

# 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 |

| Product Category           | Production Schedule                    | Par Level (End of Day)    | Notes                                     |
|----------------------------|----------------------------------------|---------------------------|-------------------------------------------|
| 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)