VIDEO TO COURSE · SAMPLE OUTPUT

Write Your Restaurant Business Plan

Nine elements, from one-page concept to start-up costs, based on Wilson K Lee's step-by-step method

3 modules | 10 lessons | quizzes + answer keys | assignments | action plan

Based on “How To Easily Write A Restaurant Business Plan” by Wilson K Lee · youtube.com/watch?v=_bIbvTMwNEM · Creative Commons Attribution licence (CC BY)
Built with the Video to Course Prompt Studio. Lesson text as the AI returned it; only the layout was added.

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FROM SECTION A

Course Map

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3. Make the case to the people reading it	m3-l1 Write your management team page	Write a team page that shows each person's background, resources and edge	7	5
3. Make the case to the people reading it	m3-l2 Run an honest SWOT analysis	Write a SWOT with at least two specific, plan-linked entries in each box	10	5
3. Make the case to the people reading it	m3-l3 Write a marketing plan that fills seats	Write a marketing plan of specific actions matched to your profiled customer	11	5
After the course	Action plan	Assemble the full plan without reopening the lessons	all, in order	n/a

Every skill (1 to 15) appears exactly once. The first lesson gives a usable win: a one-page concept you can hand to someone today. The hardest work, the numbers, sits in the middle module.

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Welcome: Write Your Restaurant Business Plan

Instructor: [YOUR NAME] Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

1. Objective

Decide whether this course fits the plan you need to write, and set up the plan folder the rest of the course fills.

2. Why it matters

A business plan is the document a bank, an investor or a future partner reads before deciding whether to back your restaurant. Five minutes checking fit now means every lesson after this one produces a page you will actually use.

3. The teaching

This course is built on a tutorial by Wilson K Lee, who owns an ice cream shop in Vancouver called 720 Sweets and has, in his words, been "doing business for the last 10 years". He made the tutorial because the question he gets most by email is how to write a proper business plan for a restaurant. His answer is a list of nine elements, each one illustrated with how he would write it for 720 Sweets. Everything you learn here is Wilson's method, taught by me with permission, and his name is on every idea that came from him.

Who this is for. You are planning to open a restaurant, cafe, dessert shop or other food and beverage business, probably your first. You know the food you want to sell. You need a written plan to show a bank, an investor or someone you want as a partner, or you simply want to stop carrying the whole plan in your head. You do not need any finance training.

What you will be able to do. By the end you can write a first-draft restaurant business plan covering the nine elements Wilson K Lee teaches, with a one-page concept, a priced and tested sample menu, revenue projections built from your own competitor count, and a start-up cost list that explains exactly what you are asking for.

Why a plan at all. Wilson gives three reasons, and you will meet them again in the first lesson. A plan helps you raise funds, because banks, government and investors need to see how you will succeed over time. It helps you attract the right partners, because what is in your head is hard to transfer to theirs. And it gives you clarity, so you avoid pitfalls you could have planned for.

How the course is laid out. Three modules, ten lessons, about five minutes each.

Module 1 defines the restaurant: your one-page concept, the one customer you serve, and the kind of location that suits them.

Module 2 puts numbers and pictures behind it: a sample menu tested in your neighborhood, revenue projections from counting a comparable restaurant, design renders, and your start-up costs and funding ask. This is the hardest module, and the one funders read most closely.

Module 3 makes the case: your management team, an honest SWOT analysis, and a marketing plan.

After the last lesson there is one action plan that takes you through assembling the whole document without reopening the lessons.

How to use it. Do the lessons in order. Each one ends with an assignment that produces one section of your plan. Keep them all in one folder. By the end, that folder is your first draft.

You will see two labels. **[General knowledge, not from the video. Check before publishing.]** marks facts I have added from widely known information, such as how to calculate a margin, because Wilson doesn't give them. **[Instructor's method, not from the video.]** marks a template or technique I add to help you produce the page. Everything without a label comes from Wilson.

What it does not cover. Wilson is clear that his nine elements are "basic elements" and "not the only type of things" a plan might need, and that the terms differ from country to country. So this course does not teach full financial statements, permits and licenses, insurance, staffing plans, legal structure or how to apply for a specific loan. It does not include the template Wilson mentions, which isn't described in his tutorial. He also points to four of his other videos (on concept types, "golden metrics", location types and marketing hacks); their content is not in this course. And one note on dates: the tutorial's title says 2022, so treat any platform, trend or figure in it as a snapshot from around then.

4. Worked example

Illustrative. Rosa wants to open a 30-seat empanada counter and has a meeting with her bank in six weeks. A friend told her to "just download a template". She reads this page and sees the course will give her a concept page, a tested menu and projections she can explain, which is what the bank will ask about. She also sees it won't cover her food permit or her lease terms, so she books a separate call with her accountant for those. She writes her plan brief: "Empanada counter, first location, bank loan meeting on 14 March, plan draft done by 1 March." The one thing that would have gone wrong: without checking scope, she would have expected the course to cover her permit and found out too late.

5. Common mistake

Waiting for a perfect template before starting. Wilson's point is the thinking behind each element, not the form it sits on. Do instead: start the folder today and let each lesson add one page.

6. Summary

Wilson K Lee, owner of 720 Sweets, teaches nine elements of a restaurant business plan: concept, sample menu, management team, design, target market, location, SWOT, marketing and financials. A plan helps you raise funds, attract partners and stay clear on where you are going. This course turns his method into ten five-minute lessons in three modules, each ending with one page of your plan. Labeled passages mark added material to check.

7. Quiz

1. Which person is this course built for? A. An accountant preparing year-end statements for an existing restaurant B. Someone planning their first food and beverage business who needs a plan to show a bank, investor or partner C. A franchise buyer who needs legal advice on a franchise agreement D. A restaurant owner looking for a staffing and payroll system

2. You see a passage marked "[General knowledge, not from the video. Check before publishing.]" What should you do with it? A. Treat it as Wilson K Lee's own advice B. Skip it because it is optional C. Check it against a reliable source, such as your accountant, before relying on it D. Assume it is wrong and leave it out of your plan

3. You need a section on permits and licenses for your bank. What does this course offer you there? A. A full lesson on permits in Module 3 B. Nothing; it is outside the course, so plan to get it from your accountant, lawyer or local authority C. Wilson's template, which covers permits D. A permit checklist inside the action plan

Answer key

1. **B.** That is who Wilson's tutorial answers. A is wrong: the course covers planning before opening, not accounts for a running business. C is wrong: there is no legal advice in it. D is wrong: staffing is not covered.
2. **C.** The label exists so you check it. A is wrong: the label means Wilson didn't say it. B is wrong: those passages often hold practical details you need. D is wrong: it may well be accurate; the point is to verify.
3. **B.** Permits are outside the source and outside the course. A is wrong: no lesson covers them. C is wrong: the template isn't described in the tutorial and isn't included. D is wrong: the action plan covers only what the lessons teach.

8. Assignment: set up your plan folder

Time: 10 minutes.

Create one folder (paper or digital) for your plan. Inside, write a one-page plan brief with four lines:

1. The business in one line (type, size, first location or not).
2. Who you are writing the plan for first: a bank, government program, investor, partner, or yourself.
3. The date you need a first draft by.
4. Anything you already know you need that this course does not cover, and who you will ask about it.

Done checklist

- [ ] The folder exists and you can find it again
- [ ] The business is described in one line
- [ ] A first reader is named
- [ ] A draft date is written as an actual date
- [ ] Out-of-scope items are listed with a person or organization to ask

Sample answer (illustrative)

> Business: 25-seat ramen bar, first location, suburban strip mall. First reader: my bank, then one possible partner (a former chef I worked with). Draft by: 30 April. Not covered here: food premises permit and liquor license (ask the city office); lease review (ask a lawyer).

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Write Your One-Page Concept

Module 1: Define the restaurant you are asking people to back. By the end of this module you have a one-page concept, a profile of the one customer you serve, and a location brief written for that customer.

Instructor: [YOUR NAME] Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

1. Objective

Write a one-page concept that names your opportunity, why you are the one to take it, how you will close the gap, and why customers will buy from you.

2. Why it matters

The concept is the first thing a banker, investor or partner reads, and Wilson K Lee estimates you have two or three minutes of their attention. If this page doesn't land, the rest of your plan may never get read.

3. The teaching

Start with who the plan is for, because that decides how you write the concept. Wilson gives three reasons to write a business plan.

The first, which he calls "the number one reason", is to raise funds. Banks, government, investors and angel investors all ask for a plan because they need to see how you plan on succeeding over the next one, three, five and 10 years. The second is to attract the right partners. Plenty of owners want someone talented who works as hard as they do, but it's very hard to get what is in your head into a partner's eyes without something written down. The third is clarity. People who go into business without a plan end up hitting pitfalls that, in Wilson's words, "can be avoided if only you planned for it."

Before the first element, Wilson adds a warning worth keeping. His elements are basic ones, not the only things a plan might need, and the terms change depending on which country you're in. Use them as a reference and tailor them to your area and your needs. If your bank calls something by a different name, use theirs.

Now the concept itself. Wilson asks you to answer four questions:

1. What problem does it solve in the marketplace?
2. Why are you the one who is going to solve it?

3. Why are you uniquely capable of solving it?
4. Why should customers buy from you?

He boils it down to one line: identify where you see an opportunity, why you are suitable, and how you will fill and close that gap.

He also names what kind of concept it is. Wilson describes four types of concept in a separate video, and those types aren't covered here. Name your type in plain words: a quick-service counter, a sit-down restaurant, a dessert shop.

Length is not negotiable. Wilson says the concept "should be only a page long and it cuts right to the chase." A 10 page essay won't get read. It will bore the people you most need.

Here is how he would rewrite the concept for his own shop, 720 Sweets, an ice cream shop in Vancouver. He would class it as a "fast-paced food concept" that needs minimal investment: no structural changes, and no hood fan, which a full-scale restaurant would need. It is a small place of about 500 square feet. He is honest that this suits one investor and not another, because of the revenue a place that size can bring in. A good concept doesn't hide its size. It lets the right reader self-select.

The gap: 720 Sweets sits in an area without many novel places for younger adults to hang out. Why him: his background traveling across Asia, seeing different recipes and presentations, and bringing them back to Vancouver. Who buys and why: university students who find these desserts intriguing and appealing. Wilson is clear this is what he "would write if I were to redo this business plan", so treat it as a model, not his original document.

[General knowledge, not from the video. Check before publishing.] The "hooded fan" Wilson mentions is a commercial kitchen exhaust hood, the ventilation system over cooking equipment. Whether your concept needs one usually depends on whether you cook with grease or open flame, and on local fire and building codes. Check with your local authority or a contractor.

[Instructor's method, not from the video.] To keep to one page, use five headings and no more than three or four sentences under each:

- **What we are:** concept type and size.
- **The gap:** what is missing in this area or market.
- **Why us:** the background, skill or resource no one else nearby has.
- **How we close it:** what you will open and offer.
- **Why customers buy:** in the customer's terms, not yours.

Read it aloud and time it. If it takes more than two minutes, cut.

4. Worked example

Illustrative. The business, people and details are invented.

Kofi wants to open a West African lunch counter in an office district. His first draft runs four pages: his family history, every dish, his kitchen design, his dream of five locations.

He rewrites it under the five headings. What we are: a counter-service lunch spot of about 600 square feet, open weekdays. The gap: plenty of sandwich chains on the block, nothing serving hot West African food at lunch. Why us: eight years cooking in his aunt's catering business, with her recipes. How we close it: four rotating dishes, ready in under five minutes. Why customers buy: a hot, filling lunch they can't get anywhere else nearby.

Result: one page, read aloud in about 90 seconds. His bank contact reads it during their first meeting rather than putting it aside.

The one thing that would have gone wrong: he nearly left his aunt's catering business out as "not really experience". That line is his entire answer to "why you", and without it the page names a gap but gives no reason he is the one to fill it.

5. Common mistake

Writing the concept as a life story or a vision statement. It reads as passion, but it never answers the reader's questions. Do instead: answer Wilson's four questions in order, under headings, and stop at one page.

6. Summary

A plan does three jobs: it helps you raise funds, attract the right partners and stay clear on your direction. Wilson K Lee's first element is the concept, kept to one page because readers give it two or three minutes. It answers four questions: what problem you solve, why you, why you uniquely, and why customers buy. Tailor terms to your country. Name your type and size honestly; they decide which investors fit.

7. Quiz

1. Your draft concept is six pages long and covers your whole career. An investor will read it before a meeting. What should you do? A. Keep it, because detail shows commitment B. Cut it to one page that answers what gap you fill, why you, how you close it and why customers buy C. Add a table of contents so they can skim it D. Replace it with your sample menu

2. Your concept is a 400 square foot dessert kiosk that needs little investment. One investor says the revenue is too small for them. What does this lesson suggest? A. Make the

concept sound bigger than it is B. Remove the size from the concept C. Keep the size stated honestly; the concept fits some investors and not others D. Drop the kiosk idea and plan a full restaurant

3. Which sentence best answers "why are you uniquely capable of solving this problem"? A. "We are passionate about great food." B. "Our customers will love us." C. "I spent six years as head baker at a bakery two streets away, and I'm bringing its best-selling recipes with me." D. "There is no other bakery like ours."

Answer key

1. **B.** Wilson's rule is one page that cuts to the chase. A is wrong: he says a long essay won't get read. C is wrong: a contents page doesn't fix the length. D is wrong: the menu is a separate element and doesn't replace the concept.
2. **C.** Wilson says his small shop may suit one investor and not another because of revenue potential. A is wrong: inflating the concept misleads the reader. B is wrong: size is part of the concept. D is wrong: nothing in the lesson says to change the business.
3. **C.** It names a specific background no competitor has. A is wrong: passion isn't a capability. B is wrong: it answers why customers buy, without evidence. D is wrong: it claims uniqueness without saying what it is.

8. Assignment: your concept page

Time: 30 minutes.

Write your concept on one page under the five headings: What we are, The gap, Why us, How we close it, Why customers buy. Read it aloud with a timer and cut until it takes two minutes or less. Save it as the first section of your plan folder.

Done checklist

- [ ] It fits on one page
- [ ] It names the concept type and approximate size
- [ ] "The gap" names a specific missing thing in a specific area or market
- [ ] "Why us" names a concrete background, skill or resource
- [ ] It reads aloud in two minutes or less

Sample answer (illustrative)

> **What we are:** a bubble waffle and soft-serve window, about 350 square feet, takeaway only. **The gap:** the riverside walk has three coffee carts and no dessert within ten minutes' walk. **Why us:** I ran the dessert station at a night market stall for four summers and built its waffle recipe. **How we close it:** six fixed menu items and

> one weekly special, open noon to 10 pm. **Why customers buy:** something sweet and photogenic they can carry on their walk.

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Profile the One Customer You Serve

Module 1: Define the restaurant you are asking people to back.

Instructor: [YOUR NAME] Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

1. Objective

Write a one-paragraph profile of a single, named target customer, then check your concept against the job they need done.

2. Why it matters

Your menu, your location and your marketing all get judged against one question: does this suit the person you're serving? If you can't name that person, every later section of the plan turns vague, and vague plans don't get funded.

3. The teaching

Your concept page says what gap you fill. This lesson says who for. Wilson K Lee lists target market as the fifth element of his plan, but it comes second here because the menu, the location and the marketing all depend on it.

His instruction is specific: identify "that one person" you're trying to serve. Not an age band, not "families and professionals". One person. Then profile them: what they like, how old they are, what kind of income they have, and what they are trying to solve.

That last field matters most. Wilson's example: suppose you're serving a 30-year-old who is hustling in their job and wants something quick to go, something to eat, something healthy. If what you offer takes 40 minutes to make, is unhealthy and is hard to eat on the go, it doesn't do the job that customer needs done. The concept fails the customer, however good the food is.

Wilson then answers the objection everyone raises: if I build everything for this one customer, won't I cut out everyone else? His answer is no. Catering to one demographic "doesn't cut out everyone else. People will still consume from you." Being specific cuts through the noise. People can see clearly what you offer. In his words, "You don't want to be vanilla in this trade."

Here is the customer he profiles for 720 Sweets. Her name is Michelle.

- She is 18 and goes to university.
- She is in her second year.
- She values the goodness of life, loves social media, loves experiencing the world, and has a purpose to what she wants to do in life.
- Her disposable income is around 8,000 to 10,000 dollars. (He doesn't say over what period or in which currency.)
- She loves experiencing food with her friends, and she loves innovative, trendy items.

Wilson says this profile let 720 Sweets attract "a bunch of Michelles", and that being so specific about the experience is how the shop gained traction. That is his account; he gives no figures.

Notice what the profile does. It names a person, so everyone on your team pictures the same customer. It gives an income, so your prices can be checked against it. It gives habits (social media, trying new things with friends), so your marketing has somewhere to start. And it gives the job: a novel, shareable treat with friends, which matches the gap in his concept, an area short on novel places for younger adults to hang out.

[Instructor's method, not from the video.] Write your profile in this order:

1. **Name and age.** A first name makes the customer real in team conversations.
2. **Situation.** Student, shift worker, parent, commuter: where they are in life.
3. **Income.** Roughly what they can spend, and say what period the figure covers.
4. **What they like.** Two or three habits or tastes that affect how they eat out.
5. **The job.** One sentence: when they come to you, what are they trying to get done?

Then run the fit test. Put your concept's "How we close it" next to the job. If your offer takes longer, costs more, or is harder to eat than the job allows, change the offer or change the customer. Don't leave the mismatch for a banker to find.

Where do the details come from? Wilson doesn't give a research method for the profile itself. You will check it in Module 2, when you survey people around your planned location.

4. Worked example

Illustrative. The business and people are invented.

Leah plans a salad bar near a hospital. Her first profile says "health-conscious adults aged 25 to 55". She rewrites it as one person: Dev, 34, an emergency-room nurse on 12-hour shifts, earns a steady salary, likes high-protein food and eats in the 30-minute break he actually gets. The job: a filling, healthy meal he can buy and finish within his break.

The fit test catches a problem. Her planned "build your own bowl" line takes about ten minutes at peak. She adds six pre-built bowls ready to grab, and keeps the build-your-own option for quieter hours.

The one thing that would have gone wrong: with the wide age band, the ten-minute wait looked fine. Only the single profile showed that her core customer could not afford to wait.

5. Common mistake

Profiling a crowd instead of a person: "everyone aged 18 to 65 who likes good food." It feels safe, but it gives you nothing to test the menu, location or marketing against. Do instead: name one person, write the job they need done, and trust Wilson's point that others will still come.

6. Summary

Wilson K Lee's target market element asks you to profile "that one person" you serve: what they like, their age, their income and the problem they need solved. His 720 Sweets customer is Michelle, an 18-year-old second-year university student who loves social media, trendy items and eating out with friends. Serving one person doesn't exclude others. Check your offer against the job your customer needs done, and fix any mismatch.

7. Quiz

1. Your target customer is a commuter who needs breakfast in under three minutes. Your signature item takes 15 minutes to prepare. What does the fit test tell you? A. Nothing, because food quality matters more than speed B. The offer doesn't do the customer's job; change the offer or the customer C. Widen the target market so speed matters less D. Leave it for the marketing plan to solve

2. A partner says, "If we write the whole plan for one customer, we'll lose everyone else." What is the best reply, based on this lesson? A. Agree, and list five customer types instead B. Say that serving one profile clearly still lets others buy, and makes the offer stand out C. Say other customers don't matter D. Say the target customer section is optional

3. Which profile is closest to the one Wilson describes? A. "Young people who like dessert" B. "Students and families in the area" C. "Ana, 20, part-time barista studying design, about 6,000 dollars a year to spend, posts food photos, wants somewhere new to take friends after class" D. "Anyone with a sweet tooth"

Answer key

1. **B.** Wilson's 40-minute example shows an offer that doesn't meet the customer's need fails the criteria. A is wrong: the customer's job includes time. C is wrong: widening the market hides the mismatch rather than fixing it. D is wrong: marketing can't make a 15-minute item fit a three-minute need.
2. **B.** That is Wilson's answer to this exact objection. A is wrong: it gives up the specificity he asks for. C is wrong: he says others will still buy, not that they don't matter. D is wrong: he lists it as an element of the plan.
3. **C.** It names one person with age, situation, income and the job. A, B and D are all crowds, with no income, habits or job to test against.

8. Assignment: your customer profile

Time: 20 minutes.

Write a one-paragraph profile of your one target customer using the five fields: name and age, situation, income (with the period), what they like, and the job. Under it, write two lines for the fit test: the job, and how your concept's offer meets it. Note any mismatch and what you will change. Save it in your plan folder.

Done checklist

- [ ] The profile names one person with an age
- [ ] Income is stated with the period it covers
- [ ] The job is written as one sentence from the customer's side
- [ ] The fit test compares the job with your actual offer
- [ ] Any mismatch has a written fix

Sample answer (illustrative)

> Marcus, 41, warehouse supervisor on early shifts, about 1,200 dollars a month to spend after bills. Likes big portions, eats in his truck, checks prices before ordering. The job: a hot, filling breakfast he can buy at 5:30 am and eat with one hand. Fit test: our breakfast burrito is wrapped to go and ready in four minutes. Mismatch: we planned to open at 7 am. Fix: open at 5:15 am on weekdays.

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Write Your Location Brief

Module 1: Define the restaurant you are asking people to back.

Instructor: [YOUR NAME] Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

1. Objective

Write location criteria specific enough to rule a site in or out before you go and see it.

2. Why it matters

Rent is one of the biggest numbers you will commit to, and the wrong type of site can starve a good concept of the customers it was built for. A specific brief also shows the people reading your plan that you've thought past "somewhere busy".

3. The teaching

With your customer named, you can say where they will find you. Wilson K Lee's location element asks you to identify the type of location best suited to your food concept, and to put it in the plan.

He starts with the most common shortcut and why it fails. Plenty of people leave location out, planning to just walk around and pick anywhere with a lot of people. But in the real world, as Wilson puts it, "budget is always a constraint." Busy costs money.

His first distinction is between a destination location and a high traffic location. He covers the difference in depth in another video, which isn't part of this course. Here he gives the two things that separate them: the number of people who walk by, and the rent. A high traffic site brings passers-by and charges for them. A destination site is cheaper, but customers have to choose to come.

His second point ties location to your customer. A site could be super accessible because you're catering to high school students. Or it could be a destination you can only reach by car, which means you're catering more to an adult, higher-end customer who drives rather than takes public transit. So the profile from the last lesson decides the access you need.

His third point is crime. How much crime happens around the area, and would it scare off your potential customers?

And the reason all this belongs in the plan: the more specifically you identify the location, the easier it is for readers to understand your concept. If it's confusing, in Wilson's words, "most likely you're not going to get your funding."

Here is the 720 Sweets brief, as he describes it:

- 15 minutes from the university by bus, which suits a university student like Michelle.
- Right in front of a bus stop.
- Around 400 to 500 square feet, which made it affordable to rent.
- An area with plenty of food businesses but not much dessert.

The detail that matters most is the order. Wilson says they identified that location "even before we found that location." The criteria came first, and the search came second.

[Instructor's method, not from the video.] Write your brief as a short list of criteria, each one testable on a site visit or a map:

1. **Type:** destination or high traffic, and why, given your customer.
2. **Access:** how your customer arrives (on foot, bus, car), and the maximum travel time from where they are.
3. **Size:** a square-foot range that fits your concept.
4. **Rent:** the most you can pay per month. If you don't know yet, write "to be set in Module 2" and come back after your start-up cost lesson.
5. **Neighbors:** what should be nearby, and what gap should exist (Wilson's "a lot of food but not a lot of dessert").
6. **Safety:** how you will check crime in the area.

[General knowledge, not from the video. Check before publishing.] Many cities publish crime maps or police statistics by neighborhood, and a commercial real estate agent can usually tell you typical rents per square foot for an area. Check what is available where you live.

Then add a "deal-breakers" line: the two criteria a site must meet or you walk away. For 720 Sweets, judging from his list, access by bus from the university looks like one of them. That is my reading, not something Wilson states.

4. Worked example

Illustrative. The business and details are invented.

Tomas is planning a late-night dumpling bar for night-shift workers and students. His first idea is the city's main shopping street, where foot traffic is huge.

He writes the brief instead. Type: high traffic, but at night, not daytime. Access: on foot or on the night bus, within 10 minutes of the transit hub. Size: 600 to 800 square feet. Rent: he leaves it open until he has costed his start-up. Neighbors: bars and late venues, with no other hot food open after 11 pm. Safety: he checks the city crime map for the blocks around the hub. Deal-breakers: within 10 minutes of the hub, and open-late permitted.

Result: the shopping street fails two criteria. It is busiest by day, and most of it closes by 9 pm. A side street by the transit hub meets all six.

The one thing that would have gone wrong: chasing daytime foot traffic would have meant paying peak rent for crowds who are asleep when he's open.

5. Common mistake

Picking a site first and justifying it later. It's easy to fall for a space and then write the brief around it. Do instead: do what Wilson did and write the criteria before you look, then score every site against them.

6. Summary

Wilson K Lee's location element asks you to identify the type of site that suits your concept before you search. A destination site and a high traffic site differ in foot traffic and rent. Access should match your customer: transit for students, parking for a customer who drives. Check crime. His 720 Sweets brief: 15 minutes by bus from the university, in front of a bus stop, around 400 to 500 square feet, and an area short on dessert.

7. Quiz

1. Your customer is a high school student with no car. A cheap site is available that you can only reach by car. What does this lesson suggest? A. Take it, because rent is the most important factor B. Rule it out, because access doesn't match the customer C. Take it and plan heavy advertising D. Change the customer to adults who drive, so the site fits

2. You found a busy corner with very high rent. What should your location brief help you decide? A. Whether the extra foot traffic justifies the rent for your concept and budget B. Nothing; busy is always best C. Whether the landlord likes your concept D. Which menu items to cut

3. When should you write your location criteria? A. After signing a lease, to explain the choice to the bank B. Before searching, so you can rule sites in or out C. Only if a bank asks for it D. After opening, once you know who your customers are

Answer key

1. **B.** Wilson ties access to the customer: accessible sites for students who don't drive. A is wrong: he names rent as one factor, not the only one. C is wrong: advertising doesn't give students a car. D is wrong: changing the customer to fit a site reverses the order of the plan.
2. **A.** Wilson names foot traffic and rent as the difference between site types, and says budget is always a constraint. B is wrong: that is the shortcut he warns against. C is wrong: it isn't one of the criteria. D is wrong: the menu is a separate element.
3. **B.** 720 Sweets identified its location "even before we found that location." A and D are wrong: by then the decision is made. C is wrong: Wilson says to include it in the plan.

8. Assignment: your location brief

Time: 25 minutes.

Write your location brief with the six criteria (type, access, size, rent, neighbors, safety) and a deal-breakers line naming the two criteria every site must meet. If you already have a site in mind, score it against the brief and write pass or fail beside each criterion. Save it in your plan folder.

Done checklist

- [ ] The type is named (destination or high traffic) with a reason tied to your customer
- [ ] Access states how the customer arrives and a maximum travel time
- [ ] Size is a range in square feet (or square meters)
- [ ] Rent has a maximum, or is marked "to be set in Module 2"
- [ ] Two deal-breakers are named

Sample answer (illustrative)

> Type: destination. Our customer drives to us for a sit-down family dinner. Access: by car, within 15 minutes of the three suburbs we serve; at least 20 parking spaces shared or on site. Size: 1,800 to 2,400 square feet. Rent: to be set in Module 2. Neighbors: a grocery anchor or cinema; no other sit-down Thai restaurant within 3 km. Safety: city crime map checked for the surrounding blocks. Deal-breakers: parking, and no Thai competitor within 3 km.

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Build and Test a Sample Menu

Module 2: Put numbers and pictures behind it. By the end of this module you have a tested, priced menu, revenue projections you can defend, design renders, and a start-up cost list that explains your funding ask.

Instructor: [YOUR NAME] Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

1. Objective

Build a sample menu that shows each item's purpose, cost, retail price and margin, and adjust it using a survey of your neighborhood.

2. Why it matters

Until you have a menu, you have no numbers: no price, no cost, no margin to put in front of a bank. A menu tested on real people nearby also gives you an answer when someone asks how you know customers want it.

3. The teaching

Your concept, customer and location are on paper. Now say what you'll sell. Wilson K Lee's second element is the sample menu: the items you propose to serve. He is blunt about it: "If you're going to start up in a restaurant or food and beverage, you definitely need a sample menu."

For every item, he asks four questions:

1. Why are you offering this specific item?
2. What need does it fulfill?
3. What does it cost?
4. How much are you planning to retail it for?

The first two tie each item back to your customer's job. The last two give you your margin. As Wilson says, once you include the cost and the retail price, "you can see what margins you can hit." He also says that without a proposed menu "we wouldn't know the numbers. We wouldn't know whether our customers want it." The menu comes before the financials for that reason.

He mentions what he calls the "golden metrics" for planning your numbers, covered in a separate video that isn't part of this course. What follows on margins is general knowledge, not his metrics.

[General knowledge, not from the video. Check before publishing.] Two simple calculations are widely used for menu items. Food cost percentage is the ingredient cost divided by the selling price. Gross margin per item is the selling price minus the ingredient cost, and as a percentage, that figure divided by the selling price. An item that costs 2.00 to make and sells for 8.00 has a food cost of 25% and a gross margin of 6.00, or 75%. What counts as a healthy figure varies by concept and country, so ask your accountant or peers in your trade.

Then test it. Wilson's next step is to take the menu outside: survey people around the block, and ask whether the menu fits their profile, whether it's something they need, and whether it's something they want.

Here is what 720 Sweets did. Three months before opening, they surveyed people around the area. They asked what kind of flavor people were looking for and how much they were spending. They also went around the neighborhood to see the different dessert shops and what they were charging. Then they compiled all of it into the proposed menu, "based upon the research that we have done in our neighborhood."

So there are two sources of evidence. People tell you what they want and what they spend. Competitors' price boards tell you what the area already pays. Your prices have to make sense against both.

[Instructor's method, not from the video.] Build the menu as a table with these columns:

Item	Why we offer it	Need it fulfills	Cost to make	Retail price	Margin

Then run the survey with three questions taken from Wilson's own: Would you buy this? What flavor or version would you choose? What do you usually spend on something like it? Ask people who match your profile, near your planned location. Record each answer on one line so you can count them.

Next, list five or so nearby competitors with what they sell and their price for the closest item to each of yours.

Finally, adjust. Cut items nobody wants. Move prices where both the survey and the competitor list say they don't fit. Write one line under the table saying what changed and why. That line is what makes the menu "researched" rather than wished for.

Wilson doesn't say how many people to survey. Aim for enough answers that one enthusiastic friend can't swing the result, and say in the plan how many you asked.

4. Worked example

Illustrative. The business, prices and survey counts are invented.

Priya plans a South Indian breakfast cafe near a college. Her draft menu has eight items, including a masala dosa at 14.00 that costs 3.50 to make (a 75% margin).

She surveys 40 students outside the college gate over three mornings and checks six cafes nearby. Most students say they spend under 10.00 on breakfast. The nearest cafes charge 8.00 to 11.00 for a hot breakfast item. Almost nobody wants the two most complex items.

She cuts those two, adds a smaller dosa at 9.50 that costs 2.40 (about 75% margin), and keeps the full dosa for weekends. Her note reads: "Weekday prices moved under 10.00 after a 40-person survey and a six-cafe price check."

The one thing that would have gone wrong: she priced from her costs alone. At 14.00 the margin looked great, but it would have priced out the customer she profiled.

5. Common mistake

Pricing from your costs and your hopes, then calling it a menu. The margins look fine on paper, and nobody has checked whether the people nearby will pay. Do instead: survey people who fit your profile and record competitor prices before you settle a single price.

6. Summary

Wilson K Lee's sample menu element lists every item you plan to sell with why you offer it, the need it fulfills, its cost and its retail price, so you can see your margins. Test it: survey people near your location on what they want and spend, and record what nearby competitors charge. 720 Sweets did this three months before opening and built its proposed menu from the results.

7. Quiz

1. Your survey shows people nearby spend about 6.00 on a coffee and pastry. Your planned combo is 11.00. What should you do? A. Keep 11.00, because your costs justify it B. Reprice or redesign the combo, or explain clearly in the plan why your customer will pay more C. Stop surveying, since the answers are inconvenient D. Remove prices from the menu

2. An item costs 3.00 to make and you plan to sell it for 12.00. What is its gross margin per item? A. 3.00 B. 4.00 C. 9.00 D. 15.00

3. A banker asks how you chose your prices. Which answer is strongest? A. "They felt right." B. "We copied a famous chain's menu." C. "We surveyed 50 people near the site about what they spend, checked eight competitors' prices, and set ours inside that range." D. "Our margins are high, so they must be right."

Answer key

1. **B.** The survey is there to catch exactly this. A is wrong: costs don't tell you what customers will pay. C is wrong: ignoring the research defeats its purpose. D is wrong: Wilson asks for the retail price on every item.
2. **C.** Selling price minus cost: 12.00 minus 3.00 is 9.00. A is the cost, not the margin. B divides the price by the cost. D adds them.
3. **C.** It shows the homework Wilson describes: people surveyed and competitor prices checked. A is wrong: there's no evidence. B is wrong: a famous chain isn't your neighborhood. D is wrong: a high margin says nothing about whether customers will pay.

8. Assignment: your tested sample menu

Time: 45 minutes to build the table, plus the time you spend surveying.

Build your menu table with all six columns. Survey people who match your profile near your planned location, and record at least five competitor prices. Adjust the menu and write one line on what changed and why. Save the table, the survey tally and the competitor list in your plan folder.

Done checklist

- [ ] Every item has all six columns filled in
- [ ] Margins are calculated, not estimated
- [ ] The survey states how many people were asked and where
- [ ] At least five competitor prices are recorded with the business name
- [ ] One line explains what changed after the research

Sample answer (illustrative)

Item	Why	Need	Cost	Price	Margin
Pork bun (2)	Fast, signature	Hot lunch in under 5 minutes	1.80	7.50	5.70 (76%)
Noodle bowl	Filling main	A full meal for office workers	3.20	13.00	9.80 (75%)
Iced tea	Add-on	Drink with lunch	0.40	3.50	3.10 (89%)

> Survey: 35 office workers on Front Street, three lunchtimes. Competitors: five, 6.00 to 15.00 for a main. Change: noodle bowl moved from 15.00 to 13.00; dropped the dessert bun (2 of 35 interested).

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Project Revenue From a Competitor Count

Module 2: Put numbers and pictures behind it.

Instructor: [YOUR NAME] Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

1. Objective

Count customers and orders at a comparable restaurant across a full week, and turn the count into first-year, three-year and five-year revenue projections.

2. Why it matters

Every funder will ask where your numbers came from, and "I estimated" is a weak answer. A projection built on a week of your own counting is still an estimate, but it is one you can defend line by line.

3. The teaching

You have prices from your menu. Now you need to know how many people will pay them. Wilson K Lee calls financials "crucial for your success" and says to "never ever leave this part out." He also takes away the usual excuse. Not knowing how you will perform "does not mean you shouldn't budget. It does not mean you shouldn't project."

The problem with projecting before you open is that we guess. In Wilson's words, "Sometimes we can become very optimistic. Sometimes we're very pessimistic." His answer: "The answer is in the survey and doing your homework."

Here is his method.

Go to a neighboring restaurant, sit there, and use a clicker. Every time someone walks in, click. Every time someone orders, see what they order and jot down the price of the item. Note whether they add a drink and whether they add dessert.

Do it several times, and then you can work out an average for how much revenue that place makes per hour. Cover the whole week: go in the morning, at lunch, during dinner, on a weekday and on a weekend. Then you have a clear picture of how they perform over a week.

Then comes the projection. If and when you can perform as well as that restaurant, your numbers would look like theirs. Use their figures as the base for your own, and project how you will do in the first year,

the next three years and the next five years.

Wilson is honest about what this is. Funders "understand that these are not real numbers." What impresses them is the homework. Imagine, he says, telling a banker you sat in a competitor's restaurant for a week to get these numbers. That shows you're willing to do the work, and it gives them something more accurate to judge.

[Instructor's method, not from the video.] Here is one way to turn your count into numbers. Wilson gives the method, not the arithmetic.

1. **Choose the comparable.** Pick a restaurant similar to yours in concept, size and price, ideally near your planned location.
2. **Plan your sessions.** Cover morning, lunch and dinner, on weekdays and on the weekend. One hour per session is a practical minimum.
3. **Record each session** on one sheet: date, day, time, people in, orders, and the price of each item, drink and dessert.
4. **Work out revenue per hour** for each session: add up the prices you recorded, divided by the hours you watched.
5. **Build a typical week.** For each day type and time block, multiply your average revenue per hour by the hours they're open in that block. Add the blocks to get a week.
6. **Turn it into a year.** Multiply the week by the weeks you plan to open. Write down every assumption in a line under the number.
7. **Project years three and five.** Wilson doesn't give a growth rate, and neither will I. Write each year's figure with the reason behind it, for example "same as year one, no growth assumed", or "a second daypart added in year three".

Then state plainly in your plan: "Based on [X] hours of observation at a comparable restaurant, [dates]." That one line is your answer to "how did you come up with these numbers?"

[Instructor's method, not from the video.] Two cautions. Be a paying customer while you count, and be discreet. Don't film or photograph people. And remember a busy restaurant you count is established; a new place may take time to reach the same level. Note that in your assumptions.

4. Worked example

Illustrative. The business, counts and figures are invented.

Jun plans a ramen shop and picks a comparable ramen bar six blocks from his site. Over one week he sits through 10 one-hour sessions covering weekday lunch and dinner and weekend lunch and dinner. He skips mornings because the bar opens at 11.

His sheets show weekday lunch averaging 380 an hour, weekday dinner 520, weekend lunch 610 and weekend dinner 700. The bar opens 11 to 3 and 5 to 10. Weekdays: 4 lunch hours times 380, plus 5 dinner hours times 520, is 4,120 a day, times 5 days, 20,600. Weekend: 4 times 610 plus 5 times 700 is 5,940 a day, times 2 days, 11,880. A typical week is 32,480. At 50 weeks, year one is about 1,624,000 if he performs as well as they do.

He writes that line under the figure, then adds his own assumption: year one at 70% of the comparable, because he's new, and years three and five at 100%.

The one thing that would have gone wrong: his first two sessions were both Friday dinner, the bar's busiest slot. Projecting from those alone would have overstated his week by more than a third.

5. Common mistake

Counting one busy session and multiplying it out. It's quick, and it produces a flattering number that falls apart at the first question. Do instead: cover mornings, lunches, dinners, weekdays and weekends, as Wilson says, and show your assumptions under every total.

6. Summary

Wilson K Lee says never leave financials out, and never skip projecting just because you haven't opened. Sit in a comparable restaurant with a clicker, count everyone who walks in, record what they order and its price, and note drinks and desserts. Cover mornings, lunch, dinner, weekdays and weekends to get average revenue per hour and a weekly picture. Project years one, three and five on the basis of performing as well as they do, and state your assumptions.

7. Quiz

1. You counted a comparable cafe only on Saturday mornings. What is the problem with projecting from it? A. There is no problem; Saturday is typical B. It misses weekdays, lunch and dinner, so the weekly figure will likely be wrong C. You should have counted only one hour D. Cafes can't be used as comparables

2. A session shows 30 orders in one hour averaging 12.00 each. What is the revenue per hour for that session? A. 42.00 B. 120.00 C. 360.00 D. 3,600.00

3. A banker says, "These aren't real numbers." What is the best reply? A. "They are guaranteed." B. "You're right. They're based on a week of counting at a comparable restaurant, with the assumptions written under each figure." C. "Every restaurant makes these numbers." D. "We'll work out the real numbers after we open, so it doesn't matter."

Answer key

1. **B.** Wilson says to go in the morning, at lunch, at dinner, on weekdays and on weekends. A is wrong: one slot can't represent a week. C is wrong: less counting makes it worse. D is wrong: any comparable business can be counted.
2. **C.** 30 orders times 12.00 is 360.00. A adds the two numbers. B and D get the multiplication wrong by a factor of ten.
3. **B.** Wilson says funders understand projections aren't real numbers; what impresses them is the homework. A is wrong: you can't guarantee them. C is wrong: it's untrue and unsupported. D is wrong: he says not knowing is no reason not to project.

8. Assignment: your revenue projection

Time: about 60 minutes of desk work, plus your observation sessions (at least 6 hours across one week).

Choose a comparable restaurant and run your observation sessions using the one-sheet record. Work out revenue per hour for each session, build a typical week, and project year one, year three and year five. Write the assumption behind every figure, and the line stating how many hours you observed and on which dates. Save the sheets and the projection in your plan folder.

Done checklist

- [ ] Sessions cover at least morning or lunch, dinner, a weekday and a weekend
- [ ] Each session sheet shows people in, items ordered and prices
- [ ] Revenue per hour is calculated for every session
- [ ] Year one, three and five figures each have a written assumption
- [ ] The plan states the observation hours and dates

Sample answer (illustrative)

> Comparable: Bao House, King Street (similar size and prices). Observed 8 hours, 3 to 9 June. Revenue per hour: weekday lunch 260, weekday dinner 340, weekend lunch 410, weekend dinner 450. Typical week (open 11 to 3 and 5 to 9, so 4 lunch hours and 4 dinner hours a day): weekdays 5 x 2,400 = 12,000; weekend 2 x 3,440 = 6,880; total 18,880. Year 1: 50 weeks at 70% of comparable = about 661,000. Assumption: new business, building a customer base. Year 3: 50 weeks at 90% = about 850,000. Assumption: regulars established. Year 5: 50 weeks at 100% = 944,000. Assumption: matching the comparable.

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Get Your Vision Drawn

Module 2: Put numbers and pictures behind it.

Instructor: [YOUR NAME] Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

1. Objective

Write a design brief for your restaurant and choose who will turn it into renders: a design firm or a freelancer.

2. Why it matters

The people reading your plan can't see what you see, and most of them will never visit an empty unit with you. A picture of the finished room does what pages of description can't, and you'll need the design cost for your start-up budget in the next lesson.

3. The teaching

Your numbers say the restaurant can work. Now show people what it will look like. Wilson K Lee's fourth element is design, and his reason goes back to the whole point of the plan: "to be able to show your vision to the people," both the people you're raising funds from and the people you want on your team. The more they can see your vision, in his view, the better your chances of getting funded and of people joining you. So he asks you to be meticulous about getting what you see across to them.

He gives two ways to get it done.

Option one: a drafting firm or an interior design firm. If you have the resources, a firm will produce the designs for you. They will talk to you about your vision and ask three kinds of question:

- What type of material do you want to use?
- What kind of feeling do you want the space to give?
- What kind of experience do you want to give your customers?

From that, they create renders of how the inside will look, and other pictures and designs that bring your vision closer to reality.

Option two: a freelancer through a site such as Upwork or Fiverr. Not everyone has the budget for a firm, and Wilson says so plainly. Online contracting sites let you hire talent to do the same job, and

it's "much more reasonable and much cheaper." The trade-off is the important part: "you need to have much more control. You need to have much more coordination" with the person to get the renders and the image you want. With a firm, the firm runs the process. With a freelancer, you do.

(Both sites are named as they stood around 2022. Platforms, fees and how they work change, so check current terms.)

For 720 Sweets, design isn't decoration. Wilson calls it "the number one thing that we relied on" when building and selling franchises: beautiful designs to show franchisees and investors what a new location could look like. He credits those designs with helping secure "a few different resources and a few different rounds of fundings." That's his account; he gives no amounts. His designs are shown on screen and can't be described here.

[General knowledge, not from the video. Check before publishing.] A render is a computer-generated image of how a finished space will look, made from a 3D model. Renders are for showing a vision. They aren't construction or permit drawings, which in many places must be prepared or stamped by a licensed professional. Check what your local authority needs before you build.

[Instructor's method, not from the video.] Whichever option you choose, write the brief yourself before you talk to anyone. It's your control, and with a freelancer it's what Wilson's "much more coordination" looks like in practice. One page:

1. **The concept in two lines**, from your concept page.
2. **The customer**, from your profile: who walks in and what they're there to do.
3. **The space:** size, shape, and photos or a floor sketch if you have a site.
4. **Material:** what surfaces, finishes and colors you want, with two or three reference images.
5. **Feeling:** three words for how the room should feel.
6. **Experience:** what happens from the door to the seat (or the counter) to leaving.
7. **Deliverables:** how many renders, of which views, at what size, and by when.
8. **Budget:** the most you will spend, so you can compare quotes.

Get at least two quotes, and write down the one you choose. That figure becomes the "design costs" line in your start-up budget.

4. Worked example

Illustrative. The business, people and prices are invented.

Amara is opening a 900 square foot Caribbean takeaway with eight stools. She can't afford a design firm, so she posts a job on a freelance site.

Her first attempt is one sentence: "Need nice restaurant renders, Caribbean vibe." The three proposals she gets back are generic, and the first draft she pays for looks like a beach bar.

She rewrites the job as a one-page brief. Customer: workers from the nearby depot grabbing lunch in 20 minutes. Material: painted plywood, terrazzo counter, green tile. Feeling: bright, quick, friendly. Experience: order at the counter, watch the food plated, eat at the window stools or take away. Deliverables: two interior renders (counter view, window view) and one shopfront view, in 14 days, with two rounds of changes. Budget: 400.

The second freelancer delivers on the first round. She adds the 400 to her start-up costs.

The one thing that would have gone wrong: with the one-line brief, she paid for a draft that couldn't go in the plan, because she handed control to the freelancer instead of keeping it.

5. Common mistake

Hiring a freelancer and expecting firm-level results without doing the firm's job. Freelancers are cheaper because you do the coordinating. Do instead: write the full brief, with material, feeling, experience, deliverables and deadline, before you post the job.

6. Summary

Wilson K Lee's design element exists to show your vision to funders and future team members. A drafting or interior design firm will ask about material, feeling and customer experience, then produce renders. A freelancer on a site like Upwork or Fiverr is much cheaper, but you need much more control and coordination. 720 Sweets relies on its designs to sell franchises and credits them with helping it raise funds. Write the brief yourself, and carry the chosen quote into your start-up costs.

7. Quiz

1. You have a small budget and decide to hire a freelancer. What does this lesson say you must add? A. Nothing; the freelancer handles everything B. Much more control and coordination from you, starting with a full brief C. A second freelancer to check the first D. A design firm to manage the freelancer

2. A design firm asks you what feeling you want customers to have. Why should you have an answer ready? A. Firms charge extra if you don't know B. Feeling is one of the things a firm asks about to turn your vision into renders, and your answer shapes what they draw C. It's needed for your permit drawings D. It isn't important; renders only show furniture

3. Your renders are done. Where else in the plan do they matter? A. Nowhere; design is a separate document B. In the start-up costs, where the design fee becomes a line item C. In the SWOT, as your main threat D. In the target customer profile, to set her age

Answer key

1. **B.** Wilson says freelancers are cheaper but need much more control and coordination. A is wrong: that describes a firm, not a freelancer. C and D are wrong: they add cost without adding the control he describes.
2. **B.** Material, feeling and experience are the questions Wilson says a firm will ask. A is wrong: nothing suggests that. C is wrong: renders aren't permit drawings. D is wrong: feeling and experience are central to what gets drawn.
3. **B.** Wilson lists design costs among start-up costs. A is wrong: design is one of his plan elements. C is wrong: design isn't a threat. D is wrong: the profile comes from your customer, not your renders.

8. Assignment: your design brief and quote

Time: 40 minutes for the brief, plus time to collect quotes.

Write your one-page design brief with all eight parts. Send it to at least two providers (firms, freelancers, or one of each). Record each quote with what it includes, choose one, and write one line on why. Save the brief, the quotes and your choice in your plan folder.

Done checklist

- [ ] The brief covers concept, customer, space, material, feeling, experience, deliverables and budget
- [ ] Material, feeling and experience are each specific (no "nice" or "modern" on its own)
- [ ] Deliverables name the number of renders, the views and a deadline
- [ ] At least two quotes are recorded with what each includes
- [ ] The chosen quote is written as a figure ready for your start-up costs

Sample answer (illustrative)

> Feeling: calm, warm, unhurried. Experience: greeted at the door, seated within a minute, open kitchen visible from every table. Deliverables: three interior renders (entrance, dining room, kitchen pass) and one exterior, 21 days, two revision rounds. Quotes: interior design studio 3,800 (renders plus a material board); freelancer 650 (renders only). Choice: freelancer at 650. The material board is nice to have, and the renders are what the bank needs.

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Cost Your Start-Up and Size Your Ask

Module 2: Put numbers and pictures behind it.

Instructor: [YOUR NAME] Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

1. Objective

List every start-up cost with what it pays for and where the figure came from, and state your funding ask so a reader can see exactly how the money will be used.

2. Why it matters

The first question about any ask is "why that amount?" If every dollar traces to a line in your start-up list, the answer is already on the page, and the reader moves on to whether to say yes.

3. The teaching

Your projections show what the restaurant could earn. This lesson shows what it costs to open. Wilson K Lee splits financials into two parts: the projection, and then "what your starting costs is."

His instruction is to identify everything you're purchasing and put it in the plan. He names the lines: equipment, renovation costs, design costs and build-out costs. Your design quote from the last lesson goes straight into one of them.

The reason is the reader. When everything is listed, your investors know how much money you need, "why is it that you're asking for 200K," and how you plan to use it. (The 200K is his example of an ask, not a recommended amount, and he doesn't give a currency.) They can see exactly where the money is going. You'll have money for an emergency fund, money for equipment, money for renovations.

Notice the emergency fund. It sits in his list next to equipment and renovations, as a planned line, not an afterthought. He doesn't say how big it should be.

Wilson's standard for this section matches his standard for projections: the more you consider, the more homework it shows, and that's what investors and partners like. "Do your homework, do your financials, do your projections, do your startup costs."

And if you're still stuck, he gives two places to go. First, your accountant: ask for templates, and ask what costs you should be considering. Second, if your accountant isn't much help, ask your peers, other

entrepreneurs in the trade, how their numbers look. That's how Wilson says he got many of his own insights before starting, so that he went into the business "with my eyes open."

[General knowledge, not from the video. Check before publishing.] Other start-up costs that restaurant owners commonly budget for, beyond Wilson's list, include: lease deposits and rent before opening, permits and licenses, professional fees (lawyer, accountant), smallwares (plates, utensils, pans), the point-of-sale system, signage, opening food and drink stock, staff hiring and training before opening, and insurance. Emergency funds are often sized as a number of months of operating costs. Ask your accountant which apply where you are and how large your reserve should be.

[Instructor's method, not from the video.] Build your start-up list as a table:

Line	What it pays for	Where the figure came from	Amount

"Where the figure came from" is the column most plans leave out, and it's the one that answers Wilson's "how did you come up with these numbers?" Use one of four labels: **quote** (a supplier's written price), **listed price** (from a catalog or website, with the date), **accountant** or **peer** (with their name or role), or **estimate** (your own figure, with your reasoning).

Then write your ask in three lines:

1. **Total start-up cost:** the sum of the table.
2. **What you're putting in:** your own money or a partner's.
3. **The ask:** the difference, with one sentence on what it pays for, for example "covers equipment, build-out and a three-month emergency fund."

Finally, take the table to your accountant or a peer and ask one question: "What's missing?" Add whatever they name.

4. Worked example

Illustrative. The business, figures and people are invented.

Sofia is opening a 1,100 square foot bakery cafe. Her first draft asks for "about 150,000" with no breakdown.

She builds the table. Equipment (deck oven, mixer, display fridge): 48,000, quote. Renovation (flooring, plumbing, counter): 37,000, quote. Design (renders and layout): 1,200, quote. Build-out (shopfront, seating, lighting): 22,000, contractor estimate. Emergency fund: 18,000, which her accountant suggested as about three months of fixed costs. Total: 126,200.

She shows it to a bakery owner she knows, who asks: "Where's your opening stock? And your deposit?" She adds 6,000 of stock (her estimate) and a 9,000 lease deposit (quote). Total: 141,200. She's putting in 30,000. Her ask: 111,200, "to cover equipment, renovation, build-out, opening stock, the lease deposit and an 18,000 emergency fund."

The one thing that would have gone wrong: her round 150,000 had no lines behind it. The bank's first question would have been "for what?", and she'd have had no answer on the page.

5. Common mistake

Asking for a round number and filling in the reasons later. It looks confident, but readers can't tell whether it's padded or short. Do instead: build the line-by-line table first, label where each figure came from, and let the total set the ask.

6. Summary

Wilson K Lee's second financial part is start-up costs: everything you're buying, including equipment, renovation, design and build-out, plus an emergency fund. Listing it shows readers how much you need, why you're asking for that amount and how you'll use it. The more you account for, the more homework it shows. If you're stuck, ask your accountant for templates and costs to consider, or ask peers in the trade.

7. Quiz

1. An investor asks why you need 180,000. Which answer does this lesson prepare you to give? A. "That's what restaurants usually cost." B. "Here is our start-up table: each line, where the figure came from, and what we're putting in ourselves." C. "We'll know once we open." D. "It's a round number we can adjust."

2. Your start-up list has equipment, renovation, design and build-out. What line from Wilson's list is missing? A. Marketing awards B. An emergency fund C. Your target customer's income D. Your SWOT analysis

3. Your accountant isn't much help with what costs to include. What does Wilson suggest next? A. Leave the costs out until you open B. Ask peers, other entrepreneurs in the trade, how their numbers look C. Copy a template from any industry D. Double every figure to be safe

Answer key

1. **B.** It shows how much, why and how the money will be used, which is the point of the section. A is wrong: it isn't your restaurant's cost. C is wrong: Wilson says not knowing is no reason not to plan. D

is wrong: a round number with nothing behind it invites doubt.

2. **B.** Wilson names money for an emergency fund alongside equipment and renovations. A, C and D aren't start-up costs.
3. **B.** That's his stated fallback. A is wrong: he says never leave financials out. C is wrong: another industry's costs won't match a restaurant's. D is wrong: doubling hides your reasoning instead of showing your homework.

8. Assignment: your start-up table and ask

Time: 60 minutes, plus time to collect quotes.

Build your start-up table with all four columns. Include at least Wilson's lines (equipment, renovation, design, build-out, emergency fund) and any others that apply to you. Label where every figure came from. Write your three-line ask. Show the table to your accountant or a peer in the trade, add anything they say is missing, and note who reviewed it. Save it in your plan folder.

Done checklist

- [ ] The table includes equipment, renovation, design, build-out and an emergency fund
- [ ] Every line has a source label (quote, listed price, accountant or peer, estimate)
- [ ] The design line matches the quote chosen in the last lesson
- [ ] The ask states the total, your own contribution and the difference
- [ ] The table notes who reviewed it and what was added

Sample answer (illustrative)

Line	Pays for	Source	Amount
Equipment	Fryer, flat-top, fridges	Quote, Kitchen Supply Co.	34,000
Renovation	Plumbing, flooring	Quote, contractor	21,500
Design	Three renders	Quote, freelancer	650
Build-out	Counter, seating, sign	Contractor estimate	16,000
Emergency fund	About 3 months fixed costs	Accountant	15,000
Permits	Health and business	Listed price, city website, 2 May	1,350

Total 88,500. Our contribution 25,000. Ask 63,500, covering equipment, build-out, permits and a 15,000 emergency fund. Reviewed by J. Park (owner, Park's Grill); added permits.

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Write Your Management Team Page

Module 3: Make the case to the people reading it. By the end of this module you have a team page that builds trust, an honest SWOT analysis, and a marketing plan built around your customer.

Instructor: [YOUR NAME] Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

1. Objective

Write a management team page that shows, for each person, the background, resources and competitive edge they bring to this restaurant.

2. Why it matters

Funders back people as much as plans. Your numbers say the restaurant could work; this page says why you are the people who can make it work.

3. The teaching

Module 2 gave your plan its numbers. Module 3 is about making readers believe them, and it starts with the people. Wilson K Lee's third element is the management team: the background of you and your partners.

The reason is what funders ask themselves. Banks and the people you raise money from, Wilson says, "would want to know what makes you guys different, what kind of resources you have, what are some of your backgrounds." So the page has three jobs: background, resources and difference.

His example is his partner, Tim, who runs one of the biggest wholesalers of bubble tea supplies in Western Canada, as Wilson describes him. Putting Tim's name and background in the plan, he says, "instantly adds credibility to the banks that we're raising funds from." For angel investors or venture capitalists, it's a big selling point: a supplier is part of the partner team. Readers can see that this team has background, ability and resources most others don't.

Look at why that works. Tim isn't just experienced. His experience connects directly to the restaurant: a dessert and drinks business with a supply wholesaler on the team. The best team entries link the person's background to a specific advantage for this business.

Wilson's own entry is simpler. He writes that he has been doing business for the last 10 years, and he lists his awards, because he wants to "showcase and flex in front of them and show them that I know what I'm

doing." He calls the finished section "a really, really great positioning piece for your business."

What if you don't have much background? Wilson says that's still okay, but you still have to write down what makes you different and what gives you a competitive edge. The aim is to impress them. In his view, the more readers are impressed, the better your chances of getting your loan approved, or of attracting the right team and talent.

[Instructor's method, not from the video.] For each person, write a short block with four lines:

1. **Name and role** in this business.
2. **Background:** years, places and results that relate to this restaurant. Awards go here.
3. **Resources:** what they bring that money can't easily buy, such as a supplier relationship, a customer base, a kitchen skill or a property network.
4. **Edge for this business:** one sentence linking 2 and 3 to a specific advantage, for example lower ingredient costs, a faster opening or a ready-made following.

If you're thin on experience, use line 4 hardest. A first-time owner who spent three years managing the front of house at a busy restaurant has a real edge. Say what it is. And if there's a gap you can't fill yourself, say who will fill it, such as an experienced head chef you've lined up.

Keep everything true and checkable. A banker may well call the restaurant you say you managed. Overstating your background to impress readers backfires the moment it's checked.

4. Worked example

Illustrative. The business and people are invented.

Daniel and Maya are opening a Korean fried chicken shop. Their first team page has two lines: "Daniel: passionate foodie. Maya: business degree."

They rewrite it in the four-line format. Daniel, head of kitchen: seven years as a line cook, the last two as sous chef at a 120-seat restaurant. Resource: he developed and tested the brine and batter over two years of staff meals. Edge: a recipe already proven at volume. Maya, operations and finance: five years as an assistant store manager for a coffee chain, running a team of 14 and a weekly budget. Resource: a relationship with a local poultry farm from her family's grocery. Edge: a supply deal that keeps chicken costs steady.

Result: the bank's loan officer spends most of their meeting asking about the poultry farm deal, the plan's strongest selling point.

The one thing that would have gone wrong: "passionate foodie" gave the bank nothing to check and no reason to trust them. The supply relationship, their best asset, wasn't on the page at all.

5. Common mistake

Listing qualifications without connecting them to the restaurant. A degree or a job title doesn't show the reader an advantage. Do instead: for each person, finish with one line on the specific edge their background gives this business.

6. Summary

Wilson K Lee's management team element shows funders what makes your team different: backgrounds, resources and edge. His partner Tim, described as running one of the biggest bubble tea supply wholesalers in Western Canada, adds instant credibility because a supplier is on the team. Wilson lists his 10 years in business and his awards. If your background is thin, still write down what gives you an edge. Keep every claim true and checkable.

7. Quiz

1. Your partner has run a coffee roastery for eight years. Which team entry is strongest for your cafe plan? A. "Experienced business owner." B. "Has run a roastery for eight years and will supply our beans at cost, keeping our coffee costs low and consistent." C. "Loves coffee." D. "Has a business degree."

2. You've never owned a business. What does this lesson suggest for your own entry? A. Leave yourself off the page B. Say you've been in business for years C. Write down the background and skills you do have, and the specific edge they give this restaurant D. Fill the page with a mission statement instead

3. Why did Tim's background add credibility in Wilson's plan? A. Because he is Wilson's friend B. Because a supply wholesaler on the partner team gives the business resources and an advantage others don't have C. Because he designed the shop D. Because he wrote the marketing plan

Answer key

1. **B.** It links the background to a specific resource and edge, as Tim's entry does. A is wrong: it's vague. C is wrong: enthusiasm isn't a resource. D is wrong: it doesn't connect to the business.
2. **C.** Wilson says little background is okay, but you still write what makes you different. A is wrong: funders need to see who runs it. B is wrong: false claims backfire when checked. D is wrong: it dodges the reader's question.
3. **B.** Wilson says having a supplier as part of the partner team is a big selling point. A, C and D are not reasons he gives.

8. Assignment: your management team page

Time: 30 minutes.

Write a four-line block for every person on your team (name and role, background, resources, edge). If you have a gap you can't fill, add a line saying who will fill it or how. Check that every claim could be confirmed by a phone call. Save the page in your plan folder.

Done checklist

- [ ] Every person has all four lines
- [ ] Every background line names years, places or results
- [ ] Every edge line names a specific advantage for this restaurant
- [ ] Any skill gap is named with a plan to fill it
- [ ] Nothing on the page is overstated or unverifiable

Sample answer (illustrative)

> **Lena Ortiz, owner and general manager.** Background: four years as front-of-house manager at Casa Verde (90 seats); winner of the city's Best Service award, 2023. Resources: a 2,000-person mailing list from her catering side business. Edge: a launch audience on day one, and a proven service system. Gap: no head chef yet. Interviewing two candidates with 5+ years running a kitchen; decision by 1 May.

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Run an Honest SWOT Analysis

Module 3: Make the case to the people reading it.

Instructor: [YOUR NAME] Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

1. Objective

Write a SWOT analysis with at least two specific entries in each box, each one linked to something already in your plan.

2. Why it matters

Funders will find your weak spots whether you name them or not. Naming them first, with what you'll do about them, shows you're ready for what's coming rather than surprised by it.

3. The teaching

Your team page shows who will run the place. The SWOT shows you've looked at everything that could help or hurt it. Wilson K Lee admits a SWOT analysis "may seem like a cliche," but he still puts it in the plan, because "we do not want to be blindsided. We don't want to have any exposure."

SWOT stands for strengths, weaknesses, opportunities and threats. Here's how Wilson explains each, with his examples.

Strengths. What does your business have over other people? Do you have a partner supplying your ingredients, so your cost of goods sold stays at cost and low? Have you been studying the vegan industry for 10 years and developed a recipe no one else has? Those are strengths over competitors. Notice the first one: it's the supplier-on-the-team advantage from your management page, showing up again.

Weaknesses. What makes you weaker than competitors? Say your offer is vegan. Is vegan mainstream? It might not be what most people order. That limits the type of people your business attracts, and it limits your revenue potential, because your offer only reaches part of the market. Wilson is firm that you keep weaknesses in: "Just because it is a weakness doesn't mean you shouldn't take that away from your plan." Investors and partners should see that you live in the real world and know your weaknesses. As he puts it, "Just because you have weakness doesn't mean that you're weak. It just means that it's something to be aware of."

Opportunities. What's opening up in the food market? Sticking with vegan, Wilson's example is to show that consumption of vegan items is rising, which puts you at the front of a growing trend. (That's his example claim as of around 2022, with no figures given. If you use a trend, back it with a dated source.)

Threats. What's working against you? If you're in a declining part of the industry, for example selling fatty, very unhealthy food, that's a threat when, in Wilson's words, "the trend is going towards healthy offerings." (Again, his example, not a sourced figure.)

His standard for the whole thing: "The more thorough and the more descriptive they are, the better." A thorough SWOT shows investors you're analytical, that you've looked at the whole picture and left nothing unturned, and that you're prepared for what comes.

[General knowledge, not from the video. Check before publishing.] A SWOT is usually laid out as a two-by-two grid. Strengths and weaknesses are internal, things about your business you control. Opportunities and threats are external, things in the market you don't control.

[Instructor's method, not from the video.] Make each entry earn its place with two rules.

1. **Link it.** Every entry points to a section of your plan: the concept, customer, location, menu survey, projections, start-up costs or team. "Strength: supplier partner (see team page)." If an entry links to nothing, it's either generic or something your plan has missed.
2. **Answer it.** Every weakness and threat gets one line on what you'll do about it. A weakness with a response reads as awareness. A weakness without one reads as a problem.

Write at least two entries per box. Then read the weaknesses and threats aloud and ask: is anything here a surprise to me? If it is, go back and fix the plan section it links to.

4. Worked example

Illustrative. The business and details are invented.

Grace is opening a vegan doughnut shop near a university. Her first SWOT is generic: "Strength: great product. Weakness: competition. Opportunity: growth. Threat: economy."

She rewrites it with links and answers. Strength: six years as a pastry chef and a recipe developed over two of them (team page). Strength: a site two minutes from the main campus gate (location brief). Weakness: vegan isn't what most people order; her menu survey showed 18 of 50 people would choose vegan (menu survey). Response: market the doughnuts as doughnuts first, with vegan second. Weakness: no business ownership experience. Response: a part-time bookkeeper and monthly reviews with her accountant. Opportunity: more plant-based options on campus each year (she cites the student union's

food report). Threat: two cafes nearby already sell doughnuts. Response: price inside the range her competitor check found, and lead with flavors they don't offer.

The one thing that would have gone wrong: her generic version would have told a banker nothing. "Weakness: competition" says less than her menu survey already showed.

5. Common mistake

Treating the SWOT as a formality and filling it with one-word entries, or leaving the real weaknesses out to look stronger. Do instead: keep weaknesses in, as Wilson says, make every entry specific and linked, and answer every weakness and threat.

6. Summary

SWOT stands for strengths, weaknesses, opportunities and threats. Wilson K Lee includes it so you aren't blindsided. Strengths might be a supplier partner or a unique recipe. A weakness might be a non-mainstream offer that limits your market. Keep weaknesses in: having one doesn't make you weak. Opportunities and threats come from market trends. The more thorough and descriptive the SWOT, the more prepared you look.

7. Quiz

1. Your plan's menu survey showed only a few people want your signature dish. Where does this belong in your SWOT? A. Nowhere; leave it out so the plan looks stronger B. As a weakness, linked to the survey, with a line on what you'll do about it C. As a strength, because it's unique D. As an opportunity, because the dish is new

2. Which of these is a threat rather than a weakness? A. Your team has no accounting experience B. Your kitchen is small C. The market is moving away from the kind of food you sell D. Your recipe takes a long time to prepare

3. Which strength entry best meets this lesson's standard? A. "Good food." B. "Our partner owns a produce farm and supplies vegetables at cost, keeping our food costs below competitors' (see team page)." C. "We work hard." D. "Great location."

Answer key

1. **B.** Wilson says keep weaknesses in, and the link and response make it useful. A is wrong: it's what he warns against. C is wrong: few people wanting it limits the market, like his vegan example. D is wrong: an opportunity is a market trend, not low demand.

2. **C.** A market trend against you is external, like Wilson's unhealthy-food example. A, B and D are about your own business, so they're weaknesses.
3. **B.** It's specific, mirrors Wilson's supplier-partner example and links to the plan. A, C and D are generic and link to nothing.

8. Assignment: your SWOT

Time: 30 minutes.

Draw a two-by-two grid. Write at least two entries in each box. Link every entry to a section of your plan, and add a one-line response under each weakness and threat. Then note any plan section you had to change because of something the SWOT revealed. Save it in your plan folder.

Done checklist

- [ ] Each box has at least two entries
- [ ] Every entry names the plan section it links to
- [ ] Every weakness and threat has a response line
- [ ] Any trend used as an opportunity or threat names a dated source
- [ ] No box contains one-word or generic entries

Sample answer (illustrative)

> **Strengths:** head chef with 10 years in Sichuan kitchens (team page); site next to a 400-unit apartment block (location brief). **Weaknesses:** spicy menu limits some customers (menu survey: 22 of 40 wanted mild options). Response: three mild dishes added. Small dining room, 24 seats (concept). Response: takeaway counter from day one. **Opportunities:** two new office towers opening nearby next year (city planning notice, dated March). Delivery demand in the area (survey: 25 of 40 order delivery weekly). **Threats:** a national noodle chain opening a mile away. Response: compete on dishes it doesn't offer. Rising rent in the district. Response: five-year lease with fixed increases.

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Write a Marketing Plan That Fills Seats

Module 3: Make the case to the people reading it.

Instructor: [YOUR NAME] Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

1. Objective

Write a marketing plan of specific actions, each one matched to what your profiled customer wants and does.

2. Why it matters

Your projections assume people walk through the door. The marketing plan is where you show readers how that actually happens, and it's the section that tells them you know your customer.

3. The teaching

Your SWOT showed what could help or hurt you. The marketing plan is the first thing you'll do about it. Wilson K Lee's question for this element is simple: "How do you plan on bringing your brand, your offering to the market?" Your investors and partners need to see how you'll succeed, which comes down to how you'll get people through the doors.

He offers a range of examples of what a plan might name:

- Partnering with food delivery services.
- Collaborating with different clubs and offering them discounts to bring groups into your restaurant.
- Leaving brochures at office buildings, and doing it consistently.
- Running Facebook ads.

(These are examples as of around 2022. Platforms and delivery services change, so check what's current where you are.)

The point isn't which of these you pick. It's that you name the specific things you'll do. "What specific things are you going to be doing to bring your business to the next level?"

Here's how 720 Sweets answers it. A big part of its marketing, Wilson says, comes down to collaboration. The reason is the customer. Michelle, the profile from Module 1, is always looking for something new. She and her friends want to be the first to show each other the latest trends. So a constant run of

collaborations with new companies gives them something new to tell and show their friends, and exposes the 720 Sweets brand to them "over and over and over again." The latest one he mentions is a collaboration with Nespresso, which he says became a big talking point with his customers because it hit what they wanted and they wanted to share it.

Look at how the channel follows from the profile. Michelle loves social media, loves trendy and innovative items, and loves eating out with friends. Collaboration gives her something new and shareable. The marketing plan isn't a list of tactics. It's the customer profile put into action.

Wilson covers his top 10 marketing hacks for restaurants in a separate video. That content isn't part of this course.

[Instructor's method, not from the video.] Write your marketing plan as a short table, one row per action:

Action	Why it fits our customer	When and how often	Cost	How we'll know it worked

Four rules for filling it in:

1. **Start from the profile.** Read your customer profile first. Every action should connect to something in it: where they spend time, what they like, how they decide.
2. **Be specific.** "Social media" isn't an action. "Two posts a week on the app our customer uses, showing each new menu item" is.
3. **Cost it.** Any spending here should match your start-up costs or your projections. If launch marketing isn't in your start-up table yet, add it.
4. **Make it checkable.** "How we'll know it worked" can be a discount code, a count of club visits, or asking new customers how they heard about you.

Three to five actions are enough for a first plan. One well-matched channel, run consistently, as Wilson does with collaboration, is worth more than ten you can't keep up.

4. Worked example

Illustrative. The business, partners and figures are invented.

Ravi is opening a protein-bowl spot next to a large gym and two office buildings. His profiled customer, Chloe, is 29, trains before work and wants a high-protein lunch she can order ahead.

His first marketing plan says: "Instagram, flyers, word of mouth."

He rewrites it from Chloe's profile. Action 1: partner with the gym on a 10% member discount, shown at the till with a gym card (fits: she's there every morning; checked by counting discounted orders). Action

2: brochures with a pre-order link at the two office receptions every Monday (fits: she orders ahead from her desk; checked with a link code). Action 3: list on one delivery app for rainy days only (fits: she won't walk out in the rain; checked by app orders). Launch cost: 1,500 for printing and the gym launch event, added to his start-up table.

Result: a plan the reader can picture working, with every cost already in his numbers.

The one thing that would have gone wrong: "Instagram, flyers, word of mouth" named channels with no customer behind them, no schedule and no cost, so a reader couldn't tell whether marketing was budgeted at all.

5. Common mistake

Listing every channel you've heard of. It looks thorough, but it shows you haven't chosen, and you can't run them all. Do instead: pick a few actions that follow from your customer profile, and say when, how often, at what cost and how you'll measure each.

6. Summary

Wilson K Lee's marketing element asks how you'll bring your brand to market and get people through the door. Name specific actions: delivery partners, club collaborations with discounts, brochures at office buildings, ads. 720 Sweets relies mainly on collaborations, such as one with Nespresso, because its customer, Michelle, wants new things to share with friends. Build the plan from your customer profile, and give every action a schedule, a cost and a way to check it worked.

7. Quiz

1. Your target customer is a retiree who reads the community newsletter and doesn't use social media. Which action fits best? A. A daily short-video campaign B. A regular ad and an opening offer in the community newsletter C. Influencer partnerships D. A late-night student discount

2. Which marketing plan entry meets this lesson's standard? A. "Social media." B. "Word of mouth." C. "Discount for the university hiking club: 15% for members on Tuesdays, posted in their group monthly, tracked by counting club cards at the till." D. "Marketing as needed."

3. Why does collaboration work as 720 Sweets' main channel? A. Because it is free B. Because its customer, Michelle, wants new and trendy things to show and tell her friends about C. Because every restaurant should use collaborations D. Because Nespresso required it

Answer key

1. **B.** It reaches the customer where they already look. A and C are wrong: this customer doesn't use social media. D is wrong: it targets a different customer.
2. **C.** It names an action, a partner, a schedule and a way to measure it, the kind of specific plan Wilson asks for. A, B and D name no specific action.
3. **B.** Wilson ties collaboration directly to Michelle wanting to be first to share new trends. A is wrong: he says nothing about cost. C is wrong: the channel works because it fits this customer, not every restaurant. D is wrong: nothing like that is said.

8. Assignment: your marketing plan

Time: 30 minutes.

Reread your customer profile. Write three to five marketing actions in the five-column table (action, why it fits, when and how often, cost, how you'll know it worked). Check that every cost appears in your start-up table or projections, and add it if not. Save the plan in your plan folder.

Done checklist

- [ ] Three to five actions, each a specific action rather than a channel name
- [ ] Every action names what in the customer profile it fits
- [ ] Every action has a schedule and a cost
- [ ] Every action has a way to check whether it worked
- [ ] Every cost appears in your start-up table or projections

Sample answer (illustrative)

Action	Fits	When	Cost	Check
Opening-week tasting for the two nearby running clubs	Our customer runs with a club on Saturdays	Opening Saturday, then monthly	300 per event	Club members signed in
Pre-order flyer in the coworking space	She orders lunch from her desk	Weekly restock	60 a month	Flyer code orders
Monthly collab item with a local roaster	She tries new things and shares them	First week of each month	Shared cost, about 150	Sales of the collab item

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Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

ACTION PLAN

Action Plan: Write Your Restaurant Business Plan

Instructor: [YOUR NAME] Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Work through these steps in order. Each one produces a section of your plan, and you shouldn't need to reopen the lessons. The order is the order you need to work in, which isn't the order the finished document reads in. Step 14 puts the pages in reading order.

Set up

Step 1. Start your plan folder and brief. Write four lines: the business in one line, who reads the plan first (bank, government program, investor, partner, or you), your draft deadline, and anything you need that this plan won't cover (permits, lease, legal structure), with who you'll ask. *If it goes wrong:* if you don't know who your first reader is, write the plan for a bank. It's the first reader Wilson K Lee names.

Define the restaurant

Step 2. Write the one-page concept. Five headings, three or four sentences each: What we are (type and size), The gap, Why us, How we close it, Why customers buy. Read it aloud and cut until it takes two minutes or less. *Decision point:* if your concept is small and low-investment, say so. It will suit some investors and not others, and that's fine. *If it goes wrong:* if "Why us" is empty, list every job, skill, relationship and recipe you have, and pick the one that connects to the gap.

Step 3. Profile one customer. One named person: age, situation, income (with the period), what they like, and the job they need done. Then the fit test: does your offer do that job in the time, price and format they need? *If it goes wrong:* if the fit test fails, change the offer or change the customer now. Don't carry the mismatch forward.

Step 4. Write the location brief. Type (destination or high traffic), access to match your customer, size range, rent ceiling (or "to be set at step 9"), the neighbors you want and the gap you want, and how you'll check crime. Name two deal-breakers. *Decision point:* high traffic costs more rent; a destination needs a reason to travel. Pick based on your customer and budget. *If it goes wrong:* if no site passes, check whether a deal-breaker is really a preference, then loosen one criterion, not all of them.

Put numbers and pictures behind it

Step 5. Build and test the sample menu. A table for every item: why you offer it, the need it fulfills, cost to make, retail price, margin (price minus cost). Survey people who match your profile near your location (would you buy it, which version, what do you usually spend), and record at least five competitor prices. Adjust, and write one line on what changed. *If it goes wrong:* if the survey says your prices are too high and your margins won't survive a cut, change the item (smaller portion, cheaper ingredients) or the customer, then retest.

Step 6. Count a comparable restaurant. Pick one similar in concept, size and price, ideally near your site. Sit in, as a paying customer, with a clicker. Count everyone who comes in, and record each order's items, prices, drinks and desserts. Cover morning (if they open), lunch, dinner, weekdays and the weekend. *If it goes wrong:* if staff ask what you're doing, be honest and polite, and leave if asked. Finish the count somewhere else comparable.

Step 7. Project revenue. Revenue per hour for each session, then a typical week (hours open in each block times the average for that block), then a year. Write year one, three and five with the assumption behind each. Add the line: "Based on [hours] of observation at a comparable restaurant, [dates]." *Decision point:* if you're new, decide whether year one is at the comparable's level or below it, and write the reason. *If it goes wrong:* if one session is far above the rest, check whether it was a special day. Recount that slot on an ordinary week.

Step 8. Get the design brief out and choose a provider. One page: concept, customer, space, material, feeling, experience, deliverables (renders, views, deadline) and budget. Get at least two quotes. *Decision point:* a design firm runs the process for you; a freelancer is cheaper but needs much more control and coordination from you. *If it goes wrong:* if a draft comes back wrong, the brief was probably vague. Tighten material, feeling and experience before the next round.

Step 9. Cost the start-up and write your ask. A table: line, what it pays for, where the figure came from (quote, listed price, accountant or peer, estimate), amount. At minimum: equipment, renovation, design, build-out and an emergency fund. Then three lines: total, your own contribution, and the ask with what it covers. Go back to step 4 and fill in the rent ceiling if you left it open. *If it goes wrong:* if you don't know what's missing, ask your accountant for a template and the costs to consider. If they can't help, ask other owners in the trade how their numbers look.

Make the case

Step 10. Write the management team page. For each person: name and role, background (years, places, results, awards), resources, and the edge it gives this restaurant. Name any gap and how you'll fill it. *If it goes wrong:* if your background is thin, lead with the edge line, and fill gaps with named people you've lined up. Never overstate.

Step 11. Write the SWOT. At least two entries per box, each linked to a plan section, with a response under every weakness and threat. Back any trend with a dated source. *If it goes wrong:* if the SWOT surprises you, go back to the plan section it links to and fix it there.

Step 12. Write the marketing plan. Reread the customer profile. Three to five actions, each with why it fits the customer, when and how often, cost, and how you'll check it worked. *If it goes wrong:* if an action's cost isn't in your numbers, add it to step 9's table or your projections, then recheck the ask.

Finish

Step 13. Check the numbers with someone else. Show the menu table, projections and start-up table to your accountant or a peer in the trade. Ask: "What's missing, and what looks wrong?" *If it goes wrong:* if they find a big gap, fix that section and recheck everything that depends on it. A change in start-up costs changes the ask; a change in prices changes the projections.

Step 14. Assemble the plan. Wilson K Lee presents the elements in this order: concept, sample menu, management team, design, target market, location, SWOT, marketing, financials (projections, then start-up costs). Using that order, put your pages together. Rename sections to match the terms your bank or country uses. Keep the concept first and to one page. *Decision point:* if your first reader has their own template, use their order and headings, and move your pages into it.

Step 15. Use it as your map. Write a short list of milestones taken from the plan (site found, funding agreed, design final, build-out done, opening). Keep the plan where you'll reread it, and check decisions against it as you go. *If it goes wrong:* if reality moves away from the plan, update the plan instead of abandoning it.

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

SECTION C

C. Listing and Launch Notes

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Course title and subtitle options

Ranked by clarity, most clear first.

1. **Write Your Restaurant Business Plan**: Nine elements, from one-page concept to start-up costs, based on Wilson K Lee's step-by-step method
2. **The Restaurant Business Plan Course**: Ten five-minute lessons and an action plan, based on Wilson K Lee's tutorial
3. **Restaurant Business Plan, Step by Step**: Concept, menu, numbers and pitch for your first food and beverage business
4. **Plan Your Restaurant Before You Open**: Build the plan banks, investors and partners ask for, one section at a time
5. **From Idea to Funding-Ready Plan**: A short course for first-time restaurant owners (Ranked last: "funding-ready" could be read as a promise of funding, which the course can't make. Use only with care.)

Course description

Write Your Restaurant Business Plan Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

Wilson K Lee, owner of the Vancouver ice cream shop 720 Sweets, gets asked one question by email more than any other: how do you write a proper business plan for a restaurant? His answer is nine elements: concept, sample menu, management team, design, target market, location, SWOT analysis, marketing and financials. He illustrates almost every one with how he would write it for his own shop. This course turns his method into lessons you work through one section at a time.

Who it's for. People planning to open their first restaurant, cafe, dessert shop or other food and beverage business who need a written plan to show a bank, investors or a future partner, or who want a clear plan for themselves. You should know what food you want to sell. You don't need any finance training.

What you'll be able to do. Write a first-draft restaurant business plan covering the nine elements Wilson K Lee teaches, with a one-page concept, a priced and tested sample menu, revenue projections

built from your own competitor count, and a start-up cost list that explains exactly what you are asking for.

What's inside. - A welcome lesson and ten five-minute lessons in three modules - Module 1: your one-page concept, the one customer you serve, and a location brief written for that customer - Module 2: a sample menu tested on your neighborhood, revenue projections from a week of counting at a comparable restaurant, a design brief for renders, and your start-up costs and funding ask - Module 3: your management team page, an honest SWOT analysis and a marketing plan built from your customer profile - A worked example, a three-question quiz and a practical assignment in every lesson, each assignment producing one section of your plan - One action plan that takes you from empty folder to assembled plan, with what to do when each step goes wrong

Who it's not for. Owners who need full financial statements (profit and loss, cash flow, break-even), help with permits, licenses, insurance or legal structure, a staffing plan, or a guide to a specific loan application. It doesn't include a fill-in template from Wilson K Lee. It won't guarantee funding, and no plan can.

About 53 minutes of lessons, plus assignments and your own research.

Welcome email

Subject: Your restaurant plan starts with one folder

Hi [STUDENT FIRST NAME],

Welcome to Write Your Restaurant Business Plan.

This course is built on Wilson K Lee's step-by-step tutorial on restaurant business plans. Wilson owns 720 Sweets, an ice cream shop in Vancouver, and he breaks a plan into nine elements, from a one-page concept to your start-up costs. You're going to write each one for your own restaurant.

Start with the welcome lesson. It takes about three minutes and ends with a short brief: your business in one line, who reads your plan first, and your draft deadline. Every lesson after that adds one section to your plan, and by the end your folder holds a complete first draft.

One thing to know up front. Some lessons ask you to get out of the house: to survey people near your planned location, and to spend a few hours counting customers at a comparable restaurant. That legwork is where your numbers come from, so plan time for it.

Here's the link to the first lesson: [COURSE LINK]

[YOUR NAME]

Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee.

(Draft: [STUDENT FIRST NAME], [COURSE LINK] and [YOUR NAME] must be filled in before sending.)

Upload checklist (any course platform)

File names and load order. Load in this order, one lesson per page or unit:

1. m0-l0-welcome.md (Welcome: Write Your Restaurant Business Plan)
2. m1-l1-write-your-one-page-concept.md (Module 1, Lesson 1)
3. m1-l2-profile-your-one-customer.md (Module 1, Lesson 2)
4. m1-l3-write-your-location-brief.md (Module 1, Lesson 3)
5. m2-l1-build-and-test-a-sample-menu.md (Module 2, Lesson 1)
6. m2-l2-project-revenue-from-a-competitor-count.md (Module 2, Lesson 2)
7. m2-l3-get-your-vision-drawn.md (Module 2, Lesson 3)
8. m2-l4-cost-your-startup-and-size-your-ask.md (Module 2, Lesson 4)
9. m3-l1-write-your-management-team-page.md (Module 3, Lesson 1)
10. m3-l2-run-an-honest-swot-analysis.md (Module 3, Lesson 2)
11. m3-l3-write-a-marketing-plan-that-fills-seats.md (Module 3, Lesson 3)
12. action-plan.md (after the final lesson, or as a downloadable)

Module titles for the platform: - Module 1: Define the restaurant you are asking people to back - Module 2: Put numbers and pictures behind it - Module 3: Make the case to the people reading it

Do not upload A-source-audit-and-course-map.md or this file. They are production notes.

Before publishing, check:

- [ ] [YOUR NAME] is replaced everywhere (search every file)
- [ ] The credit line "Based on "How To Easily Write A Restaurant Business Plan [Step-by-step] | open a restaurant 2022" by Wilson K Lee." appears on every lesson page and on the course sales page
- [ ] Every "[General knowledge, not from the video. Check before publishing.]" passage has been checked against a reliable source (an accountant for the margin and start-up cost passages, a local authority for the exhaust hood and permit-drawing passages), then kept with a short source note or rewritten. Decide whether learners see the label.
- [ ] Every "[Instructor's method, not from the video.]" label is kept, or replaced with wording that still makes clear the method isn't Wilson K Lee's
- [ ] Quizzes render with four options each and the answer key hidden or placed after the questions

- [ ] Tables (menu, start-up costs, marketing) render correctly on the platform, including inside the quoted sample answers
- [ ] Checklists render as checkboxes, or as plain lists if the platform doesn't support them
- [ ] Lesson order matches the list above
- [ ] The welcome email's placeholders are filled and its link works
- [ ] A link to the original video (https://www.youtube.com/watch?v=_blbvTMwNEM) is included if Wilson K Lee's permission terms ask for it
- [ ] No screenshots, design renders or clips from the video are used unless the permission covers them
- [ ] Spelling and style are consistent (US spelling throughout: neighborhood, flavor, color, license)

Unable to verify

Things the source states or implies that could not be confirmed from the source itself.

- Tim's business. Wilson calls it "one of the biggest wholesaler for bubble tea supplies in Western Canada" and later "the biggest wholesaler in Western Canada". The course uses the first, more cautious wording.
- Michelle's university, captioned as "UVC". Likely UBC given the Vancouver setting, but not confirmed. The course doesn't name it.
- Michelle's disposable income, "around 8,000 to $10,000": the period (per year is likely) and the currency are not stated.
- "Fast-paced food concept": possibly a mis-hearing of "fast-casual". The course uses the words as captioned.
- 720 Sweets' size: "like a 500 square feet" and "around 4 to 500 square feet". Both approximate. The course says around 400 to 500.
- That the 720 Sweets designs helped secure "a few different rounds of fundings", and that its customer profile attracted "a bunch of Michelles". Wilson's own account, with no figures.
- The vegan "on the rise" and healthy-food trends. Wilson's illustrative examples, unsourced, as of around 2022.
- The Nespresso collaboration as "the latest one". Current only around 2022, and its details aren't given.
- Wilson's "10 years" in business and his awards. Self-reported; the awards aren't named.
- The template he says he will share. Never described in the spoken words; possibly a description link, which wasn't supplied.
- The video's exact publish date. Only "2022" in the title.
- What was said in the two "[inaudible]" gaps.

Assumed or added

Everything here came from general knowledge or the instructor, not from the source. Each general-knowledge item is labeled in the lesson where it appears.

General knowledge added (to be checked): - A "hooded fan" is a commercial kitchen exhaust hood; whether you need one depends on cooking method and local codes. (m1-l1) - Many cities publish crime maps; commercial agents can give typical rents. (m1-l3) - Food cost percentage and gross margin formulas. (m2-l1) - What a render is, and that renders aren't construction or permit drawings, which may need a licensed professional. (m2-l3) - Other common start-up costs (deposits, permits and licenses, professional fees, smallwares, point-of-sale, signage, opening stock, pre-opening staff costs, insurance), and that emergency funds are often sized as months of operating costs. (m2-l4) - SWOT as a two-by-two grid, with internal and external halves. (m3-l2)

Added by the instructor: - All page templates and methods: the five-heading concept page; the five-field customer profile and fit test; the six-criterion location brief with deal-breakers; the six-column menu table and three-question survey; the session sheet and the arithmetic from hourly revenue to a year, with written assumptions for years three and five; the eight-part design brief; the four-column start-up table with source labels and the three-line ask; the four-line team block; the "link it, answer it" SWOT rules; the five-column marketing table. - The courtesy notes on counting in a competitor's restaurant (be a paying customer, be discreet, don't film), and the note that a new business may take time to reach a comparable's level. - The assembly order in the action plan (Wilson's presentation order, used as a default), and the milestone list in its last step. - All worked examples and sample answers. The people and businesses in them (Rosa, Kofi, Leah and Dev, Tomas, Priya, Jun, Amara, Sofia, Daniel and Maya, Grace, Ravi and Chloe, Lena Ortiz, and named businesses such as Bao House, Casa Verde and Park's Grill) are invented, and so are all their figures. - The audience, the level, the outcome sentence and the course size, all chosen because the questionnaire said "use defaults". - The course title options, the description and the welcome email.

Still required before publishing

- **Permission on file.** Written permission from Wilson K Lee covering a paid course built on his video, with his approved credit wording. The questionnaire says permission exists. This pack hasn't seen it.
- **Instructor name.** Replace [YOUR NAME] in every file and in the welcome email.
- **Accountant review.** Have an accountant check the margin formulas, the projection arithmetic, the start-up cost list and the emergency fund note, and confirm nothing reads as financial advice.
- **Local-rules check.** The exhaust hood, permit drawings and crime-data passages vary by country and city. Either keep them general and labeled, or localize them for your market.
- **Date the source.** Find the video's publish date and add it next to the time-sensitive items: Upwork and Fiverr, Facebook ads, delivery services, the Nespresso collaboration and the trend examples.

- **The template question.** Decide whether to ask Wilson K Lee for permission to include or link his template. The course currently says it isn't included.
- **Decide on the labels.** Choose whether learners see the "[General knowledge…]" and "[Instructor's method…]" labels, or a softer version. Removing them entirely would present added material as Wilson's.
- **Legal read** of the competitor-observation lesson, to confirm the courtesy notes are enough for your market, and that no line reads as a funding promise.
- **Fill the welcome email placeholders** and test the course link.
- **Proofread once more** for US spelling and for stray em dashes after any edits.

What a better source would improve

Blunt version: this is a clear, well-ordered tutorial, but it's a 28-minute overview of nine elements, and every element points to depth that lives somewhere else.

- **The missing videos.** Four core pieces are deferred to other videos: the four concept types, the "golden metrics", destination versus high traffic locations, and the top 10 marketing hacks. With those, the concept, menu, location and marketing lessons would teach Wilson's full method rather than its outline.
- **The template.** Promised at the start, never shown. A plan course without its creator's template is weaker than it needs to be.
- **Real numbers.** There isn't a single 720 Sweets figure for revenue, margins, start-up cost or funding raised. The only money figures are an example ask ("200K", no currency) and Michelle's income. A better source would walk through one real set of projections and one real start-up budget.
- **Financial depth.** The financials cover revenue projections and start-up costs only. Operating costs, profit and loss, cash flow and break-even, which most lenders expect, aren't mentioned.
- **The survey and the count, made concrete.** How many people to survey, what to ask exactly, how many hours of counting is enough, and how to turn hours into a year. The course fills these in with labeled instructor's methods; Wilson's own versions would be better.
- **The rest of a lender's checklist.** Permits, licenses, insurance, legal structure, staffing and an executive summary. None appear.
- **The visuals.** The 720 Sweets renders are shown and not described. A source that talked through what made them work would make the design lesson stronger.
- **Size.** Even with all of the above, three modules is about right for one 28-minute tutorial. A bigger course would need the companion videos or a longer source.