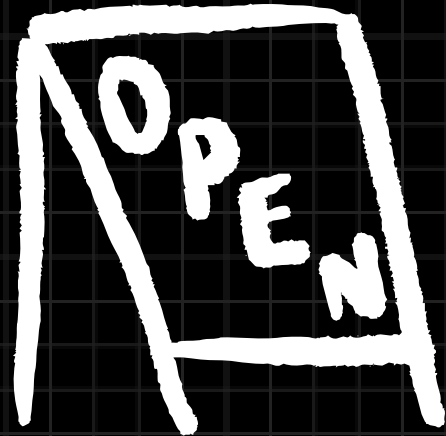


THE BUILD: YOUR RESTAURANT LAUNCH FIELD GUIDE



The practical guide every restaurant owner
needs to launch with clarity and confidence.



From First Idea to First Guest

Opening a restaurant is an exciting milestone — but it's also one of the most complex undertakings someone can take on. The process will naturally stretch you into areas where you may not be the expert. One person cannot be expected to be a chef and also be a real estate expert, a permit and licensing expert, a financing and budgeting expert, a technology expert, and a marketing expert.

Everyone has strengths and comfort zones. Maybe you excel at creating menus or building relationships with customers. But there are other steps — finding and negotiating a location, navigating local permitting, managing construction timelines, tracking budgets — where you'll need extra guidance and structure. This workbook exists to give you that support, in a clear, practical, and organized way.

There isn't a definitive guide for how to open a restaurant, because every one is unique, but this workbook is your step-by-step planning and organizational guide.

It's designed to be used alongside The Build podcast, serving as a “follow along” companion, or to be used independently in your own time. Each episode of The Build aligns with a section in the workbook, helping you turn insights into action.

We want you to feel confident in every phase of opening your restaurant — not because you suddenly became an expert in every field, but because you have the right tools, structure, and resources at your fingertips. With this workbook as your guide, you'll be able to make informed decisions, avoid costly missteps, and move toward opening day with clarity and control.

It includes:



- **Checklists** to keep you on track for each milestone.
- **Forms and worksheets** to capture your decisions, track costs, and plan details.
- **Reference guides and tips** to demystify complex processes and centralize information.
- **Space for notes and ideas** so you can adapt the tools to your business.



LISTEN TO THE PODCAST

Contents



“There's ups and downs, but at the same time, when you can meet somebody halfway or brighten their day, that's what food is about for me.”

CHEF RASHEEDA PURDIE

Owner of Ramen by Ra

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Timeline Planning



12 MONTHS

Before Opening

- ☐ Define restaurant concept and brand vision
- ☐ Draft initial business plan with financial projections
- ☐ Begin market research: demographics, competitors, traffic analysis
- ☐ Identify potential neighborhoods and property needs (e.g. drive-thru, square footage)
- ☐ Engage advisors: attorney, accountant, hospitality consultant (if needed)
- ☐ Begin exploring financing options (SBA loans, investors, savings)

11 MONTHS

Before Opening

- ☐ Refine menu concept; begin recipe testing
- ☐ Shortlist potential locations; schedule site visits with broker/agent
- ☐ Build financial package: startup cost estimate, budget draft
- ☐ Research city/state permitting requirements

10 MONTHS

Before Opening

- ☐ Select location and negotiate lease terms
- ☐ Apply for key permits (zoning, signage, build-out)
- ☐ Engage architect and/or designer
- ☐ Begin building relationships with potential suppliers
- ☐ Secure initial financing commitments

09 MONTHS

Before Opening

- ☐ Finalize lease and sign
- ☐ Work with architect/contractor on design drawings
- ☐ Submit plans for permitting approvals
- ☐ Develop high-level project timeline for construction
- ☐ Refine business plan and funding needs; apply for loans/investor capital

08 MONTHS

Before Opening

- ☐ Finalize financing agreements
- ☐ Approve design plans and begin construction bidding
- ☐ Choose technology platforms: POS, payroll, accounting
- ☐ Begin branding work: logo, visual identity, signage concepts

07 MONTHS

Before Opening

- ☐ Select contractor; sign construction contract
- ☐ Construction/build-out begins (demolition, structural work)
- ☐ Apply for health department permits and inspections
- ☐ Build pre-opening marketing plan and social media strategy

06 MONTHS

Before Opening

- ☐ Order long-lead equipment (kitchen, refrigeration, POS)
- ☐ Finalize menu items and standardize recipes
- ☐ Begin supplier evaluation and contracts (primary food, beverage, disposables)
- ☐ Start planning hiring needs and job descriptions

05 MONTHS

Before Opening

- ☐ Construction continues (plumbing, electrical, framing)
- ☐ Apply for liquor license (if applicable, often lengthy)
- ☐ Launch “Coming Soon” website and email capture form
- ☐ Start soft promotion on social media: behind-the-scenes updates
- ☐ Engage PR firm or begin outreach to local press

04 MONTHS

Before Opening

- ☐ Kitchen equipment and furnishings delivered
- ☐ Finalize training materials and operations manuals
- ☐ Set up accounting, payroll, scheduling systems
- ☐ Post job openings; begin recruiting
- ☐ Launch loyalty program pre-registration (optional)

03 MONTHS

Before Opening

- ☐ Construction finishes; inspections scheduled
- ☐ Begin staff interviews and hiring
- ☐ Test POS and technology systems
- ☐ Menu tasting panels and cost analysis
- ☐ Order uniforms, printed materials, signage
- ☐ Ramp up marketing: paid ads, press announcements

02 MONTHS

Before Opening

- ☐ Staff onboarding and training begins
- ☐ Deep clean and prep restaurant
- ☐ Receive final health/fire inspections
- ☐ Confirm all vendor and supplier contracts
- ☐ Launch grand opening campaign; finalize launch event plan

01 MONTH

Before Opening

- ☐ Soft opening rehearsals: friends/family nights
- ☐ Adjust staffing, menu flow, and service hiccups
- ☐ Launch full website with your menu and hours
- ☐ Begin setup to add restaurant to delivery and reservation platforms
- ☐ Confirm grand opening date and promotional offers

OPENING MONTH

- ☐ Hold soft launch(es) and collect feedback
- ☐ Execute grand opening event and promotions
- ☐ Monitor customer feedback closely and adjust operations
- ☐ Begin weekly performance reviews (sales, costs, guest experience)

Vision and Goal Setting

A vision statement is a concise declaration of what your restaurant aspires to become and the impact it aims to have in the community or industry. It serves as a guiding star for every decision you make, helping to align your team, attract loyal customers, and differentiate your brand from competitors. Having a clear vision statement is essential because it gives purpose to your daily operations and inspires both staff and guests with a sense of meaning.

Example Vision Statement

“To be the neighborhood’s go-to spot for quick, delicious meals made with fresh ingredients, served with a smile, and to create a positive impact in our local community.”

Example Goals

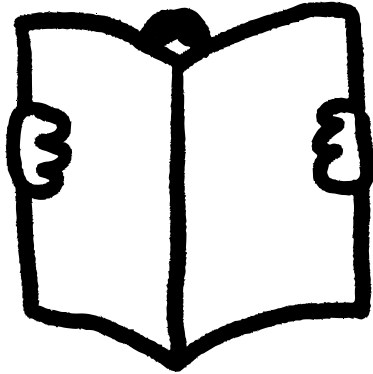
- Reach \$500,000 in sales in the first year of operation
- Have an employee retention rate of at least 85% by year-end
- Partner with two local organizations for community events within the first year

To write an effective vision statement, reflect on your core values, your ideal guest experience, and the unique role you want your restaurant to play in the market. Aim for a statement that is specific, inspirational, and forward-looking. Once your vision is in place, set measurable goals that support this direction. Good goals are actionable and time-bound, focusing on areas like guest satisfaction, revenue targets, team development, or community impact. Together, a vision statement and well-chosen goals provide a powerful framework for launching and growing a successful restaurant.

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CHAPTER 01

Start Here — Before You Break Ground



The foundation of any QSR is clarity around your concept — what you serve, who it's for, and why it matters. A well-defined concept makes every other decision more focused and effective. Great concepts succeed when they meet a real market need. Conducting research on your neighborhood, competition, and customer demographics helps you understand whether your idea fits. This means going beyond instinct: analyze foot traffic, evaluate nearby restaurants, and identify who your primary and secondary customers will be. Your goal is to match your vision with the realities of demand.

In this chapter, you'll use worksheets to clarify your QSR brand concept, build customer personas, and complete a market research and feasibility checklist. These tools will help you validate your idea and make confident, informed decisions before you commit significant resources.

QSR Concept

Defining your QSR brand concept is the crucial first step in building a restaurant that stands out and succeeds. This worksheet helps you clarify what makes your business unique, from your food and guest experience to your service model and competitive edge. Completing this section ensures every future decision is rooted in a clear, consistent vision.

Use the prompts below to put your vision into words and guide your team, partners, and future staff.

Restaurant Name & Working Title: What will you call your QSR (even if it's just a working name for now)?

Cuisine & Core Offerings: What type of food will you serve? Describe your menu highlights and signature items.

Target Guest/Customer Profile: Who are you designing this experience for? (Consider age, lifestyle, dining habits, preferences, etc.)

Service Model: How will guests order and receive their food? (e.g., counter service, drive-thru, kiosk, app-based, dine-in, delivery).

Unique Selling Proposition (USP): What sets your QSR apart from the competition? (Think: speed, quality, atmosphere, price, special diets, sustainability, local sourcing, tech integration, etc.).

Brand Personality & Experience: What feeling or experience do you want every guest to have? (Consider your vibe, decor, music, uniforms, guest interactions.).

*** Tip:** Refer back to this worksheet whenever making key decisions or communicating your brand to partners, investors, or staff. A strong, clear concept is the foundation for every successful QSR launch.

Market Research and Feasibility

Before you commit to a site or finalize your restaurant concept, it's essential to know your local market inside and out. This section guides you through the foundational research needed to make informed, confident decisions — helping you avoid costly mistakes and set your business up for long-term success.

You'll examine your competitors, understand your ideal customers, and analyze real foot traffic in your target area. By working through these checklists and prompts, you'll uncover hidden opportunities, spot potential risks, and gain the clarity you need to move forward or pivot, if needed.

★ **Tip:** Treat this research as the backbone of your business plan. Capture your notes and findings here so you can easily reference them throughout your planning process and share them with partners, investors, or lenders.

Competitive Analysis

Your [competitive analysis](#) will look at competitors across the market, especially those close to your location. Find out who has the biggest market share and how near competitors' restaurants are to yours. Once you've done your research, clearly explain the advantages you have over these competitor businesses and how you'll turn disadvantages to your favor.

List primary competitors: Identify 3-5 direct competitors in your target area (similar cuisine, service style, or price point). Write down their name, address, strengths, and weaknesses.

Visit and evaluate competitors: Dine in or visit as a guest. Take notes on customer volume and peak times, menu variety and pricing, service speed and staff engagement, online reviews.

Competitive differentiators: What unique value can you offer that competitors don't? Example: Healthier options, local sourcing, faster service, digital convenience.

Demographic Research

Few (if any) businesses have a perfect market position. There's always new competition, new trends, and new local developments that change the landscape in which you work — and that's just as true in the restaurant industry as any other. This is why it's important to be honest about the potential struggles you might face. Not only will it help you prepare, but it will also instill confidence in investors who can see that you take your business seriously.

Define target customer segments: Who are your ideal customers (e.g. office workers, families, students)?

Primary Segment: _____

Secondary Segment: _____

Gather local demographic data: Check census data, city resources, or commercial analytics for:

- Population density and growth trends
- Cultural concentrations
- Average age and household income
- Daytime vs. Nighttime population

Assess consumer preferences: What are trending cuisines, dining habits, or unmet needs in this area?

- Source: online surveys, neighborhood groups, and local forums

Foot Traffic Study

Include an analysis of your restaurant's location or potential locations. "Different locations, even within the same neighborhood, are going to perform differently due to other businesses in the area, the people that live in the area, public transportation and parking. And all of that tends to matter and influences whether your business is going to be successful or not," says restaurant consultant Tim Felkner.

Observe foot traffic patterns: Visit potential sites at different days/times; count passersby during key hours.

- Weekday AM/PM: _____ / _____
- Weekend AM/PM: _____ / _____

Identify traffic drivers: Note nearby businesses, parking availability, transit stops, schools, attractions, or offices that generate regular traffic.

Anchor businesses: _____

Community hotspots: _____

Seasonality and event impact: Are there seasonal surges (e.g., sports seasons, festivals, tourist months) or regular events that spike traffic?

Feasibility Summary

Opportunity assessment: Based on your findings, is there enough demand and differentiation to succeed?

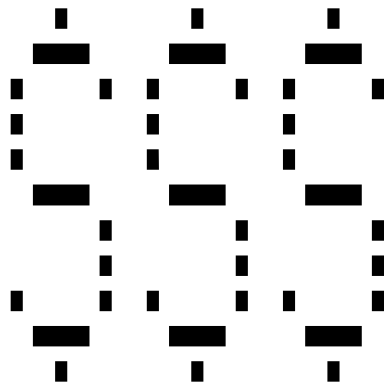
Strengths: _____

Risks: _____

Decision point: Are you ready to move forward with this location or concept?

- ☐ Yes, move forward
- ☐ No, re-evaluate options or collect more data





CHAPTER 02

Finding Space and Funding Growth

Opening a restaurant requires more than passion — it requires significant financial investment. For most sellers, securing funding is one of the biggest milestones, and often comes with heavy personal and professional risk. You may be drawing from savings, leaning on friends and family, or taking out loans with the help of a bank.

This section helps you make every dollar count by giving you tools to estimate startup costs, evaluate financing options, and prepare loan applications. You'll learn how to track must-haves versus nice-to-haves, prioritize spending, and communicate effectively with lenders, investors, and stakeholders.

Securing the Build

Opening a restaurant requires significant upfront capital for space, equipment, permits, staffing, and marketing. A [solid funding strategy](#) is key to getting started and staying afloat in the early months. Assess how much it will cost to open your restaurant and operate it. Be sure to [calculate your break-even point](#), and create a [financial analysis](#) as well to get a better understanding of your predicted cash flow.

✱ **Tips for success:**

- Start your financial planning early. Unexpected expenses are common in restaurant projects.
- Keep all cost estimates and financial documents organized in a dedicated digital or physical folder.
- Review your numbers with a professional before committing to any financial agreement or large purchase.

For informational purposes only: The following tools and resources are intended to help you organize and plan. For legal, tax, or financial advice, always consult a certified accountant, financial advisor, or attorney familiar with restaurant operations in your area.

FINANCING OPTIONS

SBA Loans: Small Business Administration-backed loans with competitive rates

Franchisor Assistance: Financing, grants, or preferred lenders from your franchise brand

Investors: Individuals, groups, or venture capital firms

Personal Capital: Personal savings, home equity, retirement funds

Other: Crowdfunding, grants, friends/family loans

KEY CONSIDERATIONS

Good credit required; detailed paperwork; slow process

Available to franchisees only; review all terms

May require equity/ giving up some control

Risk is yours; fast, but be realistic

Each comes with unique expectations and obligations

✱ **Note:** Carefully review repayment terms, interest rates, and impacts on your long-term ownership and cash flow. Consult a financial professional before committing.

Loan application checklist

Applying for a business loan involves preparation and documentation. Lenders want to see that you've planned thoroughly and can meet repayment obligations. Use this checklist to get organized before you apply.

Documentation to gather:

- ☐ Detailed business plan (including market analysis, financial projections)
- ☐ Personal and business credit reports
- ☐ Business licenses, franchise agreements, or lease documents
- ☐ Personal and business tax returns (typically 2–3 years)
- ☐ Bank statements (personal and business, 6–12 months)
- ☐ Legal entity paperwork (LLC, corporation, etc.)
- ☐ Owner resumes/references and personal financial statements
- ☐ Collateral documentation (if applicable)

Key application steps:

- ☐ Complete lender's application form
- ☐ Meet with lender/loan officer for pre-qualification
- ☐ Submit documentation package
- ☐ Schedule and complete any required interviews
- ☐ Address any follow-up requests from the lender

Important financial ratios to know:

(Your lender may ask for or calculate these—prepare ahead)

- ☐ **Debt Service Coverage Ratio (DSCR):** Can your cash flow cover loan payments?
- ☐ **Loan-to-Value Ratio (LTV):** If secured by property/equipment, how much are you borrowing relative to asset value?
- ☐ **Personal Debt-to-Income Ratio:** Your ability to take on new debt as an individual

 **Tip:** Start gathering documentation early — loan processing can take several weeks or even months.

Location Requirements

“Yes, you want to get open. Yes, you want to make that first sale. But you have to think about, how do I get to profitability? How do I open up my next door? How do I get that next upgrade to the patio? That’s where you start and then you let technology help you achieve those goals.”

MING-TAI HUH

*Restaurateur and
Head of Product at Square*

Finding the right space marks the beginning of the sprint to opening day — and it’s one of the most stressful decisions sellers face. Location can make or break a QSR, but real estate is often opportunistic, and restaurateurs shouldn’t also have to be real estate experts. The following tools help you evaluate spaces for visibility, access, cost, and functionality, whether you need a walk-up window, bar area, or open kitchen. You’ll also learn how to assess renovation needs, gather details during site visits, and understand lease terms so you can negotiate with confidence alongside agents, contractors, and property managers.

Mark your must haves:

- | | |
|---|---|
| ☐ High visibility | ☐ Delivery access/loading |
| ☐ Easy customer access | ☐ Co-tenancy (anchor stores, traffic generators) |
| ☐ Parking | ☐ Space layout/suitability |
| ☐ Outdoor space | ☐ Signage opportunities |
| ☐ Sidewalk accessibility | |

***** ***Tip:** Be realistic about your non-negotiables. Prioritizing needs over wants can widen your search and speed up your decision.*

Lease Negotiation Guide

Unlike residential leases, a commercial lease can be complex and full of critical details. Understanding key terms, risks, and negotiation points can help you protect your business for the long term.

Key clauses to review/negotiate:

- **Lease term and renewal options:** How long is the initial lease, and can you extend it?
- **Rent structure and increases:** Is rent fixed, percentage-based, or subject to annual increases? How is CAM (common area maintenance) calculated?
- **Tenant improvement (TI) allowance:** Will the landlord contribute to construction or renovation costs?
- **Assignment and sublease rights:** Can you transfer the lease if you sell or relocate?
- **Exclusive use provisions:** Are you protected from direct competitors opening in the same center?
- **Personal guarantees:** Are you personally liable for rent or defaults?
- **Repair and maintenance responsibilities:** Who is responsible for building systems, roof, and major repairs?
- **Early termination and default penalties:** What happens if you need to close early or break the lease?
- **Permitted use and restrictions:** Ensure your intended restaurant operation is allowed.
- **Signage rights:** Where and how can you display signs?

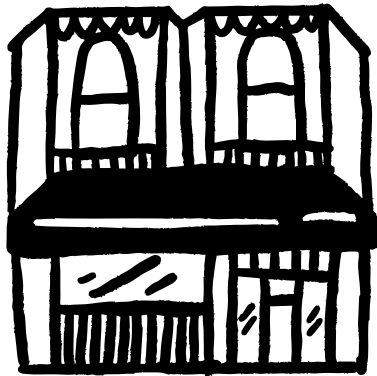
Common considerations for QSRs:

- Exterior improvement allowances
- Grease trap/venting installation permissions
- Exclusive use for your restaurant category
- Dedicated parking or curbside pickup spots
- Limited co-tenancy or “go-dark” clauses for anchor tenants

* **Tip:** Never sign a lease based only on a tour or verbal promises. Get every agreement in writing, and involve a commercial real estate attorney to review and negotiate terms.



➤ **Disclaimer:** This guide is informational and does not replace legal advice. Leasing laws and norms vary by location and property. Professional guidance is always recommended.



CHAPTER 03

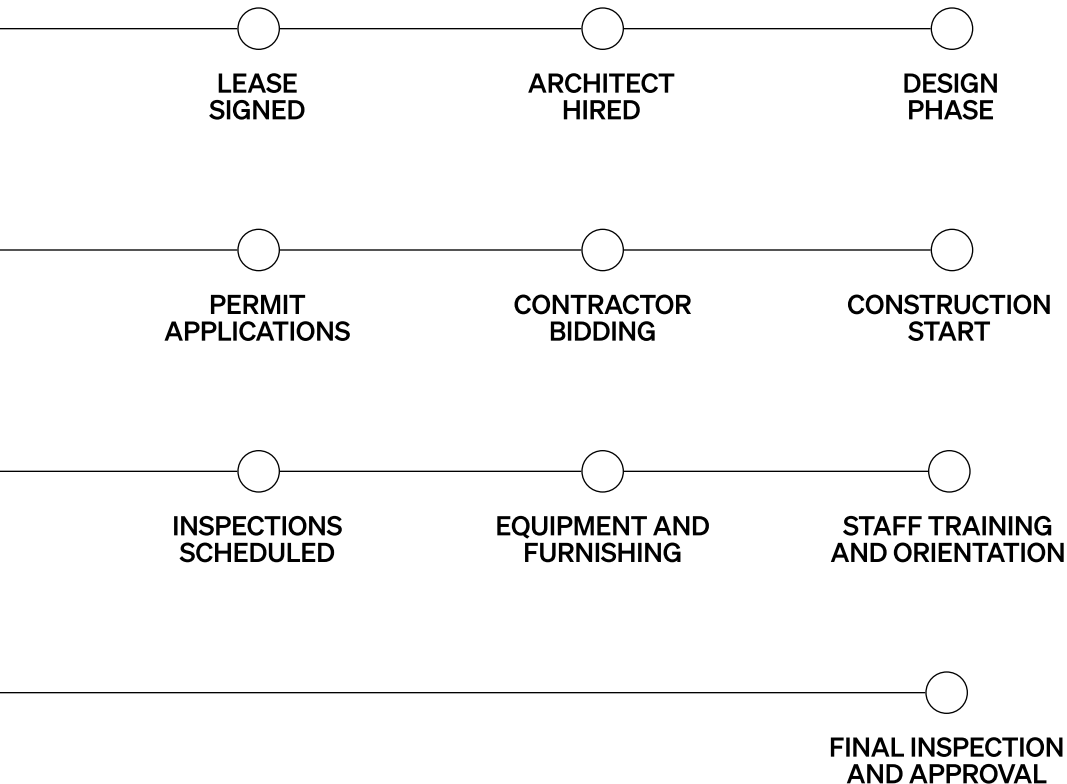
Construction Chaos and Design Vision

Once you've secured your space, you move into the complex phase of turning it into a fully functional, compliant restaurant. This section guides you through planning your build-out, selecting architects and contractors, defining your design requirements, and tracking permits.

You'll also get a clear overview of health and safety standards so you can meet regulatory requirements without delays. Whether you're upgrading an existing restaurant or starting from scratch, this section gives you the tools to manage timelines, vendors, and compliance like a pro.

The Build (Literally)

Transforming your QSR vision into a functional, compliant physical space is a multi-phase process. You'll need to organize your project timeline, select the right professionals, detail your design requirements, manage permitting, and ensure your restaurant meets health and safety standards. Use the worksheets and checklists to keep your build-out on track and ready for a smooth opening.



✳ **Note:** check local city and state permitting laws.

Permits and Approvals

Permit/License/Approvals

- | | |
|---|--|
| ☐ Business License | ☐ Building Permit |
| ☐ Employer Identification Number | ☐ Signage Permit |
| ☐ Food Service License | ☐ Liquor License |
| ☐ Health Department | ☐ Waste Management |
| ☐ Fire Department | ☐ ADA Accessibility |
| ☐ Zoning/Land Use | ☐ Utilities |

How to make sure you pass inspections:

- **Work with experts:** Partner with architects and contractors who have proven experience in hospitality projects.
- **Follow approved plans:** Stick to approved floor plans, materials, and equipment.
- **Verify Safety Systems:** Confirm that fire, plumbing, electrical, and ventilation systems are fully tested and functional.
- **Organize paperwork:** Keep all permits, certifications, and service contracts accessible and up to date.
- **Do a mock inspection:** Conduct a full walkthrough with your contractor to identify and resolve issues ahead of time.



CHAPTER 04

Designing Your Restaurant's Identity

Your brand is more than a logo. It's the story you tell through visuals, packaging, signage, and even the merch your customers take home. Creating consistency across these elements helps you stand out, reinforce your identity, and build loyalty.

Can You Taste a Brand?

A moodboard visually defines your restaurant's personality, setting the tone for all brand decisions. Collect images, textures, fonts, and color palettes that represent your restaurant's vibe. Use this template to document what belongs and why.

Element	Examples
Colors	<i>Warm, earthy tones? Bold primaries?</i>
Typography	<i>Clean, modern sans-serif, playful script?</i>
Photography style	<i>High-contrast, natural light, lifestyle shots</i>
Textures & materials	<i>Wood, steel, ceramics, neon, greenery</i>
Inspiration brands	<i>Other restaurants, retail, fashion, culture</i>
Words/feelings	<i>Cozy, bold, inclusive, vibrant, minimal</i>
Music	<i>Slow, fast, Jazz, Pop</i>

Attach/paste/sketch your moodboard here:

Packaging and Signage Audit

Your packaging and signage are often the first physical touchpoints of your brand. They communicate quality, sustainability, and style. Use the checklist to plan what you'll need, then note design considerations to help guide you as you start creating your packaging and signage.

Packaging Checklist

- ☐ Takeout bags
- ☐ Cups & lids (hot/cold)
- ☐ Food containers (bowls, clamshells, wraps)
- ☐ Napkins & cutlery
- ☐ Stickers or labels
- ☐ Branded wraps/sleeves
- ☐ Delivery-friendly packaging

Signage Checklist

- ☐ Exterior sign (lit or unlit)
- ☐ Menu board (digital or printed)
- ☐ Interior wayfinding (restrooms, order pickup)
- ☐ Window decals or A-frame sidewalk sign
- ☐ Digital signage/screens
- ☐ Digital logos and typefaces

Merch Planning

Merchandise builds brand awareness, deepens customer loyalty, and creates an extra revenue stream. Use this template to brainstorm and prioritize merch ideas.

Merch Idea	Why it Fits Your Brand	Design Notes
T-shirts	Guests rep the brand in public	Logo + fun phrase
Reusable totes	Eco-friendly, practical	Illustration + Logo
Branded chopsticks	On-theme, playful	Custom packaging sleeves
Hats/Beanies	Wearable + seasonal	Embroidered Logo
Mugs/Tumblers	Everyday use, recurring touchpoint	Bright colors + tagline

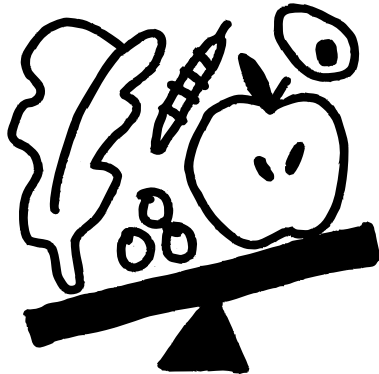
Merch Idea	Why it Fits Your Brand	Design Notes

“Do you realize how many times your guests will see servers and busboys throughout their meals? This gives you a huge branding opportunity! How you outfit your team ties into the vibe you create. There are all kinds of possibilities, but whatever you choose, be intentional about how you want your team and your customers to feel.

For example, it kills me to go into a restaurant and see that the owners have lavished attention on, say, the front door experience, but ignored other opportunities to cultivate the customer experience they want to create.

Think about what your customers see and hear when they walk in the door, while they’re waiting for a table, once they’re seated, when they walk to the restroom. Where do you want their eye to go? What should the lighting be like? What kind of music do you want playing?”

ALEX MCCRERY
Co-owner and Chief Creative
Officer at TILIT



CHAPTER 05

Building Your Menu

Designing your menu might be one of the most creative parts of opening a restaurant, but it's also where profitability is shaped. From core offerings to limited-time specials and dietary-friendly options, every choice impacts your bottom line.

This section walks you through recipe standardization, costing, and supplier evaluation, ensuring quality, consistency, and cost efficiency. You'll also find tools to track inventory and minimize waste, helping you maintain profitability long after your grand opening.

Layers of Flavor, Layers of Story

Your menu and supply chain aren't just operational necessities — they're key drivers of profit, guest satisfaction, and long-term restaurant viability. This section helps you develop a competitive menu, establish smart supplier partnerships, and build cost controls that support both great food and a healthy bottom line.



Tips for menu and cost control:

- *Standardize every recipe, and then train staff to execute them exactly.*
- *Regularly compare supplier prices and service.*
- *Track inventory and waste for the top 10-15 items weekly for the greatest impact.*
- *Use your costing data to inform menu pricing and portioning.*

Menu development considerations

[Your menu](#) is the centerpiece of your restaurant and should reflect your concept and brand. But it's also a marketing tool that can help convince new customers to try your restaurant. Here are some tips for building your restaurant menu:

- **Concept alignment:** Ensure your dishes reflect your restaurant's theme, cuisine, and brand identity, and tailor offerings to your target audience's preferences.
- **Balance and variety:** Include diverse options (vegetarian, vegan, and gluten-free, for example) to cater to different diets, and offer a mix of flavors, textures, and portion sizes.
- **Pricing strategy:** Research competitor pricing and perceived value, and make sure to avoid under or overpricing. Calculate your food costs, and aim for a 25-35% food cost ratio to maintain profitability.
- **Ingredient sourcing:** Partner with reliable suppliers for consistent, high-quality ingredients, and consider seasonal availability and local sourcing for freshness and marketing appeal.
- **Menu design:** Organize logically (drinks, starters, mains, desserts) for easy navigation, and use concise, enticing descriptions. Limit choices to reduce decision fatigue and kitchen complexity. If you have high-profit items, strategically place them in prime spots on the menu, highlighting them with bold fonts or icons.
- **Operational feasibility:** Make sure your dishes align with kitchen size, equipment, and staff skill level.
- **Testing and refinement:** Conduct staff tastings, gather customer feedback, and set yourself up to adapt to seasonal availability as well as ingredient costs. Identify underperforming menu items and look for opportunities for specials or menu rotations.

Menu Item Cost Calculator

When you put an item on your menu, knowing the true cost of your ingredients is key. This worksheet guides you through calculating the actual cost per serving, so you can price your menu items confidently and protect your margins.

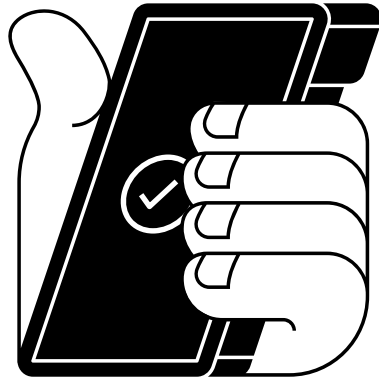
For each ingredient, enter the total order cost and number of portions created from that order. Divide the total order cost by the number of servings to find the ingredient cost per serving. Once you've calculated this for all ingredients, add them together to see your true cost per serving. From there, apply your desired markup to ensure your menu stays profitable.

	Menu Item:		
	For example, a gross of eggs, a case of steaks, or a gallon of cooking oil.	For example, if a case yields 12 portions, enter 12 here.	Cost per portion for each ingredient.
Ingredient List	Total Order Cost from Vendor	Servings per Order	Ingredient Cost Per Serving
Total Menu Item Cost:			

Supplier Evaluation Checklist

[Selecting and managing suppliers](#) impacts cost, reliability, and food safety. Use this checklist to assess new vendors and periodically review existing relationships. [Square Order Guide](#) makes it even easier by bringing all your vendors and prices into one place, so you can instantly see the best deal.

	Yes	No
Product quality	☐	☐
Competitive pricing/terms	☐	☐
Order minimums and flexibility	☐	☐
Local/regional options available	☐	☐
Specialty items offered	☐	☐
Food safety certifications	☐	☐
Responsive customer service	☐	☐
Easy ordering/reordering process	☐	☐
References from other QSRs	☐	☐
Sustainability/ethical sourcing	☐	☐
Backup supplier available?	☐	☐



CHAPTER 06

Tech That Powers Hospitality

Choosing and setting up your restaurant technology is essential for managing orders, payments, and daily operations. This section helps you select the right POS system, configure primary tools like accounting, payroll, and inventory management, and decide when to add secondary tech such as loyalty programs and QR code menus.

POS-itive Energy

Opening a QSR means running at speed: multiple order channels, high transaction volume, and fast-moving kitchens. Your POS should support this environment, not slow it down. Below are the core capabilities every QSR should look for in a POS.

Capabilities that matter most:

- **Fast, seamless ordering across channels:** QSR success is built on speed and consistency. Simplified order management keeps the line moving and ensures accuracy. Square consolidates dine-in, takeout, delivery, and online orders into a single dashboard — no juggling multiple tablets. This helps staff process orders quickly during peak rushes, reducing errors and improving guest satisfaction.
- **Kitchen Display System (KDS):** In busy QSR kitchens, communication breakdowns slow service and increase waste. A synced KDS keeps BOH and FOH aligned. Digital ticket routing ensures the right orders get to the right stations in real time. Square supports high-volume kitchens with features like coursing, modifiers, and prep times.
- **Branded online ordering:** Direct online ordering protects your margins, while integration with delivery platforms expands your reach. Square lets you offer direct, commission-free orders through your own site and integrates seamlessly with third-party delivery apps, reducing the risk of missed or duplicate orders.
- **Self-service kiosks:** Kiosks improve throughput and help manage labor costs — a critical challenge in QSRs. With kiosks, guests can place orders themselves, freeing up staff during peak periods, which supports upselling with on-screen prompts and photos.
- **Loyalty, marketing, and customer retention:** Turning first-time guests into repeat customers is essential. With integrated tools, you don't need separate systems to manage retention. Square's built-in CRM tools track visits and spending and allow you to launch loyalty programs, gift cards, and targeted campaigns directly from your POS.
- **Reporting and analytics:** Data-driven decisions help QSR operators refine menus, optimize staffing, and increase profitability. Square provides real-time dashboards for sales, category performance, and labor costs. It's also important to track busiest hours, top sellers, and profitability at a glance.
- **Payroll and team management:** Labor is one of the highest costs in a QSR. Efficient scheduling and payroll reduce errors and save time. You want a POS that allows staff to clock in/out directly on the platform. Square provides integrated scheduling, timecards, and payroll to streamline workforce management.
- **Multi-location scalability:** If your QSR grows to multiple locations, you'll want systems that scale with you. Look for centralized controls for menus, pricing, and reports across locations and a POS that makes it easy to roll out promotions or menu changes consistently.
- **Banking and cash flow support:** Restaurants run on tight margins. Fast access to funds helps cover payroll, vendors, and emergencies. Square provides instant transfers for same-day access to funds and Square Banking tools integrate directly with sales for simplified financial management.



Selecting the right POS (point-of-sale) system is a critical decision for your QSR. It's the backbone of operations — from taking orders quickly to managing inventory and analyzing performance. Your POS should match your current needs and scale with your dream. This worksheet walks you through evaluating your priorities, comparing systems, and planning next steps.

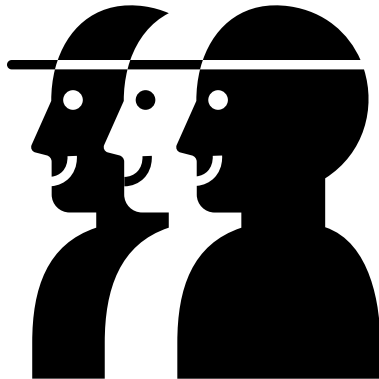
	POS 1	POS 2	NOTES
Order workflows are intuitive and fast during peak times			
KDS is responsive and reflects real-time order changes			
Branding and menu updates sync across platforms instantly			
Loyalty and marketing tools are easy to set up and manage			
Reporting dashboards are clear and actionable			
Payroll/team scheduling integrates without manual data entry			
Banking and payouts go directly into your business account			
Expansion tools support new locations with centralized controls			
Hardware options (handheld, kiosk, register) fit your format			

“Square gives me the confidence of knowing I'm not second guessing... The clock out, the schedule, and like you said, the labor and knowing what you need to do. My brain says okay, you have pre-orders, you have an employee now. Labor is connecting the two.

So here we are seeing what we need for the whole week and how we can divide and conquer as it relates to prep and control labor on a different level because we have our whole week ahead of us... it gives me confidence as an operator to see we can forecast our week because of what's been ordered. I can order that and we can divide and conquer when it comes to prep, connecting it to labor.”

RASHEEDA PURDIE

Owner of Ramen by Ra



CHAPTER 07

Building the Right Team

Your staff is the heartbeat of your restaurant. This section covers the essentials of recruiting, hiring, onboarding, and training your team — ensuring they're prepared to deliver great guest experiences from the start.

You'll learn how to create job postings, conduct interviews, and build a training program that covers both service and compliance. With the right team in place, you'll set the stage for smooth operations and strong culture.

People, Payroll, and the Plan

Your staff will ultimately make or break your restaurant, so do your due diligence before you hire. Make a list of how much support you need to run your front and back of house efficiently. Once hired, make sure your employees understand what's expected of them and that you provide an environment that will encourage retention:

- Define roles clearly (e.g., management team, kitchen staff, front-of-house staff, bar staff, etc.).
- Thoroughly train staff on service standards and safety protocols.
- Foster a positive working environment.

You'll also need to determine if you want to [process payroll yourself](#) or use [payroll software](#). Just keep in mind that [restaurant payroll](#) can be complex, especially with varying state, federal, and local laws and regulations around wages and tips. Make sure you understand the rules for your state and locality.

To run efficiently, your restaurant will need to operate with a core team, split between front-of-house (FOH) and back-of-house (BOH) staff. Describe what your team will look like. Perhaps the BOH team will include an executive chef, one or two sous chefs, line cooks, and prep cooks. FOH might consist of a general manager, an assistant manager or two, servers, hosts, and bartenders (if you plan to serve alcohol), supported by a dedicated busser and food runner during peak hours. The idea is to balance expertise and flexibility, so you can scale up with part-time staff during weekends and holidays.

You'll want to hire experienced staff for leadership roles (chefs, managers) while training entry-level positions in-house to align with your service standards. Note in your [restaurant business plan](#) how all your employees will undergo structured onboarding and cross-training in multiple stations to ensure adaptability during rushes. You might include ongoing workshops and performance incentives to keep skills sharp and morale high.

To retain top talent, you'll likely want to offer competitive wages, tip transparency, and opportunities for advancement, like promoting line cooks to sous chefs. Detail your scheduling plan, whether that's a mix of set rotations (for key roles) or flexible shifts to accommodate demand.



"All of the things that Square offers really allow you to do everything, from top to bottom. The tools that are helping me manage the staff are really important for me as the operator... If you have happy employees, you're likely to have happy guests."

MING-TAI HUH

*Restaurateur and Head
of Product at Square*

Interview Question Prompts

Question

Why do you want to work here?

How do you define a good shift and what makes it memorable?

A guest is celebrating. What would you do to elevate the moment?

Tell me about a time you went above and beyond for a customer.

Tell me about the toughest shift you've worked. How did you handle it?

How do you stay calm and productive during a rush?

How do you support your teammates when things get hectic?

What traits make a team strong in a restaurant environment?

What does responsibility mean in this job and how do you embody it?

What to listen for

Personal connection to your restaurant, curiosity about the concept, passion for service or hospitality.

Focus on team collaboration, guest satisfaction, efficiency, and a sense of shared success.

Thoughtfulness, creativity, genuine interest in hospitality, and understanding of appropriate gestures within your brand.

Specific actions, situational awareness, emotional intelligence, and accountability.

Calm under pressure, communication, problem-solving, and not blaming others.

Time management, deep breathing or mental tricks, teamwork, and clarity in chaos.

Self-awareness, empathy, stepping in without being asked, prioritizing team success.

Communication, respect, trust, hustle, dependability — framed in real-life examples.

Punctuality, owning mistakes, staying consistent even without supervision.

Onboarding and Training Checklist

Onboarding

☐ Give new hire a warm welcome

☐ Add employee to internal systems:

- Payroll software
- POS system
- Shift scheduling
- Communication tools

☐ Collect new hire paperwork:

- Form I-9 + valid ID
- Form W-4 (employees) / W-9 (contractors)
- Direct deposit details
- NDA or other business-specific forms
- Report new hire to state labor department (if required)

☐ Share employee handbook:

- Include company policies, values, benefits
- Request acknowledgment of receipt (best practice)

☐ Introduce company mission and history

Training

☐ Train on necessary tools and systems:

- POS, terminals, KDS, cameras, etc.

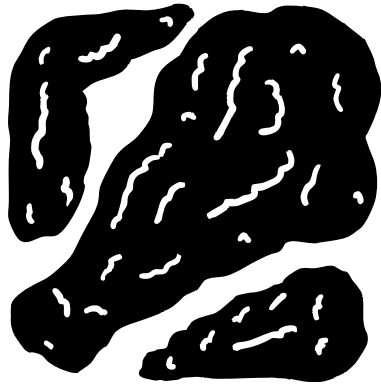
☐ Set up job shadowing with experienced team members

☐ Provide a reference guide:

- FAQs, lunch spots, extra supplies
- Workplace map
- “Who’s who” with contact info and suggested meeting topics

☐ Write role-specific goals and expectations:

- 30-day: Basic tasks
- 60-day: Intermediate responsibilities
- 90-day: Deeper role proficiency



CHAPTER 08

The Flow is the Flavor

Even the best restaurant needs customers to succeed. This section focuses on building awareness and excitement before your doors open. From setting up your website and social media to securing PR and adding your restaurant to delivery and reservation platforms, you'll find tools and timelines to maximize your launch visibility. Use these strategies to attract your first guests and turn them into loyal customers.

Steps of Service

Step 1: Welcome and orientation

The first interaction sets the tone. Whether it's a host at the door or a cashier at the counter, a warm, confident greeting makes guests feel valued from the start. If you offer table service or partial seating, guide guests clearly to their spot, confirm party size or preferences, and ensure the space is clean and inviting. Present menus (digital or printed), and offer assistance or suggestions as needed.

Step 2: Taking the order

Accurate and efficient order-taking is crucial. Staff should be able to guide guests through the menu, answer questions, and offer recommendations. Whether taking orders in person or via digital kiosk, clarity and speed are key. Make sure to note allergies, modifications, or dietary needs, and double-check the order before sending it to the kitchen.

Step 3: Food and beverage delivery

Orders should be delivered quickly and correctly, whether brought to the table or picked up at the counter. Presentation matters — even in a fast-casual setting. Ensure packaging or plating looks neat, special requests are honored, and orders are staged for efficient pickup. Timing should be coordinated so meals and drinks arrive in sync.

Step 4: Mid-meal check-ins (if applicable)

If your model includes dine-in with service, check in briefly once guests have started eating. Refill drinks, clear trash, and address any needs without hovering. Staff should read body language and avoid interrupting conversation, keeping the balance between attentiveness and space.

Step 5: Dessert or add-on offers

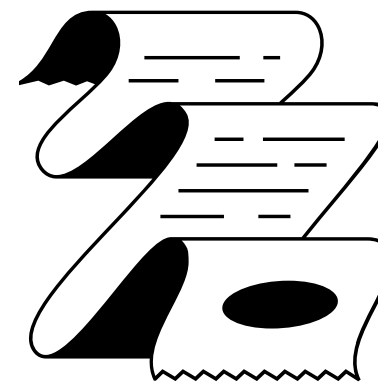
The end of the meal is a chance to suggest desserts, coffee, or grab-and-go snacks. Highlight signature items or seasonal offerings. If customers are dining in, present the options and timing clearly. For takeout or delivery, consider offering dessert at checkout or packaging flyers/promos for next time.

Step 6: Payment and farewell

The check process should feel smooth and intentional. Whether customers pay at the start, through mobile apps, or after their meal, ensure accuracy, speed, and multiple payment options. Before guests leave, offer a genuine thank you and invite them back. Final impressions matter — this moment can shape repeat visits.

Step 7: Reset and reflect

Once guests leave, the work continues. Clean and reset tables or pickup stations promptly. Restock condiments, utensils, and supplies. Review service flow with your team and address feedback. Use downtime to prep for the next rush and maintain consistency throughout shifts.



Pre-Launch Marketing Calendar

90 DAYS

Before Opening

- ☐ Finalize branding (logo, colors, signage)
- ☐ Purchase domain & launch “Coming Soon” website with email newsletter sign-up for opening day updates
- ☐ Set up social media accounts and begin posting teasers

60 DAYS

Before Opening

- ☐ Post behind-the-scenes build-out content
- ☐ Announce projected opening date window
- ☐ Begin outreach to local press and influencers

30 DAYS

Before Opening

- ☐ Launch locally targeted social media ads
- ☐ Send press release to local media
- ☐ Offer early sign-up for loyalty program with incentive

14 DAYS

Before Opening

- ☐ Host invitation-only friends & family nights
- ☐ Partner with local businesses for cross-promotions
- ☐ Partner with local business organizations or industry organizations

OPENING WEEK

- ☐ Post daily social updates (menu highlights, team intros)
- ☐ Run opening week promotions
- ☐ Engage with every customer review and tag

POST-OPENING

Weeks 1-4

- ☐ Share guest photos/reviews
- ☐ Continue local press outreach with first-month milestones



Loyalty Programs for QSRs

Types of loyalty programs for QSRs:

- **Punch card–style rewards:** A digital punch card program offers an easy way to reward repeat visits without overwhelming operations. With 57% of QSRs now offering digital loyalty programs, many choose this low-barrier option to start building relationships quickly. Square Loyalty digitizes the classic “buy X, get one free” approach so customers earn automatically at checkout, keeping engagement high while eliminating the hassle of physical cards.
- **Points-based loyalty:** Points-based programs give customers a clear path to earning rewards with every purchase, making them versatile for both single-location cafés and multi-unit brands. This approach is especially effective for operators who want flexibility to scale over time, starting with simple redemptions and expanding into more personalized offers.
- **Tiered programs:** Tiered loyalty programs encourage higher spend and frequent visits by rewarding customers as they progress through different levels. This keeps the experience dynamic and rewarding, while allowing brands to differentiate themselves in a crowded market.
- **Experience-based loyalty:** As loyalty evolves, more operators are shifting from purely discount-driven programs toward exclusive experiences — such as early menu access, members-only products, or limited-event invitations. This approach resonates with consumers seeking unique and special interactions, beyond savings alone. Square Loyalty, paired with Square Marketing, enables QSRs to target top customers with these exclusive offers, delivering memorable moments that strengthen emotional connection.
- **Integrated omnichannel programs:** With digital ordering on the rise, omnichannel loyalty programs ensure customers earn rewards no matter how they order — whether in-store, online, or via delivery. This unified approach is critical for engaging both first-time guests and long-term regulars across all touchpoints. Square Loyalty integrates seamlessly with Square Online, POS, and select delivery partners, creating a consistent experience and a single customer view that supports smarter, data-driven engagement.

Expert insights from Ming-Tai Huh:

1. Make every guest feel like a regular

Use technology to add a personal touch — even at self-serve kiosks. Recognize repeat customers, greet them by name, and make it easy for them to redeem loyalty rewards.

2. Invest in the right technology

Prioritize solutions that enhance both digital marketing and the in-person guest experience. Focus on platforms that integrate feedback, loyalty, and transaction data.

3. Build and test with a blueprint

Before rollout, collaborate with top managers to pilot new programs. Ensure staff buy-in and refine the program before scaling.

4. Balance new and returning guest strategies

For new guests: Promote your mission, create compelling offers, and target messaging effectively.

For regulars: Actively seek feedback, respond personally, and amplify your brand's biggest fans with tools and incentives to share their positive experiences.

5. Collect & correlate the right data

Use guest feedback tools (like receipt surveys) to spot menu or service issues — and fix them fast. Correlate transaction and location data to tailor marketing, menu, and operations for specific customer segments.

6. Design “no-brainer” loyalty programs

Keep enrollment frictionless. Ideally, just one tap at checkout. Go beyond discounts. Create exclusive experiences and offers for members, making them feel valued and special.

7. Use AI and analytics for smarter growth

Leverage AI tools to analyze trends and segment data, helping to pinpoint what's working and where you can grow loyalty and revenue.



CHAPTER 09

The Final Sprint

Opening day is the culmination of months of work, but it's also the start of your restaurant's real journey. This section prepares you for a smooth launch with soft opening strategies, final service rehearsals, and readiness checklists.

You'll learn how to spot and fix operational issues before the big day and ensure that your team, kitchen, and systems are ready to deliver the experience you've envisioned.

Soft Opening Checklist

A soft opening is your rehearsal before the grand performance. It gives you and your team the chance to test systems, workflows, and guest experience in a lower-stakes environment, while still operating as if it's the real thing. Unlike a grand opening, the goal isn't to impress everyone but to learn, adjust, and refine.

During a soft opening, you'll invite a limited group of guests, like friends, family, neighbors, or community partners to experience your restaurant. Their feedback, combined with your team's observations, will help you uncover gaps in training, menu execution, technology, and guest flow before the full launch.

Think of it as a controlled stress test: mistakes are expected, and every lesson learned here saves you time, money, and customer goodwill later. Use the checklist below to stay organized and ensure your soft opening gives you the insights you need to start strong on opening day.

Planning and invitations:

- ☐ Select dates for soft opening (1–3 days recommended)
- ☐ Define guest list (friends/family, local partners, community leaders)
- ☐ Send invitations or confirmations
- ☐ Decide pricing strategy (free, discounted, or full price)
- ☐ Set guest capacity limits per seating/shift

Operations and staffing:

- ☐ Train staff on full menu, POS, and service flow
- ☐ Assign roles for FOH/BOH, greeters, and runners
- ☐ Test scheduling to mirror expected opening hours

- ☐ Prepare staff uniforms, checklists, and materials
- ☐ Hold pre-shift meeting to align on goals and expectations

Menu and kitchen readiness:

- ☐ Finalize menu items for soft opening (consider smaller test menu)
- ☐ Standardize recipes, portion sizes, and plating guides
- ☐ Order sufficient inventory (track waste closely)
- ☐ Test kitchen equipment and prep systems
- ☐ Run mock service or staff tasting prior to guest arrival

Technology and systems:

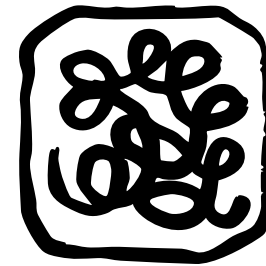
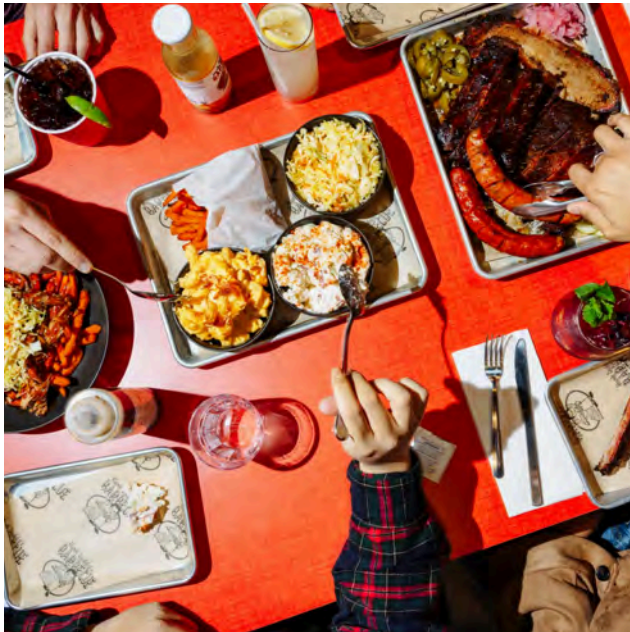
- ☐ Test POS system with sample orders
- ☐ Check Kitchen Display System (KDS) routing
- ☐ Test payment processing (credit, debit, contactless)
- ☐ Ensure online ordering/delivery integrations work
- ☐ Back up Wi-Fi, printers, and hardware

Guest experience:

- ☐ Prepare signage, menus, and ordering instructions
- ☐ Set up seating and ensure ADA accessibility
- ☐ Test customer flow from entry to pickup or table
- ☐ Set service timing goals (e.g., under 7 minutes for counter service)
- ☐ Collect guest feedback with cards, QR codes, or digital survey

Post-event review:

- ☐ Debrief with staff immediately after service
- ☐ Review sales, timing, and food waste data for adjusting inventory
- ☐ Capture guest feedback and identify recurring themes
- ☐ Document fixes for systems, menu, or training gaps
- ☐ Update grand opening plan based on lessons learned

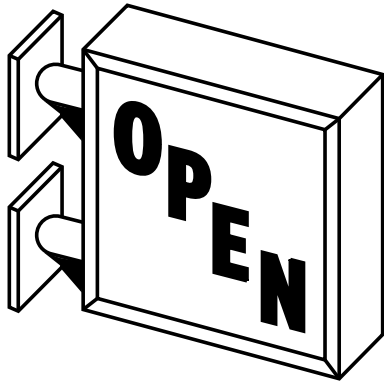


“So much about brand and restaurants in general is how you make your guests feel, right? Like people might not remember the exact meal, but they will remember how they felt when they had that experience.”

JENNY GOODMAN

*Host of The Build
and CEO of TILIT*

* **Tip:** Don't aim for perfection. Every mistake during a soft opening is a win if it helps you improve before the grand opening.



CHAPTER 10

What You Built

This space is yours to pause and reflect on your restaurant journey. You've listened to the advice and stories shared on The Build, and you've adapted them to fit your own path. Now it's time to recognize the progress you've made, wins you've achieved, and the lessons you've turned into a story that's distinctly your own.

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