




# Opening a restaurant checklist





# Congrats! You've decided to open a restaurant

Now you probably feel like you've got a million things to do. And you're right. You need to look for your ideal location, get all the necessary licenses and permits, secure funding, perfect your menu, set up your restaurant, establish your online presence, hire the right staff...the list just goes on and on.

Also, you know that getting up and running (and reaching profitability) in this business is tough. We get it. That's why we've put together this exhaustive list of things to do and consider before opening your doors. We don't want you to forget anything. And we really care about your success.

From brainstorming your concept to serving your first guest, this checklist lays out all the steps for opening a thriving restaurant. You can either print it out or download it and check off each task from the PDF. It's up to you.

And for deeper insights into each section, check out our blog post, [Opening a Restaurant: The Ultimate Guide for New Restaurant Owners](#).

So, grab a cup of coffee and your notebook. Take a deep breath. And let's dive in.

---

**Disclaimer:** Just as a reminder, this checklist is for informational purposes and isn't intended as legal, accounting, tax, HR, or other professional advice. Just like everything else when you launch a restaurant, the buck stops with you. You're responsible for complying with laws and regulations, so be sure to contact your attorney or other relevant advisors for advice specific to your circumstances.



# 1. Concept & plan



# Create your restaurant concept

At the heart of every successful restaurant, is a well-thought-out concept focused on your guests. Who are they? What kind of experience do they want?

And what's the most cost-effective way to give it to them? Clearly define these elements before you move on to your business plan.

**Describe your typical guest.** Be sure to include information like their age range, cultural background, salary, and gender. Other details might be if they are single or married, have kids and/or pets, and their preferred recreational activities. The more detail the better.  
Example: 25 – 35 year-olds who do outdoor sports on the weekends, are single, and have an average salary of \$85,000 a year.

---

---

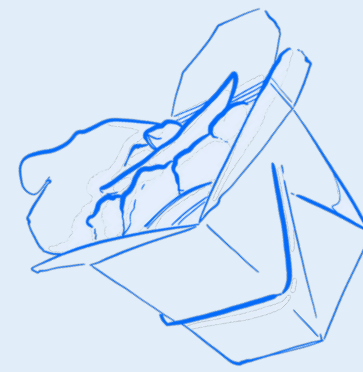
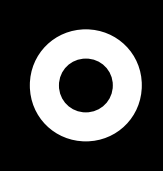
---

---

---

---





## Cuisine

**What type of food do your guests want?** The most popular cuisines in America are Chinese, Mexican, Thai, Indian, Korean, Greek, Italian, Hawaiian, and, of course, American. Other descriptors you could use are vegan, gluten-free, steakhouse, barbecue, etc.

---

---

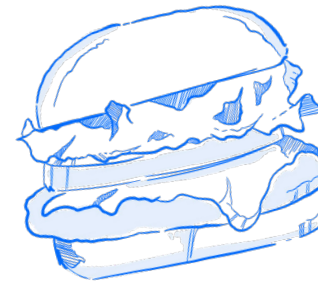
## Restaurant type

**What's the best restaurant type for your guests?** Fast casual, quick service, casual dining, fine dining, bar, brewery, bakery, coffee shop, pizza shop, food truck, ghost kitchen, etc.

---

---





## Location

**Where are your guests?** Name 2 – 3 prime locations where you think your guests will most likely want to be. Is it in an upscale shopping area for your fine-dining restaurant? Or perhaps you want to open a counter-service lunch spot near a cluster of office buildings.

---

---

---

## Daypart & meals

**When do your guests eat?** While meal times have blurred, it's good to identify when your guests want your type of food. Breakfast, brunch, lunch, dinner, or after hours? Maybe you'll have an all-day breakfast, or perhaps you're a lunch-only eatery.

---

---

---



# Competitors

**List your top 5 competitors in your city.** Write a sentence next to each competitor describing their unique selling proposition (USP). In other words, what makes them different?

---

---

---

---

---

# Your unique difference

**Identify your biggest difference.** Explain why that difference is so important and how it will make guests choose you over your competitors.

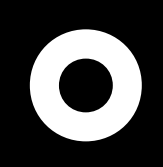
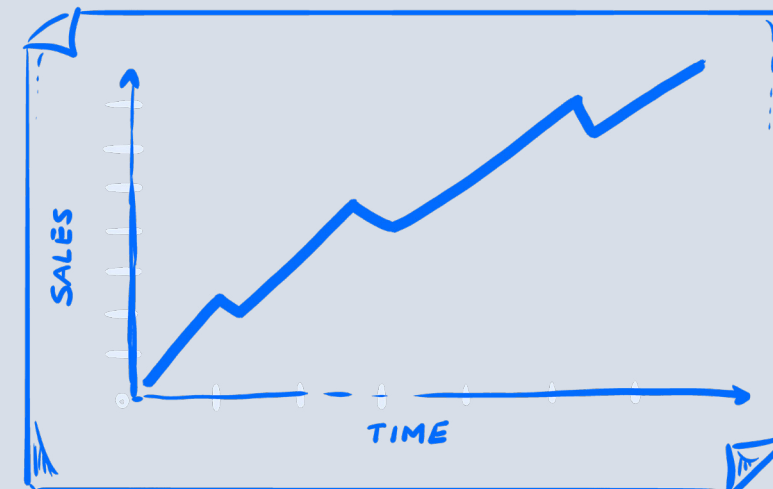
---

---

# Create your business plan

Once you've formulated your concept, it's time to put it on paper, or more practically in a doc on your computer. Your restaurant business plan will likely be comprised of the sections listed below. Check each section off as you complete it.

- Executive summary
- Company overview
- Company description
- Competitive analysis
- Ownership & management structure
- Staffing needs
- Marketing strategy
- Cost analysis
- Financial projection ([Break-even point calculator](#))



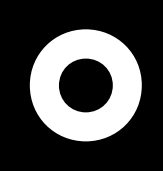
# 2. Business creation & funding



# Establish your business entity

Form your restaurant business with these next steps. The first one—hiring an attorney—is the most important. How you set up your business will depend on your restaurant type, location, and ownership structure. A professional legal advisor can provide you with the best guidance.

- Hire an attorney or legal advisor to ensure you set up your restaurant business correctly
- Register your business name with the county clerk. You may need to also establish a DBA—Doing Business As
- Get an Employee Identification Number (EIN) to act as your federal tax ID number
- Buy a website domain name for your business from a domain name registrar. Ideally, your name should be your restaurant name with a .com extension
- Claim your social media account names on Facebook, Instagram, Twitter, and Pinterest
- Your account name should be @YourRestaurantName
- Open a business bank account and business savings account
- Hire an accountant & tax consultant to ensure your books and taxes are in order



# Secure the capital needed for your restaurant

If you don't have enough capital on hand to open your restaurant, you may need to borrow money to cover your startup costs and initial operating expenses. These days, new restaurant owners have several [options for funding their restaurants](#).

Commercial bank loans

A business line of credit

[Alternative loans](#) (SpotOn Capital)

SBA loan (Small Business Administration loan)

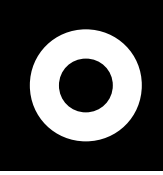
Investors/ Angel investors

Family and friends

Equipment financing

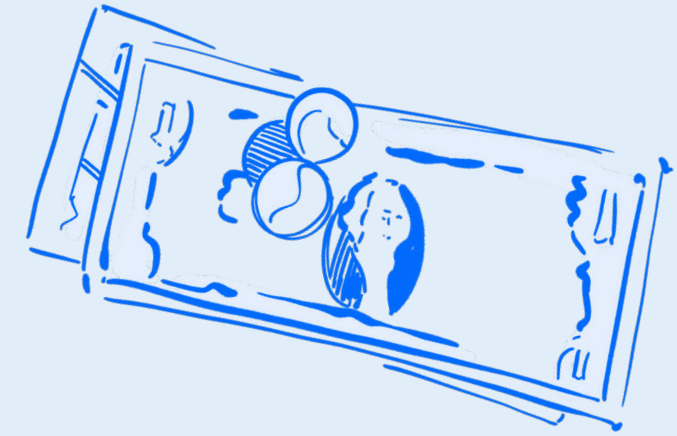
Crowdfunding - Kickstarter, FoodStart, Indigogo, GoFundMe

[Merchant cash advance](#) (not recommended)



# Compile the documents needed for funding

Some loans require lots of paperwork. Others not so much. Here's a list of documents you may want to have on hand when seeking funding.



Loan application

Statement of personal history

Personal financial statement

Personal credit score

Profit and loss statement

Projected financial statement

Business credit score

Social security card

Business plan

Business licenses and permits

EIN (Employer Identification Number)

Proof of collateral

Annual business revenue and profit

Bank statements

Balance sheet

Personal and business tax returns

Copy of your commercial lease

Disclosure of other debt

Ownership and affiliation documents

Loan Application History

Income tax returns

Resume for each business partner involved

A/R (Accounts Receivable) and A/P (Accounts Payable)

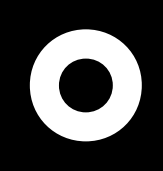
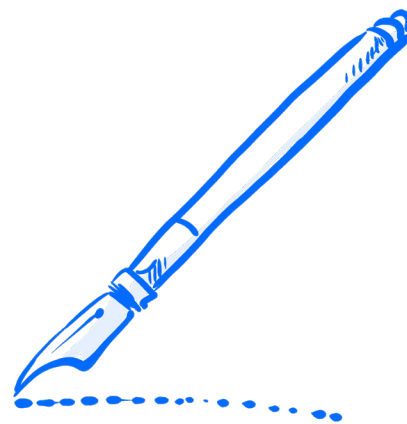
Aging Proof of Ownership and Affiliations

Legal contracts and agreements, like leases or partnership agreements

# Get the necessary license and permits

The licenses and permits you need will depend on the type of restaurant you're starting. We've listed here the most common types that restaurants need before they start doing business.

- Business license
- Food service licenses
- Liquor license
- Sign permit
- Building health permit
- Employee health permit
- Seller's permit
- Dumpster placement permit
- Resale permit
- Live entertainment license
- Music license
- Certificate of occupancy
- Food safety certification



# 3. Your restaurant



## Find the perfect location for your restaurant

The location of your restaurant could make or break your business. Before signing a lease or purchasing a space, do your research to be sure your location is the best place for your operation.

- Work with a commercial real estate agent to identify potential locations
- Rent, lease, or purchase your space
- Buy insurance for your restaurant
- Create a layout for your space



# Make sure your spot has everything you need

## Location

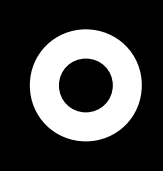
- Close to where your target audience lives, works, or shops
- Can be easily seen from the street with proper signage
- Enough parking for the number of guests you plan to accommodate
- An entrance that guests can easily identify from the parking lot

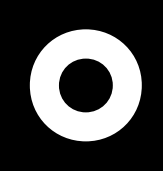
## Front-of-house

- Have a place where guests can easily pick up takeout when ordering online
- Have enough space for a smooth flow for guests and staff
- Have enough dining space for the number of guests you plan to accommodate
- Have restrooms that are out of the way but can be seen by guests

## Back-of-house

- Have an entrance that can be easily accessed by vendors and suppliers
- Adequate space for prep, cooking, storage, and staff movement based on needs
- Kitchen can be divided into separate zones for prep, cooking, baking, and cleaning
- Effective ventilation systems to remove smoke, odors, and excess heat from the kitchen
- Sufficient storage for ingredients, utensils, cookware, and cleaning supplies
- Plumbing and electricity is in good working order and are in the right places for your operation





## Establish your brand and menu

Your brand and menu represent how guests feel when they think of your restaurant. Make sure they're clearly defined from the beginning so every decision creates a consistent experience.

- Define how you want your guests to feel when they think of your restaurant
- Hire a graphic designer to create your branding—including your logo set, brand colors, and fonts
- Hire a chef to help build your unique menu offerings
- Have family, friends, and colleagues taste your recipes and give you constructive criticism on them
- Perfect your recipes so they are ready for production
- Enter your ingredients and recipes into [inventory management software](#)
- Adjust your ingredients and recipes according to your target food costs
- Set your prices according to your food costs using [restaurant menu engineering](#)
- Create short descriptions for each menu item





# 4. Equipment

# Set up your back-of-the-house for success

After you've created the layout for your kitchen, prep area, and dish station, it's time to stock it up. You probably won't need everything listed here, but you'll want to consider all your options so your back-of-house can run as efficiently as possible.

## Kitchen prep & cooking

- Commercial oven
- Range or stove
- Grill
- Fryer
- Salamander or broiler
- Steamers
- Charbroiler
- Griddle
- Food processor
- Blender
- Mixer
- Slicers
- Commercial refrigerators and freezers
- Walk-in cooler
- Ice machine
- Prep tables and cutting boards
- Shelving and storage units

## Cooking utensils and tools

- Pots and pans (various sizes)
- Baking sheets and pans
- Knives (chef's knife, paring knife, etc.)
- Cutting boards
- Mixing bowls
- Measuring cups and spoons
- Utensils (spatulas, tongs, ladles, etc.)
- Whisks
- Colanders and strainers
- Can openers
- Thermometers (for food safety)

## Service items

- Plates, bowls, and flatware
- Glassware (water glasses, wine glasses, etc)
- Serving trays
- Ramekins
- Serving utensils (spoons, tongs, etc)
- Napkin holders and dispensers
- Condiment holders





## Dishwashing station

- Commercial dishwashing system
- Dish racks or baskets to hold dirty dishes and utensils
- Flatware baskets for silverware
- Glass racks for glassware
- Drip trays or drain boards to catch excess water
- Dishwashing detergent specifically designed for commercial dishwashers
- Rinse aid to ensure spot-free drying
- Sanitizing solutions or chemicals for disinfection
- Sink with hot water supply for pre-washing and rinsing items before placing them in the dishwasher
- Spray nozzle or hose for pre-washing dishes
- Sink or basin for soaking and scrubbing stubborn stains
- Rubber or latex gloves for protection while handling dirty dishes and chemicals
- Waterproof aprons to keep staff dry and protected
- Shelving units or storage racks to hold clean dishes and utensils
- Storage for dishwashing supplies, detergents, and chemicals
- Storage for extra dish racks and trays
- Utensil holders or cylinders to separate and organize forks, knives, and spoons
- Utensil soaking container for pre-soaking heavily soiled utensils
- Safety goggles for eye protection
- Rubber mats to prevent slips and falls

- Fire extinguisher in case of emergencies
- Scrub brushes or scouring pads for removing stubborn stains
- Cleaning cloths or sponges for wiping down surfaces
- Cleaning chemicals for sanitizing countertops and sinks
- Brooms and dustpans for keeping the area clean
- Signs with instructions for proper dishwashing procedures
- Sanitation guidelines and protocols for staff to follow

## Bar (if applicable)

- Bar refrigeration (under-counter coolers, bottle coolers, etc)
- Bar sink and glass washers
- Ice bins or ice machines
- Cocktail shakers and strainers
- Bar tools (bottle openers, bar spoons, jiggers, etc)



## Disposable items

- Plates
- Bowls
- Cups and glasses
- Cutlery (plastic or wooden)
- Paper or plastic tablecloths
- Paper napkins
- Coffee cups
- Paper or plastic straws
- Stirrers
- Paper or plastic drink coasters
- Take-out containers (plastic or paper)
- Food trays
- Food wrapping  
(cling film, aluminum foil, parchment paper)
- Paper or plastic food baskets
- Condiment packets  
(ketchup, mustard, mayonnaise, etc.)
- Salt and pepper packets
- Sauce cups or containers



# Create your signature atmosphere in the front-of-house

Many guests will first experience your brand when they walk through your doors. Consider the following checklist when setting up your front-of-house before you open.

## Indoor & outdoor furniture

- Tables (various sizes and shapes)
- Chairs or seating (booths, banquettes, bar stools, etc)
- Bar counter or high-top tables (if applicable)
- Host/hostess station or podium
- Waiting area seating
- Patio furniture (tables, chairs, umbrellas, etc)
- Outdoor heaters or fans
- Planters or landscaping elements

## Light & sound

- Ambient lighting (chandeliers, pendant lights, wall sconces, etc)
- Task lighting for specific areas (bar, kitchen, etc)
- Decorative lighting elements (string lights, candles, etc)
- Outdoor lighting
- Light fixtures and shades
- Speakers and sound system
- Background music player or streaming service
- Microphones (if needed)





### Walls & floors

- Wall art, paintings, or murals
- Decorative mirrors
- Plants or flowers
- Sculptures or statues
- Decorative shelving or display units
- Signage (menu boards, specials board, etc)
- Table centerpieces or table settings
- Flooring material (tiles, hardwood, laminate, etc)
- Carpeting or area rugs
- Floor mats for high-traffic areas
- Blinds or shades
- Curtains or drapes
- Window film (for privacy or branding purposes)

### Restrooms, storage & cleaning

- Sinks and faucets
- Toilets and urinals
- Hand dryers or paper towel dispensers
- Soap dispensers and hand sanitizers
- Trash cans and waste bins
- Mirrors
- Shelving units
- Storage cabinets
- Racks or hooks for coats and bags
- Coat check area (if applicable)
- Brooms, mops, and cleaning tools
- Cleaning chemicals and detergents
- Trash cans and recycling bins
- Maintenance tools (screwdrivers, pliers, etc)
- First aid kit and safety equipment



# Set up your office and technology

## Hardware

Desktop computers

Printer (for documents and receipts)

Scanner (optional, for digitizing documents)

Networking equipment (routers, switches, cables, etc.)

[Point-of-sale stations with payment terminals](#)

[Handhelds for untethered ordering and payments](#)

[Customer-facing displays for counter-service concepts](#)

## Software

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

[Payment processing](#)

[Employee scheduling software](#)

[Online ordering and delivery platform](#)

QR codes for self-ordering and payments

[Restaurant reservation system](#) for full-service concepts

[Inventory management software](#)

[Tip reporting software](#)

[Restaurant payroll software](#)

Accounting software

Security software (antivirus, firewall, etc.)



## Furniture & office supplies

- Desks, chairs, and workstations for staff
- Shelves or cabinets for storing supplies and paperwork
- Filing cabinets or document organizers
- Lockers or storage spaces for employee belongings
- Comfortable seating and tables for break areas
- Paper, pens, and other stationery
- Filing cabinets or document storage systems
- Labeling equipment (for organizing files)
- Whiteboards or bulletin boards (for communication and planning)
- Storage boxes or containers for paperwork
- Safes or lockable cabinets for storing cash and important documents

## Communications, internet, and security

- Landline phones or VoIP (Voice over Internet Protocol) phones
- Mobile phones or smartphones for staff (if required)
- Communication apps or platforms for internal messaging (e.g., Slack)
- High-speed and reliable internet connection
- Wi-Fi network for staff and guests (if applicable)
- Network security measures (firewall, encryption, etc.)
- Security cameras and monitoring systems
- Alarm systems (intrusion and fire alarms)
- Access control systems (keycards or biometric locks)
- Backup power supply (e.g., uninterruptible power supply)

## Financial and legal documents

- Business licenses and permits
- Contracts and agreements (supplier contracts, employment agreements, etc.)
- Insurance policies (liability insurance, workers' compensation, etc.)
- Financial records (invoices, receipts, tax documents, etc.)





# 5. Menu & suppliers



## Finalize your menus and online ordering

Lock in the ingredients and pricing of your menu with the testing you did before

Take professional photos of your menu items for your online ordering menu and advertising

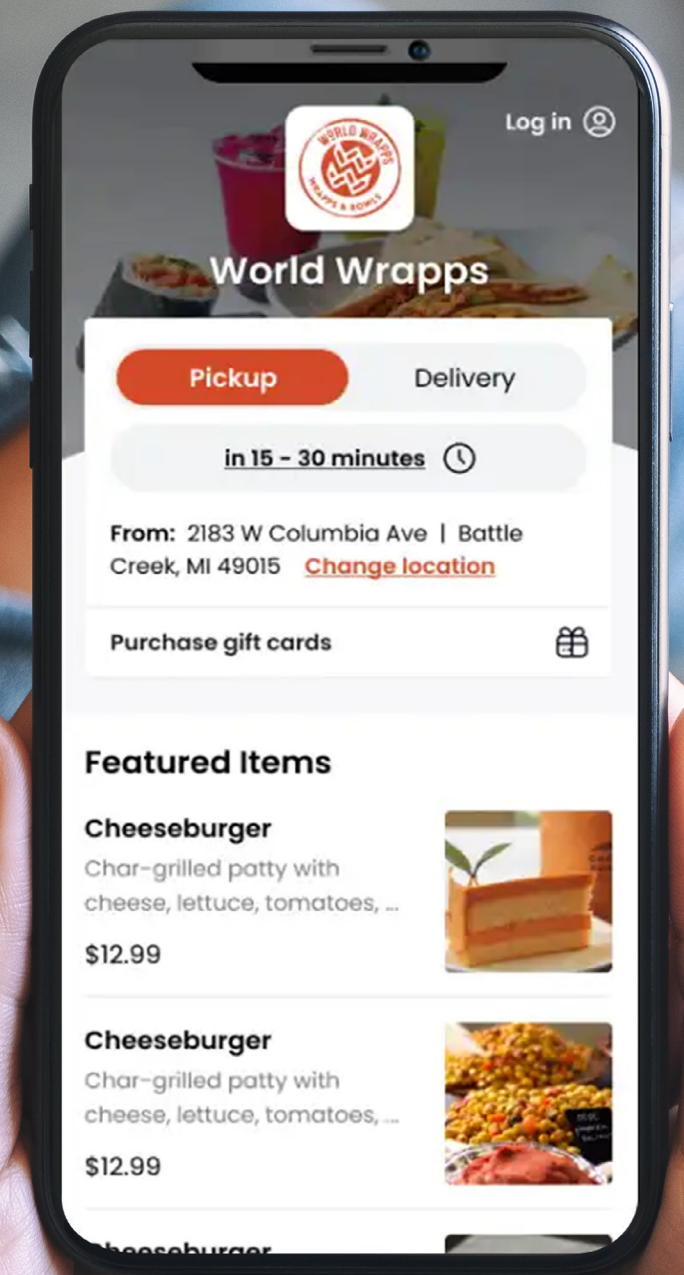
Have your graphic designer create your menu and send it to the local printer shop

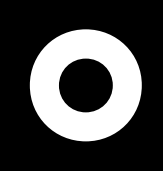
Order covers for your menus if needed

Add your menu items to your point-of-sale and online ordering menu. Your POS provider should be able to do this for you

Configure your online ordering system according to your business hours. Give yourself a buffer before your close so all orders can be processed on time

Integrate your third-party delivery systems with your POS





## Establish your suppliers and vendors

Determine the suppliers and vendors you need for food, disposables, and other goods

Find reliable suppliers based on quality, price, and delivery terms

Introduce your restaurant, discuss needs, and inquire about their products/services

Obtain quotes and product samples from potential suppliers

Finalize agreements covering pricing, payment terms, and quality standards

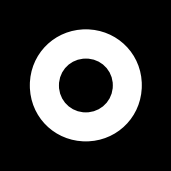
Implement efficient systems for ordering and managing inventory

Determine delivery schedules, storage, and refrigeration facilities for orders

Discuss payment periods, credit limits, and discounts for prompt payment



# 6. Staffing



# Hire the right team members

Ensure that you onboard the right employees for your restaurant. Consider the positions in this section to determine what staff you need for your concept.

## Back-of-house

- Kitchen manager
- Head chef
- Sous chef
- Line cooks
- Prep cooks
- Dishwashers
- Pastry chef
- Baker
- Butcher

## Front-of-house

- Manager
- Servers
- Counter staff
- Bartenders
- Host/Hostess
- Busser
- Expeditor/Food runner
- Baristas
- Sommelier/Wine steward
- Cashiers

## Other staff

- Accountant/bookkeeper
- Social media manager
- Marketing manager
- Cleaning staff
- Maintenance person

# Develop staff training documentation

- Cleaning procedures
- Restaurant training manual
- Staff onboarding process
- Safety procedures
- Cash handling
- [Employee handbook](#)



# 7. Opening & beyond

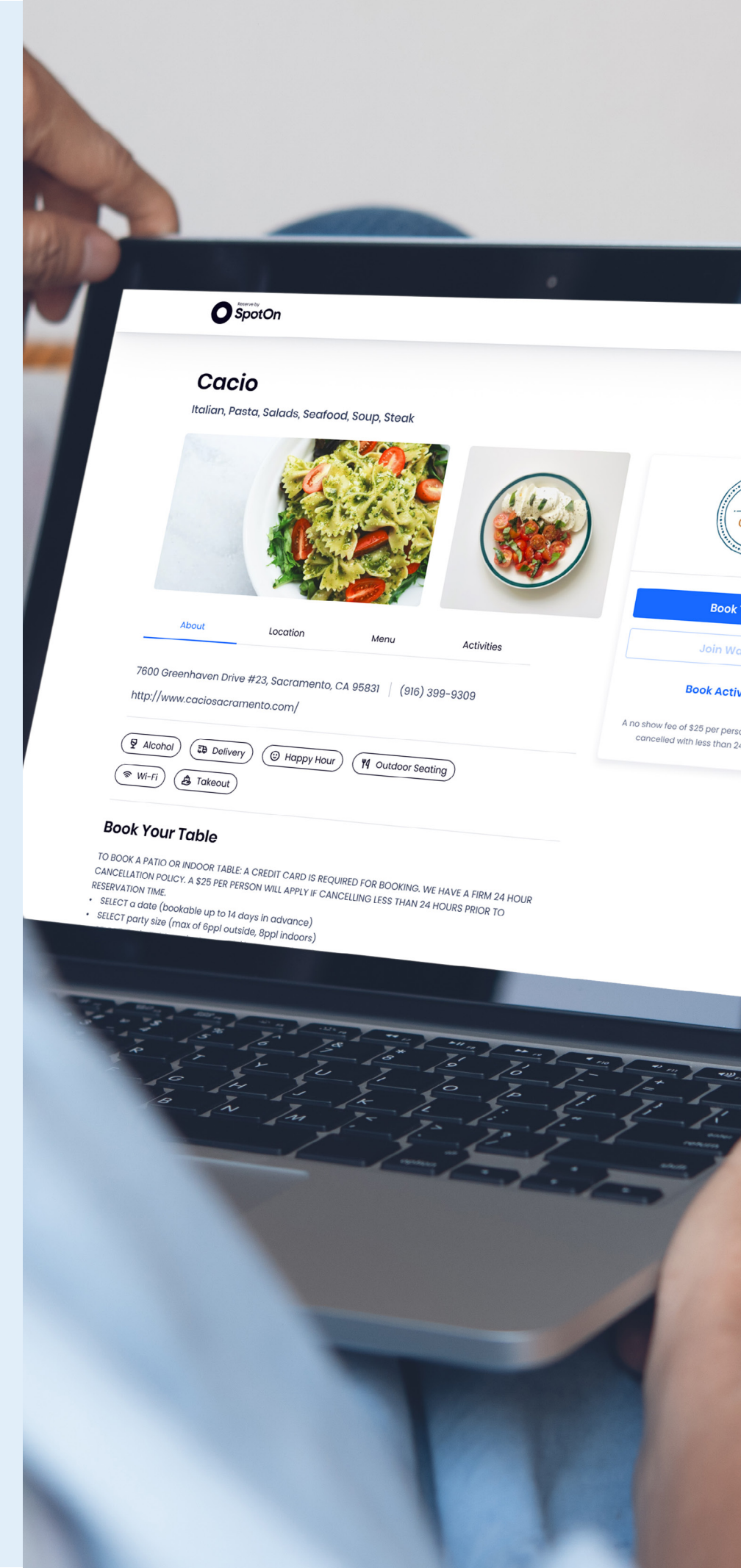
Now comes the final push—your online presence, marketing systems, opening strategy, and post-launch. This is where you bring everything together to create an exceptional launch with enough momentum to get you to profitability.

## Establish your online presence

- Claim your Google Business Profile so guests can find you in Google Search and Google Maps
- Ensure your menu and business contact information is accurate in your Google Business Profile
- Connect your [online ordering](#) and [reservations and waitlist](#) to your Google Business Profile
- Hire a web developer or use [SpotOn Website](#) to create a professional business website
- [Claim your business](#) on review management platforms like Yelp and Trip Advisor

## Set up your marketing systems

- Have your designer create business cards for your managers and have them printed at your local printer shop
- Ensure your point-of-sale is set up to collect guest ordering and contact information
- Create social media template graphics for announcing specials, holiday deals, and upcoming events. Your graphic designer should be able to help you with this
- Set up systems to monitor reviews daily with [review management software](#)
- Plan your email marketing campaigns for the year with [marketing software](#)
- Set up a [loyalty rewards program](#) to encourage guests back through your doors

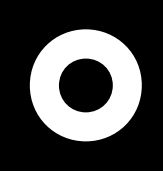


# Get ready to open your restaurant

- Set up your stations and test all your point-of-sale equipment
- Host a soft opening for family, friends, media, and local food critics
- Identify the grand opening date of your restaurant
- Post on social media a couple of times a week about the opening of your restaurant a month in advance
- Identify the newspapers and magazines that your guests read and create ads to run
- Inform the news sources in your areas about your restaurant through a press release
- Have your grand opening
- Claim your business on review management platforms like Yelp and Trip Advisor







# Keep track of operations after opening

## Staff

Ensure that your staff is happy with their wages, schedule, and tips

Identify any knowledge gaps and provide additional training every month

Avoid overstaffing or understaffing—observe the busyness of each shift and adjust the schedule as needed

---

## Reporting

Track food costs and ensure that plate costs are not fluctuating

Monitor online ordering spikes and adjust pacing according to your kitchen capacity

Track how well items are selling and adjust your purchasing and inventory accordingly

Conduct waste audits and identify how you can reduce food waste

---

## Marketing

Monitor your loyalty rewards program and add enrollment incentives if necessary

Review your online reviews and make adjustments to operations as needed

Set a cadence for posting on social media with photos and promotions

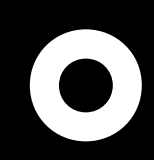
Send out an email campaign at least once a month and keep track of each one's performance



# Open with a POS provider that cares. Open your restaurant with SpotOn.

Legacy restaurant POS providers just won't grow with your business. Others will rope you into contracts and overcharge for their services.





# SpotOn is different

With us, you can expect in-person installation and training by experts. Helpful customer support that responds within minutes 24/7/365. Fair and affordable pricing without getting locked into a long-term contract. And a suite of restaurant software that works seamlessly together and is customizable to work how your team works.

In short, with SpotOn, you're entering into a relationship.

Not a contract.

Talk to a representative today, to learn more about how SpotOn technology can help you streamline operations from the get-go and accelerate your new restaurant's path to profit.

Go to [spoton.com/demo](https://spoton.com/demo) to learn more.



