule on one page, post it at the goods entrance and in the kitchen, and send it to every supplier. The kitchen plans its mornings around it.

Establish the receiving procedure.

Responsible: Sous Chef • Verified by: Executive Chef

Write how every delivery is received and who may sign for it. The person receiving checks the temperature of chilled and frozen goods, the condition and the dates of every product, the quantity against the order, and the prices on the delivery note. What does not match is refused, or recorded on the note, before the driver leaves, and the supplier is told the same day. Deliveries that are not food — the uniforms, the stationery, the chemicals — follow the same procedure.

A delivery left at the back door is never accepted, however urgent the goods.

Control access to the stores.

Responsible: General Manager • Verified by: Operator

Lock the stores that hold the most valuable stock — the wine, the spirits, the most expensive proteins — and decide who holds each key. Keep a log of who opens the cold rooms and the bar store outside the delivery and service hours.

Record every key and every code in a register kept by the General Manager. The same register serves the alarm and the safe.

Wash and set up the tableware, glassware, and cutlery.

Responsible: Floor Manager • Verified by: General Manager

Everything that touches the guest's food or drink is washed before its first use, in the restaurant's own dishwasher and glasswasher: the plates, the bowls, the glasses, the cutlery, the serving pieces. The Floor Manager organises the work as part of the first training days, so that the team learns the dishwash and the stations at the same time.

Set each service station with its stock, store the rest on labelled shelves, and record the quantities. The quantity counted now is the base against which breakage will be measured once the restaurant trades.

Order the consumables.

Responsible: Executive Chef • **Verified by:** General Manager

Order everything the restaurant uses up and nobody cooks: napkins and paper towels, bin liners, food film and foil, labels for dating food, gloves, the takeaway packaging if the concept sells it, the till rolls, the stationery of the office, and the spare batteries and bulbs. Order the cleaning chemicals from the contractor appointed for them, in the products named in the cleaning schedule.

Set a par level for each consumable as for the food, and add them to the vendor list with their supplier.

Post the breakdown contact for every piece of equipment.

Responsible: General Manager • **Verified by:** Operator

The manuals and the warranties have been in the office since we took over the building. In service, nobody has time to look for them. For each piece of equipment, record on one sheet the supplier, the model and its serial number, the warranty, the engineer to call, the hours they answer, and the response time agreed in the service contract.

Keep the sheets in a binder in the office, and post the most urgent contacts — the refrigeration, the dishwasher, the extraction, the gas — where the team can see them. A refrigerator that fails at night is called in by whoever finds it.

Count the opening stock.

Responsible: Executive Chef, Bar Manager • **Verified by:** General Manager

On the last evening before the soft opening, count every product in every store, kitchen and bar, and record the quantity and its value at the price paid. The count is done by two people, one counting and one recording, and the General Manager signs it.

Give the result to the accountant. The opening stock is the starting point of every food and beverage cost the restaurant will calculate: without it, the first period's cost of sales is an estimate.

Technology

The systems in service

The systems were chosen, installed, and tested in the previous phase, with real transactions but without a menu. Now they receive the menu and the people who will work with them. The POS comes first, because almost everything depends on it: the kitchen printers, the bar, the bills, the cash controls, the inventory, and the training of the floor. Its access levels are set before anyone receives a code.

The channels through which guests reach the restaurant follow: the reservation system with every platform that takes a booking, the telephone, and the email. Last, the network that carries them all is tested with every system running together, because a connection that holds during a test can still fail when every terminal works at once.

Programme the POS with the approved menu and test a full service.

Responsible: IT Consultant • **Verified by:** General Manager

From the programming brief, the vendor enters every item of the approved menu with its price, its modifiers, its allergen flags, and its printer or screen; the floor plan with the table numbers; every discount and complimentary item with its reason; and the reports. The General Manager checks every item on the screen against the approved menu before the training of the floor begins.

Then run a full test service with the managers: open tables, order every dish with its modifiers, send courses, split a bill, pay by card and in cash, refund a payment, close the day. Every error found is corrected before the team uses the system. The vendor then trains everyone who will use it, before the department training begins.

Set the POS access levels and controls.

Responsible: General Manager • **Verified by:** Accountant

Set in the POS who may do what. Servers and bartenders take orders, split bills, and take payments; supervisors may void or discount with a reason; only managers open the cash drawer outside a sale, see the reports, and close the day. Every void, discount, refund, and complimentary item requires a manager's code and a reason chosen from a list agreed with the accountant, which may also include the team discount and the invited guests.

Give each person their own code before their first session on the system, and never a shared one. A code used by two people makes every report unreadable.

Test the reservation system.

Responsible: General Manager • **Verified by:** IT Consultant

Connect every channel that takes bookings — the website, the maps, the booking platforms — to the reservation system, so that all of them show the same tables at the same moment, and load the floor plan as numbered.

Test it as a guest would and as the reception will: make, move, and cancel a booking on each channel, and block a table; book a large group, a booking with comments such as an allergy, and a table for a special occasion. Check that each booking appears once, at the right table, with its notes, and that the confirmation and the reminder reach the guest.

Set up the telephone and the email of the restaurant.

Responsible: General Manager • **Verified by:** IT Consultant

Set up the restaurant's telephone line with its number on every listing, a recorded message for the hours when nobody answers, and the forwarding of calls to the reception. Give the kitchen, the office, and the managers on duty the lines and the mobile phones they need.

Open the email addresses the guests and the suppliers will use, and decide who reads

each one and how quickly a message is answered.

Test the network under the load of a full service.

Responsible: IT Consultant · Verified by: General Manager

The data line has carried tests, not services. Before the first mock service, run every system at once — the POS terminals, the kitchen screens, the reservation system, the card terminals, the music — and check the speed and the stability of the connection over several hours.

Then check what happens when the line fails: which systems keep working offline, how the card terminals take payments, and how the orders reach the kitchen. If the POS cannot work without the internet, agree a backup connection with the provider before the opening.

Finance & Funding

Handling money from the first transaction

The first money the restaurant handles is not a sale: it is a float, a test payment, a salary. The card payments, the floats, and the procedures that control cash are set before the first mock service, so that the managers learn them on real transactions and not on the first busy night. The payroll follows its own clock: the first salaries fall due during training, before any sales.

The last two pieces of work look forward. With the team hired, the suppliers' prices agreed, and the menu priced, the first-year budget is reviewed on confirmed figures and turned into weekly targets of covers and revenue. Before the opening, the accountant shows what the opening has really cost and how much cash we have left to carry the restaurant until its sales can.

Open the trading accounts and the merchant account.

Responsible: General Manager · Verified by: Accountant

Open the restaurant's accounts before the first salary and the first sale: an operating account for the takings and the day-to-day payments, a payroll account that receives the total of the salaries each period and pays the team, and a reserve account that holds the working capital and is not used for daily spending. Keeping the three apart makes the cash position readable at a glance and the reconciliation simple.

Open the merchant account with the bank or the payment provider at the same time, and agree its fees and the days on which each card settlement reaches the operating account. The application and the approval take time, and the terminals take real payments only once the account is active.

Set the floats, the petty cash, and the banking procedure.

Responsible: General Manager · Verified by: Accountant

Decide the float of each till by denomination, not only as a total, collect it from the

bank, and keep it in the safe until the first mock service. Set up the petty cash with a fixed amount, the purchases it may pay for, the people who may use it, and the receipt required for each payment.

Agree how the takings reach the bank: how often, by whom, with what record, and whether a cash collection service is used. Order the banking stationery with the floats; it takes time to arrive.

Write the cash handling and closing procedure, and train the managers.

Responsible: Accountant · Verified by: General Manager

Write the procedure that every shift follows: how a till is opened and counted, how it changes hands, how the takings are counted at the end of the shift, how a difference is recorded and explained, how the day is reconciled against the POS and the card reports, and how the cash goes to the safe. Deep Dive 5.3 sets out the method.

Train every manager on it before they train anyone else. The managers then run the procedure at every mock service, so that they do not do it for the first time in front of a paying guest.

Run the first payroll.

Responsible: Accountant · Verified by: General Manager

Give the accountant, before the first day of training, every employee's contract, tax and social security details, bank details, and start date, so that the first salaries are paid on the date written in the contracts. Check that the timekeeping system passes the hours worked to the payroll, and that the training days are recorded as working time.

Check with the accountant that the cash for the payrolls of the training and of the opening weeks is in the account, as planned in the cash flow model.

Review the budget forecast and set the covers and the revenue week by week.

Responsible: Accountant · Verified by: Operator

We set the first-year budget before the team, the suppliers, and the menu prices were confirmed. Review it with the accountant on the confirmed figures: the payroll of the hired team, the prices agreed with the suppliers, the cost of the approved menu, the service contracts. Where a line has moved, record why.

Then turn the budget of the opening period into a target for each week: the covers and the revenue, by service. The General Manager shares the targets with the Executive Chef and the other heads of department, so that each of them knows what the restaurant must achieve and what their department contributes to it, and agrees with them how the actual figures will be compared with the targets from the first week of trading.

Check the cash position before the opening.

Responsible: Accountant · Verified by: Operator

Before the opening, compare the pre-opening spending with its budget: the works, the

equipment, the stock, the payroll of the training, the marketing. Confirm the cash left in the accounts, and that the reserve set aside for the early trading period is still intact. If the reserve has been used to cover overruns, say so now, not when the first accounts arrive. The operator then decides how to restore it before the restaurant depends on it.

Legal, Permits & Insurance

Confirming that the restaurant may open

By now every application in the permit register has been filed, and most have been granted. What remains is to confirm that nothing is missing on the first day, and that every licence the guest or the inspector may ask to see is displayed where the law requires it.

The insurance follows the same logic. The policies were placed when we took over the building; now the team works in it, cooking and serving, and the broker checks the cover against what the restaurant actually does. A licence or a policy confirmed by telephone is not confirmed.

Confirm every licence is active and displayed.

Responsible: Attorney · Verified by: Operator

Go through the permit register line by line with the attorney: the food business registration, the alcohol licence, the music licences, the terrace permit, and every other approval the restaurant needs. For each one, check that it has been issued, that it is in the company's name and at this address, that it covers the hours and the activities the restaurant will run, and that its conditions are met. If the alcohol licence has not been issued, the bar does not open.

Display each licence where the law requires it, file a copy in the office, and record in the register the date on which each one must be renewed.

Confirm every operating policy is active.

Responsible: Insurance Broker · Verified by: Operator

Ask the broker for the written confirmation of every policy in force: the property and contents, business interruption, public and product liability, employers' liability for the whole team, and any other cover the lease or the law requires. Check that each policy covers what the restaurant will do from its first service, such as serving alcohol, playing live music, or delivering food.

Check every condition the insurer has set — the extraction cleaning, the service of the fire suppression, the alarm monitoring — and file the certificate that proves it. Display the employers' liability certificate where the law requires it.

People

From a group of new hires to a team

The team arrives on the same morning, and from that morning we pay for every hour. Before it arrives, the managers are prepared as trainers and the building is checked for its risks. The first days then set the frame: the joining pack, the safety induction, and the food hygiene training come before any skill, because no one may work in the kitchen or the dining room without them.

The training follows the programme planned in the previous phase, in the order that makes it work: the whole team together, then the POS, then each department apart, with the menu tasted by everyone every day and the suppliers in their sessions, and finally the departments together again in a service without guests. At the end, each person is checked against what their role requires, and the rota of the opening is written from those results, not from the list of people hired.

Prepare the heads of department before the team arrives.

Responsible: General Manager, Executive Chef • Verified by: Operator

Before the team arrives, the General Manager and the Executive Chef set the Standards of Service and the training programme and share them with the heads of department: the Floor Manager, the Bar Manager, and the Sous Chef. Each of them must know the standards and the programme of their department well enough to teach them, and agree with the others how every competence will be checked.

A head of department who has not prepared teaches from memory, and each department ends up with its own version of the standard.

Assess the workplace risks and set up the first aid.

Responsible: General Manager • Verified by: Operator

Walk the building with a safety checklist before the team arrives and record every hazard: a step without a marking, a cable across a passage, a heavy item stored high, a floor that becomes slippery, a chemical without its safety sheet. Give each hazard an owner and a date, and write the risk assessment the law requires for each activity: cooking, cleaning, lifting, working late at night.

Name the first aiders for every shift, place the first-aid kits, the burn kit, and the eye-wash station where the risks are, and open the accident book.

Welcome the team with the joining pack.

Responsible: General Manager • Verified by: Operator

When the team arrives, each new employee receives the joining pack: a copy of the signed contract and the employee handbook, the uniform and its care, the locker, the rota of the training days, the names of their manager and of the person to call when they are absent. Complete each personnel file before the first session: the right to work, the tax and bank details, the emergency contact, and the certificates.

Keep the first hour for the welcome: the team together, the operator and the two leaders, the concept, and the plan of the days that follow.

Run the health and safety induction.

Responsible: General Manager • Verified by: Operator

Before any practical session, take the whole team through the building: the fire exits and the assembly point, the first-aid kits, the gas and electricity shut-offs, and the safe use of the equipment and the chemicals. Explain how an accident or a near miss is reported.

Certify every food handler.

Responsible: Executive Chef • Verified by: General Manager

Every person who handles food or drink — the cooks, the bartenders, and any server who plates or portions — is trained in food hygiene to the level the local law requires before they prepare food for a guest. The course is given by the external food safety consultant in the first days of training, and the certificate is issued as the local law requires.

Keep a copy of every certificate in the personnel files, with its expiry date. An inspector asks for them, and a person without one cannot work the first service.

Run the first days with the whole team together.

Responsible: General Manager • Verified by: Operator

The first days of training bring the whole team into the same room, whatever their role: cooks and servers, bartenders, hosts, and the dishwash team. They learn the concept as the guest is meant to experience it, the standards of the restaurant, food safety, the allergens and the emergency procedures, the building and its systems, and what each role expects. The days end with a short test, which checks that the foundation is in place before anyone moves to their department.

It is the only time the whole team learns the same things together, and what it learns here is what it will defend in service. Deep Dive 5.1 sets out the method.

Train each department on its own standards.

Responsible: Executive Chef, Floor Manager, Bar Manager • Verified by: General Manager

When the days together are over, each department trains apart, with a trainer named for each: the kitchen on its stations, its recipe cards, and the pass; the floor on the sequence of service in the Standards of Service; the reception on the reservation system, the floor plan, and the guests who wait; the bar on every drink to its recipe and on the responsible service of alcohol; the dishwash on its machines, the use of its chemicals, and its pace.

Every session works with the restaurant's own documents and equipment, first slowly and correctly, then at the pace of a busy service.

Taste the menu with the whole team every day.

Responsible: Executive Chef • **Verified by:** General Manager

Every day of the department training ends with the whole team around the same table. The kitchen and the bar serve the dishes and the drinks of the day, and each one is tasted, described, and discussed: the ingredients, the allergens, the cooking, what goes with it, what a guest is likely to ask.

The floor learns what the kitchen means by its words, and the kitchen hears what the guests will want to know. When the programme closes, every server has tasted every dish and every drink on the menu and can describe each one without notes.

Run the supplier sessions.

Responsible: Floor Manager, Bar Manager • **Verified by:** General Manager

Run the sessions booked with the suppliers. The wine supplier presents each wine on the list and how to recommend it; the roaster sets the grind and teaches every coffee on the menu; the chemical supplier shows the dosing of the dishwasher and the safe use of each product; the equipment suppliers show the daily care of their machines.

Hold each session in the restaurant, with the team in uniform and the real products, and record who attended. A wine the server has never tasted is sold by its price, not by its taste.

Rehearse the service with the whole team before the first mock service.

Responsible: General Manager, Executive Chef • **Verified by:** Operator

Bring the departments back together and run the service without guests: managers and staff play the guests, the orders go through the POS, the kitchen cooks, the floor serves, the bar sends the drinks, and the reception seats the tables. Repeat each handover until it works: the order from the floor to the kitchen, the plate from the pass to the table, the drink from the bar, the guest from the reception to the server.

The rehearsals find the problems between departments that no department training can show. They are solved here, before any guest is in the room.

Sign off every member of the team as ready.

Responsible: General Manager, Executive Chef • **Verified by:** Operator

When the training programme ends, each manager checks every person in their department against the competences of their role, with the written test and the tasks watched during the training. The manager and the employee sign the result.

For anyone who is not ready, apply the decision agreed before the training started, and tell them in person, with the reason. A decision delayed to the soft opening is taken by the guests.

Write the opening rota.

Responsible: Heads of department • **Verified by:** Operator

Write the rota for the soft opening and the opening weeks from the team plan, the

opening hours, and the bookings already received. Staff the opening weeks more heavily than a normal week, because a team still learning works more slowly; place the strongest people on the busiest services, and pair each person still learning with an experienced colleague on the same station. Name a replacement for each role in case someone does not arrive.

Compare the cost of the rota, week by week, with the staff cost of the trading budget. The General Manager approves it before it is published to the team.

Operations

From the empty room to the soft opening

Everything we wrote in the previous phase is now set up for guests. The room comes first: the reception ready to receive them, the light and the sound fixed for each service so that the guest finds the room the same every night, the cleaning schedule in force from the first day, and the notices and the emergency contacts where every member of the team will see them.

Then the services themselves, in rising order of difficulty: friends and family at the mock services, then invited guests from outside the team's circle at the soft opening, then the public. After each service the managers correct what it revealed, the same night.

Set up the reception station.

Responsible: *Floor Manager* • **Verified by:** *General Manager*

Set up the reception as the guest will find it: the reservation system open on its screen, the telephone, the plan of the room with its numbered tables, the menus, the space for coats and bags, and what is needed to record the walk-ins and the waiting times.

Test it from the reception itself: the person at the reception must see every booking, add a walk-in, move a table, and see which tables are free, at every moment of the service.

Set the lighting and the music for each service.

Responsible: *Floor Manager* • **Verified by:** *General Manager*

Fix, for each service and each area, the level of every light circuit and the music: the playlist, the volume, and who may change them. Record each setting as a scene in the lighting and sound systems, or in writing where they have none, and label each control panel so that any manager can set it.

Check every scene at the hour of the service it belongs to, with the room set and someone sitting at the tables. A setting fixed at midday in an empty room is wrong at nine in the evening in a full one.

Put the cleaning schedule in force.

Responsible: *Executive Chef, Floor Manager, Bar Manager* • **Verified by:** *General Manager*

The cleaning schedule is a plan of its own, separate from the HACCP records. It lists

every area, surface, and piece of equipment — the kitchen, the bar, the dining room, the washrooms, the stores, the outside — with the product and the method for each, how often it is cleaned, and who signs for it.

Divide it by department and by moment: what is cleaned during service, at the close of each day, and in the weekly deep clean. Use the products named by the chemical supplier, at the dilution on their label. The schedule keeps the restaurant as clean as it was on the morning of the first day of training.

Post the notice boards and the emergency contacts.

Responsible: General Manager · Verified by: Operator

Put up the staff notice board where the whole team passes: the rota of the week, the notices the law requires employers to display, the evacuation procedure, the names of the first aiders, and the messages of the managers.

Post the emergency contacts — the emergency services, the nearest hospital, the gas and electricity providers, the alarm company, the General Manager — in the staff common area, and in the office.

Run the mock services and the soft opening.

Responsible: General Manager · Verified by: Operator

The mock services come first. The guests are friends and family of the team and of the operator, invited in advance, who know they are taking part in a rehearsal and agree to say what went wrong. Nobody pays: each bill is closed in the POS as complimentary, so that the cost of the food is recorded. At every mock service at least one table declares an allergy, so that the procedure of the Standards of Service is tested from the order to the table. Each service runs as a real one and is followed the same night by a debrief, with every finding written down, given an owner, and corrected before the next service. The soft opening follows, when the mock services run to the standard. Its guests are also invited and do not pay, but they come from outside the team's circle: neighbours, local businesses, the people met during the campaign, and the press if the PR consultant advises it. They are booked through the reservation system, and the covers grow only when the previous service has run to the standard. Deep Dive 5.1 sets out the method.

Confirm the opening date.

Responsible: Operator

During the training, the operator meets the General Manager and the Executive Chef to review where the opening stands: the progress of the training against its programme, the systems, the stock, the licences and the policies, and every procedure the opening still needs. Each open point is given an owner with a completion date.

If everything is on track, the operator confirms the opening date, and the reservations open. If it is not, the date is moved now, before we announce it, when moving it costs nothing but time.

Marketing & PR

From the announcement to the opening day

In this phase marketing moves from preparing the ground to filling the tables. The campaign's first stage built a list of people waiting for news; the second begins with the launch, when the restaurant appears online in full and the bookings open from the opening day onwards. From that moment the campaign has something concrete to offer — a date, a table, a menu — and every message, every post, and every listing leads to the booking page.

Online, the restaurant is judged before it is visited. The website, the social profiles, and the listings on the maps are its shop window: they show the same hours, the same menu, and the same photographs everywhere, and one person keeps them up to date. Journalists and influencers are invited when the service can hold up to their judgement; what they see is what their readers will expect long after the visit.

Launch the restaurant online and open the reservations.

Responsible: Marketing Consultant · Verified by: Operator

The day is chosen by the operator with the General Manager, once the opening date is certain. On that day the full website goes live, the social accounts begin to publish, every listing shows the opening date and the hours, and the reservations open from the opening day onwards. The contacts collected in the first stage receive the announcement first, with the chance to book before anyone else.

Before the announcement goes out, check every channel against the others: the same date, the same hours, the same booking link.

Manage the website and the social profiles.

Responsible: Marketing Consultant · Verified by: General Manager

From the launch, the website and the social profiles are where most guests meet the restaurant first, and their work is to turn that interest into a booking. The website loads quickly on a phone and shows on its first screen the current menu, the address with a map, the hours, and the booking button. The listing on the maps carries the exact address, the telephone answered during service, the hours, the menu, the booking link, and the professional photographs of the finished room and the dishes. The social profiles state the opening date, the address, and the booking link, and publish regularly what the guest will find. Claim the listings on the review sites, so that the restaurant can answer what is written about it.

Name one person who updates every channel when something changes and who reads every message, comment, and review, answering each within the time agreed with the General Manager. A review left unanswered speaks for the restaurant to everyone who reads it.

Run the second stage of the campaign.

Responsible: Marketing Consultant • **Verified by:** Operator

From the launch to the opening day, the campaign shows what the guest will find: the dishes of the approved menu in the professional photographs, the team in training, the room ready, the story of the product we use. Every message carries the booking link. The General Manager follows up the local businesses, hotels, and residents met during the first stage with an invitation to book.

Count the bookings each week against the target of the plan, and the share coming from each channel. A channel that brings contacts but no bookings is changed before the opening, not after.

Invite the press, the media, and the influencers.

Responsible: PR Consultant • **Verified by:** Operator, General Manager

Decide with the PR consultant when and how journalists, media, and influencers are invited. There are three ways, and the choice depends on how ready the service is: invite them one by one to different dinners of the soft opening; hold an evening only for them during the soft opening; or, if the team is not yet sure of its service, invite them in small groups in the weeks after the opening, when the service is steady.

Whatever the choice, every guest from the press is booked like any other, served by the standards, and followed up by the PR consultant after the visit, with the press kit and the photographs. Agree with each influencer in advance what is offered and what, if anything, is expected in return, and respect the rules of this market on declaring paid content.

What Might Go Wrong in Phase 5

—Shortening the training to make up for time lost on site. The team reaches the first guests without having served together, and the gaps that the rehearsals would have found are found by the guests in the opening weeks, when their opinion of the restaurant is formed.

—Starting the department training before the team has learned the POS. Each server finds their own way through the system, the bills and the orders are recorded differently by each person, and the habits take weeks to correct under the pressure of service.

—Leaving the managers to train without preparing them. Each one teaches from memory and from their last restaurant, and the team learns as many versions of the standard as there are departments.

—Accepting deliveries without the receiving procedure. Goods above the temperature limit, short quantities, and wrong prices enter the stores unchecked, and the supplier disputes every claim made after the driver has left.

—Setting up the kitchen without balancing the stations. One station carries the slowest dishes of the menu, every table waits for it, and the late tables of the mock services are

blamed on the cooks instead of the organisation.

- Serving the mock services and the soft opening without closing the bills in the POS. The food leaves the kitchen with no record, the cost of the free services disappears from the accounts, and the first food cost of the restaurant is wrong before it has a single sale.
- Not asking the guests of the mock services for their feedback. The services seem to run smoothly, the debrief has little to correct, and the problems wait for the first paying guests.
- Inviting too many guests to the soft opening because they all accepted. The kitchen receives a full room before it has served a half-full one, the times of the standards are lost, and the guests who were meant to spread the word spread the wrong one.
- Solving the problems of the mock services by adding people. A late station gets an extra cook, a busy section an extra server, and the extra hours stay on the rota. The staff cost is above the budget from the first week, for problems that a change of method would have solved.
- Changing the standards after every service on the strength of one night. Each debrief adds a rule or reverses one, and by the soft opening the team no longer knows which version to follow, so each server falls back on the habits of their last restaurant.

Deep Dives — Phase 5

The three methods that follow are about running, not planning. The training and the first services, the stock, and the cash were all prepared in the previous phase or decided in this one; what remains is to make them work every day with real people, real food, and real money, and to notice early when they do not.

Each method ends with something the operator can check before the opening: a team ready to serve, a stock counted and ordered with discipline, a till that balances.

DEEP DIVE 5.1

How to run the training, the mock services, and the soft opening

TEMPLATE AVAILABLE FOR DOWNLOAD: T4.5 — PRE-OPENING TRAINING PLAN • T4.11 — STATION CHECKLISTS • T5.7 — MOCK SERVICE & SOFT OPENING LOG

When to read this. Before the heads of department prepare the training, and again before the mock services begin. The weeks between the team's first day and the opening decide which restaurant the guests will meet.

Guests in the opening weeks do not distinguish between a team that is still learning and the standard of the house: they judge whichever one is at their table. Training, rehearsals with guests, and soft opening form a single programme where each stage relies on the one before.

Step 1. Prepare the heads of department

In the days before the team's first morning, the General Manager and the Executive Chef go through the training programme and the Standards of Service, page by page, together with the other heads of department. The aim is not to present the documents but to make each head of department able to teach them: to explain why each standard exists, to show it, and to recognise at once when it is not being followed. Each of them prepares the sessions of their own department and agrees with the others how a competence is judged, so that a pass means the same in the kitchen as on the floor. Once training begins, the heads of department are the standard in person. The team copies what they do more than what they say, and a head of department who cuts a corner in front of the team has rewritten the standard for everyone watching.

Step 2. Build the foundation with the whole team

The first days bring the whole team into one room, whatever the role, and it is the only time everyone learns the same things together. Start with the concept as a guest should experience it, from the first search online to the moment they leave, because every standard that follows is a consequence of it. Then the house rules; then food safety, allergens, and emergencies, which concern every person in the building; then the building itself and its systems; and last, what each role expects and who each person will work with.

Close these days with a short assessment for everyone. It is not meant to fail anyone: it shows whether the foundation is in place. When many people miss the same answer, the session was the problem, and it is run again before the departments separate.

Step 3. Train the departments, and taste every day

Each department then trains on its own, led by its head, in its own space. The trainer

shows the task done correctly and explains why it is done that way. Each session ends with the trainee doing the task alone while the trainer watches, and the competence is recorded the day it is passed.

Every afternoon the departments meet for the tasting. The kitchen and the bar bring out the dishes and drinks of the day, everyone tastes them and describes them, and the floor asks the questions a guest would ask. This is where the departments learn from each other: a server learns what the chef means by a word, and a cook learns what guests actually want to know.

Step 4. Bring the team together and run the mock services

When the departments are ready, bring them together without guests.

Then run the first mock service, with invited friends and family, every system live and the team in uniform. Three observers, one for the kitchen, one for the floor, and one for the bar, record what happens in their area without intervening. The debrief takes place as soon as the service closes, while the details are fresh: what worked, what failed, whether the cause was the system or the skill, and one owner for each fix. The next day is for the corrections — a station rearranged, a sequence changed, a brief rewritten — built into the documents and practised, not only discussed.

The second mock service shows whether the corrections hold. If the same problems return, the fix was not enough, and it is reworked before the soft opening. The failures that mock services find most often are, in this order: the dishes of one table leaving the kitchen at different times; information that does not reach the right person at the right moment; errors in the POS; plates held too long at the pass; and the pace of the service. Watch for these first.

▲ *Do not drop the second mock service to save a day. The first tells us what is wrong; only the second tells us whether the correction worked. If the calendar is too tight, shorten the days together or the department training instead.*

Step 5. Run the soft opening in sessions

The soft opening is not a press event: it is an operational test with real guests in controlled conditions. Its guests are invited and do not pay, and they come from beyond the team's own circle. Run it in at least three sessions over several days rather than one long evening, because the team's answer to each problem improves from one session to the next.

The first session is the most forgiving: people who understand the context and will be honest, in about half the room — enough pressure to expose the problems, not so much that the team is overwhelmed before it can correct them. The second invites people from the trade — suppliers, other operators, nearby businesses — who notice details a general audience would miss, in a fuller room. The third runs at or near full capacity, with the neighbourhood, the people who registered their interest during the

campaign, and, where the PR consultant advises it, the first journalists. Its standard is the standard of the opening night.

Step 6. Collect the feedback and act before the next session

Conversations at the table and impressions from the team are not enough. Leave a short card on every table with three questions — what worked, what could be better, and one specific thing the guest noticed — and hold the managers' debrief at the end of each session on the same three questions. After a session with guests from the trade, call two or three of them the next day.

Review everything the following morning. The points that appear in more than one source, from the guests and from the team, are the patterns to correct; a single comment is a preference. Each correction has an owner and a deadline before the next session, and the log is read at the brief that opens it. Before each session, tell the team what is being watched that night, because a team that knows what is being evaluated gives sharper answers.

Step 7. Close the training and confirm the team is ready

After the last session, each head of department presents the results of their team to the General Manager and the Executive Chef: who is ready, who needs more time, and the decision for each person. The opening rota is built on the people who are ready, not on the people who were hired. The third session is also the final check of the opening date confirmed during the training: if it shows serious problems, the restaurant opens with a reduced capacity or a shorter menu in its first week, and only a failure that would put guests at risk moves the date.

The General Manager then closes the training in front of the whole team: names what was achieved, restates the standard the team will be held to, and sets out the first week of trading.

None of this guarantees a perfect opening night; no opening is perfect. What it guarantees is a team that has already met its problems, knows how to correct them, and works to one standard. That is the difference between a restaurant that improves from its first week and one that spends its first months repairing the impression it made.

DEEP DIVE 5.2

How to set the par levels and place the opening orders

TEMPLATE AVAILABLE FOR DOWNLOAD: T5.3 — OPENING ORDERS & PAR LEVELS

When to read this. When the menu is approved and the suppliers are chosen, before the first order. The opening stock is bought without any history of sales, so every quantity is a decision, and every mistake is paid in waste or in dishes taken off the menu.

The par level is the quantity of a product that must be on the shelf after each delivery for the restaurant to reach the next delivery without running out. Set well, it keeps the stock as low as the service allows: less cash tied up on the shelves, less waste, less space used. Set badly, or not set at all, it leaves the ordering to the memory of whoever is on duty, and the restaurant swings between shortages and products thrown away.

Step 1. Group the products by how they behave

Not every product needs a par level. Divide the list of ingredients into four groups. The products used in large quantities every day — flour, oil, tomatoes, the main proteins, the house wine — are the ones the par level is made for. The fresh products that keep only a day or two — fish, herbs, some vegetables — are ordered every day against the bookings, not against a fixed level. The products that keep for a long time — dry goods, spirits, cleaning products — have a par level with a minimum and a maximum, and are ordered in full cases when they reach the minimum. The products used rarely are ordered only when needed.

Step 2. Estimate the usage without a history of sales

Without sales, the usage of each product is calculated, not observed. Start from the covers expected at each service, divide them across the dishes of the menu — an even spread within each section, with a margin on the dishes the team will recommend — and multiply by the quantity of the product in each recipe, adjusted by the yield tests. Add the staff meals and a small allowance for waste. The result is the usage of a normal day.

Step 3. Set the par level of each product

The par level equals one normal day of usage multiplied by the number of days between two deliveries, plus a safety stock that depends on the supplier: small for a supplier who delivers every day and never misses, larger for one who delivers once a week or from far away. Express the result in the units the supplier sells — a case, a sack, a crate — and check that it fits the shelf, the cold room, or the freezer it is meant for. A par level that does not fit the storage is a calculation, not a decision.

Step 4. Build the opening orders

The first orders do not follow the par levels of a normal week. The opening budget set aside three to four weeks of projected usage for the stock, but that is the total for the whole opening period and the first weeks of trading, not the size of the first delivery. The orders follow the services the restaurant will actually run: the training sessions and the tastings, the mock services, and the soft opening, each with fewer covers than a normal service. Write the covers expected at each, and order for them, spreading the deliveries over several days, one category at a time, so that each is checked by the receiving procedure. Order little and often: a shortage is solved the next day; a case of fresh produce ordered for guests still to come ends in the bin.

Step 5. Order from the par level every time

Once trading starts, every order follows the same routine. Before the cut-off time of each supplier, the person responsible counts the stock of each product on the shelf and subtracts it from its par level: the difference is the order. The count and the order are written on the order sheet of that supplier, which lists the products in the order in which they stand on the shelves, so that the count is quick and nothing is forgotten. Nobody orders from memory, and nobody orders what is not on the sheet without the approval of the head of the department.

Step 6. Correct the par levels after the first weeks

The par levels of the opening are an estimate, and the first weeks of trading replace it with facts. Compare what each product actually used with what was forecast. A product that runs out before the delivery needs a higher level; a product that is thrown away, or that sits on the shelf past half its life, needs a lower one. Review the levels every week at first, then every month, and every time the menu changes.

When we order from the par levels, we know at any moment how much stock we hold and why. That knowledge is the base of the food cost: the stock on the shelf is money already spent, and only a level set and reviewed with discipline keeps it from becoming waste.

DEEP DIVE 5.3

How to set up cash handling and internal control

TEMPLATE AVAILABLE FOR DOWNLOAD: T5.4 — CASH HANDLING & RECONCILIATION LOG

When to read this. Before the POS access levels are set and the first mock service runs. These procedures must be in place when trading starts; putting them in place after the first differences have appeared is much harder than starting with them.

Most cash lost by a new restaurant is not stolen. It is lost through procedures that are applied differently by each person, differences that nobody investigates, and a culture in which handling money is informal because no formal process was ever set. The losses are small and frequent, and by the time they show in the monthly accounts they have been happening for weeks and their source is hard to find. The procedures that prevent them are simple. Their value lies in being followed by everyone, every day, from the first service.

Step 1. Separate the people who handle money from those who check it

No single person should control a financial process from beginning to end. The person who takes the cash is not the person who records the reconciliation, and the person who records the reconciliation is not the person who authorises the banking. In a small restaurant a complete separation is not always possible, but the principle is applied as far as the team allows: the manager on duty counts, the General Manager checks the next morning, and the accountant checks the General Manager.

Step 2. Fix the float by denomination

The float is the cash in each till at the start of a service, to give change. Define it by denomination — so many notes of each value, so many coins — and not only as a total. A float defined only by its total contains a different mix every day, depending on who prepared it; a float defined note by note is the same every day, and any difference shows at once.

A manager counts the float at the start of each shift and signs the float sheet, which stays in the drawer. When the shift ends, the till is counted by a manager, not by the person who used it. When a cashier changes during the shift, the till is counted and signed over; a till is never shared without a count.

Step 3. Reconcile every day, not every week

At the end of each day, compare three figures that should be equal: the cash sales recorded in the POS, the cash in the tills less the floats, and the cash prepared for the bank. Then compare the card payments in the POS with the reports of the terminals, and later with the settlement that reaches the bank, net of its fees. When the figures match, the day is clean. When they do not, the difference is recorded with its explanation,

however small, and investigated the same day: a difference traced the same night is a mistake; a difference found a week later is a mystery.

Keep every reconciliation in one log, signed by the manager who made it, with the closing report of the POS attached. Watch the cumulative difference of the week more than the difference of any single day: a small difference that goes one way one day and the other way the next is noise; a small difference that always goes the same way is a pattern, and it is investigated.

Step 4. Use the POS as the first control

With the access levels set, every void, refund, discount, or complimentary item carries the code of the manager who approved it and a reason taken from a fixed list. The POS produces two reports: an interim report, which can be printed at any moment without closing anything, and the closing report, printed when the day ends, which totals the sales by type of payment, the voids, and the discounts, and cannot be altered once it is printed. The closing report is the document the reconciliation starts from.

The General Manager reads the report of voids, discounts, and complimentary items every morning, and the accountant reviews it every month. An unusual number of voids on one server, or discounts that match no promotion, become visible only through the reasons recorded with them.

Step 5. Move the cash safely and keep the petty cash apart

The takings go to the safe at the end of each shift, in a sealed bag with the count written on it. The bank deposit is prepared by a manager, never by the floor staff, and two people count it, sign the record, and, where possible, take it to the bank together or hand it to the cash collection service. No one person has access to the cash and to the records of the cash at the same time.

The petty cash is kept in its own box with a fixed amount. Every payment from it has a receipt, the cash and the receipts together always equal the fixed amount, and the box is topped up only against the receipts.

Step 6. Agree how tips and service charges are handled

Write, with the accountant, how tips paid in cash and by card, and any service charge, are recorded, taxed, and shared, as the law of the market requires and as the employee handbook promises the team. Tips handled informally become a dispute between employees and, in many jurisdictions, a problem with the tax authority.

Step 7. Train the managers first, and practise before any guest pays

Train every manager on these procedures first: the first week of trading is not the moment to explain why the float is counted by denomination or what the closing report is for. Nobody pays at the mock services or at the soft opening, so the procedures are practised on the bills closed as complimentary and on test payments made by the managers: at every one of those services the floats are counted, every bill is closed with

its reason, a few card payments and refunds are made and reversed, and the day is reconciled and signed as it will be on a trading night.

A team that understands why a procedure exists follows it more faithfully than one that follows it because it was told to. Controls set from the first day protect the takings, but they also protect the people who handle them: when every movement of cash is recorded, nobody can be wrongly suspected of a difference they did not cause.

Phase 5 Checklist

1. HACCP rules in force before the first delivery, every record kept up to date, and the kitchen checked by the food safety consultant before the opening.
2. Kitchen stations set up along the flow, each with its prep list and its section of the recipe book.
3. Yield tests run on the first deliveries; recipe cards and costs corrected.
4. Bar set up with its preparations, its batches, and its pouring standards.
5. Every recipe loaded into the inventory system and linked to its item in the POS.
6. Menu checked by two people against the POS and the recipe cards; final prices and layout approved by the operator; small first run printed.
7. QR code menu published, identical to the printed menu and the POS.
8. Stores cleaned, organised, and labelled; every cold unit holding its temperature before the first delivery.
9. Par levels set for every product of the kitchen and the bar.
10. Opening orders placed for the training, the mock services, and the soft opening.
11. Delivery schedule agreed with every supplier, posted, and sent.
12. Receiving procedure written and applied to every delivery.
13. Access to the stores controlled; key and code register kept by the General Manager.
14. Tableware, glassware, and cutlery washed, set up, and counted.
15. Consumables ordered, each with its par level.
16. Breakdown contact posted for every piece of equipment.
17. Opening stock counted, valued, signed, and given to the accountant.
18. POS programmed with the approved menu, tested in a full service, and the team trained on it.
19. POS access levels and controls set; a personal code for every user.
20. Reservation system connected to every channel and tested as a guest and as the reception.
21. Telephone and email set up, with who answers and how quickly.
22. Network tested under the load of a full service; the plan for a failure agreed.
23. Operating, payroll, and reserve accounts open; merchant account active.
24. Floats set by denomination, petty cash set up, and banking procedure agreed.
25. Cash handling and closing procedure written and every manager trained on it.
26. First payroll paid on the date of the contracts.
27. Budget forecast reviewed on confirmed figures; covers and revenue targets set week by week.
28. Cash position checked against the pre-opening budget, with the reserve confirmed.
29. Every licence confirmed active, displayed, and recorded for renewal.
30. Every operating policy confirmed in writing, with its conditions met.
31. Heads of department prepared to train their teams before the team arrived.

32. Workplace risks assessed; first aiders named, first-aid equipment in place, accident book open.
33. Joining pack given to every member of the team; every personnel file complete.
34. Health and safety induction given to the whole team.
35. Every food handler trained and certified as the local law requires.
36. First days of training run with the whole team, closed by a test.
37. Each department trained on its own standards, with every competence recorded.
38. Menu tasted by the whole team every day; every server able to describe every dish and drink.
39. Supplier sessions run and attendance recorded.
40. Service rehearsed by the whole team without guests before the first mock service.
41. Every member of the team signed off, or the decision taken for those who are not ready.
42. Opening rota written, staffed for the opening weeks, and approved against the staff cost of the budget.
43. Reception station set up and tested.
44. Lighting and music set and recorded for each service.
45. Cleaning schedule in force, by department and by moment.
46. Notice boards and emergency contacts posted.
47. Mock services and soft opening run, with every bill closed in the POS and every debrief finding closed or assessed.
48. Opening date confirmed by the operator after the review of the training and the opening procedures.
49. Website and social accounts launched; reservations open from the opening day.
50. Website, social profiles, and listings complete and kept up to date by one person; every review answered.
51. Second stage of the campaign under way, with the bookings counted every week.
52. Press, media, and influencers invited in the way chosen with the PR consultant.

Working Files from the Toolkit

- T5.1 — CLEANING SCHEDULE
- T5.2 — PREP LISTS
- T5.3 — OPENING ORDERS & PAR LEVELS
- T5.4 — CASH HANDLING & RECONCILIATION LOG
- T5.5 — OPENING ROTA
- T5.6 — MENU DESIGN & PRINT GUIDE
- T5.7 — MOCK SERVICE & SOFT OPENING LOG
- T5.8 — OPENING READINESS REVIEW

FIRST 90 DAYS

The doors are open

The doors are open. After all the plans, the contracts, the dust of the works, and the weeks of rehearsal, the first guests walk in, sit down, and order, and the restaurant that existed on paper is serving people who chose it. The first evenings carry an energy that no training can reproduce: a full room, a kitchen calling the orders, a guest who stops at the pass to thank the cooks. These evenings deserve to be lived by the operator and by the whole team, because they are the reward for everything that came before them. The energy of the opening fades; the work it hides does not. In the first weeks the team works at full effort but not yet at full efficiency, and every service shows something to change. The figures start to arrive — the covers, the spend, the cost of each plate, the hours worked — and for the first time they are real, not forecast. The first reviews appear, some of the team leave, and cash goes out at the pace of a full restaurant while the revenue is still finding its level. For many first-time operators these ninety days are harder than the opening itself, because every problem now appears in front of the guests and has to be solved while the restaurant keeps serving.

This chapter gives the first ninety days a structure. Daily briefs, for the floor and for the kitchen, turn each service into a correction, and later into the daily conversation between the managers and the team. Every week the General Manager reviews the sales, the purchases, and the cost of the rota against the budget with the operator, the Executive Chef, and the accountant. At the end of each month the stock is counted, the P&L shows the real food and beverage cost, and the break-even point is checked on real costs.

Key Moments in the First 90 Days

The first evening with paying guests is the moment the restaurant becomes a business. Until the night before, every guest was invited and every bill was closed as complimentary; from this service every table is a guest who chose us, every bill is paid, and every plate counts in the food cost. Before the doors open, the General Manager gathers the team for a few minutes: the bookings of the evening, the large tables, the allergies already declared, the one standard to watch. From the next day the daily briefs begin, one for the floor and one for the kitchen, and from then on they are part of every day of the restaurant.

At the end of the second week the most visible problems of the opening have been corrected, and the service starts to find its flow. The floor and the kitchen begin to work in sync: the orders reach the pass at a pace the kitchen can hold, the plates leave

when the table is ready for them, and the waiters know how long each dish takes. The same week, the floor and the kitchen meet together for the first time since the opening, to look back at the first two weeks and set the goals of the next ones.

Around the third or fourth week the excitement of the opening is gone for good. The reservation book is less full than in the first days, some of the team are tired in a way that one day off does not fix, and the list of things still to change is longer than expected. We realise that the restaurant is no longer a project with an end date but a business we have to run tomorrow and every day after. The operators who come through this moment well are those who prepared for it: a reserve of cash that covers the slow weeks, a General Manager who runs the restaurant without being told, and heads of department who have been given real responsibility.

The close of the first month produces the first real P&L. The stock is counted, every invoice is entered, the payroll is posted, and the accountant separates what belongs to the opening from what belongs to the trading. For the first time we can see what the restaurant earns and spends in a normal month, against the forecast written before the lease was signed, and how many covers it really needs each week to break even. It is the first figure in the life of the restaurant that does not depend on an estimate.

The ninetieth day closes the opening period. The operator, the General Manager, the Executive Chef, and the accountant sit down with three months of figures and set them against the plan. The restaurant that exists at this point is not the one that was planned: some dishes have been replaced, some people have left, and the busiest service may not be the one expected. The meeting does not judge the plan; it decides the next quarter, in writing, on the figures of a restaurant that is now real.

Who Is Involved in the First 90 Days

Operator

Reads the figures every week with the General Manager, the Executive Chef, and the accountant, reads every monthly P&L and break-even check with the accountant, decides on the menu review, on the consultants' contracts, and on the next quarter, and joins a brief from time to time.

General Manager

Attends the floor brief, leads the weekly meeting with the Executive Chef and the weekly review of the figures, checks the cash every morning and the standards of service every week, and manages the reviews, the licences, the fire safety, the employment records, and the POS.

Executive Chef

Leads the kitchen brief, calculates the food cost, updates the recipe cards, runs the dishes of the day, reviews the menu with the menu engineering method, and keeps the

hygiene of the kitchen at the standard of the opening every day.

Heads of department

The Floor Manager, the Bar Manager, and the Sous Chef take part in the daily briefs, adjust the par levels and the rota to the real activity, count the stock, assess their people before the end of the trial periods, train every new starter, and record the defects of the building. The Floor Manager also runs the reservations, the complaints during service, and the information online; the Bar Manager runs the beverage cost, the drinks list, and the review of the drinks with the menu engineering method.

The team

Serves the first paying guests, reports what it sees in the briefs, tastes every new dish and drink, and applies each correction from the service in which it is announced.

Accountant

Takes part in the weekly review of the figures, closes the books at the end of every month, reads the P&L with the operator against the projection, checks the break-even point on real costs, and pays the suppliers on the agreed terms.

Attorney

Checks every change to the way the restaurant runs against its licences, and advises on the contracts of the team at the end of the trial periods.

Marketing Consultant

Puts the trading stage of the marketing plan into action and, from the information collected by the team and given by the guests, refines it with precise targets.

PR Consultant

Keeps the interest of the press alive once the opening is over, and brings in the journalists who preferred to wait until the service was steady.

IT Consultant

Checks that the systems agree with each other on the first month's figures, sets up the backups and the protections of every system, and hands over their support before the opening period ends.

Food Safety Consultant

Makes unannounced checks of the kitchen, the stores, and the records, so that the hygiene of trading stays at the standard of the opening.

Fire Safety Trainer

Trains the whole team to act in a fire, and the new starters at each following course.

Suppliers

The main suppliers, confirmed after the first weeks, become partners of the restaurant: they deliver to its real consumption, and their consistency, quality, and prices are reviewed regularly.

Operations

The rhythm that turns every service into an improvement

In the first weeks every service produces more information than the managers can remember: a dish that reached the table late, a guest who waited for the bill, a booking that never arrived. Without a fixed routine, that information is forgotten by the next morning, or acted on in a hurry by whoever happened to hear it. The routine is short and simple: a brief before every service, one for the floor and one for the kitchen, and a meeting with the whole team every week.

Each part of the routine has an owner. The heads of department lead the briefs of their area, the Floor Manager adjusts the reservations and the floor plan to the real demand of each service, and the General Manager checks that every correction decided is carried out in service. The operator can join a brief from time to time, unannounced: a few words of recognition from the owner motivate the team more than any target, as long as the brief stays in the hands of the manager who leads it.

Run the daily brief before every service.

Responsible: Floor Manager, Executive Chef • **Verified by:** General Manager

Hold two short briefs every day before the first service, at a fixed time and place: one for the floor, led by the Floor Manager with the Bar Manager and the floor team, and one for the kitchen, led by the Executive Chef with the Sous Chef and the cooks. The General Manager attends the floor brief, and the two meet whenever a point concerns both.

Each brief covers five points, always in the same order: what went well, what went wrong in the last service, what the guests said, the correction for today, and who is responsible for it. It is also the daily line of communication between the heads of department and the team: the dishes of the day, the large bookings, the standard to watch in the service. Deep Dive 6.2 sets out the method.

▲ *Do not skip the brief after a good service. It is the moment to say what went well, and to hold that standard in the next one.*

Hold a weekly meeting with the whole team.

Responsible: General Manager, Executive Chef • **Verified by:** Operator

Once a week, on the same day and at the same time, bring the floor and the kitchen together for a short meeting: how the week went, what the guests and the reviews said, what changes next week — a new dish, a new procedure, a change of rota — and who deserves to be recognised. It is the one moment in which the whole team hears the same message at the same time.

After the first weeks, once the service has found its flow, the weekly meeting becomes a monthly one; the daily briefs carry the communication in between.

Review the flow of the service.

Responsible: *Floor Manager, Executive Chef* • **Verified by:** *General Manager*

In the first weeks, watch where the service slows down: the orders that wait at the pass, the drinks that arrive after the starters, the guests who wait for the bill, the waiter who crosses the room to fetch what should be at hand. Measure how long each table waits between ordering and receiving each course, from the POS or by watching a full service, and compare it with the times the kitchen and the floor agreed for each course.

Each slowdown has a cause: the order in which the courses are fired, the position of a station, the moment the bill is brought, the route between the kitchen and the room. Correct the cause, not the symptom, and bring each correction to the brief.

Keep the opening and closing checklists in use.

Responsible: *Manager on duty* • **Verified by:** *Floor Manager, Executive Chef*

Every shift opens and closes with its checklist, one for the floor and the bar and one for the kitchen: the equipment switched on and off, the mise en place, the float, the doors, the gas, the alarm. The manager on duty signs it at the end of the shift, and the head of department reads the checklists of the previous day the next morning.

In the first weeks the team is tired, and the checklists are the first thing to be skipped, usually at closing, when everyone wants to go home. A checklist ticked without being done is worse than no checklist at all: from time to time, the head of department checks one in person at the end of a closing shift.

Handle complaints during service.

Responsible: *Floor Manager* • **Verified by:** *General Manager*

Decide before the service who speaks to a guest who complains, and what that person can offer: a dish replaced, a drink, a dessert, a discount on the bill. Set the limit of each manager, so that the waiter does not negotiate at the table and the guest receives an answer within minutes, not at the end of the evening.

Record every complaint and every compensation: the table, the reason, and what was offered. The record shows whether the same problem keeps returning, and explains the complimentary items and the discounts that the General Manager finds in the POS exceptions the next morning.

▲ *A complaint solved at the table rarely becomes a negative review; a complaint ignored often does.*

Check the standards of service.

Responsible: *General Manager* • **Verified by:** *Operator*

Once a week, watch a full service from the room without taking part in it, with the Standards of Service in hand: the welcome at the door, the time to the first drink, the way each dish is presented, the clearing of the table, the bill, the goodbye. Every

standard that was not held goes to the brief of the next day.

After the first month, add a mystery guest: someone the team does not know, who books, dines, pays, and reports against the same standards. The managers see the service as it runs when they are in the room; the mystery guest sees it as the guests do.

Manage the reservations and the floor plan.

Responsible: Floor Manager • Verified by: General Manager

The first weeks show how the room really fills: which services are full, which tables are asked for, how long the guests stay. Use them to adjust the reservation system: the floor plan with every table and its seats, the times at which bookings are taken, the length of each sitting, the share of the room left free for walk-ins, and where large groups are seated.

Build each service on the floor plan: give every table to a section, and spread the arrivals so that the kitchen does not receive all the orders at the same moment. Confirm the bookings on the day, by message or by telephone, and record the guests who do not arrive. Where the market accepts it, a card guarantee for large tables or for the busiest evenings is a further protection.

Finance & Funding

Reading the plan against the real figures

In the first ninety days the figures have to answer two questions: is there enough cash to last until the restaurant reaches its break-even point, and is it moving towards it at the pace the plan expected? A busy evening or a quiet week answers neither; only the figures of several weeks, read the same way every time, do.

The answer separates a slow start from a structural problem. In a slow start the sales are below the plan but grow from week to week, and the costs are where they were expected. In a structural problem the sales stop growing after the first month, or the costs stay above the plan, and nothing in the figures suggests that time alone will change them. A slow start is managed with patience and with the reserve; a structural problem needs a decision, and the earlier it is taken, the more options remain. Mistaking a structural problem for a slow start is the most expensive error of this period, because on the ninetieth day the decisions for the next quarter are built on that diagnosis.

Review the daily cash and the POS exceptions.

Responsible: General Manager • Verified by: Accountant

Every morning, the General Manager checks the closing of the previous day in the Cash Handling & Reconciliation Log (T5.4): the cash and the card totals against the POS, the floats, the deposit, and the report of the exceptions — the voided items, the discounts, the complimentary bills, the refunds, and the bills reopened after payment.

Each exception carries a reason and the name of the manager who approved it. A

pattern, such as the same user voiding items at the end of the shift or the same table receiving a discount every week, is investigated immediately.

Review the figures every week.

Responsible: General Manager • **Verified by:** Operator

Every week, on the same day, the General Manager reads the figures of the week with the operator, the Executive Chef, and the accountant, against the weekly targets set before the opening: the covers, the sales of food and of drinks, the average spend, the purchases of food and drinks against their sales, and the hours worked against the staff cost of the budget. The real food and beverage cost needs the stock count and is known at the end of the month; in the weeks between, the purchases against the sales show whether it is moving in the right direction.

Every figure that is off target leads to a decision, with a name and a date — not to a discussion postponed to the following week.

Close the first month and read the first P&L.

Responsible: Accountant • **Verified by:** Operator, General Manager

At the end of the first month the accountant closes the books: every invoice entered, the payroll posted, the closing stock counted and valued. The P&L that follows is the first real one.

Read it with the accountant, line by line, against the projection, and explain every difference. Then make four checks before trusting the result.

Check that every cost of the month is in. Ask the accountant whether the utilities, the repairs, and the last deliveries have been entered, and whether the insurance and the licences carry their monthly share. A missing cost makes the month look better than it was.

Take out the costs of the opening: the extra hours of the first weeks, the food thrown away while the kitchen learned the volumes, the late pre-opening invoices. They will not come back, and the month must be read without them.

Check the stock count before trusting the food cost. A shelf missed or a product counted twice changes it more than any error in the kitchen.

Compare the result with the bank. Ask the accountant how much cash the restaurant generated or used in the month. Loan repayments, taxes still to be paid, and stock on the shelves take cash out without appearing in the P&L, so a month in profit can still leave less money in the account.

Calculate the food and beverage cost every month.

Responsible: Executive Chef, Bar Manager • **Verified by:** General Manager

At the end of every month, with the stock count, the Executive Chef calculates the actual cost of the food and the Bar Manager the actual cost of the drinks: the stock at the start of the month, plus the purchases, minus the stock at the end, against the sales of the

month. Each compares it with the theoretical cost: what the month's sales would have cost if every dish and every drink had been made exactly to its recipe card. The difference between the two comes from waste, portions, yields, and losses. Find its cause before the next count, and bring the correction to the brief of the kitchen or of the bar.

Check the break-even point at the end of every month.

Responsible: Accountant • *Verified by:* Operator, General Manager

At the end of the first month, the accountant recalculates the break-even point with the real costs: the fixed costs actually paid — rent, salaries, utilities, insurance, repayments — and the real cost of food, drinks, and the variable part of the staff as a share of the sales. The result shows how many covers a week the restaurant needs to cover its costs. Compare it with the covers actually served. If the covers are below the break-even but rise every week, keep going. If the break-even has risen because the costs are higher than planned, or the covers stay flat or fall, act at once: on the costs, on the average spend, or on the marketing. Deep Dive 6.1 sets out the method.

Pay every supplier on the agreed terms.

Responsible: Accountant • *Verified by:* General Manager

Pay every invoice on the date agreed, from the first one. A new restaurant that pays on time is the customer a supplier remembers when a product is scarce or a delivery has to be made outside the schedule. Before paying, check each invoice against the delivery note and the agreed price.

If cash becomes tight, call the supplier before the payment is due and agree a new date. A payment missed without warning costs more trust than the amount is worth.

Review the opening consultants' results against their contracts.

Responsible: Operator • *Verified by:* Accountant

The contracts of the marketing consultant and of the PR consultant set out what each would deliver and how the results would be measured. When their opening work ends, compare what was delivered with what was agreed, and decide for each one whether to continue, with a new contract written for the trading period, or to end the engagement. Do the same with every other consultant or contractor still invoicing the restaurant, and close the contracts that are no longer needed.

Close the first ninety days and decide the next quarter.

Responsible: Operator

On the ninetieth day, the operator meets the General Manager, the Executive Chef, and the accountant to compare the restaurant with the plan: the P&L of the three months against the projection, the break-even point against the covers served, the cash left against the reserve, the menu after its review, the team after the trial periods, and the corrections still open.

The meeting ends with written decisions for the next quarter: the targets; any change to the menu, the opening hours, or the staffing; the marketing budget; and the date of the next review. From this meeting the restaurant leaves its opening period and is run on its own figures.

Food & Beverage

Testing the menu against real sales and real costs

We approved the menu on tastings and on costs calculated before the opening. Only trading shows two things that no tasting can: which dishes the guests actually choose, and what each dish really costs when it is cooked many times a night, by the whole brigade, under pressure.

The real cost is found in the kitchen and at the bar: in the yields that differ from the estimates, in what ends up in the bin, in the bottles opened and never finished. The guests' choices are found in the sales, and they depend on the floor as much as on the plate, because a dish the waiters have not tasted, or have not heard explained by the chef in the brief, is rarely recommended. Menu engineering puts the two answers together. It looks at every dish from both sides at once, how often the guests choose it and how much it earns, because a dish that sells well can earn little and one that earns well can sell little; read together, the sales and the costs show which dishes carry the restaurant and which ones have no relevance at all.

Update the recipe cards with the real yields.

Responsible: Executive Chef, Bar Manager • Verified by: General Manager

The recipe cards were written before the opening, on yields estimated during the tastings. After the first weeks of real production, weigh again what each preparation actually gives: the fish after filleting, the meat after cooking, the sauce after reducing, the number of measures each bottle actually pours. Where the real yield differs from the estimate, correct the quantities and the cost on the card.

The theoretical cost is calculated from these cards. A card with the wrong yield makes the gap between the actual and the theoretical cost look like waste or theft, when it is only an error on paper. Give every corrected card to the cooks and the bartenders who prepare the item.

Keep a waste log in the kitchen and at the bar.

Responsible: Sous Chef, Bar Manager • Verified by: Executive Chef, General Manager

Record every product thrown away, at the moment it is thrown: what, how much, and why — out of date, spoiled, burnt, sent back by a guest, prepared in excess, a drink spilled. A sheet next to the bin or a screen on the POS is enough, as long as it is filled in during the shift and not from memory at the end of it.

Every week, read the log. The same product out of date every week means the order

is too large; the same preparation made in excess means the production list does not follow the bookings; the same dish sent back means a problem in the recipe or at the pass.

Run the dishes of the day.

Responsible: *Executive Chef* • **Verified by:** *General Manager*

Offer a short list of dishes of the day, decided each morning on what the kitchen has: a product that must be used before it loses its quality, a seasonal delivery, a cut or a fish bought at a good price. A well-planned dish of the day turns a potential waste into a sale.

The dishes of the day are also the testing ground of the next menu. A new dish sold to real guests, at its price, for a few days, shows whether they choose it and whether the kitchen can make it at the speed of a full service. Cost each one before offering it, and record its sales.

Hold a tasting with the floor team.

Responsible: *Executive Chef, Bar Manager* • **Verified by:** *Floor Manager*

Before a new dish, a dish of the day, or a new drink reaches the guests, the floor team tastes it. The Executive Chef or the Bar Manager explains the ingredients, the allergens, and the preparation, and how to describe it at the table in one sentence. A few minutes after the brief are enough.

A waiter who has not tasted a dish recommends the ones they know instead, and a good dish stays unsold. In the first months the team changes and the recipes are corrected: repeat the tasting of the whole menu for every new starter, and whenever a recipe changes.

Review the drinks list and the wines by the glass.

Responsible: *Bar Manager* • **Verified by:** *General Manager*

The cellar and the bar were stocked on estimates, and they hold the first mistakes: labels bought in quantities we will not sell for months. Every month, compare the stock of each label with its sales, stop reordering what does not move, and ask the floor to recommend it until it is sold.

The wines by the glass need their own control, because an open bottle loses its quality within days. Record every bottle opened and the glasses it served, and keep by the glass only the wines that sell fast enough to be finished while they are still good. A preservation system pays for itself only when the wines by the glass are many or expensive.

Review the menu with the menu engineering method.

Responsible: *Executive Chef, Bar Manager* • **Verified by:** *Operator*

When the sales have settled, use the menu engineering method to analyse every dish and every drink: how often the guests choose it compared with the others in its section, and how much margin it leaves. The method places each item in one of four groups,

and each group calls for a different decision: keep it, improve its margin, sell it better, or replace it.

The review does not change the menu at once. It shows which dishes and drinks the next menu should keep, improve, or replace, and the changes are made together when the next menu is introduced, so that the costing, the POS programming, the print, and the training are repeated only once. Deep Dive 6.3 sets out the method.

Equipment & Purchasing

Ordering on what the restaurant really uses

The par levels and the opening orders were set on the covers forecast and on estimates. From the first week, the deliveries, the counts, and the sales replace the estimates, and the stores can be sized on the real consumption. Too much stock is cash sitting on a shelf and waste in the bin; too little is a dish missing on the busiest evening of the week. The equipment enters its normal life as well. The warranties are running, the service contracts begin, and the first breakdowns show which machines and which contractors we can rely on.

Adjust the par levels to the actual consumption.

Responsible: Heads of department • Verified by: General Manager

After the first two or three weeks of trading, compare the par level of every product in the Opening Orders & Par Levels file (T5.3) with what was actually used, from the counts and from the sales, and set each level on the real consumption.

Review the pars again after every change of the menu, of a product, or of a supplier, and whenever the covers change with the high or the low season.

Count the stock at the end of every month.

Responsible: Heads of department • Verified by: Accountant

On the last day of every month, count the whole stock across the kitchen, the bar, and the stores. Use the same sheets, the same order, and the same pair of counters each time, so that two counts can be compared; value every item at its latest purchase price, and hand the result to the accountant on the first working day of the new month.

Check the count of the bar against what the POS has sold. A gap in the wine or the spirits is then found and investigated within the same month.

Review the performance of every supplier.

Responsible: Executive Chef • Verified by: General Manager

The suppliers were chosen on their offers; the first weeks show how they deliver. Keep checking the consistency of each supplier: deliveries on time or late, complete or short, at the agreed temperature and quality, at the agreed price.

Raise every recurring problem with the supplier as soon as it appears. At the end of the first month, decide for each category of product whether the supplier stays, or is

replaced by the second choice of the comparison.

Start the maintenance calendar.

Responsible: General Manager • **Verified by:** Operator

Put on one calendar every maintenance the restaurant needs: the service contracts agreed before the opening, the cleaning of the extraction and of the grease trap, the pest control visits, the checks of the fire equipment, the descaling of the coffee machine and of the dishwasher, the filters of the air conditioning, and the periodic tests required by the law or by the insurer.

Each entry has a date, a contractor, and a person who checks that the work was done. Keep every service report: the insurer and the inspectors will ask to see them.

People

Finding out who the team really is

The first weeks of trading are the most honest assessment of the team we will ever have. Some people discover that the work is not what they expected; others, unremarkable in training, become the most reliable under pressure. Departures in the first weeks are normal in a new restaurant, and the way they are handled decides whether they unsettle everyone else.

The staffing level changes too. The rota of the opening was built for the opening; trading shows how many people each service really needs, and the staff cost is brought back within the budget before overtime and extra shifts become a habit.

Adjust the rota to the actual covers.

Responsible: Heads of department • **Verified by:** General Manager

Every week, each head of department compares the hours worked in the department with the covers served and with the staff cost of the budget, and builds the rota of the following week in the Opening Rota file (T5.5) on the real covers of each service, not on the forecast.

When the extra hours concentrate in one department, look for the cause before cutting the rota. A prep list sized for the forecast or a slow point in the service is corrected in the way the work is done; cutting the rota only moves the problem to the people who remain.

Assess every member of the team before the end of the trial period.

Responsible: Heads of department • **Verified by:** General Manager, Executive Chef

Before each trial period ends, the head of department assesses the person on what they have shown in service: the standards they hold, how they respond to feedback, their reliability, and their effect on the rest of the team. A person who makes mistakes but learns from them is worth more at this stage than one who performs reliably but refuses to change anything.

For each person, the General Manager or the Executive Chef decides to confirm the contract, to extend the trial where the law allows it, with clear objectives and a date, or to end the contract within the trial period, on the advice of the attorney.

▲ *Do not let a trial period end by default. Once it has passed, ending a contract is slower and more expensive in most markets.*

Manage the early departures and hold an exit conversation.

Responsible: General Manager • **Verified by:** Operator

When someone is clearly wrong for the role — the standard is not met, the feedback does not land, the guests notice — act quickly. A team that watches a problem left unaddressed loses confidence in its managers faster than it is shaken by any departure. When someone decides to leave, hold a short conversation within a day or two, in private. Thank them for their work in the opening, then ask what made the work harder than they expected, what would have changed their decision, and what they would tell a friend thinking of applying. Do not defend the restaurant or correct their account; write down what they say, and act on anything that echoes what others have said.

Replace without lowering the standard, and train every new starter.

Responsible: Heads of department • **Verified by:** General Manager

Do not fill a gap with whoever is available. A few days with a smaller team working well cost less than a new hire who brings new problems. Recruit with the same job description and the same interview used before the opening.

Give every new starter the joining pack and an induction built from the training plan: the concept, the standards of the role, food safety and emergencies, the systems, and a trial shift checked by the head of department. A new starter left to learn the job from a colleague in the middle of a service learns the colleague's shortcuts.

Build the team.

Responsible: General Manager, Executive Chef • **Verified by:** Operator

The team was hired in a few weeks and has worked under pressure since the first evening, and the floor and the kitchen often know each other only across the pass. Give them reasons to become one team: a staff meal eaten together before service, at a fixed time, cooked with the same care as the guests' food; a shift spent by a waiter in the kitchen and by a cook on the floor, so that each sees the work of the other; and, after the first month, an evening out together, paid by the restaurant.

Watch how the team forms. A new team under pressure sometimes gathers around the wrong person, the one who complains, cuts corners, or sets the floor against the kitchen, and the habits that settle in the first months are hard to change later. Speak to that person early, and give responsibility to the people who set the right example.

Marketing & PR

From the opening to the second visit

The pre-opening campaign created the curiosity, the press coverage, and the full rooms of the first weeks. That momentum fades quickly, and nothing replaces it unless we replace it on purpose. Marketing after the opening has a different goal: to turn first-time guests into regular ones, and to reach the people who were not watching the opening. This is also the period in which the restaurant is judged in public every day. The reviews arrive from the first evening, and the way we read and answer them shapes the opinion of everyone still deciding whether to book.

Read the reviews every day and act on them.

Responsible: General Manager · Verified by: Operator

Read the new reviews every day, and answer quickly: a serious complaint is dealt with the same day, not at the end of the week. Look for patterns, not verdicts. A single complaint may describe one unlucky evening; when several guests raise it within a few weeks, it is a problem, and it is discussed at the daily brief of the floor or of the kitchen, depending on the subject. A specific compliment that repeats shows what the restaurant does well and must protect.

Each reply is written for future guests rather than for the reviewer. Deep Dive 6.4 sets out the method.

Put the trading stage of the marketing plan into action.

Responsible: Marketing Consultant · Verified by: Operator

The marketing plan written during the Build phase already sets out the first months of trading. Put that stage into action, and adjust its content to what now comes from the life of the restaurant — the dishes guests order most, the team, the suppliers, a full Friday evening.

Give guests reasons to come back: a seasonal dish, an event, a lunch offer for the businesses nearby, a message to the guests in the database.

Agree the marketing budget for the period with the marketing consultant, and move it between channels only on the results the bookings show.

Measure where the guests come from.

Responsible: Marketing Consultant · Verified by: General Manager

The floor team records the source of every booking — the website, the maps, the social profiles, the booking platforms, the telephone, a recommendation — and asks the guests who walk in, briefly, how they heard of the restaurant. The General Manager sends the figures to the marketing consultant every week.

From these figures, and from what the guests tell the team, the marketing consultant refines the plan with precise targets.

Follow up the press after the opening.

Responsible: PR Consultant • **Verified by:** Operator

The interest of the press lasts a few weeks after the opening. Keep it with something new to tell: the first seasonal change of the menu, the story of the chef or of a special product we use on our menus, an event, a milestone of the restaurant. Invite the journalists who could not come during the opening, and those who were asked to wait for a steady service.

Build the guest database.

Responsible: Marketing Consultant • **Verified by:** General Manager

Collect the contacts of the guests from the bookings, the website, and the cards on the table, with their consent and within the data protection law of the market. Record in the reservation system what the team learns about each guest: their preferences, an allergy, a special occasion, their usual spend.

Use the database in two ways: to welcome a returning guest with what the restaurant already knows about them, and to send messages that give a reason to come back. A guest who comes back has the lowest acquisition cost of all, because the restaurant has already paid to bring them in once.

Technology

Systems that agree with each other

The POS, the reservation system, the inventory, the payroll, and the accounts were connected and tested before the opening. Trading is their first real test: every sale, every delivery, and every hour worked now passes through them, and a link that does not work shows up as a figure that does not match.

The support the IT consultant gave for the opening comes to an end in this period, and the systems pass into the hands of the restaurant. From now on they change with it: people leave, dishes and prices change, the opening hours are adjusted, and every change that is not entered at once leaves a system that no longer describes the restaurant we run.

Check that the systems agree with each other on the first month's figures.

Responsible: IT Consultant • **Verified by:** Accountant

At the end of the first month, compare the same figures in every system: the sales of the POS with the payments of the card provider and the deposits in the bank; the products sold with the stock movements of the inventory; the hours of the rota with those of the payroll; and all of them with the accounts.

Every difference is an error of programming, an error of use, or a missing link, and each is corrected at its source. Before the support of the opening ends, agree with the IT consultant and with each vendor who answers each kind of fault, and how quickly.

Remove the access of everyone who leaves.

Responsible: General Manager • **Verified by:** Operator

On the day a person leaves, remove every access they had: the POS code, the reservation system, the email, the alarm code, the keys, and any password they shared with others. In the first months the team changes often, and every departure leaves behind codes that nobody remembers to close.

A POS code still active is the simplest way to void a sale or apply a discount under someone else's name, and the exception report we check every morning would show the name of a person who no longer works for us.

Keep the POS aligned with every change.

Responsible: General Manager • **Verified by:** Executive Chef, Bar Manager

Enter every change in the POS before the service in which it applies: a dish of the day, a new price, a corrected recipe, a dish taken off, a table with a new number on the floor plan. Whoever decides the change tells the General Manager, and only the General Manager, or one person they name, programs it.

A dish sold under the wrong button distorts the sales of two items, and the figures we use for the menu engineering and for the theoretical cost are only as good as the POS that records them. Every week, read the sales by item: a dish that never sells, or one that sells more than the kitchen remembers making, is often an error of programming.

Back up the data and protect the systems.

Responsible: IT Consultant • **Verified by:** General Manager

Before the support of the opening ends, ask the IT consultant to set up, and to show the General Manager, the protections the restaurant needs: an automatic backup of the data of every system, tested by restoring a file; a personal password for every user; the updates of every device installed when they are released; the guests' Wi-Fi separated from the network of the POS and of the office; and the security rules of the card provider applied.

In the first months nobody thinks of these protections, because everything works. We notice them on the day a system fails or is attacked, and the bookings and the payments stop with it.

Keep the information online correct.

Responsible: Floor Manager • **Verified by:** General Manager

List every place where the restaurant appears online — the website, the maps, the booking platforms, the delivery platforms if any, the social profiles — and check that each one shows the same opening hours, telephone number, address, booking link, and current menus.

In the first months the opening hours are adjusted and the menus change, and every change must reach every listing on the same day. A wrong closing time or any wrong

information online turns a guest away before they arrive, and we never know that we lost them.

Legal, Permits & Insurance

Ready for every inspection

From the opening, the restaurant can be inspected at any time, and not only by the health authority: the fire authority, the licensing authority, the labour inspectors, and the tax authority can all visit, usually without warning. Each one checks that the restaurant runs the way it was approved.

Hygiene deserves the most attention, because it protects the guests and because a failed inspection can close a restaurant in a day. It is not a cleaning done the morning an inspector is announced: it is the result of the habits of every day, written in the cleaning schedule and in the HACCP records, and checked by the managers in every service.

Keep the hygiene standards of the opening every day.

Responsible: Heads of department • Verified by: Food Safety Consultant

The standards set before the opening tend to slip once the restaurant is busy: a temperature not recorded, a label missing, a cleaning skipped on a late night. The heads of department check every day that the cleaning schedule is followed, that the temperatures and the deliveries are recorded, that every product is labelled and dated, that the allergen information is up to date, and that every member of the team follows the rules of personal hygiene.

Ask the food safety consultant to visit regularly and without warning, as an inspector would, and to check the kitchen, the stores, the bar, and the records. Correct what each visit finds and keep its report. Every new member of the team receives the food safety training before working with food.

Run the restaurant within its licences.

Responsible: General Manager • Verified by: Attorney

The changes of the first months — a later closing time, tables added outside, live music — often need a new authorisation before they start. Check each one with the attorney before it is announced, because an inspector judges the restaurant on what the licence allows, not on what we planned.

Display every licence the law requires, and keep the documents each authority may ask for in one place, ready to be shown. Record the expiry date of every licence and permit in the permit register, so that no renewal is missed in the years ahead.

Train the team for a fire.

Responsible: General Manager • Verified by: Operator

Book a fire safety course with a qualified trainer for the whole team: how to raise the alarm, which extinguisher to use on which fire, how to use the fire blanket, how to shut

off the gas, and how to lead the guests out. Send the new starters to the next course, and after the first month hold an evacuation drill with the whole team, outside service hours.

Until a new starter has attended the course, their head of department shows them, on the first shift, the exits, the meeting point, the alarm points, and the extinguishers, and tells them who calls the emergency services.

Keep the fire exits and the routes to them clear in every service. In the first weeks they fill up with cases of wine, high chairs, and the tables moved for a large group, and nobody notices until an inspector does, or until we need them.

Keep the employment records ready for inspection.

Responsible: General Manager · Verified by: Accountant

Keep a complete file for every member of the team: the signed contract, the documents the law requires before a person starts work, the records of the hours worked, the payslips, and the papers that close the contract of those who have left. A labour inspector can ask for them without warning, and a missing document is a fine even when the work itself was regular.

In the first three months many people join and leave, and the papers are the first thing left for later. Check each file when a person starts and again when they leave, and make sure the hours recorded match the rota and the payroll.

Design & Construction

The defects period

The defects liability period runs well beyond the first ninety days, but trading is when most defects show: a drain that backs up when every sink is open, a door that no longer closes, a cold unit that cannot hold its temperature on a full evening.

Each defect notified in time is repaired at the contractor's cost; each defect left unreported becomes our cost.

Record the defects that appear in trading and report them before the defects liability period ends.

Responsible: Heads of department · Verified by: General Manager

The heads of department keep the defects list opened at the handover up to date, with a photograph of each new defect and its effect on the service, and pass every new entry to the General Manager on the day it is found; the General Manager notifies the contractor in writing. Before the period ends, the operator books the final inspection with the architect, and the retention is released only when every defect on the final list has been repaired. Deep Dive 4.1 sets out the method.

What Might Go Wrong in the First 90 Days

- Running the daily brief inconsistently. When the brief is held one day and skipped the next, the team understands that the problems are not so important, and the Standards of Service are quickly diluted into something that no longer represents the restaurant.
- Answering a negative review rudely. The reply stays under the review for every future guest to read, and it does more damage to the restaurant than the review itself.
- Expecting the momentum of the opening to carry on by itself. The press and the curiosity fade within weeks, the covers fall, and the restaurant starts looking for guests when the marketing budget has already been spent on the opening.
- Not checking the break-even point because the restaurant looks busy. A full room with a low average spend or a high cost can lose money every night, and the loss is found when there are fewer ways left to correct it.
- Reviewing the menu in the first weeks. The dishes are judged from the orders of curious guests and of the press, good dishes are removed, and the costing, the print, and the training are paid for twice.
- Keeping the par levels of the opening. The stock ordered on the forecast stays on the shelves, the waste rises, and cash remains tied up in products the kitchen no longer uses.
- Filling every departure at once with an available person who does not fit the profile. The new hire learns the job during service from a colleague, the standard drops, and within weeks the person leaves or is let go; we pay a second time for the recruitment and the training of the same position.
- Letting the hygiene standards slip once the restaurant is busy. A record not kept or a cleaning skipped becomes a habit, and the first inspection finds it before the managers do.
- Treating the General Manager and the Executive Chef as staff to supervise instead of managers to trust. The operator becomes the bottleneck of every decision, and the two people hired to run the restaurant stop running it.
- Reporting the construction and equipment defects too late. The contractor disputes defects that were never notified, and their repairs are paid from the operating budget.

Deep Dives — First 90 Days

The four methods that follow are about turning what the restaurant learns every day into decisions. Every service, review, and dish sold produces information; collected in the right way, it becomes data the managers can use. What makes a difference is not how much of it we collect, but how quickly the data is turned into a decision.

DEEP DIVE 6.1

How to read the figures of the first month

TEMPLATE AVAILABLE FOR DOWNLOAD: T6.1 — DAILY & WEEKLY TRADING LOG · T6.2 — MONTHLY P&L & BREAK-EVEN REVIEW

When to read this. Before the first day of trading, to know what to record from the first service, and again at the end of the first month, when the first P&L and the break-even check are made.

Everyone knows that the first days of a restaurant are not a guide to its future. What matters is what we do with the first thirty days: if the right figures are recorded from the first service, the end of the month gives a clear picture of what the restaurant sells, what it costs, and how far it is from paying for itself. If they are not, the first month is only a memory. This Deep Dive sets out which figures to record, where to find them, what each one tells, and what to do when it is off target.

Step 1. Record four figures after every service

At the close of every service, take four figures from the POS and write them in one daily log, next to the target of the day set in the budget. The covers served: how many guests ate. The sales, with food and drinks shown separately. The average spend per cover: the total sales divided by the covers. The no-shows: the guests who booked and did not arrive, taken from the reservation system.

It takes a few minutes, and after the first week the log already shows which days and which services work, and which do not.

Step 2. Read what each figure tells

The covers tell how many guests the restaurant attracts. Covers below target on certain days, while others are full, point to the marketing and to the opening hours; covers below target every day point to the concept or to the price.

The average spend tells how much each guest leaves. When it is below target, look at the food and the drinks separately. A low spend on food points to the prices or to the structure of the menu — guests who skip the starter or the dessert. A low spend on drinks, with normal food, almost always points to the floor team, which is not proposing the wine, the aperitif, or the coffee.

The no-shows tell how much revenue is lost at the door. A table held for a guest who does not arrive is a table that cannot be sold again that evening; the answer is in the way the reservations are confirmed and managed.

Step 3. Review the week

Once a week, the General Manager reads the daily log of the week with the operator, the Executive Chef, and the accountant, together with two more figures. The purchases of food and drinks, as a percentage of the sales of the week: without a stock count it is

not the real cost, but read week after week it shows whether the cost is moving away from the theoretical cost of the recipe cards. The staff cost: the hours worked in each department, multiplied by the hourly cost, against the staff cost of the budget.

Compare each day with the same day of the previous weeks — a Tuesday with the Tuesdays, a Saturday with the Saturdays — because one rainy evening or one local event moves a day, not a trend. For every figure off target, decide one action, with a name and a date.

Step 4. Close the month with the accountant

At the end of the month the accountant produces the first P&L: the sales, the cost of food and drinks, the staff cost, and the fixed costs — rent, utilities, insurance, fees, repayments. Compare each line with the projection of the business plan. Set aside what was spent only because the restaurant was opening, so that the P&L shows the cost of a normal month.

Step 5. Check the break-even point

The break-even point is the number of covers the restaurant needs to cover all its costs. To recalculate it on real figures, take three numbers from the P&L. The fixed costs of the month. The average spend per cover. The variable cost of a cover: the food, the drinks, and the hours of staff that rise and fall with the activity, divided by the covers served. Subtract the variable cost from the average spend: the result is the margin each cover leaves to pay the fixed costs. Divide the fixed costs by that margin, and the result is the number of covers needed in the month; divide it by the weeks of the month to obtain the weekly figure. For example, with fixed costs of 40,000 in the month, an average spend of 40, and a variable cost of 14 per cover, each cover leaves 26: the restaurant needs about 1,540 covers in the month, or about 355 a week. Compare that figure with the covers actually served.

Step 6. Decide what the result means

Put the break-even next to the covers of the last four weeks. If the covers grow every week and the costs follow the plan, keep the marketing steady, hold the costs, and check again at the end of the next month. If they do not, find the figure that is off target and act on it: a cost that is too high, an average spend that is too low, marketing that does not bring guests, or opening hours that do not match the demand.

Then check how many months the reserve can last: divide what is left of the reserve by the cash lost in the month. For example, with 60,000 left and 15,000 lost in the month, the reserve lasts four months. If, at the pace at which the covers are growing, the restaurant will not reach its break-even before then, the operator and the accountant decide the corrections before the next month begins.

Recorded from the first service and read every week, these few figures replace impressions with facts. If we know, at the end of the first month, how many covers the restaurant needs and how many it is serving, we have time to correct the course while the reserve is still there to support it.

DEEP DIVE 6.2

How to run the daily brief and the team meeting

When to read this. Before the first service with paying guests. The briefs work only if they start on the first day and are held every day after it.

In a restaurant, the standard of the service is decided before the doors open. The brief is the moment in which the managers tell the team what matters in the service that is about to start, and the team tells the managers what it saw in the last one. Held every day, short, and always in the same way, it is the most effective management tool the restaurant has, and it costs nothing.

Step 1. Organise two briefs

Each day, before the first guests arrive, two briefs take place, always at the same hour and in the same spot. The floor brief is led by the Floor Manager, with the Bar Manager, the servers, the runners, and the reception; the General Manager attends it. The kitchen brief is led by the Executive Chef, with the Sous Chef and the cooks. When a point concerns both — a large group, a new dish, a complaint — the two leaders agree it before their briefs.

Keep each brief to a quarter of an hour, standing, in the room or in the kitchen. A brief held around a table turns into a conversation, and a conversation does not end with a decision.

Step 2. Correct the last service

Every brief starts from the last service. Ask the same questions every day, in the same order. What went well — naming the person and the moment. What went wrong — one or two precise moments, not a general feeling. What the guests said, as they said it. The correction for today. Who is responsible for it. In the first two weeks these questions take most of the brief; later they take less time, but they never disappear.

Step 3. Talk to the team

As the corrections become fewer and smaller, the brief also becomes the place where the managers speak to the team every day. On the floor: the bookings of the service, the large tables and the guests to recognise, the dishes of the day tasted and described, the allergens to watch, the standard of service to work on that day, and what yesterday's reviews said. In the kitchen: the dishes of the day and the new preparations, the products to use first, the timing of the large tables, the standard of a plate to hold. In both: the objectives of the week, and the recognition of who did well.

Step 4. Hold a weekly meeting with the whole team

Once a week, the whole team meets for half an hour at most, led by the General Manager and the Executive Chef. Follow the same order every time: how the week went, without

the figures of the accounts; what was heard from the guests and read in the reviews; what changes next week and why; who deserves to be recognised, and for what. Close by asking the team what it needs from the managers.

After the first weeks, once the service has found its flow, the meeting can be held once a month; the daily briefs never stop.

Step 5. Keep it constant

The team watches the managers more than it listens to them. A brief skipped tells the team that the problems can wait; a correction announced and never checked tells it that the standards are optional. Hold the briefs every day, start them on time, and open each one by checking the correction of the day before. Change one important thing at a time, and announce it before the service in which it applies, so that its effect can be seen.

Run this way, the briefs and the weekly meeting do two things at once: they correct the restaurant while it learns, and they build the team that will run it.

DEEP DIVE 6.3

How to review the menu with menu engineering

TEMPLATE AVAILABLE FOR DOWNLOAD: T6.3 — MENU ENGINEERING

When to read this. Before the first review of the menu, once the sales have settled.

Every dish on the menu takes space on the page, products in the stores, and time in the kitchen, and it has to earn that place. Menu engineering checks whether it does, by looking at two things for every dish: how often the guests choose it, and how much each portion earns. The menu engineering template of the toolkit does all the calculations. We enter four figures for each dish, and the file tells us which group the dish belongs to; this Deep Dive explains what to enter, where to find it, and how to read what the file returns.

Step 1. Choose the period

Use the sales of a period in which the menu did not change and the trading was steady: after the weeks of the opening, long enough to include every day of the week several times, and without an event that filled or emptied the room. Write the period at the top of each sheet, so that the next review can be compared with this one.

Step 2. Enter four figures for each dish

The template has one sheet for each section of the menu — starters, first courses, main courses, desserts, salads, wines, and cocktails and other drinks — because a dish competes only with the others of its section. In each sheet, fill in the blue cells for every dish:

- *Dish name*: exactly as it appears on the menu.
- *Units sold*: the portions sold in the period, from the sales report of the POS.
- *Dish cost*: the cost of a portion, from the recipe card updated with the real yields and the current prices.
- *Selling price*: the price on the menu, without the taxes.

Everything else is calculated by the file. Do not type in the other cells.

Step 3. Read the classification of each dish

The last column of the sheet places every dish in one of four groups.

- **Star**: high profit, high popularity. The dishes that carry the restaurant.
- **Plowhorse**: low profit, high popularity. The guests love them, but each portion earns little.
- **Puzzle**: high profit, low popularity. They would earn well if more guests ordered them.
- **Dog**: low profit, low popularity. They take space and work, and give little back.

The file decides with two rules. A dish has a high profit when a portion earns more than

the average of its section. It is popular when it sells at least 70% of what it would sell if every dish of the section sold the same — the standard set by Kasavana and Smith, who developed the method.

Step 4. Read the totals

Look at the Total Profit column before deciding anything: it shows how much each dish earned in the whole period. A modest dish sold every evening can earn more than the most expensive dish on the menu, and that changes how a low profit per portion is judged. At the bottom of the sheet, the file also shows the food cost of the whole section and the average profit per portion, the figure each dish is measured against.

Step 5. Decide for each group

—**Stars: protect them.** Keep the recipe, the portion, and the price, give them the most visible places on the menu, and make sure the floor knows them better than any other dish.

—**Plowhorses: improve their profit, but keep them.** The guests who order them regularly would not come back without them. Raise the price slightly, reduce the most expensive ingredient with a tighter portion or an equivalent product, or rebalance the garnish, one change at a time.

—**Puzzles: help them sell before cutting them.** The problem is usually how the dish is presented, not the dish itself. Rewrite the description, move the dish to a more visible place on the menu, and taste it with the floor team so that they can recommend it. If it is still a Puzzle at the next review, treat it as a Dog.

—**Dogs: replace them,** unless the figures show that they sell other dishes, or the concept needs them, like the only vegetarian main course. Test the replacement first as a dish of the day.

Step 6. Change the menu once

Check each decision with the kitchen, collect them all, and introduce them together in the next menu, so that the recipes, the POS, the printed menu, and the team's training are updated together. Keep most of the menu as it is: guests return for the dishes they know. Then let the new menu trade for a steady period, and fill in the template again before the next change.

Repeated at every change of menu, this review keeps the menu earning as the prices of the suppliers, the tastes of the guests, and the seasons change. It does not replace the judgement of the chef; it gives that judgement the figures to work with.

DEEP DIVE 6.4

How to read and answer the reviews

When to read this. Before the first service with paying guests. The first review often arrives on the first evening, and the first reply sets the tone of all the others.

The reviews arrive before the restaurant is ready for them. A guest who had a strong first experience writes the same evening; a guest who had a poor one writes even faster. There is no point in treating them as an intrusion: for many future guests the reviews are the first impression of the restaurant, formed before they have seen the room or the menu. The work has two sides — reading the reviews as information, and answering them as a public conversation.

Step 1. Read every review, every day

One person, named, follows every platform where guests write about the restaurant and receives an alert for every new review. Read the reviews every day: a serious complaint — a guest who fell ill, an allergy not respected, a rude member of the team — is investigated and answered the same day. Once a week, look at all the reviews of the week together: read one by one, each review is an emotion; read together, they are information.

Step 2. Sort what the guests are talking about

Sort the points of every review by subject: the food, the service, the waiting times, the prices, the room, the noise, the cleanliness, the booking. After a few weeks the list shows what the guests notice, in their own words, and it is often not what the team expected.

Step 3. Tell a pattern from an incident, and bring it to the team

One complaint can be one bad evening. The same complaint from several guests within a few weeks describes a problem, whatever the scores of the reviews around it, and it is taken to the daily brief of the department concerned, floor or kitchen, where it becomes a correction with a name. The same applies to praise: a specific compliment that keeps returning — a dish, a person, a moment of the service — shows what the restaurant does well, and it is read at the brief, in front of the team. Generic reviews, positive or negative, say little; specific reviews are the ones to learn from. A team that hears what guests write about its work, the good with the bad, starts to see the restaurant through the guests' eyes.

Step 4. Check the facts before answering

Before answering a negative review, find the evening, the table, and the bill in the POS, and talk to the people who were on duty. A review that is specific and credible is investigated with the team; a review that does not match any booking or any bill is

treated differently. Knowing the facts keeps the reply accurate, and it often shows that the complaint was right.

Step 5. Write the reply for the guests who will read it later

Answer every review that describes a specific experience, positive or negative, within a day or two. The reply is not written for the reviewer, who has already formed an opinion, but for every future guest who will read it. Keep it short and specific. Thank the guest, name what they described, and, when they describe a problem, acknowledge it without defending the restaurant and say what has been done about it. Invite them to contact the General Manager directly if there is more to discuss, and continue the conversation in private.

Never argue, never explain at length, never reveal the details of a guest's booking, and never answer while angry.

In practice:

Write every reply to a negative review as a draft and wait at least two hours before publishing it. Read it aloud. If it sounds defensive, write it again.

Step 6. Handle the hardest reviews

The first one-star review will arrive; the only question is when. In the first weeks it feels like a verdict on the whole restaurant. It is not: what defines the restaurant is the reply in public and whether the problem described is solved in the kitchen or on the floor.

A review that is false, abusive, or written by someone who was never a guest is reported to the platform through its own procedure, with the evidence, and answered, if at all, with one calm sentence. Never post reviews about the restaurant, never ask the team or friends to post them, and never offer a discount or a gift in exchange for a review: the platforms remove them, and consumer law in many markets forbids fake reviews and reviews that are paid for. Guests can be invited to leave a review, all of them in the same way, whatever they are expected to write.

Read every day and answered with care, the reviews tell the restaurant what to protect and what to fix, and the replies show every future guest a restaurant that listens.

First 90 Days Checklist

1. Daily briefs held every day before service, for the floor and for the kitchen, each opening with the correction of the day before.
2. Weekly meeting with the whole team held every week, and turned into a monthly one once the service has found its flow.
3. Flow of the service reviewed, and every slowdown corrected at its cause.
4. Opening and closing checklists signed at every shift and read by the heads of department.
5. Limits for handling complaints during service set; every complaint and compensation recorded.
6. Standards of service checked every week; a mystery guest added after the first month.
7. Reservation system and floor plan adjusted to the real activity of the room; no-shows recorded.
8. Daily cash and POS exceptions checked every morning, with a reason for every exception.
9. Figures reviewed every week against the weekly targets, with a decision for every figure off target.
10. First monthly P&L read with the accountant against the projection, after the four checks.
11. Actual and theoretical food and beverage cost compared every month, and the cause of every difference found.
12. Break-even point recalculated on real costs at the end of every month and compared with the covers served.
13. Every supplier paid on the agreed terms, or a new date agreed before the payment was due.
14. Opening consultants' results reviewed against their contracts; each contract renewed or closed.
15. First ninety days closed with the General Manager, the Executive Chef, and the accountant; decisions for the next quarter written down.
16. Recipe cards updated with the real yields and given to the cooks and the bartenders.
17. Waste log kept in the kitchen and at the bar, and read every week.
18. Dishes of the day costed before they are offered, and their sales recorded.
19. Stock of every label compared with its sales every month; kept only if they sell while still good.
20. Every new dish, dish of the day, and drink tasted by the floor team before it reaches the guests.
21. Menu reviewed with the menu engineering method on a settled period, and changed once.
22. Par levels adjusted to the actual consumption, and reviewed at every change of menu, product, or supplier.

23. Stock counted on the last day of every month, valued, and given to the accountant.
24. Performance of every supplier reviewed; each one kept, warned, or replaced.
25. Maintenance calendar in force, with a date, a contractor, and a checker for every entry.
26. Rota built every week on the real covers and on the staff cost of the budget.
27. Every member of the team assessed before the end of the trial period, and a decision taken.
28. Early departures handled quickly, with an exit conversation for everyone who left.
29. Every replacement recruited to the same standard and given the induction.
30. Staff meal, shifts exchanged between floor and kitchen, and a team evening organised.
31. Reviews read every day, serious complaints answered the same day, patterns discussed at the brief.
32. Trading stage of the marketing plan in action, with its budget agreed for the period.
33. Source of every booking recorded and sent to the marketing consultant every week.
34. Press followed up after the opening with something new to tell.
35. Guest database built with the guests' consent, within the data protection law.
36. Figures of every system checked against each other at the end of the first month, and support agreed with every vendor.
37. Every access of a person who leaves removed on the same day.
38. Every change entered in the POS before the service in which it applies.
39. Backups tested, personal passwords in use, and the guests' Wi-Fi separated from the restaurant's network.
40. Information online identical on every platform, and updated on the day of every change.
41. Hygiene standards checked every day; food safety consultant's visits held, findings corrected, reports kept.
42. Every change to the way the restaurant runs checked against its licences; licences displayed and expiry dates recorded.
43. Fire safety course held for the whole team, evacuation drill held, and fire exits kept clear.
44. Employment file complete for every member of the team, checked at every start and every departure.
45. Defects recorded and notified as they appeared; retention released only when every defect is repaired.

Working Files from the Toolkit

- T6.1 — DAILY & WEEKLY TRADING LOG
- T6.2 — MONTHLY P&L & BREAK-EVEN REVIEW
- T6.3 — MENU ENGINEERING

CLOSING NOTE

The book ends here. The restaurant does not.

Opening day was the end of a planning process, not the beginning of a settled business, and the ninetieth day is not an ending either. The work behind us was about making decisions under uncertainty, with incomplete information and real money at stake. The work ahead is different: it is about doing the same things well every day, keeping them consistent, and adjusting them when the guests and the figures say so.

The operators who do this well are not those who had the best opening night. They are those who treated the first service as the first piece of evidence, and every service after it as a chance to close the distance between the restaurant they planned and the restaurant the business needs. A restaurant never reaches a finished state. It reaches a rhythm, and keeping that rhythm is a different skill from building it.

There are things this book could not give. It could not say which member of the team would become indispensable and which would leave without warning. It could not prepare anyone for the supplier who goes silent before a busy weekend, or for the machine that fails at the worst possible moment. It could not say how long it takes for the first guests to become regulars, and for the restaurant to earn the quiet loyalty that never shows in the covers of the opening week or in the press. These things are learned by running a restaurant, not by planning one.

What the book could do — and what I hope it did — is make sure that when those problems arrive, the ground beneath them is solid. The company is set up correctly. The financial controls are in place. The team was hired with intention and trained before the first service. The systems were built before the pressure of trading made building them impossible. That ground does not prevent problems; it decides whether they can be managed. Some of what we built will hold exactly as designed. Some of it will have to be rebuilt while the restaurant is open, which is always harder and more expensive than doing it in advance. That is normal: no opening meets its real guests and stays entirely intact. The question is never whether changes will be needed, but whether we have the structure, the team, and the cash to make them without losing what we set out to build. Keep the habits that brought the restaurant this far: the weekly review, the honest reading of the figures, the courage to change what the guests and the numbers ask us to change. Keep the concept document on the desk, and on the difficult days read again the paragraph that opens it — the meal, the place, the idea that started everything. It was written before the first contract, the first invoice, and the first problem, and it is still the reason the restaurant exists.

The restaurant will tell us what it needs. The operators who listen to it, and act, are the ones still open years from now.

APPENDIX A

The Professionals and Consultants

What each external professional does for the opening, and what to agree before appointing them

An opening depends on professionals who do not work for the restaurant but for the project: they are appointed for a scope of work, paid a fee, and judged on what they deliver. This appendix gives a short profile of each of them, in the order in which they are appointed: what they do and what they do not do, when to appoint them, the work they carry out for the opening, the questions to ask before appointing them, and what to agree in writing.

Every appointment letter covers the same ground: the scope of the work, phase by phase, as described in the profile; the deliverables and their dates; the fee and how it is paid; how changes to the scope are priced; the professional indemnity insurance; the person who leads the work; how quickly urgent questions are answered; and how the engagement ends. Each profile adds what is specific to that professional. These notes are not legal advice: the attorney reviews every letter before it is signed.

For every appointment, meet at least two candidates and ask each one the same questions. The answers are easier to compare, and the difference between them is often the most useful information we get.

The Accountant

The accountant checks every figure of the project against what restaurants really cost and earn in this market. This is the first professional appointed, and the one who stays longest. The accountant does not decide whether the project goes ahead, does not look for the money, and does not handle the cash of the restaurant day to day: those belong to the operator and the General Manager.

When to appoint

Phase 1, before any other professional: “Appoint the accountant”.

What the accountant does for the opening

In Phase 1 the accountant works with us on the numbers that show whether the restaurant can work: the cost estimate, the cash flow model, the break-even point, and the business plan, whose projections are reviewed line by line before any lender sees them. The legal structure of the company is chosen together with the attorney, and the funding options are checked. In Phase 2 every real cost — the site, the insurance, the contractor’s bid — goes into the model, the opening budget is rebuilt on real prices, and the business plan is finalised. During the works, in Phase 3, the company is registered for its taxes, the accounting software is chosen, and every stage payment is checked against the budget.

Phase 4 prepares the restaurant to trade: the cost of the team, the accounting system, set up with the General Manager, and the first-year trading budget. In Phase 5 the accountant writes the cash handling procedure and trains the managers on it, runs the first payroll, sets the weekly targets of covers and revenue, and shows the operator how much cash is left before the opening. After the opening the work becomes a routine: the weekly review of the figures, the monthly close, the P&L read with the operator, the break-even point recalculated on real costs, and the suppliers paid on the agreed terms.

An accountant on the team

Once the restaurant trades, and if its size allows it, part of this work can move inside the restaurant: a bookkeeper or a finance manager on the payroll records the invoices, prepares the salaries, pays the suppliers, and closes the month. The external accountant does not disappear. In most countries the tax returns and the annual accounts must be prepared or signed by a qualified professional, and the external accountant checks the work of the person inside. Before the opening there is no structure to hire into: the accountant is appointed in Phase 1, when the restaurant exists only on paper.

Ask before appointing

- Which restaurants do you work for today?
- Who will prepare our monthly accounts, and how soon after the end of the month will we receive them?
- Which accounting software do you recommend for a restaurant, and why?

Agree in writing

Agree two fees, because the work is of two kinds: one for the pre-opening work — the model, the business plan, the company set-up, the budget — and a monthly one for the service of trading. For the monthly fee, write down exactly what it covers — the bookkeeping, the payroll, the tax returns, the monthly accounts — and the day of the month by which the accounts arrive: anything not listed will be charged by the hour. Agree who files each tax return, and who represents the restaurant if the tax authority opens an inspection. Agree our access to the accounting software, and that the records belong to the restaurant, so that they can be handed to another accountant without delay if the engagement ends.

The Attorney

The attorney checks everything the restaurant signs and every authorisation it needs. When the licensing process is complex, the attorney decides with us whether a specialist licensing agent is needed. The attorney does not negotiate the commercial terms of the lease and does not choose the site: those decisions stay with the operator.

When to appoint

Phase 1, after the accountant: “Shortlist and appoint the attorney”. The attorney advises us until the opening and after it, so how quickly they answer matters as much as what they charge.

What the attorney does for the opening

In Phase 1 the attorney sets up the company with the accountant and checks the business plan for legal problems. Phase 2 is the busiest phase. It starts with confirming, for each leading site, that a liquor licence can be obtained, and continues with the permit register, the landlord’s approval requirements in writing, the shareholders’ agreement where there is more than one owner, and the review of the appointments of the design team and of the contractor, of the lease, and of the construction contract, before anything is signed. In Phase 3 the liquor licence application is filed and followed until the licence is issued, and the offers to the General Manager and the Executive Chef become employment contracts. In Phase 4 the remaining applications of the permit register are filed, and the employee handbook and the contracts of the team are reviewed. In Phase 5 the attorney goes through the register a last time and confirms that every licence is active. After the opening, every change to the way the restaurant runs is checked against its licences, and advice is given on each contract at the end of the trial periods.

Ask before appointing

- Have you obtained liquor licences for restaurants, and how long did they take?
- Who in your firm will handle the lease, the licences, and the employment contracts?
- How quickly do you answer a question that cannot wait, such as a lease clause before a signing date?

Agree in writing

Ask for a fixed fee, or at least a cap, for the work that can be defined in advance — the company set-up, the lease, the construction contract, the shareholders’ agreement — and an hourly rate for everything else, with an estimate before any new piece of work begins. Write down who in the firm handles each subject, because the lease, the licences, and the employment contracts are often handled by different people. Agree the response time for urgent questions, and whether the liquor licence is part of the scope or goes to a specialist agent, whose fee is agreed separately. Agree how the fees of the authorities are paid, so that they do not appear later, unexpected, on the attorney’s invoice.

The Insurance Broker

The insurance broker finds the insurers, negotiates with them on our behalf, and makes sure every policy is active before its risk begins. The broker does not insure the restaurant, the insurer does, and the broker's advice is only as good as the information we give: every change to the project must reach the broker.

When to appoint

Phase 1: "Shortlist and appoint the insurance broker". The first policies are needed on the day the lease or the construction contract is signed, and the broker needs time to prepare them.

What the insurance broker does for the opening

In Phase 1, before there is a site to insure, the broker lists every policy the restaurant will need. In Phase 2, with a site and a construction programme to quote against, at least three insurers price each policy, so that the real premiums enter the financial model before the lease is signed. Phase 3 brings the construction insurance, active before work starts, and the employers' liability, active before the first employee joins; Phase 4, the cover for the building and its contents from the day of practical completion. In Phase 5, before the first guest, the broker confirms in writing that every operating policy is in force and covers what the restaurant will actually do.

Ask before appointing

- Which restaurants do you insure, and with which insurers?
- How are you paid: by commission from the insurer, by a fee, or both?
- If we have a claim, who handles it with the insurer, and how?

Agree in writing

Agree how the broker is paid — a commission included in the premiums, a fee, or both — and ask for the commission to be stated for each policy. Write down the list of policies and the date by which each one must be active, and the broker's duty to tell us in writing about every exclusion and every condition the insurer imposes, such as an alarm, the cleaning of the extraction, or a fire inspection: a condition that is not met can void the cover. Agree who handles a claim with the insurer and within what time, and a review of the cover every year once the restaurant trades, when the sales, the team, and the contents are known.

The Commercial Real Estate Broker

The commercial real estate broker searches for the site on our behalf and presents only the properties that meet the written brief. The broker is valuable for the knowledge of the market, the rents, and what is available before it is advertised. The broker is usually paid only if a lease is signed: their opinion is useful, but the decision on the site, and the figures behind it, stay with us, the architect, and the accountant.

When to appoint

Phase 1: “Shortlist and appoint the commercial real estate broker”, so that the search can start as soon as Phase 2 begins.

What the real estate broker does for the opening

In Phase 2 the broker checks the site brief before the search starts, then applies it to every property before presenting it. Each candidate arrives with the details we need to screen it on paper — the floor area, the condition of the space, the rent — and the visits are arranged for us. With them comes the history of the street: which units have failed, which landlords are difficult, why a unit has been empty for years. The work ends when the site is chosen; the negotiation of the lease is ours, with the attorney.

Ask before appointing

- Which restaurant leases have you closed in this area in the last two years?
- Who pays your fee, the landlord or the tenant, and how much is it?
- Will you show us properties that do not meet the brief, and how will you tell us?

Agree in writing

Agree the fee, who pays it — the landlord, the tenant, or both — and when it falls due. Confirm in writing that the broker acts for us, and how the broker deals with a landlord who also pays a commission. Write down the area and the type of property of the search, as in the site brief, and whether the appointment is exclusive and for how long: an exclusive appointment without an end date ties us to one broker for the whole search. Agree what happens to the fee if we find the site through another route.

The Graphic Designer

The graphic designer creates the identity of the restaurant — the logo, the colours, the typefaces — and its guidelines, and applies them to everything the guest will read. Judge the work as it will be used, not on a presentation board: print the logo at the size of a business card, read a page of the menu on paper, and look at the identity on the screen of a phone.

When to appoint

Phase 1: “Shortlist and appoint the graphic designer”. The identity must be ready before the design of the restaurant begins.

What the graphic designer does for the opening

Working from the concept document, the designer joins, in Phase 2, the meeting in which the façade and the positions of the signs are agreed with the architect and the interior designer. Phase 3 brings the identity and its guidelines, which the operator approves before any supplier uses them, and the artwork for the signage. In Phase 4 the identity is applied to the stationery, the printed material, the exterior menu display, and the gift vouchers; in Phase 5, to the menus, laid out for print and for the QR code version from the approved text.

Ask before appointing

- Which restaurant identities have you designed, and can we see them applied: the sign, the menu, the website?
- How many proposals will you present, and how many rounds of changes are included?
- Will the final files be ours, in every format the printer, the sign maker, and the web developer need?

Agree in writing

Agree the number of proposals and of rounds of changes included in the fee, and the price of every further round. List every item to design — the identity, the guidelines, the signage artwork, the stationery, the printed material, the vouchers, the menus — and price separately the items that may come later. Agree the transfer of all rights to the restaurant, and the delivery of the source files in every format the printer, the sign maker, and the web developer need. Agree the dates of the identity and of the guidelines, because the architect, the interior designer, and the sign maker are waiting for them.

The Architect

The architect turns the concept into a building that can be approved, built, and run, and is the professional who protects our interests on site. Where a specialist kitchen designer draws the kitchen, the architect coordinates them and remains accountable for the layout. The architect does not build, does not choose the equipment brands, and does not manage the budget: those belong to the contractor, the Executive Chef, and the operator.

When to appoint

Phase 2, together with the interior designer, before the site visits begin in earnest. The lease is never signed before the architect has assessed the space.

What the architect does for the opening

In Phase 2 the architect's work starts before any design exists: the site visits, or a list of what to check given to us beforehand; a written opinion on each leading site; a review of the existing building, of the technical inspections, and of the seating plan. Once the site is chosen, the code requirements become design requirements, the final design is developed with the interior designer, the exterior design is prepared for the landlord, and the contractor's bid is reviewed before we sign. During the works, in Phase 3, the architect schedules the statutory inspections, inspects the structure and the services before they are covered, and confirms each milestone in writing before it is paid. The positions of the technology, the fire systems, and the exterior works are checked against the drawings, and the signage permit is applied for. Phase 4 brings the tests of the building systems, the final inspections, the snagging inspection, the check of the building documents and of the final account, and the certificate of practical completion. The work ends after the opening, with the final inspection at the end of the defects liability period: the retention is released only when every defect has been repaired.

Ask before appointing

- Which restaurants have you completed?
- Will you draw the kitchen yourselves, or coordinate a specialist kitchen designer?
- How often will you inspect the works, and how do you record what you find?

Agree in writing

The fee is usually a percentage of the construction cost or a fixed sum for each stage. A fixed sum is easier to control, because a percentage grows with every variation. Agree what each stage includes — the site assessments, the final design, the work on site, the handover — and how many site inspections the fee covers, because extra visits are the most common additional charge. Write down who draws the kitchen and who pays the kitchen designer, how a change to the brief is priced before it is made, and the professional indemnity insurance the architect holds. Agree our right to use the drawings for later work on the building, and the notice each side must give to end the appointment, with the fee due for the work already done.

The Interior Designer

The interior designer decides how the restaurant feels to the guest, and turns that decision into a specification precise enough to be priced and ordered. The interior designer does not decide the structure of the building or the layout of the kitchen: those belong to the architect.

When to appoint

Phase 2, together with the architect: “Shortlist and appoint the architect and the interior designer”. Often the architect proposes the interior designer, or the two work in the same studio. The work then runs faster, because the building and the interior are designed together from the first day.

What the interior designer does for the opening

In Phase 2 the interior designer proposes the design direction, then develops the final design with the architect, describing every material, finish, piece of furniture, and light in full. The terrace, where there is one, is designed and costed, and the schedule of the furniture and the fixtures is priced by at least three suppliers, with the delivery times. During the works, in the second stage of Phase 3, the finish materials are checked as they arrive, and each area is released to the next trade only when it is ready. In Phase 4, before the formal snagging inspection, every finished area is checked against the specification.

Ask before appointing

- Which restaurants have you designed, and how have they aged after some years of service?
- How do you combine the look of the room with the work of the floor team: the service stations, the routes, the cleaning?
- Do you receive a commission on the furniture and the finishes you specify?

Agree in writing

Agree the fee and what it includes: the design direction, the full specification, the schedules for the FF&E, and the number of visits during the second stage of the works. Ask whether the designer receives any commission from the suppliers of furniture, lighting, or finishes; if so, it must be stated, because it affects what is specified. Write down the date of the specification, since the orders and the construction programme depend on it, and how a change to the specification is priced once the orders are placed. Agree our right to use the design for later work on the restaurant. If the interior designer belongs to the architect’s studio, the two appointments become one letter: keep the scope, the deliverables, and the fee of the interior design written separately within it, so that each part can be checked on its own.

The Kitchen Designer

The kitchen designer is rarely an independent professional: usually the equipment supplier provides one, as part of its offer. The designer draws the kitchen: the position of every piece of equipment, the routes of the food, the staff, and the waste, and the services each station needs — water, drainage, gas, power, and extraction. The kitchen designer works under the architect's coordination, and does not decide the menu or the way the kitchen will work: those belong to us and, once appointed, to the executive chef. The architect remains accountable for the layout.

When to appoint

Phase 2, at the appointment meeting of the architect, where we decide who draws the kitchen. Choosing the kitchen designer means choosing the supplier that provides them, so compare at least two suppliers before the final design begins. Choosing the supplier for the design is not yet the order: the equipment is ordered in phase 3, after the executive chef has reviewed the layout.

What the kitchen designer does for the opening

In phase 2 the kitchen designer can join a site visit before the shortlist, to judge the extraction, the drainage, and the power. Once the site is chosen, the designer is briefed with the map of the kitchen flows (deep dive 2.4) and draws the layout, with the equipment positions, the pass, and the extraction route, within the final design developed by the architect and the interior designer. The designer then prepares the equipment schedule, priced in the supplier's offer, and the drawings of the services the contractor must bring to each station. In phase 3 the executive chef reviews the layout and the equipment schedule before anything is ordered, the service points are checked against the drawings before the walls and the floors are closed, and the designer confirms that each piece of equipment is installed where the drawing puts it. Before the opening, the supplier's technicians show the team the daily care of every machine.

Ask before appointing

- Which restaurant kitchens have you designed and equipped?
- Is the design included in the price of the equipment, or charged separately?
- If we buy part of the equipment from another supplier, will you still complete the design and the drawings?

Agree in writing

The design is rarely free: its cost is in the price of the equipment, and a layout drawn by a supplier tends to fill the kitchen with that supplier's catalogue. Agree that the drawings and the equipment schedule are ours once delivered, and that we may ask other suppliers to price the same equipment on them; if the supplier charges a design fee, agree that it is deducted from the order.

Agree what the design includes — the layout, the equipment schedule, the services drawings, and the visits to the site — and the date it is delivered, because the final design and the contractor's bid depend on it. Write down how a change is priced once the equipment is ordered, and that the designer works under the architect's coordination. For the equipment itself, the order states the delivery dates, the warranty, and the service after the opening.

The General Contractor

The general contractor builds the restaurant to the final design and to the programme agreed before work starts, and remains liable for faults in the work for the period set in the contract. The contractor does not design the restaurant and does not certify its own work: those belong to the architect.

When to appoint

Phase 2: “Shortlist and appoint the general contractor”. The contractor prices the final design, and the construction contract closes the phase together with the lease.

What the contractor does for the opening

In Phase 2 the contractor walks the leading site and prices the final design trade by trade, with a programme and the payment terms. During the works, in Phase 3, the site runs in two stages — the structure and the services first, the finishes second — and the programme is checked with us every week. The utilities are connected; the cabling, the data line, and the fire systems are installed; the kitchen and bar equipment is received and installed; the exterior is completed and the signage put up; and every change and every payment is requested in writing.

In Phase 4 the contractor completes the last finishes, repairs the defects on the snagging list, and hands over the building documents. After the opening, every defect reported before the end of the defects liability period is repaired free of charge.

Ask before appointing

- Which restaurants have you built in the last three years?
- Who will run our site every day, and will that person stay until the handover?
- Which trades do you employ directly, and which do you subcontract?

Agree in writing

For the contractor, the appointment is the construction contract itself (T2.4). It fixes the scope of work and the price; the programme, with its start date, its milestones, and the date of completion; and a payment schedule tied to milestones that can be checked on site, never to dates. It sets the procedure for variations, so that no change is made or paid without a written instruction and an agreed price, the retention held back until the defects are repaired, and the length of the defects liability period. It names the insurance the contractor holds during the works, and what happens if the works finish late.

The IT Consultant

The IT consultant is an independent professional, not a vendor, who checks what the technology vendors claim and makes sure the systems of the restaurant work together. The consultant does not run the systems day to day: before the opening period ends, their support passes to the vendors, and their daily use to the managers of the restaurant.

When to appoint

Phase 3, at the start of the works: “Shortlist and appoint an independent IT consultant”. The technology has to be decided before the walls are closed.

What the it consultant does for the opening

In Phase 3 the IT consultant maps every system the restaurant needs and how they connect, helps us choose the POS, gives the architect the position of every piece of hardware before the walls close, and checks the cabling, the sound system, and the dedicated data line as they are installed. Phase 4 brings the installation of the hardware, the tests of every link between the systems, and the check of the reservation, inventory, and timekeeping systems and of the brief for the POS programming.

In Phase 5 the consultant supports the programming of the POS, tests the network under the load of a full service, checks the reservation system, the telephone, and the email, and stays on call during the first services. After the opening come the check that the systems agree with each other on the first month’s figures, the backups and the protections of every system, and the handover of their support before the opening period ends.

Ask before appointing

- Which restaurants have you set up, and which systems did they use?
- Do you receive any commission or payment from the vendors you recommend?
- Who answers the phone if the POS stops in the middle of a Saturday evening?

Agree in writing

Write down the consultant’s independence: no commission or payment from any vendor, now or later. Agree the fee for each stage — the map of the systems, the installation and the tests, the support during the first services — and the hours on call in the first weeks of trading, with the rate for anything beyond them. Agree the technology file the consultant hands over at the end: the list of systems, the accounts and their access, who to call for each fault, and the date by which the support passes to each vendor.

The Marketing Consultant

The marketing consultant is an agency or an independent consultant with restaurant experience, who writes the marketing plan with us and puts it into action. The consultant does not decide the concept or the positioning, which we provide, and the budget of each stage is agreed with us.

When to appoint

Phase 3, chosen from at least two candidates, to write the marketing plan: “Write and approve the marketing plan”.

What the marketing consultant does for the opening

In Phase 3 the consultant writes the marketing plan from our brief: the positioning, the target guest, the channels, the campaign, the budget, and the first ninety days. Phase 4 brings the first stage of the campaign, the professional photography, the website, and, where a PR consultant is needed, a say in the choice. In Phase 5 the restaurant goes online, the reservations open, the website and the social profiles are kept up to date, and the second stage of the campaign runs up to the opening. After the opening, the trading stage of the plan is put into action, the sources of the guests are measured, the guest database is built, and the plan is refined on what the figures show.

Ask before appointing

- Which restaurant openings have you run, and can we see the websites and the social profiles you built for them?
- How will you measure the results of each channel?
- Who in your team will do the work: the person we meet, or someone else?

Agree in writing

Agree the deliverables of each stage — the plan, the first stage, the launch, the second stage, the trading stage — and how the result of each is measured: contacts collected, bookings, guests by source. Keep the consultant’s fee separate from the budget spent on the channels, and write down who spends that budget and how every expense is reported. Agree whether the press is part of the work, or goes to a PR consultant. Agree that the website, the social accounts, the photographs, and the guest database belong to the restaurant, and the review at the end of the opening work, before any new contract for the trading period.

The PR Consultant

The PR consultant is appointed only if the marketing consultant does not deal with the journalists, and knows the food writers, journalists, and guides that matter for the restaurant's guest. A PR consultant cannot promise a review, and a good one does not.

When to appoint

Phase 4, after meeting at least two: "Appoint the PR consultant".

What the pr consultant does for the opening

In Phase 4 the PR consultant prepares the press kit for the day the reservations open: the concept on one page, the biographies of the chef, the General Manager, and the operator, a selection of the menu, and the professional photographs commissioned by the marketing consultant. In Phase 5 the timing of every invitation to journalists, media, and influencers is agreed with the operator, and each visit is followed. After the opening, the interest of the press is kept alive with something new to tell, and the journalists who preferred to wait for a steady service are brought in.

Ask before appointing

- Which restaurant openings have you handled, and what coverage did they receive?
- Which journalists and guides would you invite for us, and why those?
- What do you do when a journalist visits on a bad evening?

Agree in writing

Agree the fee and its period — a fixed fee for the opening, or a monthly fee — and the date on which it ends. List the deliverables: the press kit and its date, the invitations before and after the opening, and a report of the coverage obtained. Agree that no journalist or influencer is offered payment, or a meal in exchange for a review, without the operator's approval. Agree how the results are reviewed at the end of the opening work, before any new contract.

The Food Safety Consultant

The food safety consultant is an external specialist in food hygiene, who checks the restaurant as an inspector would. The consultant does not run the HACCP system: the Executive Chef imposes it on the kitchen, and the Sous Chef keeps its records.

When to appoint

Phase 5, before the first delivery of food and the first day of training.

What the food safety consultant does for the opening

In Phase 5 the consultant checks, before the opening, that the set-up and the procedures of the kitchen comply with the law, and gives every food handler the hygiene course in the first days of training, with the certificate the local law requires. After the opening come regular visits without warning: the kitchen, the stores, the bar, and the records are checked, and every finding goes into a report. Every new team member receives the course before working with food.

Ask before appointing

- Which restaurants do you follow, and how did they do at their inspections?
- Does your course issue the certificate the local law requires?
- After the opening, how often will you visit, and what will your report contain?

Agree in writing

Agree the check before the opening and its date, the course for the team and for every new team member after it, and the number of unannounced visits in the first months of trading. Write down what each report contains — the findings, their urgency, and the date by which each must be corrected — and who receives it. Agree the price of each course and of each visit, so that the cost follows the turnover of the team, and ask for the certificate of every person trained, to keep in the employment records.

The Fire Safety Trainer

The fire safety trainer is a qualified trainer who teaches the team to act in a fire. The trainer does not replace the induction: on the first shift, the head of department still shows every new team member the exits, the meeting point, the alarm points, and the extinguishers.

When to appoint

After the opening, booked by the General Manager: “Train the team for a fire”.

What the trainer does for the opening

In the first weeks of trading the trainer runs the course for the whole team: how to raise the alarm, which extinguisher to use on which fire, how to use the fire blanket, how to shut off the gas, and how to lead the guests out. The new team members attend the following courses. After the first month the General Manager holds an evacuation drill with the whole team, outside service hours, on what the course has taught.

Ask before appointing

- What qualification do you hold, and is it recognised where we open?
- Will the course take place on our premises?
- How often do you run courses?

Agree in writing

Agree the date and the length of the first course, and whether it is held on our premises. Agree the calendar of the courses for new team members and the price of each, so that the cost follows the turnover of the team. Ask for a certificate for each person trained, to keep in the employment records, and whether the trainer can advise on the first evacuation drill.

APPENDIX B

Tasks by Category

Every task of the book, grouped by area of work and listed by phase

This appendix gathers every task of the book by area of work. Inside each category the tasks are listed by phase, in the same order in which they appear in the chapters, so that we can follow one area — the money, the building, the team — from the first decision to the end of the first ninety days without turning through every phase.

The titles are the same as in the chapters. Each one leads back to its phase, where the task is explained, together with the role responsible for it and the role that verifies it.

Concept

The project brief and the referral network that open the project.

Phase 1 — Decide & Prepare

- Write the one-page project brief.
- Build the referral network.

Finance & Funding

From the appointment of the accountant to the decisions of the ninetieth day.

Phase 1 — Decide & Prepare

- Appoint the accountant.
- Build the cost estimate.
- Build the pre-opening cash flow model.
- Estimate the break-even point.
- Write the business plan.
- Have the accountant review the projections.
- Map the funding options.
- Open a first conversation with a lender or investor.

Phase 2 — Find & Secure

- Have the accountant test the model against every real cost.
- Rebuild the opening budget on the contractor's bid.
- Finalise the business plan.
- Prepare the personal financial statement.

Phase 3 — Build

- Open a separate account for the construction payments.
- Approve every stage payment and variation against the budget.

Phase 4 — Set Up

- Agree the contractor's final account.
- Set up the accounting system.
- Set the first-year trading budget.

Phase 5 — Final Preparation

- Open the trading accounts and the merchant account.
- Set the floats, the petty cash, and the banking procedure.
- Write the cash handling and closing procedure, and train the managers.
- Run the first payroll.
- Review the budget forecast and set the covers and the revenue week by week.
- Check the cash position before the opening.

First 90 Days

- Review the daily cash and the POS exceptions.
- Review the figures every week.
- Close the first month and read the first P&L.
- Calculate the food and beverage cost every month.
- Check the break-even point at the end of every month.
- Pay every supplier on the agreed terms.
- Review the opening consultants' results against their contracts.
- Close the first ninety days and decide the next quarter.

Legal, Permits & Insurance

From the appointment of the attorney to a restaurant ready for every inspection.

Phase 1 — Decide & Prepare

- Shortlist and appoint the attorney.
- Select the legal entity structure.
- Shortlist and appoint the insurance broker.

Phase 2 — Find & Secure

- Build the permit register.
- Decide whether the liquor licence needs a specialist agent.
- Collect insurance quotes.
- Sign a shareholders' agreement, if the business has more than one owner.

Phase 3 — Build

- Put the construction insurance in place before work starts.
- Submit the liquor licence application.
- Apply for the signage permit.
- Register the company for every tax it will pay.

Phase 4 — Set Up

- File the remaining applications in the permit register.

- Put the property and employers' liability insurance in place before practical completion.

Phase 5 — Final Preparation

- Confirm every licence is active and displayed.
- Confirm every operating policy is active.

First 90 Days

- Keep the hygiene standards of the opening every day.
- Run the restaurant within its licences.
- Train the team for a fire.
- Keep the employment records ready for inspection.

Site & Lease

From the appointment of the real estate broker to the signed lease.

Phase 1 — Decide & Prepare

- Shortlist and appoint the commercial real estate broker.

Phase 2 — Find & Secure

- Write the site brief.
- Calculate the sales-to-investment ratio for every candidate site.
- Visit and assess the candidate sites.
- Obtain the architect's written feasibility assessment for each leading site.
- Confirm liquor licence availability for each leading site.
- Test the seating plan against the revenue model.
- Review the existing building: floor plan, structure, and floor levels.
- Obtain the code requirements for this building in writing.
- Commission the technical inspections on the leading site.
- Negotiate and sign the lease.
- Obtain the landlord's approval requirements in writing.

Design & Construction

From the appointment of the design team to the end of the defects liability period.

Phase 2 — Find & Secure

- Shortlist and appoint the architect and the interior designer.
- Shortlist and appoint the general contractor.
- Build the regulatory requirements into the design.
- Develop and deliver the final design.
- Finalise the exterior design and submit it to the landlord.
- Design and cost the terrace, if the concept includes one.
- Obtain quotes for the FF&E.
- Obtain and review the contractor's bid.
- Sign the construction contract.

Phase 3 – Build

- Agree the two-stage construction programme and track it every week.
- Schedule the statutory inspections.
- Inspect the structure and the services before they are covered.
- Connect the utilities and transfer the accounts.
- Check the finishes, the joinery, and the bar against the drawings.
- Install the fire suppression, alarm, and safety systems.
- Complete the exterior works.
- Produce and install the signage.

Phase 4 – Set Up

- Test the building systems under full load.
- Pass the final inspections.
- Agree the snagging list with the contractor.
- Collect the building documents from the contractor.
- Certify practical completion and take over the building.
- Have the building cleaned before anything moves in.

First 90 Days

- Record the defects that appear in trading and report them before the defects liability period ends.

Equipment & Purchasing

From the FF&E orders to the maintenance calendar of trading.

Phase 3 – Build

- Order the FF&E against the construction programme.
- Receive, inspect, and install the kitchen and bar equipment.
- Order the operating supplies and equipment (OS&E).

Phase 4 – Set Up

- Arrange secure storage for the goods that arrive before practical completion.
- Commission the kitchen and bar equipment.
- Receive and check the operating supplies and equipment (OS&E).
- Select the suppliers and open the accounts.

Phase 5 – Final Preparation

- Clean, organise, and label the stores before any goods arrive.
- Set the par levels.
- Place the opening orders.
- Agree the delivery schedule with every supplier.
- Establish the receiving procedure.
- Control access to the stores.

- Wash and set up the tableware, glassware, and cutlery.
- Order the consumables.
- Post the breakdown contact for every piece of equipment.
- Count the opening stock.

First 90 Days

- Adjust the par levels to the actual consumption.
- Count the stock at the end of every month.
- Review the performance of every supplier.
- Start the maintenance calendar.

Technology

From the appointment of the IT consultant to systems that agree with each other in trading.

Phase 3 – Build

- Shortlist and appoint an independent IT consultant.
- Map the technology stack before buying any system.
- Select the POS system.
- Give the hardware positions to the architect before the walls close.
- Install the cabling and the sound system.
- Install a dedicated data line for the POS and card payments.

Phase 4 – Set Up

- Choose and set up the reservation, inventory, and timekeeping systems.
- Install the hardware and test every system.
- Write the POS programming brief.

Phase 5 – Final Preparation

- Programme the POS with the approved menu and test a full service.
- Set the POS access levels and controls.
- Test the reservation system.
- Set up the telephone and the email of the restaurant.
- Test the network under the load of a full service.

First 90 Days

- Check that the systems agree with each other on the first month's figures.
- Remove the access of everyone who leaves.
- Keep the POS aligned with every change.
- Back up the data and protect the systems.
- Keep the information online correct.

People

From the job descriptions of the first two managers to a team assessed in service.

Phase 3 – Build

- Agree the job descriptions and the employment contracts.
- Recruit the General Manager.
- Recruit the Executive Chef.
- Onboard the General Manager and the Executive Chef.

Phase 4 – Set Up

- Define the management structure.
- Plan the headcount and check it against the staff cost.
- Confirm the pay rates and benefits for every role.
- Write the job descriptions for every role.
- Hire the Floor Manager, the Bar Manager, and the Sous Chef.
- Recruit the team and sign every contract.
- Write the employee handbook.
- Plan the pre-opening training.

Phase 5 – Final Preparation

- Prepare the heads of department before the team arrives.
- Assess the workplace risks and set up the first aid.
- Welcome the team with the joining pack.
- Run the health and safety induction.
- Certify every food handler.
- Run the first days with the whole team together.
- Train each department on its own standards.
- Taste the menu with the whole team every day.
- Run the supplier sessions.
- Rehearse the service with the whole team before the first mock service.
- Sign off every member of the team as ready.
- Write the opening rota.

First 90 Days

- Adjust the rota to the actual covers.
- Assess every member of the team before the end of the trial period.
- Manage the early departures and hold an exit conversation.
- Replace without lowering the standard, and train every new starter.
- Build the team.

Food & Beverage

From the first draft of the menu to the menu the guests choose.

Phase 4 — Set Up

- Write the first draft of the menu.
- Build the beverage list.
- Test the menu at two or more tastings and approve it in writing.

Phase 5 — Final Preparation

- Put the HACCP system into force before the first delivery.
- Set up the kitchen stations.
- Run the yield test on the first deliveries.
- Set up the bar: its preparations, batches, and pouring standards.
- Load the recipes into the systems.
- Check the menu before the final print.
- Publish the QR code menu with the photographs.

First 90 Days

- Update the recipe cards with the real yields.
- Keep a waste log in the kitchen and at the bar.
- Run the dishes of the day.
- Hold a tasting with the floor team.
- Review the drinks list and the wines by the glass.
- Review the menu with the menu engineering method.

Operations

From the management office to the daily brief of trading.

Phase 4 — Set Up

- Set up the management office and the safe.
- Set the opening hours for each day and each service.
- Finalise the floor plan, the table numbers, and the sections.
- Write the Standards of Service.
- Write the reservations policy.
- Write the checklist for every station.
- Appoint the service contractors.

Phase 5 — Final Preparation

- Set up the reception station.
- Set the lighting and the music for each service.
- Put the cleaning schedule in force.
- Post the notice boards and the emergency contacts.
- Run the mock services and the soft opening.
- Confirm the opening date.

First 90 Days

- Run the daily brief before every service.
- Hold a weekly meeting with the whole team.
- Review the flow of the service.
- Keep the opening and closing checklists in use.
- Handle complaints during service.
- Check the standards of service.
- Manage the reservations and the floor plan.

Marketing & PR

From the appointment of the graphic designer to the guest database.

Phase 1 — Decide & Prepare

- Shortlist and appoint the graphic designer.

Phase 2 — Find & Secure

- Analyse the competition as a paying customer.

Phase 3 — Build

- Approve the brand identity.
- Write and approve the marketing plan.

Phase 4 — Set Up

- Appoint the PR consultant.
- Run the first stage of the campaign.
- Commission the professional photography.
- Build the website, ready to go live the day reservations open.
- Produce the printed material and the gift vouchers.

Phase 5 — Final Preparation

- Launch the restaurant online and open the reservations.
- Manage the website and the social profiles.
- Run the second stage of the campaign.
- Invite the press, the media, and the influencers.

First 90 Days

- Read the reviews every day and act on them.
- Put the trading stage of the marketing plan into action.
- Measure where the guests come from.
- Follow up the press after the opening.
- Build the guest database.

TEMPLATE INDEX

Every file of the downloadable toolkit, in the order of the book

Every template of the book is listed here, chapter by chapter, with the Critical Path Planner first. The number of each template carries its phase — T1.1 belongs to Phase 1 — and each one is named in the Deep Dive or the task it supports. Every spreadsheet opens with a How to Use sheet, so the work can start without going back to the chapter.

The Planner

Critical Path Planner

Every task of the book, from Phase 1 to the end of the first ninety days, with the tasks it depends on and the critical path of the opening marked. Enter your own target dates and update the status every week: the file shows which tasks can start, which dates conflict with the tasks before them, and which tasks are late, with a dashboard of progress by phase and by category.

Building Your Concept

To.1 — Concept Document

The working file of the concept: every decision of the chapter, with the reasons behind it. Fill it in section by section while reading Building Your Concept, and keep it up to date as the project develops.

To.2 — Restaurant Brief

One document for everyone who will design, build, and run the restaurant. It translates the Concept Document into what each collaborator needs to act on, so that every professional works from the same brief.

Phase 1 — Decide & Prepare

T1.1 — Opening Budget

Every cost of opening the restaurant, from the first professional fee to the working capital reserve, built line by line in seven areas with a source for every figure. It follows Deep Dive 1.2 and stays in use until opening day, with the estimate, the committed amount, and the final cost of each line.

T1.2 — Twelve-Month P&L Projection

The profit and loss projection for the first twelve months of trading, built from four revenue drivers, three cost ratios, and the fixed costs, in three scenarios. It follows Deep Dive 1.3.

T1.3 — Pre-Opening Cash Flow Model

Every payment of the opening budget and every source of funding, placed in the month it actually happens, with the balance month by month until opening day. It shows whether the money will be in the bank when each payment falls due, and follows Deep Dive 1.4.

T1.4 — Break-Even Calculator

The sales the restaurant needs every week to cover its running costs, in covers and as a share of its capacity, with a test of the working capital reserve. It follows Deep Dive 1.5.

T1.5 — Business Plan Template

The six sections of the business plan, to be completed in order with the figures of the Phase 1 templates. It is the document a lender or an investor reads, and the reference for every decision that follows.

T1.6 — Capital Plan

How much we can afford to lose, where the funding will come from, and whether the loan repayments can be carried. It supports Deep Dive 1.1, the funding tasks of Phase 1, and the funding section of the business plan.

T1.7 — Revenue by Service Period

The revenue of a restaurant open for more than one service, built period by period — lunch, dinner, all day — each with its own covers, table turns, and average spend. It feeds the P&L projection when a single average is not enough.

Phase 2 — Find & Secure**T2.1 — Local Competitor Analysis**

The analysis of the restaurants every guest will compare us with: the competitive set, a profile of each competitor, the patterns in their reviews, and the positioning statement that results. It follows Deep Dive 2.1.

T2.2 — Site Selection Brief

The search for a site from start to finish: the written brief for the broker, the paper screening of every candidate with its sales-to-investment ratio, the site visit, and the list of gaps to close before signing. It follows Deep Dive 2.2.

T2.3 — Contractor Tender Brief

The written brief every contractor receives, followed by the comparison of the bids on the same scope and the review of the chosen bid trade by trade. It follows Deep Dive 2.5.

T2.4 — Sample Construction Contract

An annotated reference document that shows, in plain English, the structure and the key clauses of a construction contract for a restaurant fit-out. It is not a contract to sign: every contract must be drafted or reviewed by an attorney.

T2.5 — Permit & Licence Register

Every permit and licence the restaurant needs, with its authority, its lead time, the documents required, the latest date to apply, and the person responsible, including the path of the liquor licence. It follows Deep Dive 2.7 and stays in use until every approval is issued.

Phase 3 — Build

T3.1 — Technology Stack Map

The map of every system the restaurant will use, how they connect, what each one costs, and where each piece of hardware goes, completed before the walls close. It follows Deep Dive 3.2.

T3.2 — Brand Identity Review and Approval

How the operator reviews and approves the identity and its guidelines, and makes sure every supplier — the sign maker, the printer, the web developer — works from them. It follows Deep Dive 3.3.

T3.3 — Marketing Plan

The marketing plan of the restaurant, written by the marketing consultant from our brief and approved by the operator: positioning, target guest, channels, campaign, budget, and the first ninety days. It follows Deep Dive 3.4.

T3.4 — Social Media & Web Presence Guide

How to open and prepare every digital channel — the maps, the website, the social profiles — from the day the identity is approved, so that everything is ready when the campaign starts.

T3.5 — Job Description — General Manager

The job description that goes with the offer to the General Manager: what the role is responsible for, the authority it has, and how the work will be judged.

T3.6 — Job Description — Executive Chef

The job description that goes with the offer to the Executive Chef: what the role is responsible for, the authority it has, and how the work will be judged.

T3.7 — Leadership Interview Scorecard

The two searches for the General Manager and the Executive Chef, from the shortlist to the signed offer: the interviews, the trial, the references, and the decision, scored in the same way for every candidate.

Phase 4 — Set Up

T4.1 — Punch List & Handover

Everything needed to take over the building from the contractor: the walk-through, the snagging list, the tests of the systems, the final inspections, the building documents, and the defects after practical completion. It follows Deep Dive 4.1.

T4.2 — Team Plan & Staff Cost

From the busiest service to the number of people the restaurant needs and the cost of the complete team, set against the staff cost of the projection, with the organisation chart. It follows Deep Dive 4.2.

T4.3 — Job Description Template

One job description for every role in the team, written by the head of department before the role is advertised, and signed by the employee with the contract.

T4.4 — Team Interview Scorecard

The recruitment of every role below the General Manager and the Executive Chef, with the same questions and the same scores for every candidate of the same role. It follows Deep Dive 4.2.

T4.5 — Pre-Opening Training Plan

Everything the training needs, prepared in Phase 4 so that it can run in Phase 5: the competences of each role, the programme, the material, the trainers, the mock services, and the sign-off. It follows Deep Dive 4.3.

T4.6 — Menu Tasting & Approval

From the limits of the kitchen to the menu signed by the operator, through tastings run as working meetings, with a decision for every dish. It follows Deep Dive 4.4.

T4.7 — Recipe & Beverage Costing

The cost of every dish and every drink from one price list, with the yield of every ingredient and the table of allergens. It follows Deep Dive 4.4.

T4.8 — Menu Pricing & Writing Guide

How to set the price of each dish and write the words the guest will read, between the approved recipe and the printed menu.

T4.9 — Supplier Comparison & Vendor List

From the draft menu to the list of suppliers the restaurant may order from: the specifications, the comparison of at least three suppliers, the terms, and a backup for every category. It follows Deep Dive 4.5.

T4.10 — Standards of Service

The service the guest receives, moment by moment: what is done, by whom, and within how long. It is the document the floor team is trained and judged on, and follows Deep Dive 4.7.

T4.11 — Station Checklists

A checklist for every station of the kitchen and of the service: what must be ready before service, what is checked during it, and what is done before the station is closed.

Phase 5 — Final Preparation**T5.1 — Cleaning Schedule**

What is cleaned, how, how often, with which product, and by whom, separate from the food safety records, with the cleaning done by contractors.

T5.2 — Prep Lists

The prep list of every station of the kitchen: what must be prepared before service, in the quantity the covers of the day require, with the use-by date for the label.

T5.3 — Opening Orders & Par Levels

The opening stock and the routine that follows it: the delivery days, the par level of every product, the first orders, the order sheet, the receiving log, and the opening stock count. It follows Deep Dive 5.2 and stays in use after the opening.

T5.4 — Cash Handling & Reconciliation Log

The control of cash and cards from the first mock service: the floats, the count of every till, the daily reconciliation, the voids and discounts, the banking, the petty cash, and the tips. It follows Deep Dive 5.3 and stays in use after the opening.

T5.5 — Opening Rota

The rota for the soft opening and the first four weeks of trading, written from the team, the opening hours, and the bookings, and checked against the staff cost of the budget.

T5.6 — Menu Design & Print Guide

How to lay out the approved menu so that guests can read it and order from it, check it before it is printed, and publish the same text behind the QR code.

T5.7 — Mock Service & Soft Opening Log

The record of every service with guests before the opening: what the observers saw, what the guests wrote, what was decided at each debrief, and whether it worked. It follows Deep Dive 5.1.

T5.8 — Opening Readiness Review

The review at which the operator, the General Manager, and the Executive Chef check where the opening stands, give every open point an owner and a date, and confirm the opening date.

First 90 Days**T6.1 — Daily & Weekly Trading Log**

The figures of the first ninety days, recorded after every service and read every week against the targets: covers, sales, average spend, purchases, and staff hours. It follows Deep Dive 6.1.

T6.2 — Monthly P&L & Break-Even Review

The P&L of each of the first three months, read with the accountant against the projection, with the break-even point recalculated on real costs and the months the reserve can last. It follows Deep Dive 6.1.

T6.3 — Menu Engineering

Every dish and every drink reviewed on two measures: how often the guests choose it, and how much each portion earns. Enter four figures per dish and the file places it in one of four groups. It follows Deep Dive 6.3.

GLOSSARY

The terms of the book, in plain language

This glossary defines the terms used in the book that may be unfamiliar to a first-time operator. The definitions are written in plain language, and each one explains the term as the book uses it. Where a term has different names in different markets, the most common alternatives are given.

Adjustment log

The single written list, kept in the first months of trading, of every problem found in service and every change decided to solve it. Each entry records the problem, where it shows, its priority, the change, its owner, the date its result will be checked, and the result. It keeps the corrections of a new restaurant deliberate and traceable.

As-built drawings

The technical drawings issued at the end of the works that show the building as it was actually built, including every change made during construction. They differ from the design drawings because they record what exists, not what was intended. They are needed for any later maintenance, repair, or alteration.

Average spend

The revenue of a period divided by the number of covers served in it, usually measured net of sales tax and service charge. Also called spend per cover. It is one of the two figures, with the number of covers, on which every revenue projection is built.

Break clause

A clause in a lease that allows the tenant, the landlord, or both to end the lease at a set point before its expiry, usually with notice and under conditions. For a restaurant it limits the loss if the business does not work.

Break-even point

The level of sales at which the restaurant covers all its costs and makes neither a profit nor a loss. It is expressed as sales per week and as covers per week, and compared with the capacity of the restaurant to judge whether it can realistically be reached.

Builder's risk insurance

Insurance that covers the building, the works in progress, and the materials on site against damage, theft, or loss during construction. In some markets it is called contractor's all-risks insurance. It must be active before anyone starts work on the premises, and the construction contract should state who arranges it.

Building control

The authority, public or private depending on the market, that checks that construction work complies with the building regulations: structure, fire safety, ventilation, drainage, access. Its inspections during and at the end of the works are required before the

premises can be used.

Business interruption insurance

Insurance that replaces lost income and pays continuing costs when the restaurant has to close because of an insured event, such as a fire or a flood. It is often the cover that decides whether a restaurant reopens after a serious incident.

Cash flow model (pre-opening)

The projection, period by period, of every payment from the start of the project to opening day, set against the money available at each point. The budget shows whether there is enough money in total; the cash flow model shows whether it will be in the bank when each payment is due.

Chart of accounts

The list of accounts in which every income and every cost of the business is recorded. It is designed with the accountant so that the books produce the profit and loss account in the format the restaurant uses to make decisions.

Commissioning

The testing of each piece of equipment and each building system after installation, by the supplier or the installer, to prove that it works as specified before it is used. It ends with the equipment registered for warranty and the staff shown how to use it.

Concept document

The written description of the restaurant: its origin, its guest, the experience, the format, the food and drink, the service culture, its position, its name, and its identity, with the reasons behind each decision. It is the reference against which every later decision is tested, and it is revised as the project develops.

Construction programme

The schedule of the works prepared by the contractor and agreed before the works start: what will be built, in what order, by whom, and when. It is the basis for tracking progress and for seeing a delay before it grows.

Contingency

An amount added to the budget, on top of the estimated costs, to pay for what was not foreseen. It is kept as a separate line, not spread across the other items, and it is used only after a deliberate decision.

Contribution margin

The selling price of a dish or drink, net of sales tax, minus the cost of its ingredients. It is the money each portion leaves to pay the other costs and the profit, and it is the measure of profitability used in menu engineering. Sometimes called gross margin per dish.

Covers

The number of guests served. A table of four is four covers. The covers of a service, a

day, or a week are the basic unit of every forecast, every staffing plan, and every order of stock.

Critical path

In project management, the chain of tasks that depend on one another and together decide the earliest date on which a project can finish. A delay on the critical path moves the end date; a delay elsewhere does not, as long as it stays within its margin.

Daily brief

A short meeting held every day in the first weeks of trading, always at the same time and with the same questions, to turn each service into one precise correction with a named owner. It is replaced by a weekly review once it stops finding new problems.

Defects liability period

The period after practical completion, set in the construction contract, during which the contractor must repair at its own cost any defect caused by its work. The last part of the retention is released when the period ends and the defects notified during it have been repaired.

EBITDA

Earnings Before Interest, Tax, Depreciation, and Amortisation. A measure of the profit the restaurant makes from its operations, before the cost of its financing and the charges that do not involve cash. Lenders and investors use it to judge whether the business can earn money and repay debt.

Employer's liability insurance

Insurance that covers the employer if a member of staff is injured or falls ill because of their work. In many markets it is compulsory from the day the first employee starts, and its certificate must be displayed.

Extraction system

The hood, ducts, fans, and filters that remove heat, smoke, steam, and grease from the kitchen and carry them out of the building. Its route and its outlet often decide whether a site can become a restaurant, and it must be cleaned regularly for safety and insurance.

FF&E

Furniture, Fixtures, and Equipment. The items of the restaurant that can be moved and that last for years: kitchen and bar equipment, tables, chairs, lighting fixtures, and similar items. They are usually recorded as assets and depreciated, rather than counted as a cost in the year they are bought.

Final account

The agreed total value of the construction work at the end of the job: the contract sum, plus or minus every approved variation. The balance due to the contractor is the final account less every payment already made and the retention.

Fire suppression system

An automatic system installed in the kitchen hood that releases an extinguishing agent onto the cooking line when it detects a fire, and shuts off the gas. It is often required by the fire authority and the insurer, and it must be serviced at set intervals.

Fit-out

The work that turns an empty or existing space into the restaurant: the internal construction, the finishes, the services, and the installation of the fixed equipment and furniture. The fit-out budget and the fit-out period are among the first figures negotiated with the landlord.

Float

The fixed amount of cash, in set denominations, placed in each till at the start of a service so that change can be given. At the close it is counted out and set aside before the takings of the day are counted.

Food cost percentage

The cost of the food used, expressed as a percentage of food sales. A dish that sells for twenty and uses ingredients costing five has a food cost of twenty-five per cent. Beverage cost is calculated in the same way on drinks. The percentage is a useful control, but the contribution margin of each dish is what pays the bills.

Forward-march principle

The rule of kitchen design by which food moves in one direction only — from delivery to storage, preparation, cooking, and the pass — never travelling backwards, and with clean and dirty items never sharing a path. It is the basis of a safe and efficient kitchen layout.

Grease trap

A device fitted between the kitchen drains and the public sewer that captures fats, oils, and grease before they reach it. Also called a grease interceptor. It is sized on the output of the kitchen and must be emptied and serviced regularly; a blocked or undersized trap is a common cause of drainage failures and of action by the authorities.

Gross profit

Sales minus the cost of the food and drink sold. In the profit and loss account it is shown for food and for beverages, as a value and as a percentage of their own sales. It is the starting point for reading the profitability of the restaurant.

HACCP

Hazard Analysis and Critical Control Points. The method of food safety management on which food safety law rests in most markets. It identifies the points at which food can become unsafe, sets controls and limits at those points, and requires the checks to be recorded and acted on when they fail.

Heads of department

In this book, the managers who lead the departments of the restaurant: the Floor Manager, the Bar Manager, the Executive Chef, and the Sous Chef.

Heads of terms

A written summary of the main commercial terms agreed between landlord and tenant before the lease is drafted: rent, length, rent-free period, break clauses, permitted use, and similar points. Also called a letter of intent. It is usually not binding in the way the lease is, but it fixes what has been agreed and is the basis on which the attorney drafts or reviews the lease.

Hoarding

The temporary panels that close off the site from the street during the works. In the opening campaign it becomes the first sign of the restaurant, carrying its name and an invitation to follow it.

Joining pack

The documents and items each new employee receives on the first day: a copy of the signed contract, the employee handbook, the uniform, the locker, the training rota, and the names of their manager and of the people they will work with.

Lead time

The time between placing an order or an application and receiving what was ordered: equipment, materials, permits, licences, or people who must give notice to their employer. Long lead times are the main reason why some tasks must start long before they seem urgent.

Limited company

A form of company that is a legal person separate from its owners, so that the owners' personal assets are protected from the debts of the business, unless they have given a personal guarantee. In some markets it is called a limited liability company. It is the usual structure for opening a restaurant.

Liquor licence

The permission, granted by the local authority or the licensing body, to sell alcohol on the premises. Its name, its conditions, and its time to obtain vary widely between markets, and it is often the permit with the longest lead time of the opening.

Menu engineering

The analysis of every dish on two measures — how often it sells compared with the others in its section, and how much contribution margin it leaves — to decide which dishes to keep, reprice, reposition, or replace. It sorts the dishes into four groups: stars (popular and profitable), plowhorses (popular, less profitable), puzzles (profitable, less popular), and dogs (neither).

Merchant account

The account, opened with a bank or a payment provider, that allows the restaurant to accept card payments and receive the money from them. Its fees and the time it takes to transfer the money are part of the cost of every card sale.

Mise en place

Everything a cook prepares and places within reach before service — ingredients cut, sauces made, garnishes ready, tools in place — so that each dish can be completed quickly when it is ordered.

Mock service

A full rehearsal of a service before the opening, with invited guests who do not pay, every system working, and the team in uniform. Observers record what happens, and the problems found are corrected before the next service.

Moodboard

A collage of chosen images that shows the intended look and feel of the restaurant: the space, the colours, the materials, the graphics, the food, and the guest. It is the bridge between the written concept and the work of the designers, and it is built around a productive tension — two qualities that seem slightly in conflict but together create a distinctive identity.

No-show

A guest who books a table and does not arrive without cancelling. No-shows leave tables empty that could have been sold, and they are controlled with reminders and, where necessary, a card guarantee or a deposit.

Occupancy cost

The cost of occupying the premises: the rent, the service charge, and the local property taxes. It is fixed — it does not fall when sales fall — and it is expressed as a percentage of sales to judge whether a site is affordable.

Operator

In this book, the person or company that owns the project and takes its decisions: the owner of the restaurant, or the partner who represents the owners.

OS&E

Operating Supplies and Equipment. The smaller items used every day in the restaurant: crockery, glassware, cutlery, smallwares, linen, uniforms, and similar items. They are usually counted as a cost when bought, and they are distinct from FF&E.

P&L

The profit and loss account: the statement of the income and the costs of a period, and of the profit or loss that results. The P&L projection is the same statement prepared in advance, as a forecast, before the restaurant opens.

Par level

The quantity of a product that must be on the shelf after each delivery for the restaurant to reach the next delivery without running out. Each order brings the stock back up to its par. Set well, par levels keep the stock as low as the service allows, with less cash tied up and less waste.

Pass

The counter between the kitchen and the dining room where finished dishes are checked and handed to the floor team. The person running the pass controls the timing of every table.

Permit register

The single list of every permit, licence, registration, and certificate the restaurant needs, with the authority that grants it, what it requires, its status, and its expiry or renewal date.

Permitted use

The use of the premises allowed by the lease. For a restaurant it must cover the service of food and, where planned, of alcohol, late trading, takeaway, and private events. A narrow permitted use can prevent the concept from changing later.

Personal guarantee

A promise by an individual to pay a debt of the company if the company cannot. It removes, for that debt, the protection that a limited company gives to its owners. Lenders and landlords often ask for one from the operator.

Petty cash

A small fixed amount of cash kept for minor purchases paid in cash. Every payment is recorded with its receipt, and the fund is topped up to its fixed amount against those receipts.

Positioning statement

A plain sentence that says where the restaurant sits among the alternatives: for which guest, what kind of place, and the specific reason to choose it. It is written so that anyone on the team can repeat it.

Practical completion

The point at which the architect certifies that the building can be used for its purpose, even if minor defects remain. On that date the building passes from the contractor to the client, part of the retention is released, and the defects liability period begins.

Pre-opening costs

The costs incurred before the restaurant starts to trade: rent from the date it is due, salaries during recruitment and training, the opening stock, the marketing before the opening, the training and the mock services, and professional fees. They are among the costs most often underestimated.

Preliminaries

The part of a contractor's bid that pays for running the site rather than for the building itself: site management, temporary power and water, waste removal, site insurance, scaffolding, and similar costs. Comparing them between bids shows where contractors have hidden or inflated costs.

Prep list

The list, for each station of the kitchen, of everything that must be prepared before service and in what quantity, based on the bookings and on what is left from the previous service.

Press kit

The pack prepared for journalists: the concept on one page, the biographies of the chef, the General Manager, and the operator, a selection of the menu, the professional photographs, and the reservation details.

Public liability insurance

Insurance that covers the business if a guest, a supplier, or any other member of the public is injured or their property is damaged on the premises or because of the business.

Punch list

The written list of defects, unfinished work, and work not done to the agreed standard, drawn up when the works are inspected at the end of construction. Called the snagging list in some markets. Every item has a description, a responsible party, and a date for its repair.

Ramp-up

The period after the opening during which the sales of a new restaurant grow towards their normal level. The financial projections must include it, because a restaurant does not reach its stable sales on its first day.

Recipe card

The written standard for a dish or a drink: every ingredient with its quantity, the method, the presentation, the allergens, and the cost. It is the reference for cooking, for training, for costing, and for checking the food cost.

Reference Range

In this book, a box that gives a physical ratio or a typical range that can help a first estimate. It is a starting point to be checked with the accountant and the local professionals, not a target.

Rent review

A clause in a lease that allows the rent to be recalculated at set points during the lease, against the market, an index, or an agreed formula.

Rent-free period

A period at the start of a lease during which the tenant pays no rent, usually granted so

that the premises can be fitted out before trading begins. Its length is one of the main points of the lease negotiation.

Restaurant brief

The version of the concept document written for the professionals who will design, build, and run the restaurant. It adds the budget available, the target dates, and the status of the site and of the key appointments, and every recipient works from the same version.

Retention

A share of each payment to the contractor that is held back, part of it until practical completion and the rest until the end of the defects liability period. It gives the client the means to have defects repaired.

Rota

The schedule of shifts that says who works, when, and in which role, for each day of the week.

Sales-to-investment ratio

The annual sales projected for a site divided by the total investment needed to open there. It shows how much the restaurant sells each year for every unit of money invested, and it is used to screen candidate sites before a lease is negotiated.

Service charge

A term with two meanings. In a lease, it is the tenant's share of the cost of running and maintaining the common parts of the building. On a restaurant bill, it is an amount added for the service, which belongs to the team according to the law and the policy of the restaurant, and is not revenue.

Shareholders' agreement

The agreement between the owners of a company that sets out their shares, how decisions are taken, how profits are distributed, what happens when one of them wants to leave, and how disputes are resolved. It should be signed before the company commits to a lease.

Soft opening

A short series of services held just before the official opening, with invited guests who do not pay, in growing numbers. It tests the restaurant with real guests in controlled conditions and gives the team a last chance to correct before the doors open to the public.

Staff cost percentage

The total cost of the team — salaries, employer's contributions and taxes, and benefits — expressed as a percentage of total sales. It is followed separately for the kitchen and the floor, and against the covers served as well as against the sales.

Stage payment

A payment made to the contractor at agreed points of the works, against the value of the work completed and certified, less the retention.

Standards of Service

The written document that describes how the restaurant serves its guests, step by step, from the booking to the departure, with the behaviour expected of every role. It is the basis of the floor training and of every check of the service.

Station checklist

The list, for each station of the kitchen, the bar, and the floor, of what must be done to open it, to keep it during service, and to close it.

Table turns

The number of times a table is used by different guests in one service. One turn is a full cycle, from the arrival of the guests to their departure. With the covers, the average spend, and the number of services, it is one of the figures on which the revenue is projected.

Technology stack

All the systems the restaurant depends on: the POS, the card payments, the reservations, the inventory, the rota and payroll, the accounts, the network, the security. Because they must share data, they are chosen together and tested for compatibility before any of them is bought.

Tender

The process by which several contractors are asked to price the same works, on the same documents, so that their offers can be compared. Each offer is called a bid or a tender.

Theoretical food cost

The cost that the food sold in a period would have had if every dish had been made exactly to its recipe card. The difference between the theoretical and the actual food cost measures waste, portions, yields, and losses.

Trial period

The first period of an employment contract, set by the contract and the law, during which either side can end the employment more easily. Also called a probation period. Each person is assessed before it ends.

Use class

The category of use that the planning rules assign to a property, such as shop, office, or restaurant. If a property does not have the use class a restaurant needs, a change of use, through planning permission, must be granted before it can trade.

Variation

A written instruction from the client to the contractor to change the work agreed in

the contract. Also called a variation order. Its cost and its effect on the programme are agreed in writing before the work is done. Variations agreed only by word are a main source of disputes.

Void

The cancellation in the POS of an item already entered on a bill. Every void carries a reason and the name of the manager who approved it, and voids are checked every day because they are a common route for losses.

Working capital reserve

The cash kept aside to pay the restaurant's costs in its first months of trading, while sales are still growing. In this book it is sized at ninety days of fixed operating costs. It is kept separate from the construction and pre-opening budget and is never used to cover their overruns.

Yield

The share of a product that is actually usable after cleaning, trimming, cooking, or portioning. A fish bought whole may lose a large part of its weight before it reaches the plate. The cost of each ingredient is calculated on its yield, and a yield test on the first deliveries checks the figures used in the recipe cards.

Between the idea of a restaurant and its first paying guest lie hundreds of decisions, taken in an order that forgives very few mistakes. **Restaurant Critical Path** follows an opening from the first idea on paper to the end of the first ninety days of trading. It turns the concept into a written plan, then leads through the five phases of the work — deciding, finding the site, building, setting up, and preparing to open — with every task in its place, the person responsible for it, and what must be true before moving on. Thirty Deep Dives go into the work most often done wrong, from the lease to the menu to the first figures, and a downloadable toolkit turns each method into a working file. Not a book about passion, but about the work that turns it into a restaurant.