



Restaurant Branding Roadmap Exercise

Exercise for business planning–building your team

Before you Begin

Create a quiet space for yourself where you aren't likely to be disturbed. It's best to set aside 30-45 minutes to complete this exercise. You can do this by yourself or with your team.

In this exercise, you'll do some pre-planning. This is a big picture exercise in which you will think about why you want to open your restaurant, what vision you have for your business and the resources you have and the knowledge you might need to acquire.

In this exercise there are no "right" or "wrong" answers. The purpose of this tool is to get you thinking about what you need in your business. You won't focus on how to get there at this point. After you answer the questions, you'll review them and look for any new ideas or insights you gained from creating your answers.

This information will help you see what areas your strong in, where you need support, knowledge or more team members.

Example Question 1: Who's on my team? What's each person's role?

Even if you are starting your restaurant because you are crazy passionate about it and you want to serve your customers, it is still a business. Do you know how much you need to make? This will play into how you build your operations and financial model.

Example Question 2: What support(s) do I have?

When beginning a new venture, it is important to take stock of everything that you've got to help you succeed. These are also some ideas for who you can ask for help or ideas when you're looking for new team members or knowledge.

Examples of supports are:

- Friends and family
- Business networks
- Clubs
- Programs
- Groups
- Companies
- Your personal beliefs, attitudes, ideas and faith.

List **any** people or things that will support you as you achieve your goals.



Restaurant Branding Roadmap Exercise

Example Question 3: What resources do I have?

Take stock of what resources that you have to help you launch your restaurant. Examples of resources are:

- Money
- Education
- Experience
- Talent
- Strengths

Example Question 4: What do I need to learn or find?

Think about the areas where you might need assistance or knowledge. Examples of areas of learning are similar to resources:

- Money
- Education
- Experience
- Talent
- Strengths
- Connections
- Experts
- Advisors
- Teachers

Example Question 5: Who else do I need on the team and what are their roles?

Think about the areas where you might need new team members and what you need them to do and how these roles fit together. Examples:

- Bookkeeper—keeps track of the profit and loss and taxes. Works with the manager and chef to see where costs can be managed
- Manager—this person manages FOH and BOH and reports to me about what's going on. Also, helps me develop training materials for teaching staff about the concept, brand and delivery
- Business partner—someone with more experience finding, financing and opening new locations. Work very closely together with me and the bookkeeper to make sure that decisions on investing in the business make sense and increase profitability.



Restaurant Branding Roadmap Exercise

After completing the questions, take a moment to step back and reflect on the overall experience of this exercise. What are your insights? What did you learn? What do you take away from this experience? Collect your thoughts on the last page.

Example New ideas and realizations:

Review all of your answers and see if there are thoughts, patterns or ideas that you hadn't noticed before. For example:

- "I didn't consider the impact my restaurant hours would have on my life, I'm going to revisit that."
- "I have a lot more support than I thought that I did."
- "I've got to do some work on my concept."
- "I just had a great idea for a concept, my market could really use a great family restaurant."
- "Asking 'why' helped me figure out that I want to have someone else manage the operations, I am more interested in getting a restaurant off the ground."

You can use this information to explore new ideas or rethink your original plan. It is very helpful to have as much of the big picture figured out before you dive into the formal business plan writing phase.

Example: I've got this!

In this section, write down the ideas or parts of your restaurant plan that you feel highly confident about.

- "I have tons of BOH experience, I can manage that easily."
- "My concept is rock solid."
- "I have my partners and our agreement all lined up."

Example: I'll need some help here.

As the old saying goes, "No man (or woman) is an island" so you're not expected to have 100% of everything figured out or to be able to do it yourself, so fill in the areas where you'll need some assistance here.

- "I will need some help figuring out the numbers part."
- "I love cooking, but I am going to need to find a chef."
- "I'm going to need a manager."
- "I'll need to do some research on how to create a concept."

Business planning–building the dream team

Who's on my team? What's each person's role?

What support do I have?

What resources and skills do I have?

Business planning–building the dream team

What do I need to learn?

Who else do I need on the team and what are their roles?

Business planning–building the dream team

Takeaways from this exercise

Jot down any realizations that you gathered and create a list of areas you feel confident in and areas where you will need support.

New ideas and realizations

I've got this!

I'll need some help here