

Opening a Restaurant

The Ultimate Checklist

Whitepaper



CAKE

Opening a restaurant takes organization and collaboration. Even a minor oversight - like forgetting to order wine glasses - can result in major issues on your opening night. Savvy restaurant managers make a list, and check it much more than twice. This basic checklist can serve as a starting point as you plan your restaurant's big night.

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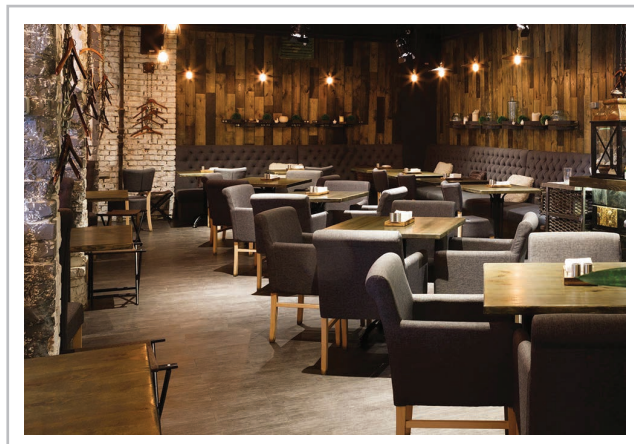
Design the Experience

From the moment they step into your restaurant, your guests should feel welcome and excited to eat. It's vital to create a mood through your design - whether you commission a graffiti artist to paint a mural on your dining room wall, or you invest in silver candelabras for every table.



FURNISH THE KITCHEN

In a perfect world, you may be able to purchase a restaurant space with an existing kitchen. Otherwise, it's up to you to buy and install the necessary equipment for your restaurant. The exact list of items you'll need depends on your cuisine, but you can get started with refrigeration equipment, an oven, range, grill, a deep fryer, shelving and storage, a commercial dishwasher, rubber mats, towels, mops, and cleaning supplies.



FURNISH THE DINING ROOM

Interior design is a big part of the customer experience. How do you want your guests to feel when they walk into your space? Choose appropriate furniture, light fixtures, and other accessories carefully, to create a mood. You may invest in some combination of booths, tables, chairs, stools, benches, bar tops, countertops, carpeting, paintings, and light fixtures.

BUY SMALLWARES

Smallwares include everything your staff and guests can hold in their hands - from platters and cooking vessels right down to the most delicate teaspoon. Don't forget frequently overlooked items like salt and pepper shakers, bus trays, pot holders, can openers, and plenty of mixing bowls!

CHOOSE LINENS

Linens set the mood when your guests sit down in your restaurant. Paper napkins are appropriate for Quick Service Restaurants (QSRs) and family restaurants, while cloth napkins are an essential part of fine dining. Make sure you get enough towels to service your kitchen as well.

BUY SINGLE-USE ITEMS

Budgeting for single-use items, like receipt paper and to-go containers, takes a little more foresight. Choose the items that you think will work best, and buy them in a small quantity to start. Once you're confident that you like the specific brands you're using, you can place a larger order.

CREATE AN ORGANIZATIONAL LAYOUT FOR YOUR FRONT OF HOUSE

Interior design creates a mood, and it also impacts the flow of your restaurant. Design your front of house (FOH) with a place for your host to sit or stand, an area for guests to queue or wait for tables, and enough room for your staff to move among them easily.





Operations

Before you open to the general public, make sure your business is set up to run smoothly. Put yourself in a customer's shoes—what would you want from the dining experience? Position your restaurant to meet as many of your guests needs as possible, but don't sacrifice your bottom line in the process.

CHOOSE THE BEST LOCATION

In the restaurant industry, it's all about location, location, location. Choose a venue for your business that fits in your budget, suits your concept, and that will appeal to local customers.

CONSIDER THE SEASON

Depending on your location, the time of year may influence your business. For example, a coffee shop in the Midwest will need to serve more hot drinks in the winter, and more iced drinks in the summer. A cozy bistro on a college campus should plan for a busier season during the school year.

MAKE A BACKUP PLAN

The most successful businesses have contingency plans for every possible issue. If your wifi goes down, do your chefs have hard copies of every recipe? If the electricity goes out, do you have a backup generator so you can still use your kitchen appliances? Who will you call for emergency fridge repair? Answer these questions well in advance, and you'll save yourself the stress - and lost revenue - of dealing with them on the fly.

PARK IT!

Where will people park when they visit your restaurant? If you're located just under a train station, this may not be an issue. Or, do you expect to get a lot of foot traffic?

TRACK MARGINS

When all is said and done, the margin for food sales is pretty slim. Price your menu items carefully - and take into account the cost of your ingredients, the cost of labor, and the maximum amount a guest will happily pay for a dish. Your garden salad might be delicious, but it's unlikely that customers will pay \$40 to try it.

BANKING BEST PRACTICES

Before you start accepting orders, you should open a new bank account and apply for more than one line of credit. You'll also need a payroll account and a payroll system. Your finances are one area of business where organic growth just won't cut it. Set up clear workflows before your restaurant is profitable, and you'll save yourself time and stress down the road.

GET AN EMPLOYEE IDENTIFICATION NUMBER

An Employee Identification Number (EIN) is like a social security number - but for a business, instead of an individual. Apply for your EIN as soon as you have an address, so that you can be in good standing with the IRS from day one.

ACCOUNT FOR ACCOUNTING

Are you paying your servers as employees or independent contractors? Will you pay yourself a salary, or take dividends from the business as its CEO? Are you compliant with your state's minimum wage laws? Answer all these questions as soon as possible, by consulting an accountant and investing in the necessary accounting software.

GARBAGE

Make sure you sign up for a garbage service before you start generating waste! If possible, you can also connect with a recycling service in your area.

THE RIGHT TOOLS FOR THE JOB

Get a toolbox. Trust us; it'll come in handy someday. You should be ready to call professionals for certain issues - like fixing your water heater or replacing an electrical outlet. But when one of your tables is wobbly, you can probably repair it yourself with the proper wrench.





Choose a Point of Sale System

Your Point of Sale (POS) system is the one tool that your staff will use every day, without fail. (Yes, we're including your stove - what if you host a cookout on the beach?) This powerful software is essential for every aspect of a business. Do plenty of research before you make an investment, and be sure your new POS can handle all of your restaurant's needs.

DO YOUR RESEARCH

Speaking of tools - your POS system is the most crucial tool in your entire restaurant. This software tracks your profits, your sales, and ongoing trends in your guests' dining habits. Make sure you take the time to research your options before investing in the POS you'll use every day.

HOW WILL YOU HANDLE TO-GO ORDERS?

Takeaway orders require a their own workflow. How will you get tickets from the POS to the kitchen? Whose job is it to place plastic cutlery and paper napkins in each bag? How do the items get from the kitchen to the delivery driver's car? Plan ahead, and rely on your POS system to simplify every step of the process.

HOW WILL YOU HANDLE RESERVATIONS?

You may need additional guest management to handle reservations and waitlists. If possible, choose software that integrates with your POS system. This will save you time and energy reconciling cloud reports down the line.

MAKE A DYNAMIC FLOOR PLAN

For full-service and fine-casual restaurants, it's important to have a dynamic floor plan. By having a dynamic floor plan, managers can adjust each server's section at any moment, and keep track of every change they make in real time. This added functionality keeps your staff on track and your customers satisfied.

Safety

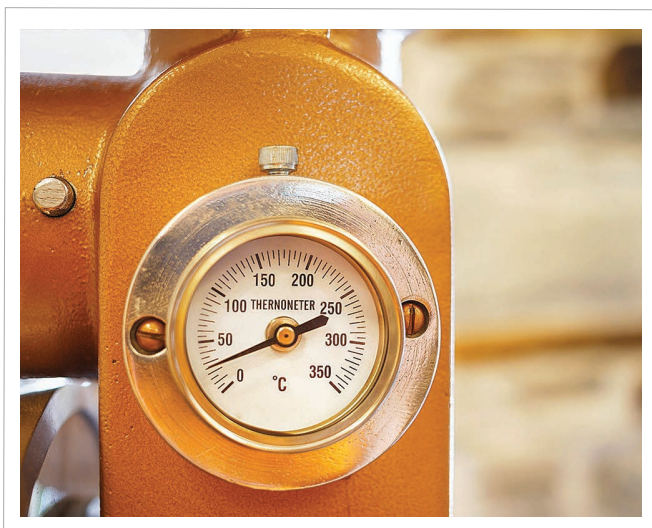
As a business owner, you are responsible for the safety of everyone on your premises - whether they're a server, a chef, or a patron. From food safety to basic kitchen protocols, it's important that you and your staff are trained to comply with local and federal laws that keep everyone in good health.

CHECK LOCAL AND FEDERAL LAWS

When you're setting up your kitchen, make sure you're familiar with local and federal laws regarding food safety and sanitation.

CERTIFIED EQUIPMENT

All racks and tables in your restaurant should be certified by the National Sanitation Foundation (NSF).



THERMOMETERS

Make sure you install thermometers in your fridges, and invest in meat thermometers for cooked items. Safe food temperatures are a must to prevent foodborne illnesses.

FOOD STORAGE SUPPLIES

All lids, containers, pans, bowls, and single-use items (like saran wrap) should be safe to use in a commercial food setting.

FINISHES

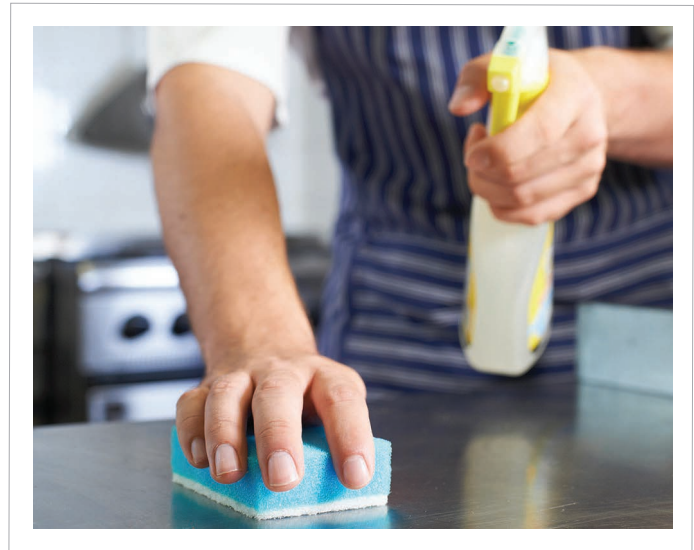
Make sure all the sealants and caulking used in your kitchen are NSF-certified.

LICENSING

Just as you need a license to drive a car, you also need one to serve alcohol. Most restaurant owners are required to have a business license, a liquor license, a signage permit, and health permits to comply with local laws.

ADDITIONAL EQUIPMENT

It's not just your food that needs to be safe! Order first aid kits, sanitizers and disinfectants, and wet floor signs. Accidents happen, and you should be prepared to keep your staff and your guests safe under any circumstances.





Staffing

Any business is only as successful as its weakest team member. Choose employees you can trust, and invest the time and money it takes to train them in current best practices. As the public face of your restaurant, your staff's competence can make or break your financial success.

WORK YOUR CONNECTIONS

When it's time to hire your staff, there's no need to start from scratch. If you have connections to talented cooks and waitstaff, use them. Ask friends in the foodservice industry to send you their trusted ex-employees. Remember: this business has so much turnover, that an unemployed server is not necessarily a poor choice.

POST HIRING NOTICES

If your network can't provide you with a complete staff, post notices online and in local papers. Look for candidates who have experience in opening restaurants, not just working at established businesses.

PLAN EMPLOYEE MEALS

Most restaurant managers offer a free lunch as a perk of working at a restaurant. This practice keeps your staff happy and productive while helping them get to know your menu. However, make sure you set clear and reasonable boundaries to keep your restaurant profitable.

TRAIN FOR EVERYDAY SHIFTS

Prepare your employees to handle issues that will arise during regular shifts at your restaurant. How will you alert them if you run out of a dish? What is your tipping policy? How will you work with them to set a weekly schedule?

PLAN A TRAINING PROGRAM

Teach your employees the proper procedures for handling food, serving drinks, operational safety, and customer service. If you have a uniform or a dress code, explain it with enough time for your staff to procure appropriate attire. Most importantly, help your team understand your restaurant's short-term and long-term goals.

COMMUNICATE EXPECTATIONS

What makes a good employee? Do you expect servers to arrive 15 minutes before their shift begins? Will you cut employees on slow nights? Is there a minimum number of hours a server can work each week? Let your team know what your expectations are, so they can do their best to meet them. Delineate clear metrics for employee performance, and plan regular performance reviews.





Inventory

A meal is only as good as the ingredients that go into it. When stocking your restaurant, it's important to choose distributors that can provide the quality and price that you need. After your inventory arrives, you'll need a system to minimize waste, keeping customers happy and your overhead down.

CHOOSE DISTRIBUTORS

Vet potential distributors for their expertise and reputation. Choose partners who you can rely on to make deliveries on time, including items of great - and consistent - quality. A lousy vendor can be a disaster, but a good one will never leave you in the lurch.

PLAN FOR VOLUME

What size is your restaurant floor and what size is your stockroom? It's not always a good idea to buy ingredients in bulk - even if doing so will get you the lowest price. You should only stock as many perishable ingredients as you can safely store, and expect to sell before they go bad.

INVENTORY TRACKING

Inventory management software can help you track the items you have on hand and compare them to the number of dishes you can expect to sell each day. Invest in the software you need to make sure you're not wasting food, money, or time.

DINNER

WHILE YOU WAIT

ARTISAN RUSTIC BREADS: *virgin olive oil, dukkah, Nocellara*
NOCELLARA OLIVES: £2.95
GARLIC FLATBREAD



Menu Planning

What makes your menu special? If you're opening a burger bar, you might offer several different kinds of meat, plus one or two veggie patties. If you serve sushi, then it will be more important to connect with a local fish market. It's important for any restaurant to strike a balance: appeal to as many customers as possible, without losing sight of what makes your concept great.

FOOD FOCUS

Your customers will have a range of tastes and dietary restrictions. You can accommodate many of these, but not all of them. If you're opening a pizza restaurant, it makes sense to offer a gluten-free crust option - but you probably don't have the infrastructure to serve sushi. Focus in on the reason a customer would come into your restaurant, and showcase your signature items on your menu.

SET APPROPRIATE PRICE MARGINS

The margin for food sales is pretty slim. Most restaurant owners use specialized software that breaks recipes down by ingredient and tracks actual food costs, so you can easily calculate the profitability of each item on your menu. The more data you have on hand, the better your decisions will be - and the more money your restaurant will make.

MENU DESIGN

Proofread your menu copy to make sure it's error-free. Work with a designer to include your logo, your font, and other details that improve your restaurant's ambiance (like price formatting, photos of the food, line drawings, etc). When you're ready, send it to a professional printer.



Marketing

You can't make a profit without customers. Before your restaurant opens, create a strategy for getting the word out to hungry guests in your area. Your marketing plan should reflect your restaurant concept - a Quick Service Restaurant (QSR) serving tacos and guacamole may see success from distributing menus to local schools and offices, while a bar might have more luck offering 2-for-1 drinks on Tuesday nights.

DESIGN A LOGO

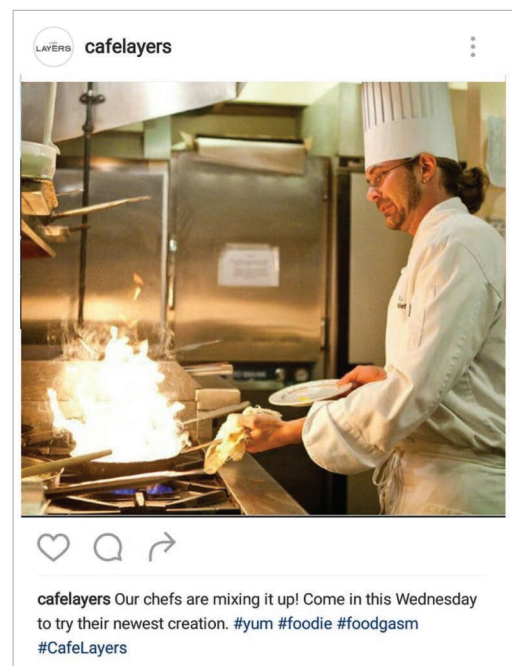
About five to six months before opening, start working on your logo design. Your logo will be important for your business letterhead, your menu, and any printed materials you order, such as paper napkins or flyers. The sooner you get the word out, the better!

BUILD A SOCIAL MEDIA PRESENCE

People love pictures of food. Your restaurant should have an active presence on Instagram, at the very least, and on Twitter and Facebook if possible. Post about your menu, your staff, and your restaurant's ambiance. Build up a following as early as you can, so you can utilize social when it's time to announce your opening night.

PROMOTE YOUR OPENING

Choose an opening date as soon as possible - and give yourself plenty of time between the announcement and the opening itself. Generate buzz with social media, press outreach, and word-of-mouth networking. There's no such thing as overpromotion for a restaurant opening!





The Big Night

When you're finally ready to open your doors, it may feel like the end of a long journey - but you're just getting started. Pace yourself, and remember that a successful restaurant may be open for decades to come.

PRE GRAND OPENING

Create a simulated Grand Opening. Invite friends and family for honest feedback, spot problems early on and avoid any surprises.

REST UP

It may sound silly, but be sure to get plenty of sleep the night before your grand opening. Go into the big day looking and feeling your best.



RALLY THE TROOPS

Ask your staff to arrive early on opening night so they can set up. During this prep time, give them a pep talk about the event. Remind them why you hired them, and encourage them to do their best. This will improve their morale, and also your own confidence!

GO WITH THE FLOW

Even the best opening night is sure to have the occasional hiccup. Go with the flow of your restaurant - keep an eye out for issues that may require your attention, but don't get in your servers' way.

ENJOY YOURSELF!

Customers come to a restaurant for the food, but they stay for the hospitality. Show your guests that you're happy to be here, and you'll make them glad they came.



Running a Restaurant Can Be a Piece of CAKE with Our Point of Sale System

Simple, intuitive, and cost friendly.



Affordable Hardware

Lease or purchase



Restaurant-proof

Simple, intuitive



24/7 customer support

Help when you need it



2.5% transaction fee

No additional costs

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