

Restaurant Name

*Restaurant Concept*

*(Company Name)*

*(Street Address)*

*(City, State, Zip Code)*

*(Date Created)*

*[Enter Your Contact Information]*

(Name)

(Email)

(Phone Number)

(Website)

# Table of Contents

[Restaurant Name](#)

[Restaurant Concept](#)

[Table of Contents](#)

[1.0 Executive Summary](#)

[1.1 Business Objectives](#)

[1.2 Keys to Success](#)

[2.0 Business Description](#)

[2.1 Startup Cost Summary](#)

[2.2 Sample Menu](#)

[2.3 Location & Facility](#)

[2.4 Ownership & Management Profiles](#)

[3.0 Food, Products & Services](#)

[3.1 Product Description](#)

[3.2 Daily Operations and Production](#)

[3.3 Pricing and Profitability](#)

[4.0 Market & Industry Analysis Summary](#)

[4.1 Market Segmentation](#)

[4.2 Competition](#)

[5.0 Marketing Strategy](#)

[5.1 Competitive Advantage](#)

[5.2 Marketing Strategy & Positioning](#)

[5.3 Traditional Marketing & Advertising](#)

[5.4 Online Marketing & Advertising](#)

[6.0 Financial Plan & Projections](#)

[6.1 Startup Costs](#)

[6.2 Break-even Analysis](#)

[6.3 Projected Profit & Loss](#)

[6.4 Projected Cash Flow](#)

[6.5 Projected Balance Sheet](#)

[7.0 Conclusion](#)

[8.0 Appendix](#)

# 1.0 Executive Summary

*This one-page section should summarize the entire business plan. Be descriptive here; you want bank loan officers or potential investors to keep reading. Include highlights of your ownership team, your restaurant concept, what makes you competitive in the market, and your path to profitability.*

*It's a good idea to write this section last.*

## 1.1 Business Objectives

*What do you want your restaurant to achieve? Include at least five objectives. Make them specific and actionable.*

*It is common to see restaurant business objectives around a specific targets for sales volume, profit level, customer traffic, and number of hours worked by owner. If you have plans to expand to multiple revenue streams (like catering or online ordering) or multiple locations, you should include those objectives here, as well.*

## 1.2 Keys to Success

*List at least three factors that will make your restaurant a success. Are your hours of operation a good fit for the neighborhood? Do you offer a product or service that sets you apart from nearby competitors?*

## 2.0 Business Description

*Open with a few paragraphs describing your restaurant, including essential facts like name, address, hours of operation, square footage, and enticing details about your proposed location (this can be a location where you have secured a lease or merely one a space that is a strong contender).*

### 2.1 Startup Cost Summary

*Briefly, how much will it cost to start your business? Consider creating a chart with each expense.*

### 2.2 Sample Menu

*Include a sample menu of your food and beverage offerings here. Include a few mouthwatering images of your food or beverages if you have them.*

### 2.3 Location & Facility

*Where is your business located? What makes the location a benefit? What's the facility like? How will the facility increase your likelihood of success? List leasing details and a floor plan if you have them. If you don't have a specific location finalized, describe the location you are looking for and list a couple of strong options that are currently available for lease.*

### 2.4 Ownership & Management Profiles

*This is where you describe yourself and your management team. Be sure to describe the management structure of your restaurant here as well. That can be as simple as listing each person's title in their biographical statement. As the owner, will you also work in the restaurant as the chef or general manager? Or do you have a chef and general manager on staff?*

*Focus on your and your principals' relevant industry experience in your descriptions. If you are working with an experienced consultant, list them as well.*



## 3.0 Food, Products & Services

*Write a paragraph with a high-level overview describing the drinks, food, and products you intend to sell.*

### 3.1 Product Description

*This is a deeper look at your complete product line and all of your revenue streams. What types of food and drink will you serve? And how will you sell it—in-store, online, via delivery, food trucks, or catering operations? What other food products, merchandise, or services will you sell? If you plan to book private events or have a private dining room for weddings, mention that here. If you plan to partner with specific suppliers or farms or grow some of your own produce, include those details as well.*

### 3.2 Daily Operations and Production

*What are the day-to-day operations and systems that keep your restaurant running? Who will handle tasks like inventory management, tip payout, cleaning, and dropping cash deposits to the bank?*

### 3.3 Pricing and Profitability

*What is the price of every item on the menu and how much profit do you expect to make on a sale? Create a chart.*

## 4.0 Market & Industry Analysis Summary

*Briefly describe the restaurant industry in your location or the industry trends for your restaurant type. Cite studies or new stories when possible. Make a clear argument to people reading your business plan that you have done the research and know that your location needs your restaurant.*

### 4.1 Market Segmentation

*What types of customers will visit your restaurant? Use data to explain their purchasing habits and how many are in your area. If there is steady traffic from tourism, office workers, or families living in neighboring buildings, include those details.*

*It is typical to include brief sections describing your:*

- *Target Customer Profile*
- *Market Size*
- *Market Potential*

### 4.2 Competition

*Who are your main competitors within a five-mile radius? List at least five. Include a chart with details like distance, description, and where your restaurant is expected to outperform or compete with these other businesses. It is okay to mention challenges here. Ignoring potential conflicts or overlaps with other businesses can make it look like you haven't done your research. Bankers and investors like to see that you are aware of the work it will take to make your business successful.*



## 5.0 Marketing Strategy

*Give a high-level overview of your marketing strategy and how you will implement it.*

### 5.1 Competitive Advantage

*What will you do better than competing restaurants?*

### 5.2 Marketing Strategy & Positioning

*What are your strategies for marketing your business? How will you communicate your restaurant offering in a 30-second statement?*

### 5.3 Traditional Marketing & Advertising

*What type of physical marketing and advertising will you do? Where will the materials be designed and printed? See our guide to the [best restaurant marketing software](#) for tools and ideas.*

### 5.4 Online Marketing & Advertising

*What online marketing and advertising will you do? Who will manage it?*

## 6.0 Financial Plan & Projections

*What assumptions have you made about the economy and your restaurant to figure out the financial projections below?*

*Use this [financial projections worksheet](#) from SCORE—a network of volunteer business mentors affiliated with the Small Business Administration—as a guide to the sections below. Ideally, turn the projections into charts for investors and bankers to understand the numbers more easily. You can do this in a spreadsheet tool like Microsoft Excel or Google Sheets.*

## 6.1 Startup Costs

*How much money will it require to open your restaurant? List the expenses and include costs. Read our guide to [restaurant costs](#) to ensure you have included everything.*

## 6.2 Break-even Analysis

*The break-even point is when your total revenue and total costs are equal. This is the point after which you start turning actual profit. Typically in a restaurant business plan, the break-even point is expressed as a date. This lets banks and investors know at what point they can expect to start seeing a return on their investment.*

*This [calculator from the SBA](#) can help you figure out your break-even point.*

## 6.3 Projected Profit & Loss

*This is a forecast (typically a table) that summarizes what your expected income and expenses (also called profits and losses, or P&L) will be. This P&L forecast tells investors and banks that you understand your business expenses and have budgeted for them correctly.*

*It is standard practice to include three full years' worth of projections. Break the first year's profit and losses down by month. List year two and three by quarter.*

## 6.4 Projected Cash Flow

*How much cash is expected to come into and flow out of your restaurant each month?*

## 6.5 Projected Balance Sheet

*List the projected assets (cash, equipment, and product inventory) and liabilities (accounts payable and long-term debt) of the business for the next three years in a spreadsheet format. The [SCORE website has an excellent template](#), or you can read our guide to [creating a balance sheet in QuickBooks Online](#).*

## 7.0 Conclusion

*This section is the book-end to the Executive Summary. This is where you once again summarize the key points of your business plan that indicate your restaurant's expected success. Only in this section should you also directly ask for specific support from the people reading the business plan (investment of a certain amount or a loan of a specific size) and tell them why you need the support. This doesn't need to be lengthy; something like, "We are looking for a \$250,000 small business loan to cover our buildout expenses" is typical.*

## 8.0 Appendix

*Include any additional documentation to support the business plan. If your business is a franchise, include a copy of your franchise agreement. If you have already secured a location, include a copy of your lease, or if you are strongly considering a location, include a copy of the proposed lease.*

*If you have more visual documentation, like artist renderings of your finished shop, your proposed website design, or your proposed furnishings and equipment, include them here. It is also standard to include resumes of your managers or business partners or any secured permits, licenses, or insurance policies if you have them.*