



# Opening a Restaurant

## A Checklist for Restaurant Operators



# Introduction

Opening a restaurant is hard – there is no way around it. From first timers to seasoned restaurant groups; things will go wrong, problems will arise. You can mitigate many of these issues by being organized, planning ahead, and leaving time to tackle the unforeseen.

We have put together a checklist to help you on your journey to opening. It is by no means an exhaustive list. Each project and each company will be different but we have tried to hit the big points you will not want to forget. We encourage you to tailor this list to your organization needs and have left space for you to do so.

Good luck with your opening and we hope to someday work with you or just stumble upon your new restaurant for a meal.

Mathew Focht  
CEO, EMERGING

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# OPENING TIMELINE



## 12 Months to Opening

Find a location, sign a lease, ensure financing, begin permitting process

Hire a contractor and interior design firm to begin construction and build out

## 6 Months to Opening

Begin search for Executive Chef and General Manager

Order furniture and fixtures and develop a marketing plan

## 3 Months to Opening

Gather all paperwork: employee handbook, job descriptions, intake paperwork, etc.

Request all supplier/contractor bids: food, supplies, POS, uniform, etc.

## 2 Months to Opening

Finalize opening menus: Food, drink, and special events

Place ads for all management and hourly staff and begin interviews

## 1 Month to Opening

Begin receiving bulk orders and moving everything into place

Begin training for all management and hourly staff

## 7 Days to Opening

Hang all necessary signage, post emergency information, and setup office

Mock service, friends and family and adjustments as necessary

## NOW OPEN

# Financial

<b>To be Supervised by:</b>	
<b>Deadline:</b>	

<b>Setup Bank Accounts</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Establish Merchant Accounts		
	Order Deposit Slips		
	Have designated signers prepare signature cards		
	Establish Relationship/open account with Local Bank		
	Order Manual Credit Card Swiper and Slips		

<b>Setup Shipping Account for Store</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Setup shipping account		
	Order envelopes and slips		
	Create shipping sheet for management		

<b>Track and Receive Necessary Licenses and Permits</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Federal Tax ID		
	State Tax ID		
	Liquor License Application		
	Department of Health Application		

“This checklist is a restaurant opening bible, putting everyone on the same page for success.” David Stockwell, Vice President of Emerging Concepts

<b>Payroll Setup</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Get quotes and select payroll company		
	Confirm proper setup for all payroll files		
	Confirm direct deposit if applicable		
	Create payroll sheet and protocols		
	Complete payroll training with management prior to opening		

<b>Establish Pre-Opening Budget for all Departments</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Training		
	Furniture, fixtures, and equipment		
	Smallwares		
	Glassware		
	Direct operating supplies		
	Ramp-up labor schedule		
	100% proforma labor budget		

“When I first decided to open a restaurant, I was turned down by several banks. It was the late 80’s and many restaurants were failing. I refused to give up because I knew I had a good concept.” Emeril Lagasse

# Construction

<b>To be Supervised by:</b>	
<b>Deadline:</b>	

<b>Construction Vendor Facilitation</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Create spreadsheet with all vendor info		
	Sign up for accounts with all vendors		

<b>Coordinate and Confirm Target Dates for All Government Inspections and Permitting</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Department of Health		
	Fire		
	Mehcanical		
	Plumbing		
	Certificate of Occupancy		

<b>Review Locking Schedule for Property</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Confirm all doors that need to be secured are set to be locked		
	Magnetic stripe card vs. standard keyed entry		
	Door swing and handle sides		
	Complete walk-through with property GM		
	Turnover keys to GM and EC		

<b>Setup Cleaning Service</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Obtain quotes and select cleaning company (ensure all contracts have escape clause)		
	Schedule final clean prior to opening		

<b>Liquor Room Construction</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Shelving and storage space		
	Label all shelves according to needs		

<b>Trash Removal Setup</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Obtain quotes and select trash company		
	Establish bin sizes		
	Decide on a compactor		
	Set pickup frequency		
	Develop a recycling plan and program for separation		
	Obtain price quotes for special pick-ups		

<b>Lighting</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Create lightbulb list for all areas with codes		
	Purchase backups of each type		

<b>Other</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Obtain quotes for water softener system and select company		
	Create emergency shut off procedures and training for all sensitive equipment		

“There has been no great surprise, no sudden revelation. I knew pretty much what I was getting into. What I’ve learned is that a restaurant can be as much of an art as you want it to be, but it has to be a successful business first.”

Charlie Trotter



# Special Projects

<b>To be Supervised by:</b>	
<b>Deadline:</b>	

<b>Join Local Chamber of Commerce</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Submit application		
	Complete payment of applicable membership fees		
	Schedule management to attend upcoming mixers		

<b>Uniforms</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Design and select employee uniforms		
	Source local vendors that offer uniform		
	Create a one-sheet informing employees of desired look and info on where to purchase		
	Order any custom items		

## Notes:

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# Operations

<b>To be Supervised by:</b>	
<b>Deadline:</b>	

<b>Opening Liquor Order</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Setup relationships with all wine, liquor and beer vendors		
	Create opening orders to all vendors		
	Create opening Inventory sheets with costs		
	Create purchase order for each vendor		
	Schedule receiving team		
	Create PARS for bar and storage area		

<b>Dining Room Logistics</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Create opening and closing sidework for each section		
	Identify max seating and numbers for all tables		
	Post Certificate of Occupancy, Liquor License, and any other applicable licenses		

<b>Setup Pest Control Vendor</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Receive bids and select a company		
	Perform walkthrough and receive detailed monthly plan		
	Specify what treatments are inclusive and what are additional		

<b>POS Setup-Operations</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Receive quotes and select a vendor		
	Input menu and special items		
	Confirm all reporting categories and desired revenue centers		
	Create table chart with table numbers		
	Create copy of menu with printer routing for each item		
	Confirm all new hires entered into POS		

<b>Coordinate and confirm Target Dates for All Gov Inspections and Permitting</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Department of Health		
	Fire		
	Mehcanical		
	Plumbing		
	Certificate of Occupancy		

<b>Floor Plan</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Create floor chart with table and seat numbers		
	Identify sections based on service coverage		
	Create opening and closing sidework for each section		
	Identify maximum seating for all tables		

<b>Comp Set Analysis</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Complete a competitor analysis		
	Complete a SWOT (strengths, weaknesses, opportunities, threats) analysis		

Specific Policies and Procedures			
X	Phase	Due By	Notes
	Define tip structure		
	Determine employee meal policy		
	Determine break and smoking areas		
	Determine uniform quota per employee		
	Define employee locker policy (day/overnight)		

General Information			
X	Phase	Due By	Notes
	Decide and publish hours of operations		
	Create informational sheet listing all staff including managers and contact information		

“A great restaurant doesn’t distinguish itself by how few mistakes it makes but by how well they handle those mistakes.” Danny Meyer

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# Human Resources

<b>To be Supervised by:</b>	
<b>Deadline:</b>	

<b>Management Hiring</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Run ad for General Manager and hire		
	Run ad for Executive Chef and hire		
	Run ad for Managers and hire		
	Run ad for Sous Chefs and hire		
	Establish organizational chart with roles and responsibilities		

<b>Hourly Hiring</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Run ads on Craigslist or local channels		
	Complete hiring training seminar with management team		
	Establish staffing pars for each position		
	Identify pay scale and TIP procedure for all employees		
	Create standard interivew questionnaire		

<b>Application and New Hire Paperwork</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Create new hire packets		
	Supply management with applications		
	Print employee handbooks and paperwork		

Setup Needs for Business			
X	Phase	Due By	Notes
	Workman's compensation		
	Liability insurance		
	Rollout platform for all eligible employees per AHCA		
	Order required labor law posters and post		
	Determine emergency hospital/urgent care for employee and guest accidents		
	Post emergency care instructions		

“Sometimes you get lucky. You get the right resume, make the right calls, and hire that perfect person for the position you’ve been searching to fill. ‘Sometimes’ is more accurately defined as ‘in a few cases.’ In most cases, the person you’ve hired requires some assistance and training to reach the level of guest service, cleanliness and product development you’re striving for.”  
 Marisa Upson

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# Kitchen Operations

<b>To be Supervised by:</b>	
<b>Deadline:</b>	

<b>Menu Creation</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Create breakfast menu		
	Create lunch menu		
	Create dinner menu		
	Create brunch menu		
	Create banquet menus		
	Create off-site catering menu		

<b>Unique Items</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Purchase digital clock for kitchen line		
	Label all shelving in dry storage and walk-in		
	Confirm mats ordered for all prep areas and behind the line		
	Order blue tape dispenser for kitchen		

<b>Checklists and Standard Operating Procedures</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Set-up sheets with pars		
	Create opening checklist		
	Create closing checklist		
	Create Department of Health checklist		
	Create prep lists with pars		
	Create recipe book with menu costing		
	Create count sheets		
	Create vendor list with contact information		

Opening Order and Menu Prep			
X	Phase	Due By	Notes
	Opening orders set and communicated to vendors		
	Receiving and opening prep schedule completed		
	Friends and family menu created and printed		

“Restaurant operators need to have a firm handle on food [spending], since it will take up a large portion of their budgets. The more they can negotiate fair prices with suppliers, order less expensive items, and reduce waste, the more successful they’ll be at running their restaurants.” Mark Haidet

**Notes:**

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# Bar Operations

<b>To be Supervised by:</b>	
<b>Deadline:</b>	

Bar Layout			
X	Phase	Due By	Notes
	Create bar schematic with all product placement		
	Determine flow to bar and servers		
	Specify which glassware will be washed at bar		

Bar Menu Creation			
X	Phase	Due By	Notes
	Create cocktail menu		
	Create beer list		
	Create wine list		
	Determine ingredient pars for all drinks		
	Compile recipe book for all cocktails		

“Growing up as a young kid, I was in a restaurant. So, you know, I always had a very good understanding of the nuances. And in a way, that was a bad thing. Because it kind of programmed me to believe that if you’re going to have a restaurant, this is what you need to do, and this is the way it’s going to be run.” Grant Achatz

# Marketing

<b>To be Supervised by:</b>	
<b>Deadline:</b>	

<b>Coming Soon Collateral</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Order opening business cards for management		
	Create "Opening Soon" banner		
	Create "Now Hiring" banner		

<b>Secure Public Relations Partner</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Obtain bids and select a firm		
	Obtain PR plan and implementation tasks		

<b>Collateral Design-for Building</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Design exterior door logos		
	Purchase restroom signs		
	Create storage signs		
	Create handwashing signs for the bathroom		
	Create fire zone exit signs		
	Design exterior signs and awning		
	Compile awards and press clippings		
	Create menu box design		

“Nothing goes perfectly, especially when you’re opening a restaurant.”  
Bobby Flay

<b>VIP/Grand Opening Party</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Identify list of VIPs: media, social influencers, vendor partners, and PPX guests		
	Select dates for event		
	Design invites for print and web		
	Confirm menu for event with Chef		
	Confirm staffing for event with GM		
	Send out invite for opening party		

<b>Create and Finalize Graphic Design Package</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Create Logo		
	Determine type/font for all communication and collateral		
	Determine business card design and order		
	Create menu design and layout		
	Create letterhead and stationary		
	Purchase "Thank you" cards for GM		
	Create giftcard design and order		

<b>Social Media</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Create Facebook account		
	Create Twitter account		
	Post daily photography of construction and updates for Twitter and Facebook		
	Compile marketing email list		

<b>Concierge Plan</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Concierge list for local area completed		
	Schedule opening concierge run in conjunction with marketing and GM		

# Information Technology

<b>To be Supervised by:</b>	
<b>Deadline:</b>	

<b>POS setup and implementation</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Identify number of stations and locations		
	Confirm order with POS provider		
	Set date for installation and training		
	Handover training and database to GM		
	Run test tickets for all items in the kitchen		

<b>Alarm and Security Camera Setup</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Install alarm system		
	Identify control points		
	Confirm blueprint placement of all security cameras - office, safe, kitchen, entry		
	Train management on the alarm system - entry/exit and recordings		

<b>Telephone Setup</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Confirm unit numbers and locations		
	Ensure numbers are correct online		
	Setup call forwarding where necessary		
	Setup voicemail and record hold message		
	Create 1-sheet directory for team		
	Ensure a portable device is ordered and compatible with system		
	Confirm fax line operation and number		

<b>OpenTable</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Order desktop, CPU, and license		
	Ensure floor chart and book are setup		
	Go live prior to opening to begin accepting reservations		
	Confirm private event page setup with pictures		
	Update link to OpenTable on website		

<b>Music Setup</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Confirm speaker placements on blueprints		
	Decide on content provider		
	Determine desired playlist and atmosphere		
	Create or retain playlist provider for music		
	Purchase IPOD or install 3rd party equipment		
	Confirm sound check test for control and speaker functionality		

<b>General Office/IT Setup</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Establish email distribution group for restaurant		
	Connect and test print/scan from all workstations		
	Confirm phone operations		
	Install monitoring software on all PC's		

“A restaurant is a compendium of choices that the owner has made. If you look around a restaurant, everything represents a choice: the kind of salt shaker that’s on the table, the art on the walls, the uniforms on the waiters.” Danny Meyer

# Purchasing

<b>To be Supervised by:</b>	
<b>Deadline:</b>	

<b>Coffee Machine Ordering/Installation/Training</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Identify placement and confirm necessary power pulled		
	Confirm appropriate water softness		
	Determine and purchase model		
	Confirm install date		
	Ensure staff is properly trained on using and cleaning machine		

<b>Office Order Including Safe and Copy Machine</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Purchase opening order with all necessary opening supplies		
	Order a safe and confirm install date		
	Ensure you ordered backups for all necessary supplies - printer toner, menu paper, etc.		

<b>Tables and Chairs, Bar Stools</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Determine design, styles, and quantity		
	Receive bids for furniture		
	Place order and schedule delivery		

“Days off are few and far between in the restaurant business. But on an hour off, I like to have a glass of wine with my wife.”

Geoffrey Zakarian

<b>MISC Bar Supplies</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Determine what bar supplies are needed		
	Prepare purchase order separated by vendor		
	Place order and schedule delivery		

<b>Smallwares</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Select smallware designs for each dish		
	Establish PARS for each type of servicewear		
	Prepare purchase order separated by vendor		
	Place order and schedule delivery		

<b>Wall Coverings</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Select artwork or wall coverings		
	Verify mounting needs and structural capability		
	Prepare purchase order separated by vendor		
	Place order and schedule delivery		

<b>Glassware</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Select all glassware for each type of drink		
	Establish PARS for each type of glassware		
	Prepare purchase order separated by vendor		
	Place order and schedule delivery		

“The restaurant business is something that you have to treat like a baby. You have to constantly be there. You can’t trust it to anybody else, because no one’s going to love it like you do.” Action Bronson

Source and Secure Specialty Vendors			
X	Phase	Due By	Notes
	Pest control		
	Florist/plant service		
	Linen supplier		
	Carpet cleaning		
	Grease trap		
	Hood cleaning		
	Specialty ice		
	Holiday decoration supplier		
	Banquet rental supplier		

MISC Supplies			
X	Phase	Due By	Notes
	Vacuum cleaner		
	Fire extinguishers with 6 month service		

Notes:

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# General Contractor Follow-Up

<b>To be Supervised by:</b>	
<b>Deadline:</b>	

<b>Kitchen Equipment</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Confirm drawings		
	Confirm specs and placement of all equipment		
	Warranty information filed		
	Any necessary permits filed and received		
	Installation of all equipment completed		
	Kitchen design proofed and finalized		
	Ensure all equipment is working and properly installed		
	Request all lien waivers and close-out documents to submit to landlord for tenant improvement allowance		

<b>Electric</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Drawings completed and confirmed		
	All necessary power specified for kitchen, prep, floor, IT, etc.		
	Inspection scheduled		
	Permits obtained		

“Hopefully, imparting what’s important to me, respect for the food and that information about the purveyors, people will realize that for a restaurant to be good, so many pieces have to come together.” Thomas Keller

# Training

<b>To be Supervised by:</b>	
<b>Deadline:</b>	

<b>Scheduling</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Prepare training schedule for all employees		
	Prepare and distribute schedule for first two week of operation		
	Identify any emergency hire needs		
	Create master calendar for group training - HR, POS, orientation, service standards, and menu		
	Define schedule for Friends and Family event		

<b>Serv Safe Training-Department of Health</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	All managers and chefs complete online course for the DOH - Management Food Handler's certificate, Allergen training, Alcohol Serving license, etc.		
	All managers trained and completed one full Department of Health walkthrough		

<b>Training Preparation</b>			
<b>X</b>	<b>Phase</b>	<b>Due By</b>	<b>Notes</b>
	Finalize desired steps of service		
	Complete all FOH training manuals		
	Complete all opening checklists		
	Complete all closing checklist		
	Complete all specific sidework sheets		
	Select training team		



**Contact Us**

Mathew Focht, CEO

312-878-8000

info@emergingconcepts.com

www.emergingconcepts.com

**ABOUT EMERGING CONCEPTS**

Emerging Concepts is a division of EMERGING. We are a strategic real estate partner with today's leading restaurant and entertainment concepts. Our clients are highly selective with their growth and require great understanding of their concepts. We are passionate about our relationships and concepts that impact our quality of life and environment.

**ABOUT EMERGING**

EMERGING optimizes restaurant and entertainment concepts for sustainable growth and profitability. EMERGING is a family of companies that elevate restaurant and entertainment concepts to be among the top in the industry. We provide the most valuable resources to today's emerging operators and concepts.

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