



4500 S. Lakeshore Drive #595
Tempe, AZ 85282
(480) 491-0123

PRE-OPENING RESTAURANT CHECKLIST

OPERATIONS

Budgets & Accounting

- Develop a Performa for project. Need help with your business plan? Call Jay Varcoe at **Professional Beaccounters**, 480-361-1145.
- Prepare opening budget including FF&E.
- Have standard credit sheet drafted for ease of setting up accounts. Call Bob Albertson at Heartland Payment Systems, 602.663.0899.
- Set up office supply account.
- Direct POS programming. Set up account codes for all POS items. Darren Sivley at **Copperstate Restaurant Technologies** at (480) 603-3020 will help you with all POS needs.

General Operations

- Assemble restaurant tool kit.
- Set up labor control tools: time cards, labor tracking, etc.
- Decide what the hours of operation will be for each meal period.
- Decide equipment layout in all service stations. Consider all electrical, fire protection and plumbing, and communicate with supplier.
- Set up inspection with health dept., fire dept. well before opening. Do they need to see plans now? Allow time to correct any problems.
- Set up hiring roster with quotas on a poster.
- Test all equipment with supplier prior to training.
- Establish format for mock services and who, when, what, menu
- Telephone system: Consider all phone line needs:
 - ◆ Burglar
 - ◆ Fire
 - ◆ Credit Card
 - ◆ POS Support

- ◆ Pay Phone
- ◆ Business
- ◆ Fax
- ◆ Pagers
- Obtain sound system bids.
- Light Bulb Schematic.
- Establish employee meal policy.
- Determine proper light levels for lunch and dinner and label rheostats (dimmers).
- Set up exterior landscape service.
- Purchase misc. items for front desk: battery powered clock, pencils, erasers, tape, and notebooks.

Menu

- Finalize menu selections. Call **Donna Forry at The Menu Designer's** for all your menu planning/recipe development needs. 480.283.8706.
- Prepare ideal food cost menu engineering.
- Validate meal and beverage abbreviations for POS System. Darren Sivley at **Copperstate Restaurant Technologies** at (480) 603-3020 will help you with all POS needs.
- Conduct pricing survey and recommend pricing.
- Create first draft of menu items utilizing all kitchen stations in most efficient manner. Call Donna Forry for all your graphic design needs. (480-283-8706). Email: info@themenudesigner.com. Website: www.themenudesigner.com.
- Determine opening liquor/wine order and associated prices.

Kitchen Operations/Service Operations

- Finalize all operating tools:
 - ◆ Set-up sheets with pars
 - ◆ Opening checklists
 - ◆ Closing checklists
 - ◆ Prep lists with pars
 - ◆ Standardized recipe book
- Freezer pull sheets
- Prepare chart showing order & delivery dates from vendors. Make sure all purveyors understand proper delivery times.
- Finalize opening supplies orders. Provide list of all primary and backup vendors.
- Plan product-opening orders including mocks & employee meals.
- Determine your needs for linens. You will need laundering service for table linens as well as uniforms.

- ❑ Finalize inventory forms.
- ❑ Finalize all order books by product and purveyor & backup. Include all purchasing specs.
- ❑ Finalize beer and wine selections. Put together opening order & order guides with pars in pencil.
- ❑ Put together food order books, inventory sheets, perpetual inventory sheets in pencil.
- ❑ Clean, organize and label all shelving:
 - ◆ Dry Storage
 - ◆ Walk-in
 - ◆ Freezer
 - ◆ Supply area
 - ◆ Service Area
 - ◆ Chemical Storage
 - ◆ Bar Storage
- ❑ Set up dish machine service. Call Mark LeBrun with **Pro Clean** at (602) 233-0457 x 293.
- ❑ Schematic all kitchen stations & service stations.
- ❑ Buy quality knives and slicer blades; sharpen them on a weekly or bi-weekly basis. **AZ Cutlery** can take care of that for you. Call Kevin Povinelli at (602) 867-0346.
- ❑ Develop table numbers and seating charts for different section sizes & phasing charts.
- ❑ Schematic bar.
- ❑ Set up soda system installation.

Maintenance/Engineering

- ❑ Make list of keys needed in store. Have all coolers, equipment, etc. keys same as doors. Collect all keys upon installation.
- ❑ Schedule maintenance crew for initial cleaning.
- ❑ Obtain bids for cleaning and maintenance for FOH. Includes carpet cleaning, exterior and interior windows, floors, restroom and upholstery.
- ❑ Check water hardness. Get bids for water softeners. Check specs on equipment to plan for additional filtration.
- ❑ Make contractors phone list for emergencies.
- ❑ Write floor maintenance procedures.
- ❑ Determine all emergency shut-off procedures, emergency exit procedures.
- ❑ Draft Map
- ❑ Need initial pre-open clean out of grease trap and schedule for 6-month program.
- ❑ Prepare R&M book for all equipment. Send in all warranties.
- ❑ Set-up hood cleaning service.

- ❑ Have alarm & fire systems checked. Obtain bids and coordinate with construction supervisor.
- ❑ Purchase Vacuum cleaner.
- ❑ Identify insect control plan. I.E. Do we need electric bug killer for back door?
- ❑ Arrange pest control service.
- ❑ Buy necessary fire extinguishers.
- ❑ Set up maintenance for all types of restaurant refrigeration equipment, exhausters, ice machines and HVAC equipment.

Staffing

- ❑ Develop projected list of employee needs for each area of operation & sources for recruiting.
- ❑ Develop pay scales for all crew work groups:
 - ◆ Front Desk
 - ◆ Servers
 - ◆ Wait Assistants
 - ◆ Bartenders
 - ◆ Cooks
 - ◆ Prep Cooks
 - ◆ Dishwashers
 - ◆ Supervisors
 - ◆ Managers
- ❑ Arrange for interview site, furniture, phones & supplies. Place employment ads in local newspapers & schedule recruiting missions.
- ❑ Review staffing manual for interviewing and hiring procedures. Establish target question list.
- ❑ Consider **ADP** for your payroll service; they make it really easy with automatic tax pay service. Call Renee Rainey at (602) 435-8522.

Training

- ❑ Identify dates of training allowing for “dry run” or “soft opening” time.
- ❑ Validate service sequences.
- ❑ Develop bar opening checklist.
- ❑ Develop kitchen-opening checklist & for all departments: open, close & managers. Set up general meeting and training session.
- ❑ Document and train management and staff.

MARKETING/DEVELOPMENT

Restaurant Branding and Menu Design

- ❑ Develop new menu copy. **Donna Forry** great for menu consulting, she can be reached at 480.283.8706.
- ❑ Develop beverage and/or wine list if used.
- ❑ Arrange menu(s) production with printer.
- ❑ Identify and choose menu covers if used.
- ❑ Arrange stationary and business cards.
- ❑ Gift Cards.
- ❑ Guest comment cards.
- ❑ Order sign supplements/banners:
 - ◆ Coming soon
 - ◆ Opening date
 - ◆ Now hiring
 - ◆ Restrooms
 - ◆ No deliveries between...
 - ◆ Hours of business
- ❑ Décor decisions including pictures and menu boards.
- ❑ Arrange local telephone service with easily remembered number.
- ❑ Landlord approval-plans, equipment, FF&E interiors, signage, etc.

Uniforms

- ❑ Finalize uniform decisions.

Advertising and Public Relations

- ❑ Hire local PR firm.
- ❑ Set up your website.
- ❑ Send out press releases to all local media.
- ❑ Prepare a series of ads to be used if needed to fuel business.
- ❑ Organize pre-opening press event.
- ❑ Decide any other pre-opening events; VIP, contractors, etc. Develop invitation list, format, etc.
- ❑ Canvas local businesses, etc. for names to invite for special lunches and dinners.
- ❑ Choose local charities to support.

LEGAL

Corporations & LLCs Formed

- Conditional use permit.
 - ◆ Corporations
 - ◆ LLC's
 - ◆ Buy Sell Agreements
 - ◆ Employer requirements – IRS, State, Unemployment
 - ◆ Business Plans
 - ◆ Minutes Updates

Insurance Needs

- Insurance requirements: Scott Shirley with **Farmers Insurance** can give you complete coverage for any insurance needs at (480) 607-3010.
 - ◆ Dram shop
 - ◆ Liability
 - ◆ Workman's comp

ACCOUNTING/FINANCE

- Obtain federal tax number, employer and employee tax numbers.
- Decide how monies are to be handled in store including amounts for petty cash, house banks, and bar banks.
- Open bank account and decide when and how deposits will be made. Call Jay Varcoe at **Professional Beancounters**, 480-361-1145.
- Get deposit stamp and pad, deposit bags, slips, coins and bill wrappers, etc.
- Armored car service.
- Set up POS charge system. Dedicated phone line.
- Determine what licenses are needed and apply for them: health, retailer, food handler, liquor, workers comp, excise tax, state tax.
- Set up security system.
- Order safe.
- Contract utility companies for change in billing & get energy analysis.
- Set up opening budget for tracking, including FF&E.
- Determine whether you would like to lease or purchase your restaurant equipment. Rudy Degroot with **Degroot Leasing** can get you the lowest interest rates. Give him a call at (480) 946-0092.

TRAINING

- ❑ Finalize training programs with agendas and objectives with tests.
- ❑ Organize orientation materials.
- ❑ Develop sidework schedules for all FOH.
- ❑ Set up POS training for management & crew.
- ❑ Arrange lodging for all opening personnel.
- ❑ Wine & beer seminars for sales knowledge and over-consumption policy.
- ❑ FOH menu descriptions for all items.
- ❑ Plating and garnish guide for all items.
- ❑ Set up training recipe manuals.
- ❑ Select training team.
- ❑ Set data for training team arrival.
- ❑ Prepare master training calendar.
- ❑ Set up training manuals & opening materials.
- ❑ Organize any necessary management training such as:
 - ◆ MSDS location, reading, etc.
 - ◆ Interviewing and hiring (legal vs. illegal questions, ADA, etc.)
 - ◆ Restaurant standards and systems
 - ◆ Cost controls
 - ◆ Customer service
 - ◆ Train the Trainer
- ❑ Finalize training guidelines for all areas.

HUMAN RESOURCES

- ❑ Obtain supplemental posters for crew areas: OSHA, safety, minimum wage, etc.
- ❑ Pre-opening safety audit.
- ❑ Safety and first aid training.
- ❑ Sanitation videos.
- ❑ Review OSHA standards with management team.

DESIGN/CONSTRUCTION

- Is the sprinkler system wired to an alarm?
- Set up kitchen fire control system.
- Arrange appropriate door hardware: panic alarms, push bars, peep holes, etc.
- Arrange proper locks, deadbolts, etc. Re-key just before opening.
- Check all lighting specs and make light bulb order guide for operations.
- Make sure all electrical switches, breakers, compressors, valves, etc. are labeled and accessible.
- Have the thermostat boxes been locked?
- Need a buzzer at the back door for deliveries?
- Make a full set of building and equipment plans for operations files.
- Collect all warranties for new equipment and send in cards. Place all equipment information in a notebook for reference.
- Prepare critical path for operations based on construction schedule.
- Would you like a custom decorative water feature?

FURNITURE/FIXTURES/EQUIPMENT

- Need games or a pool table in your establishment? **Global Entertainment** can set you up with low prices. Tom Yario will give you some quotes at (602) 705-5300.
- Are all your furniture needs taken care of?
- When you're ready to sell or buy a new restaurant call Arizona's largest "Exclusively Restaurants" Real Estate Brokerage. Reuel Couch, Dave Andrea and AJ Edelstein with **The Restaurant Brokers** will take good care of you at (480) 491-0123.
- For all your equipment and small ware needs your one stop shop is at the W. West Equipment 602-687-9310

Your restaurant business success is our success.

**We hope you find this Checklist to be a useful tool
in opening your new restaurant.**

Consulting services are always available upon request.

480.491.0123