**Café & Bakery Template**

**A. Core Concept & Brand Identity**

* **Business Name:**
* **Concept & Vibe:**
	+ *(e.g., Third-Wave Artisan Coffee Roaster, Neighborhood Pastry Shop, European-Style Café, Modern Bakery with Global Influences)*
* **Mission Statement:**
	+ *(e.g., "To be the community's daily ritual, offering meticulously crafted coffee and soulful, from-scratch pastries.")*
* **Target Audience:**
	+ *(e.g., Morning Commuters, Remote Workers, Students, Families on Weekend Mornings)*
* **Price Point:**
	+ *(e.g., $$ - Premium, $ - Value-focused)*
* **Unique Selling Proposition (USP):**
	+ *(What sets you apart? e.g., In-house roasting, gluten-free dedicated facility, award-winning pastry chef, unique single-origin focus.)*

**B. Production Scheduling & Workflow**

**1. Production Schedule Template (Based on Day-Part Demand)**

| **Product Category** | **Production Schedule** | **Par Level (End of Day)** | **Notes** |
| --- | --- | --- | --- |
| **Croissants & Viennoiserie** | Bake off frozen @ 4:00 AM | [e.g., 12] of each type | Proofing starts at 2:00 AM |
| **Muffins & Loaves** | Baked @ 3:00 AM (from prepped batter) | [e.g., 18] of each type | Batter prepped the previous afternoon |
| **Cookies & Scones** | Baked @ 5:00 AM (from prepped dough) | [e.g., 24] of each type | Dough prepped and portioned day before |
| **Sandwiches & Savory** | Assembled @ 6:00 AM / 10:30 AM | [e.g., 30] units | Prepped components ready for assembly |
| **Specialty Cakes & Pastries** | Produced Day-Prior (2:00 PM - 6:00 PM) | [e.g., 8] slices per cake | Focus on production during afternoon lull |

**2. Staffing & Production Roles**

* **Overnight/Opening Baker (3:00 AM - 11:00 AM):** Executes bake-off and early morning production.
* **Day Baker/Production (10:00 AM - 6:00 PM):** Preps batters, doughs, and components for next day; produces afternoon items.
* **Pastry Chef (Salaried):** Manages menu, recipes, inventory ordering, and quality control.

**C. Display Case & Inventory Rotation**

**1. First-In, First-Out (FIFO) System for Display Case**

* **Zoning:** Organize the case logically (e.g., Viennoiserie left, Pastries center, Savories right).
* **Labeling:** Every pan/tray must have a **Day Dot** with:
	+ **Item Name:** e.g., Almond Croissant
	+ **Bake Date/Time:** e.g., 10/26 - 4:30 AM
	+ **Pull Date/Time:** e.g., 10/27 - EOD
* **Restocking Procedure:**
	1. Remove remaining old items from the front of the case.
	2. Place **newly baked items behind** the existing ones.
	3. Move the **older items to the front** to be sold first.
* **Waste Tracking:** Log all unsold, pulled items daily to identify overproduction and adjust pars.

**2. Day-Part Par Level Adjustment**

* **Morning Peak (7-10 AM):** Case should be 100% full and diverse.
* **Afternoon (12-3 PM):** Focus on cookies, scones, cake slices, and remaining savories. Reduce viennoiserie par levels.
* **Evening (3-5 PM):** "Golden Hour" discount on select morning items ([e.g., 25% off]) to reduce waste.

**D. Coffee Program Development**

**1. Core Coffee Menu Structure**

* **Espresso Core:** House Espresso Blend, Single-Option Decaf.
* **Brewed Coffee:** At least two offerings (e.g., a crowd-pleaser "Daily Brew" and a featured "Single-Origin Rotator").
* **Milk Program:** Standard Dairy, and at least two premium alternatives (e.g., Oat, Almond). Charge for alternatives.
* **Signature Drinks:** [e.g., 3-4] seasonal or house-specialty beverages (e.g., Salted Honey Lavender Latte).

**2. Quality Control & Training**

* **Dialing In:** Espresso must be dialed in at opening, after morning peak, and after any bean batch change.
* **Drink Standards:** Documented recipe for every drink (espresso weight, milk volume, temp, foam texture).
* **Tasting ("Cupping"):** Weekly team tastings of new roasts or single-origins to maintain palate and knowledge.

**E. Retail Product Margin Analysis**

**1. Simplified Product Margin Matrix**

| **Product Category** | **Average Food Cost %** | **Target Margin** | **Action Plan** |
| --- | --- | --- | --- |
| **Brewed Coffee** | 15-20% | **High** | Driver of high margin; focus on bean quality and upsell to larger size. |
| **Espresso Drinks** | 20-25% | **High** | Driver of profit; train on milk steaming and latte art for perceived value. |
| **Pastries (In-House)** | 25-30% | **Medium-High** | Control cost through production efficiency. High perceived value. |
| **Pastries (Wholesaled)** | 50-60% | **Low-Medium** | For convenience and variety. Don't rely on for primary profit. |
| **Retail Bags (Beans)** | 40-50% | **Medium** | Increases brand reach and take-home experience. |
| **Merchandise (Mugs, etc.)** | 50-60% | **Medium** | Brand marketing and additional revenue stream. |

* **Overall Target Food Cost:** [e.g., 25-30%]
* **Overall Target Labor Cost:** [e.g., 25-30%]

**2. Bundling & Upsell Strategy**

* **"Classic Combo":** Any brewed coffee + pastry for $[X.XX] (saves customer $[X.XX]).
* **Upsell Path:** "Would you like a fresh-made almond croissant with that latte today?"

**F. Customer Flow & Counter Service Optimization**

**1. Counter Service Sequence of Service**
CUSTOMER ENTERS -> QUEUES -> ORDERS -> PAYS -> WAITS -> RECEIVES ORDER -> EXITS

**2. Optimization Strategies for Each Step**

* **Queue & Order:**
	+ **Clear Menu:** Large, easy-to-read menu board with high-margin items featured.
	+ **Queue Management:** Use a stanchion to form a single line. Provide mini-menus in line.
	+ **Order Takers:** Train staff to greet quickly, make eye contact, and use suggestive selling.
* **Payment:**
	+ **Efficient POS:** Tablet-based or touchscreen systems with quick-modifier buttons.
	+ **Multiple Payment Options:** Accept all forms of tap/phone pay.
* **Order Fulfillment ("The Hand-off Plane"):**
	+ **Dedicated Roles:** **Cashier** takes order, **Barista** makes drinks, **Food Runner** handles pastries.
	+ **Logical Flow:** The espresso machine should be positioned so the barista can hear drink orders being called.
	+ **Calling Orders:** Use a clear, standardized system (e.g., "Large latte for Michael!").
	+ **Organization:** Keep the hand-off plane clear and organized. Group items for a single order together.

**3. Peak vs. Non-Peak Staffing**

* **Morning Peak (7-10 AM):** 1 Greeter/Cashier, 1 Food Runner, 2 Baristas, 1 Floater.
* **Mid-Day Lull (11 AM - 1 PM):** 1 Cashier/Barista, 1 Barista/Food Runner.

**G. Key Performance Indicators (KPIs) Dashboard**

* **Daily/Weekly KPIs:**
	+ **Transactions per Day:** [Number]
	+ **Average Ticket Value:** $[Amount]
	+ **Items per Transaction:** [Number]
	+ **Coffee-to-Food Attachment Rate:** [e.g., 60%] of coffee customers also buy food.
	+ **Waste Percentage:** [Cost of Wasted Goods / Total Food Sales]
	+ **Customer Wait Time:** Peak time target: < [e.g., 3] minutes in line, < [e.g., 2] minutes at hand-off.

**H. Critical Path to Opening (Café/Bakery Focus)**

* **Phase 1: Concept & Business Plan** (Complete this template)
* **Phase 2: Legal & Financial**
	+ Form Business Entity (LLC)
	+ Secure Funding & Business Bank Account
	+ Obtain Federal EIN & State Tax ID
	+ Secure All Licenses & Permits (Health, Business, Signage)
* **Phase 3: Location & Build-Out**
	+ Secure High-Foot Traffic Location
	+ Finalize Design with focus on customer flow and production space
	+ Contractor Selection & Build-Out
	+ Install Specialized Equipment (Espresso Machine, Deck Ovens, Display Cases)
* **Phase 4: Operations Setup**
	+ Establish Supply Chain (Coffee Roaster, Dairy, Flour, etc.)
	+ Finalize Menu & Standardized Recipes
	+ Hire & Train General Manager and Head Baker/Pastry Chef
	+ Hire & Train Baristas & Counter Staff with a focus on service sequence
	+ Conduct Mock Services to refine workflow
* **Phase 5: Grand Opening & Marketing**
	+ Execute "Soft Opening" with discounted pricing
	+ Launch Grand Opening with a "First 100 Customers" promotion
	+ Implement Local Loyalty Program (e.g., digital punch card)