



# Restaurant Business Plan Template

2021





**The restaurant business plan is a crucial first step in turning an idea for a restaurant into an actual business.** Without it, investors and lenders will have no way of knowing if the business is feasible or when the restaurant will become profitable. Business plans span dozens (or even hundreds) of pages, and due to the stakes that lie within the document and the work required to write it, the process of writing a restaurant business plan can threaten to overwhelm.

That's why BentoBox has created a restaurant business plan template for aspiring restaurant owners. This template makes creating a business plan easier with section prompts for business plan essentials like financial projections, market analysis and a restaurant operations overview.

**[Download the Template](#)**



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# Executive Summary

The executive summary provides a 1-2 page overview of the restaurant and its business model. While the details of how the restaurant will succeed will be explained throughout this business plan, this section will both prove the legitimacy of the restaurant idea while encouraging investors to enthusiastically read through the rest of the plan.

**Some specific topics that might be covered in the executive summary include:**

- Restaurant name, service type and menu overview.
- A quick mention of why the leader of the restaurant business is positioned to help it succeed.
- A brief overview of the restaurant's competitive advantages and how they will help the business thrive in its target market.
- Expected break even point and sales forecasts for at least the first year.



# Leadership Team

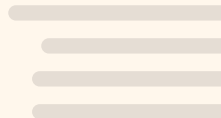
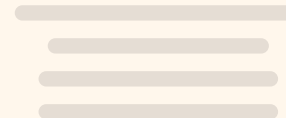
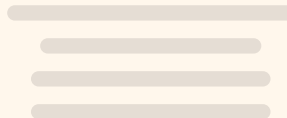
This section will introduce readers to the team that will run the restaurant. Some people who might be worth including here are the restaurant's owner(s), other investors, franchise representatives, managers and/or back-of-house leaders.



**Name**

**Role at company**

2-3 sentences explaining who this person is and why they are a good fit for this position.





# Restaurant Business Overview

This section introduces the reader to the restaurant's concept. It should paint the picture of what potential guests can expect when they walk through the door, pull up to the drive-thru or place an order on the restaurant's website.

## MISSION STATEMENT

What is the restaurant's mission? This section should boil down the purpose of the restaurant's existence in a catchy sentence or two.

## MENU & CUISINE

This section explains what kind of food will be sold at the restaurant, from the overall cuisine type to a few example dishes.

## SERVICE STYLE

Is the restaurant full-service, fast-casual, drive-thru only or some combination of these concepts? It should be explained why that concept was selected and – if unique – how the guest ordering process will work.



# Industry & Market Analysis

This section compiles research that's been done on the industry, the location the restaurant will occupy and those the restaurant will serve. The more detail provided in this section, the more valid the conclusions reached in the financials section will appear to be.

## INDUSTRY OVERVIEW

The industry overview serves as a snapshot of the industry and why now is the right time to open up a restaurant (and pursue the chosen restaurant concept). Specific research to support these claims should be included and cited.

## LOCATION OVERVIEW

This section provides an overview of the area chosen to be the home of the restaurant. Specifically, an explanation should be given for why the general area (and if known, the specific location) of the restaurant was selected. Also, it should be communicated here if an existing restaurant location is being purchased and – if so – whether or not it will be rebranded.

## TARGET MARKET

Who will be the restaurant's regular customers – office workers looking for a grab-and-go lunch or families of four looking for a meal after a long week? This section should also estimate the size of the target market in the area alongside any demographic information known about people in that market.

## COMPETITIVE LANDSCAPE

This section summarizes an analysis of the restaurant competition in the area and how it will compete. Supporting documentation such as a [SWOT analysis, a competitive matrix and/or a Porter's Five Forces Analysis](#) might go here (or in the appendix).

# Marketing Strategy

The marketing strategy section highlights which marketing channels will be used to appeal to the restaurant's target market.

## BRAND POSITIONING

Before explaining whether or not you'll use Facebook, an overview of the restaurant's brand positioning should be provided.

Add strategies for the following outlets in this section if applicable.

Public Relations

Social Media

Direct Mail

Website Marketing

Community Engagement

Video Marketing

Newspaper/Magazine

Paid Search Marketing

Email Marketing



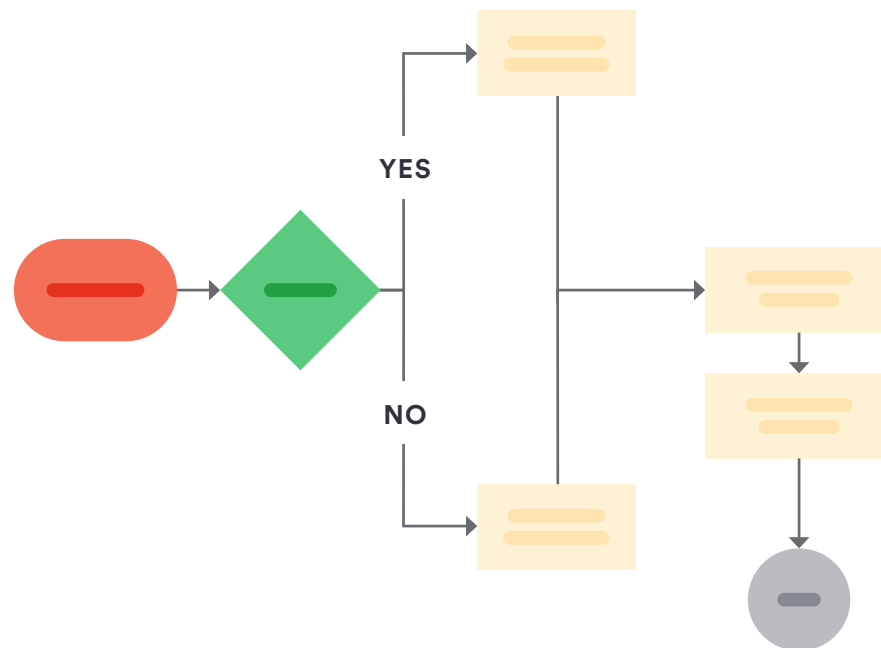


# Operating Model

The operating model section is for going over the logistics of running the business and showing readers that all the pieces are in place to efficiently and accurately fulfill orders – all while retaining staff, keeping the restaurant safe and breaking even as soon as possible.

## SERVICE MODEL

The service model is the end-to-end experience of ordering at the restaurant in all of the different ways a guest will be able to (online ordering, in-person dining, etc.). Specifically, staff touchpoints with guests in both the front and back of the house should be identified.



## TARGET MARKET

This section should give an overview of both in-store restaurant technology (such as a POS system) and any integrated software that helps restaurants get discovered online, like a website or an online ordering program.

In this section, there should be a list of types of technology that will be utilized to streamline operations in the restaurant, alongside an explanation of how they will enhance the guest experience and which technology providers the business will be partnering with.

Examples of restaurant technology that might be highlighted in this section include:

[Restaurant website management](#)

[Online ordering system](#)

[Gift card management](#)

[Online catering platform](#)

[Events management software](#)

[Digital ordering & payment](#)

[Digital loyalty program](#)

[Restaurant point-of-sale \(POS\)](#)

[Inventory management software](#)

[Kitchen display screens \(KDS\)](#)

[Payroll & HR software](#)

[Scheduling and employee engagement software](#)

# Operating Model

## STAFFING & HIRING

What steps will be taken to hire, train and onboard a staff of restaurant professionals? This section could include recruiting tactics, a rundown of the interview process, safety and training procedures, retention plays and the target staff size upon open.

## KITCHEN & BACK-OF-HOUSE

This section should contain a walkthrough of the restaurant's kitchen operations strategy. Inventory management strategy, approach to food suppliers and a list of required kitchen tools and equipment should be covered.



# Financial Overview & Projections

At the end of the day, investors need to know when and if the restaurant will be profitable. This section will provide them with that information.

## OPENING COST OVERVIEW

This section should provide a thorough explanation of how much the restaurant will cost to open. It should be exhaustive so investors know exactly where their money is going. If needed, a complete opening cost outline should be provided in the appendix.

## SALES FORECAST

Included here should be a forecast of how much revenue the restaurant is projected to make. As a benchmark, this forecast should be provided for the first twelve months of business and/or until the break even point is reached. If needed, a more in-depth sales forecast broken down by month/quarter can be provided in the appendix.

## PRO FORMA INCOME STATEMENT

The business's profit or loss during this early period should be projected with a pro forma income statement. It's important to put as much work as possible into this document to set realistic goals for investors based on research and quotes from vendors. Since the [P&L statement](#) will likely be a one-sheeter, it might make sense to briefly summarize the time period and bottom line reflected in the document and to attach the full version in the appendix.

## BREAK EVEN ANALYSIS

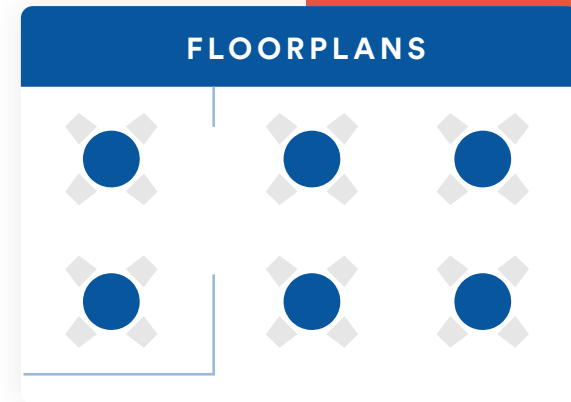
The projected break even point in both dollars and number of days should be declared in this section. Aim to be as objective as possible in the analysis, as investors will likely pay close attention to what's in this section.



# Appendix & Supporting Documents

Any and all supporting documents referenced throughout the plan should be included in this section, including (but not limited to):

- Financial statements, graphs, tables, charts and/or projections
- Photos or renderings of the restaurant location
- A sample menu
- Photos of the restaurant website and/or online ordering platform
- Floor plans
- References from colleagues in the restaurant industry



# Business Plan Glossary

This glossary explains some of the key terms used throughout this template. It can be kept as is, deleted if not needed, or altered to add more terms that may need an explanation.

## BREAK EVEN

Break even is the point in either time or dollars where a business earns back all of the money it spent up until that point, after which it will be profitable. The formula for calculating break even point in dollars (or sales) is explained [here](#).

Break even point, in time, is determined by comparing sales forecasts with break even in dollars to estimate how long it will take for the business to achieve that break even point.

## PRO FORMA INCOME STATEMENT (P&L STATEMENT)

A pro forma income statement is a projected profit and loss (or P&L, for short) statement. Based on sales and costs estimates, it shows whether or not a business will be profitable at a set point in the future. When making a P&L statement for a business plan, it's wise to project it for the expected break even point so investors will know when they will see a return on their investments. Projected pro forma income statements are further explored [here](#).

## SWOT ANALYSIS

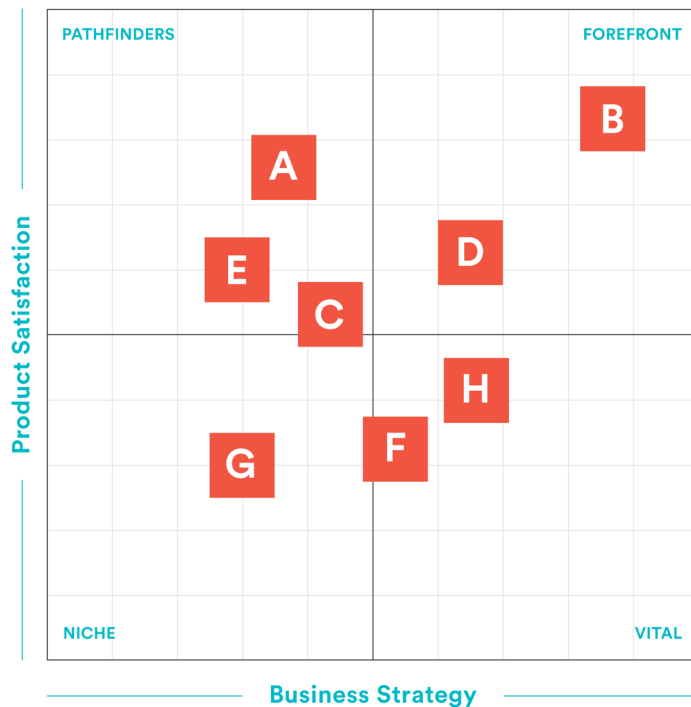
A SWOT analysis explores the restaurant's internal strengths and weaknesses and its external opportunities and threats. It outlines what success factors are in a business's control, which ones are not and what can be done to help the restaurant compete. Learning how to build a SWOT analysis for a restaurant business can be done [here](#).



# Business Plan Glossary

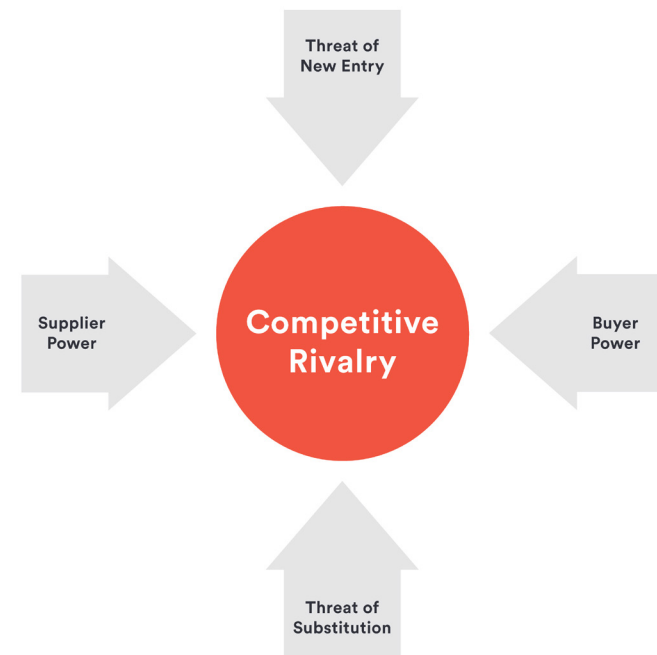
## COMPETITIVE MATRIX

A competitive matrix is used to visually compare a business to its competitors. There are several different kinds of competitive matrices, many of which are explained [here](#).



## PORTER'S FIVE FORCES ANALYSIS

A Porter's Five Forces Analysis explores five major forces in determining a business's viability – buyer power, supplier power, competitive rivalry, the threat of substitution, and the threat of new entry into the industry. Ideally, the analysis will suggest that the restaurant doesn't face many external threats and is likely to succeed. Porter's Five Forces is explained more [in this article](#).





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