Restaurant Owners Playbook

15 restaurant toolkits, Trivia and Open Mics



17 PRACTICAL GUIDES / ONE NAVIGABLE COLLECTION

Plan the work. Train the team. Welcome the neighborhood.

Start with the problem in front of you

One reference for owners and managers

This playbook brings together 15 practical restaurant toolkits and the complete Trivia and Open Mics host guides. Use it to choose one improvement, brief your team, test a plan, and review what happened. The original guides and reusable printable forms are retained in full.

Find the right page

The contents page and PDF bookmarks jump to each guide. Expand a guide’s bookmarks for individual pages. Contents page numbers are the combined PDF viewer positions. Printed numbers within each guide restart at 001; its internal page references still refer to that guide’s original numbering.

Use the editable companion files

The separately supplied toolkit packs contain editable Word templates and, where applicable, Excel workbooks. Those editable files are not embedded in this PDF. Print forms from the relevant guide, or customize the companion files before using them with your team.

Entertainment Bundle and question bank

The Entertainment Bundle includes Trivia, Open Mics, and the separately supplied 1,000 Question & Answer Database. This combined PDF contains the two complete host guides; the 104-page question bank remains a separate included companion for easier hosting. Its questions overlap the Trivia Host Kit, and its five-round games differ from the kit’s four-round games.

Check local requirements before acting

The original source notes and cautions remain in each guide. References are primarily US-based. These planning resources are not legal, employment, accounting, licensing, accessibility, or food-safety advice. Examples are hypothetical; verify costs, permissions, local requirements, and qualified advice before use.

Combined edition October 2026. Source documents remain unchanged.

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Entertainment Bundle

E1 Trivia Host Kit 211

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Tip: expand the bookmark panel for page-by-page navigation within each guide.

Slow Night Promotions

A practical playbook for filling quieter services without giving away the margin



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Build one small, measurable promotion around a genuinely quiet service. This toolkit helps you choose the offer, check the economics, brief the team, and decide whether to repeat it. It is designed for independent restaurants, not a guaranteed sales formula. All businesses, dollar amounts, and results in the examples are hypothetical. Financial examples use net sales excluding sales tax and tips. Check local requirements before promoting alcohol, collecting customer details, or making special pricing claims.

Inside this toolkit

1. Find the service worth improving
2. Choose one reason to visit
3. Test the economics before launch
4. Launch with a simple service plan
5. Decide what to repeat

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

The companion Excel workbook contains editable inputs and live formulas or planning fields. Read its instructions before changing values. Its hypothetical examples may use a more detailed set of assumptions than the guide. Use consistent units and cost definitions, and never treat contribution as full accounting profit.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Find the service worth improving

Start with the service you can improve, not the discount you can advertise. Pull the last four to six comparable services from your POS. Keep weekday, time window, opening hours, and service format consistent. Mark holidays, closures, unusual weather, large private bookings, and stockouts instead of silently averaging them in.

- Record covers, net sales, average spend per cover, food and packaging cost, actual labor hours, and peak ticket time. Use the median of comparable nights as a simple starting baseline.
- Ask the team what kept guests away: poor awareness, weak reason to visit, inconvenient timing, or a service problem. A promotion cannot repair slow food or inconsistent opening hours.
- Check the bottleneck. Empty dining seats are not useful capacity if the kitchen, parking, or one server is already stretched.
- Choose one audience and one behavior: nearby office teams visiting on Wednesday, local families eating before the rush, or regulars bringing a first-time guest.

Hypothetical example: Cedar Table has 48 seats but serves 30 covers on a typical Wednesday between 5 and 8 pm. Friday is already busy. The owner chooses Wednesday, targets nearby residents, and caps the first promotion at 44 covers spread across two arrival windows. The first target is 10 additional covers while keeping the kitchen ticket-time measure below 20 minutes. This is an experiment target, not an expected industry result.

Use the campaign planner before buying advertising. Write down what will count as success and what would make you stop. If the quiet night loses money because the menu is poorly costed, fix that first.

Choose one reason to visit

A strong offer gives guests a clear occasion and a clear choice. Keep the normal menu available unless a limited menu is explicitly advertised. Prefer a manageable experience or bundle over a blanket percentage discount.

Format	Best use	Operational check
Neighborhood supper	A fixed two-course selection on one quiet evening	Use shared prep and state the included choices
Chef feature night	A small menu feature with a short table-side explanation	Time the explanation outside the busiest pickup period
Early dinner bundle	A defined seating window before demand usually builds	State last eligible seating and avoid rushed hospitality
Local producer feature	A menu special with factual supplier information	Confirm supply and permission before naming a partner

Hypothetical choice: Cedar Table offers a $22 soup-and-main supper on Wednesday from 5 to 8 pm, with two mains and one soup. The kitchen already uses the ingredients. There is no competition, performance, prize, or alcohol discount. Guests who want the regular menu can still order it.

- Choose one reason to come, one date or date range, one price, and one booking action. List exclusions prominently.
- Cost the actual included portions. Do not assume an inexpensive starter offsets an uncosted main.
- Avoid adding several new recipes, complicated modifiers, or a time-consuming presentation to a quiet service with a small team.
- Use a real limit tied to capacity. Do not invent scarcity, savings, or popularity claims. Advertising claims should be truthful, supported, and not misleading. (Source 1)

Test the economics before launch

Use contribution, not revenue alone. For this planning model, contribution is net sales minus the variable costs you include. List those costs consistently on both the baseline and promotion sides. Extra campaign labor, printing, and similar one-off costs are then deducted separately. This is a decision estimate, not full accounting profit.

Hypothetical Wednesday	Baseline	Promotion
Covers	30	44
Net sales per cover	$24	$22
Variable cost per cover	$9	$8
Contribution per cover	$15	$14
Total contribution	$450	$616
Extra campaign costs	$0	$90
After extra campaign costs	$450	$526

The promotion generates $76 more estimated contribution than the baseline: $616 minus $90 minus $450. The $90 consists of $60 incremental labor and $30 printing. This simplified example treats every promotion cover as a $22 sale and assumes comparable operating conditions. The usual fixed rent and base staffing are unchanged, so they are not charged a second time.

Break-even promotion covers = (baseline contribution + extra campaign costs) ÷ promotion contribution per cover. Here, ($450 + $90) ÷ $14 = 38.6, rounded up to 39 covers. That hurdle accounts for lower margin on guests who might have visited anyway. Break-even reasoning depends on accurate fixed and variable cost assumptions. (Source 2)

- Run a downside case at 34 covers: $476 minus $90 minus $450 = a $64 decline. Can you afford that test?
- Include payment fees, delivery commissions, packaging, waste, and paid setup where relevant. Never count a cost twice.
- If the required covers exceed practical capacity, change the offer or do not launch.

Launch with a simple service plan

Give one manager ownership from copy approval to the next-day review. Use your existing approved communication channels first. A small pilot should not require a new booking platform or a large advertising commitment.

- Two weeks before: choose the date, check the baseline, cost the offer, assign the owner, and confirm the kitchen can execute it. Write the stop conditions.
- One week before: photograph the actual food, publish one clear announcement, update the booking notes, and brief anyone answering calls. Use the same offer details everywhere.
- Two days before: check reservations by arrival window, confirm stock and staffing, and send a reminder only through channels you are permitted to use. Do not add people to a marketing list merely because they booked.
- Before service: set the POS button or reporting code, test the check presentation, rehearse the guest explanation, and confirm who can resolve a complaint.
- During service: log redemptions and exceptions without interrupting hospitality. Close the offer when the published capacity or stock limit is reached, and update available channels promptly.

Hypothetical staging: Cedar Table plans 22 covers arriving from 5 to 6:15 pm and 22 from 6:30 to 8 pm. The chef sets a realistic preparation quantity with a small buffer based on the normal booking cancellation pattern. The host explains remaining availability rather than promising a table that has not been confirmed.

For food handling, allergen questions, illness reporting, and holding procedures, use your restaurant’s approved procedures and applicable local rules. FDA’s Food Code is a model used by jurisdictions, not a substitute for your local requirements. (Source 3)

Decide what to repeat

Review results the next day while the team remembers the service. Compare like with like. A busy night after a rainstorm, holiday, or local event is not clean evidence that your promotion caused the change.

- Measure covers and contribution after incremental costs against the baseline. Keep refunds, comps, and discounts in the numbers.
- Review service quality: ticket-time measure, stockouts, complaints, overtime, and how many guests could not order what was advertised.
- Ask a short optional question at booking or checkout: “What prompted your visit today?” Separate “saw the offer” from “would have visited anyway.” Self-reports are directional, not proof.
- Track repeat visits only through an existing appropriate system. Do not collect more personal information than the test needs.
- Choose repeat, revise, or stop. Change one important element at a time so the next result teaches you something.

Hypothetical review: Cedar Table served 44 covers versus a 30-cover baseline, a 46.7% increase. Estimated incremental contribution was $76. Its chosen ticket-time measure rose from 16 to 19 minutes and no advertised item sold out. The owner repeats the same offer once before increasing the guest cap; one service is too little evidence for a permanent program.

Example decision rules to adapt: repeat only if contribution clears the planned hurdle and the service guardrails hold; revise if demand exists but the bundle erodes margin; stop if staff cannot execute safely or guests consistently misunderstand the terms. Avoid declaring success because a post received many likes. The useful result is a healthier service, not a larger audience alone.

Campaign planner

Complete this before launch. Attach a POS baseline export and the current recipe costs. One owner should approve the plan and record any change.

Decision	Your plan
Restaurant and campaign name	_____
Owner and review date	_____
Quiet day and service window	_____
Comparable baseline dates and exclusions	_____
Baseline covers and net sales	_____
Target guest and reason to visit	_____
Offer price and exact inclusions	_____
Dates and restrictions shown to guests	_____
Practical capacity and arrival windows	_____
Booking method and cancellation approach	_____
Primary success measure and target	_____
Service guardrails and stop trigger	_____

- Check before approval: costed portions; stock confirmed; staff assigned; POS tracking tested; customer terms consistent.
- Promotion owner: _____ Approval date: _____
- If alcohol, outside partners, or special customer-data collection are added, pause and review the applicable requirements first.

Offer economics worksheet

Use your companion calculator or fill this page manually. Enter amounts excluding sales tax and tips. Separate ongoing variable costs from campaign-only costs.

Input	Baseline	Planned offer
Covers	_____	_____
Net sales per cover	_____	_____
Variable cost per cover	_____	_____
Contribution per cover	_____	_____
Total contribution	_____	_____
Extra campaign labor	Not applicable	_____
Other campaign costs	Not applicable	_____
Contribution after campaign costs	_____	_____

Contribution per cover = net sales per cover − variable cost per cover. Total contribution = covers × contribution per cover. Estimated incremental contribution = promotion contribution − campaign-only costs − baseline contribution.

Scenario	Covers	Estimated incremental contribution
Downside	_____	_____
Expected planning case	_____	_____
Capacity limit	_____	_____

Break-even covers: _____ Practical cover capacity: _____
Costs included: _____
Costs deliberately excluded and why: _____
Maximum test loss the owner accepts: _____ Go or no go: _____

Worked check, hypothetical: baseline 30 × $15 = $450; offer 44 × $14 = $616; campaign cost $90; incremental result $76. Break-even is 39 covers. If your contribution per cover is zero or negative, this formula cannot rescue the offer.

Promotional copy pack

Replace every bracket before use. Match dates, prices, availability, and terms to the approved campaign planner. These are drafts for your own channels, not instructions to contact anyone.

Announcement template
Make [weekday] your [occasion]. Join us at [restaurant] on [date or dates], [service window], for [exact food offer] at [price]. Includes [items or choices]. [Important exclusions and applicable price disclosures]. [Reservation or walk-in details]. Book or learn more at [link or contact].

Short reminder template
[Offer name] is on [day], [time], at [restaurant]. [One specific reason to visit]. [Price and core inclusion]. [Accurate availability statement]. [Booking action]. Full details: [link].

Host or server explanation
“On [day] we are offering [bundle] for [price] during [window]. It includes [items]. [Exclusion]. You can [booking action], and [regular-menu availability]. Would you like the details?”

Completed hypothetical announcement
Make Wednesday your neighborhood supper night. Cedar Table is serving soup and a choice of two mains this Wednesday, 5 to 8 pm, for $22 per person before tax and gratuity. Drinks and extras are separate. The regular menu remains available. Reservations are recommended. Ask our host for the two main choices and current table availability.

- Final check: no invented “normally” price, unsupported savings, fake urgency, or promise of a guaranteed table.
- Photo check: show the portion and food guests will actually receive.
- Approved by: _____ Published locations: _____

Staff briefing sheet

Use for a ten-minute pre-service briefing. The manager reads the offer aloud, then asks a host, server, and kitchen lead to explain their part back.

Briefing item	Answer
Date and manager on duty	_____
Offer and price	_____
Included choices and substitutions	_____
Exclusions and eligible service times	_____
Stock or cover cap	_____
POS button and reporting code	_____
Allergen question escalation contact	_____
Booking and queue handling	_____
Complaint and refund decision owner	_____
Sold-out message and who updates it	_____
Service pause trigger	_____

Practice these situations
1. A guest arrives after the offer window. Explain the terms calmly and involve the manager for any exception.
2. A guest asks whether a substitution is safe for an allergy. Do not guess. Follow the approved escalation process.
3. A regular guest expected the usual menu. Explain what remains available and offer a clear choice.

Team questions to resolve before opening: _____
Final changes communicated to every station: _____
Briefed by: _____ Time: _____ Next update: _____

Service run sheet

Set the times for your restaurant. Use one shared copy at the host stand or manager station; avoid separate versions that drift.

When	Action	Owner	Done
Before prep	Verify booked covers and safe production plan	_____	___
Before opening	Check stock, menu wording, POS, and price	_____	___
Pre-service	Brief all stations and confirm escalation	_____	___
First arrival window	Count seated and unfilled reservations	_____	___
Mid-service	Check stock, ticket times, and guest issues	_____	___
Capacity reached	Update host team and public availability	_____	___
Close	Export sales and record additional costs	_____	___
Next day	Hold fifteen-minute review	_____	___

Exception time	What happened	Action and owner
_____	_____	_____
_____	_____	_____
_____	_____	_____

Working guardrails
Ticket-time measure and limit: _____
Maximum covers per arrival window: _____
Who can reduce capacity or pause the offer: _____
Guest explanation if unavailable: _____

A pause protects the guest experience. Do not keep selling a bundle after a required item is unavailable unless the guest is clearly told what changed and can choose another option.

Results and next decision

Review within one working day. Compare the same service window and cost definitions. Keep a copy so the next test starts from evidence.

Measure	Baseline	Actual
Covers	_____	_____
Net sales	_____	_____
Variable costs	_____	_____
Incremental campaign costs	Not applicable	_____
Contribution after campaign costs	_____	_____
Chosen ticket-time measure	_____	_____
Refunds or comps	_____	_____
Stockouts or complaints	_____	_____

Estimated incremental contribution: _____
Guest feedback themes: _____
Weather, local event, or other comparison limitation: _____
What staff found difficult: _____

Decision	Complete one
Repeat	Keep the same offer and test again on _____
Revise	Change only _____ because _____
Stop	The failing guardrail or economics were _____

Next owner and date: _____
One operational change before the next service: _____
How the next result will be measured: _____

Hypothetical conclusion: “Repeat once at the same 44-cover cap. Incremental contribution was $76 and the ticket-time measure stayed below our 20-minute limit. Do not increase capacity yet.” This is stronger than “The promotion felt busy.”

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

Source 1 FTC Advertising FAQs A Guide for Small Business

Truthful supported advertising and avoiding misleading offer claims. US guidance checked October 2026.

https://www.ftc.gov/business-guidance/resources/advertising-faqs-guide-small-business

Source 2 SBA Break Even Point

General break-even and contribution-margin logic. Toolkit figures are original hypothetical calculations, not performance benchmarks.

https://legacy.sba.gov/business-guide/plan-your-business/calculate-your-startup-costs/break-even-point

Source 3 FDA Retail Food Protection

State local and tribal restaurant oversight and the FDA model Food Code. No claim that this toolkit establishes food-safety compliance.

https://www.fda.gov/food/guidance-regulation-food-and-dietary-supplements/retail-food-protection

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Hiring and Staff Training

A repeatable system for choosing fairly and helping new team members succeed



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Use this toolkit to define a restaurant role, run consistent interviews, and turn the first seven training shifts into observable skills. It is an operating aid, not an employment contract, legal opinion, or food-safety certification. Examples are hypothetical and written for a US context. Before use, check your location’s employment, wage, scheduling, accommodation, youth-employment, and food-safety requirements with qualified local help. Do not collect sensitive applicant information in these worksheets.

Inside this toolkit

1. Define the job before the person
2. Run a consistent interview
3. Score evidence rather than chemistry
4. Make onboarding paid and observable
5. Use seven shifts to build confidence

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

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Define the job before the person

Begin with the work that is actually uncovered. Review two weeks of rosters, overtime, service bottlenecks, and manager rescue tasks. Decide whether you need an additional person, a different shift pattern, clearer station ownership, or more training for the current team.

- Write three to five essential outcomes: accurate orders, a stocked station, safe handoffs, or a completed close. Separate must-have capabilities from skills you will teach.
- State the actual schedule window, work location, compensation structure, reporting line, and how applicants can request help with the application process. Confirm required pay disclosures locally.
- Describe the work accurately without turning preferences into unnecessary barriers. Replace “rock star” or “perfect culture fit” with observable, job-related behaviors.
- Choose the interview criteria and questions before meeting candidates. Use the same core questions and comparable information for everyone.

Hypothetical role: Cedar Table needs a part-time dinner server for two specified weekday evening shifts and one weekend shift. The essential outcomes are accurate order entry, clear allergy-question escalation, timely communication, and a complete station close. Previous experience with its particular POS is preferred, not essential; paid training covers that system.

A clear role also improves retention. Show candidates the actual service pace, expectations, schedule, and training plan. Do not imply guaranteed hours, tips, promotion, or long-term employment unless you intend and are authorized to make that commitment. Set the review date and hiring owner before posting.

Run a consistent interview

Use a short structured conversation: explain the role, ask the same core questions, offer a job-relevant scenario, invite candidate questions, and explain the next step. Allow examples from school, volunteering, caregiving work, or other industries when they demonstrate the required skill.

- Ask: “Tell me about a time you noticed an error. What did you do, and how did you check the result?” Look for accountability rather than a perfect story.
- Ask: “Two tables need help and a food order is ready. How would you decide what to do first?” Give everyone the same restaurant context.
- Ask: “Describe a time you learned a new process. What feedback helped?” Look for a concrete practice and correction loop.
- Ask: “These are the required shift windows. Can you meet them?” Keep the question about availability, not family arrangements, religion, disability, or the reason for availability.

Keep inquiries focused on job qualifications. Do not ask about pregnancy, children, medical history, religion, age, or other protected personal characteristics; pre-offer disability inquiries are specifically restricted. US coverage and local rules vary. If a candidate requests an accommodation, route it through your appropriate process rather than scoring the request. (Source 1)

Hypothetical scenario: “A guest says they have an allergy. You do not know whether the sauce contains that ingredient. What do you do?” Provide the house procedure first. Evaluate whether the candidate follows it and asks the designated person, not whether they already know every ingredient. Do not use a live unpaid service shift as an interview exercise. Review any working trial with a qualified wage-and-hour adviser first.

Score evidence rather than chemistry

Immediately after the interview, each interviewer records evidence independently. Score what the person said or demonstrated against the same rubric. Do not score appearance, accent, handshake, similarity to the team, or how entertaining the conversation felt.

Criterion	Evidence to record
Clear communication	States the issue, checks understanding, and explains the next step
Prioritization	Identifies urgency and seeks help when simultaneous demands conflict
Learning and correction	Describes practice, feedback, adjustment, and a check
Procedure judgment	Uses the provided rule and escalates uncertainty rather than guessing

Use a simple three-point scale: 1 = no usable evidence yet or an unresolved response inconsistent with the provided procedure; 2 = workable evidence with a specific gap or prompt needed; 3 = clear evidence, appropriate action, and a sensible check. Mark not observed rather than inventing a score. Ask the same neutral follow-up where evidence is missing.

Hypothetical comparison: Candidate A scores 3, 2, 3, 2, totaling 10 of 12; Candidate B scores 2, 3, 2, 2, totaling 9. That one-point difference is not proof of superior performance. Review the actual evidence, essential requirements, and trainable gaps. Candidate A needs coached prioritization; both need supervised procedure practice.

- Do not invent a pass score after seeing who applied. Decide how criteria will be used before interviews.
- Resolve missing evidence before making a decision where practical. A total is a discussion aid, not an automatic hiring decision.
- Record a concise job-related reason. Keep applicant records in an appropriately restricted system under your applicable retention policy.

Make onboarding paid and observable

Give each new employee one named trainer, one current station checklist, and a predictable way to ask questions. Prepare access, uniform expectations, the shift schedule, timekeeping instructions, and the manager contact before arrival. Keep payroll, identity, and other sensitive records in approved systems, not this toolkit.

Plan required onboarding and job-related training as paid work and record the time. Under US Department of Labor guidance, training can be excluded from working time only when all four stated conditions are met, including that it is voluntary and not job-related. Do not assume a video watched at home is unpaid. Check applicable rules and coverage. (Source 2)

- Explain: describe the task, why it matters, and the approved standard.
- Demonstrate: perform the task slowly, including the judgment points and when to stop.
- Practice: let the learner try with supervision and immediate feedback.
- Observe: ask for a second demonstration without prompting when appropriate.
- Confirm: record what was demonstrated, remaining limits, and the next review. Attendance is not the same as competence.

For safety-critical tasks, use your approved procedures and qualified supervision. Cover illness reporting, hand hygiene, allergen escalation, cleaning, relevant equipment, and emergency reporting without substituting this booklet for local requirements. FDA provides a model Food Code; restaurant oversight is largely state, local, and tribal. (Source 3)

Hypothetical POS lesson: the trainer enters a sample order, demonstrates the correct modifier and allergy escalation, then observes the learner repeating the process twice in training mode. A mistaken modifier becomes a coaching point, not an instruction to practice on an unsuspecting guest.

Use seven shifts to build confidence

The seven-day plan means seven training shifts, not necessarily seven consecutive calendar days. Adjust it to the role, scheduling rules, workload, and learning needs. A person can need more time without being a poor hire. Never sign off an unsafe task to meet a calendar target.

Shift	Main outcome
1	Understands the workplace, reporting routes, timekeeping, and basic safety procedures
2	Can prepare the assigned station with a trainer
3	Can enter or execute standard orders accurately in supervised practice
4	Can handle an exception and escalate uncertainty
5	Can manage a limited section or station with active support
6	Can complete opening or closing checks and explain discrepancies
7	Demonstrates agreed tasks and receives a specific next-stage plan

Hypothetical review: a new server demonstrates accurate standard order entry on shifts 3 and 5 but needs prompts for modifications. On shift 7 the manager signs off standard orders only, schedules two more coached shifts for modifiers, and keeps allergy questions under the designated escalation process. “Needs practice on modifiers” is more useful than “not confident enough.”

- End each shift with three questions: what became clearer, where did you need help, and what should we practice next?
- At two and four weeks, review schedule fit, clarity, support, and demonstrated skills. Ask what surprises the employee encountered.
- Track training completion, repeated errors per comparable opportunity, time to task signoff, and early departures. Use small-team numbers for learning, not unsupported forecasts.
- If a pattern appears across several new hires, improve the instruction or process before blaming individuals.

Job description builder

Fill in one role at a time. Check all advertised terms and local disclosure requirements before posting. This worksheet is not an offer letter.

Field	Complete for this vacancy
Role and location	_____
Manager and employment arrangement	_____
Compensation and applicable benefits	_____
Required shift windows and expected hours	_____
Three essential outcomes	1 _____ 2 _____ 3 _____
Necessary job capabilities	_____
Skills we will teach	_____
Actual work conditions and essential duties	_____
Application method and deadline	_____
Application assistance contact	_____
Interview criteria and hiring owner	_____

Hypothetical server wording
“Take and enter accurate orders, explain menu choices, escalate allergy questions through our house process, communicate delays, and complete assigned station checks. Training includes our POS and service sequence. Required availability: [actual shifts]. Compensation: [verified terms].”

Hypothetical line cook wording
“Prepare assigned recipes to documented portions, maintain the station using approved procedures, communicate stock and timing issues, and complete opening and closing checks. Training includes our recipes and equipment procedures. Required availability: [actual shifts]. Compensation: [verified terms].”

Review for unnecessary barriers and vague promises.
Approval owner: _____ Date: _____

Structured interview worksheet

Candidate reference: _____ Role: _____ Interviewer: _____
Date: _____ Same scenario and core questions used: Yes / No

Core question	Evidence notes
What interests you about these actual duties and shift windows?	_____
Tell me about an error you noticed and how you handled it.	_____
How would you prioritize the supplied service scenario?	_____
Tell me how you learned a new process and used feedback.	_____
Using our supplied procedure, what would you do with an uncertain allergy question?	_____

Scenario supplied to every candidate
“You have just been told food is ready for pickup. A guest asks for another drink and a second guest says an item on their plate may contain an allergen. Explain your first steps and who you would involve. For this exercise, the manager handles allergen concerns and another server is available to help.”

Neutral follow-ups
“What happened next?” “What was your role?” “How did you check it was resolved?” “What would you do differently?”

Candidate questions and information to clarify: _____
Essential schedule requirements confirmed: _____
Next step and date communicated: _____

Keep notes job-related. Do not record volunteered medical or other protected personal details here. Route requests for assistance appropriately.

Anchored interview scorecard

Score independently before discussing. Use the same criteria and anchors for everyone. If evidence was not observed, mark N rather than treating it as a low score.

Criterion	1 Needs evidence	2 Workable with gap	3 Clear evidence
Communication	Issue or next step unclear	Explains issue but needs a check prompt	Clear issue, next step, and understanding check
Prioritization	Misses urgent issue after context	Recognizes urgency but needs help sequencing	Addresses urgency and delegates appropriately
Learning	No concrete correction example	Describes practice with limited checking	Describes feedback, change, and result check
Procedure judgment	Guesses despite supplied procedure	Uses procedure after a prompt	Uses procedure and escalates uncertainty

Criterion	Score or N	Specific evidence
Communication	____	_____
Prioritization	____	_____
Learning	____	_____
Procedure judgment	____	_____

Total only if all observed: ____ / 12
Missing evidence to obtain: _____
Essential requirements confirmed separately: _____
Trainable gaps and planned support: _____
Job-related decision and reason: _____

Hypothetical evidence note: “Asked the manager to address the allergen concern, requested a colleague collect the ready food, and told the waiting guest what would happen next.” This supports a prioritization score better than “seemed like a good fit.”

Reviewer: _____ Date: _____ Next step: _____

Paid onboarding checklist

Employee reference: _____ Start date: _____ Trainer: _____
Manager contact: _____ Scheduled paid training hours: _____

Task	Owner	Completed or next action
Confirm schedule, arrival instructions, and actual role terms	_____	_____
Set up approved payroll and employment paperwork process	_____	_____
Explain timekeeping and how to correct an error	_____	_____
Show reporting routes for concerns and emergencies	_____	_____
Review applicable illness and hygiene procedures	_____	_____
Demonstrate allergen question escalation	_____	_____
Identify equipment requiring training or authorization	_____	_____
Provide current station and recipe procedures	_____	_____
Practice POS or station tasks under supervision	_____	_____
Explain breaks and scheduling through approved policy	_____	_____
Schedule end-of-shift and seven-shift reviews	_____	_____

Teach back
Ask: “Who do you contact if you are unsure?” “How do you record a time correction?” “What should you stop and escalate?” Do not treat a signed checklist as proof the employee can perform every task.

Unresolved access or equipment issue: _____
Tasks not yet authorized for independent work: _____
Training time recorded through: _____
Employee questions and manager response: _____

Seven shift training plan

Set actual dates around the employee’s schedule. Each shift ends with a brief check-in. Extend training when evidence or safe practice requires it.

Shift and date	Practice focus	Evidence and next step
1 _____	Orientation, timekeeping, reporting, safety routes	Learner explains who to contact: _____
2 _____	Station setup and service sequence	Observed setup with checklist: _____
3 _____	Standard orders or recipe tasks	Accuracy in supervised practice: _____
4 _____	Modifiers, exceptions, escalation	Correct response to scenario: _____
5 _____	Limited live responsibility with support	Observed tasks and prompts needed: _____
6 _____	Opening or closing and handoff	Discrepancy identified and escalated: _____
7 _____	Demonstration and next-stage plan	Signed-off tasks and further coaching: _____

Use after every shift
One task that improved: _____
One situation that remains unclear: _____
Practice task for the next shift: _____
Trainer and date: _____

Hypothetical adjustment: standard orders are signed off after repeated accurate demonstrations; modifiers remain supervised for two more shifts. The employee is not assigned unrestricted solo responsibility simply because shift 7 has arrived.

Coverage plan while the trainer is coaching: _____
Fallback trainer if the named trainer is absent: _____
Paid training hours planned and actual: _____

Skills signoff and early review

Use observed behavior, not confidence alone. Status options: Not introduced / Practicing with support / Demonstrated to standard. Set the required observation for your operation.

Task	Required observation	Status and reviewer
Station setup	Uses current checklist; identifies missing item	_____
Standard order or recipe	Accurate supervised demonstrations	_____
Allergen escalation	Follows the approved route without guessing	_____
Guest or station handoff	Communicates status and checks understanding	_____
Opening or closing	Completes checks and reports discrepancies	_____
Timekeeping	Explains entry and correction process	_____

Evidence dates and notes: _____
Tasks still restricted or supervised: _____
Additional practice and trainer: _____

Two or four week conversation
1. What is clearer now than on your first shift? _____
2. Which expectation or schedule detail surprised you? _____
3. When was it difficult to get help? _____
4. What should your trainer explain differently? _____

One manager action with owner and date: _____
One employee practice goal with support: _____
Next review: _____ Manager: _____

Team review metrics to choose from: completed training shifts; time to specific task signoff; repeated errors per observed opportunity; and early departures with voluntarily shared reasons. Small samples are signals to investigate, not a basis for broad claims.

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

Source 1 EEOC Prohibited Employment Policies and Practices

Job-related selection and restrictions on discriminatory hiring practices and pre-offer disability inquiries. This toolkit is not a legal compliance guarantee.

https://www.eeoc.gov/prohibited-employment-policiespractices

Source 2 US Department of Labor Fact Sheet 22 Hours Worked

Conditions for excluding training from compensable work time under the FLSA. Local law and coverage require separate review.

https://www.dol.gov/agencies/whd/fact-sheets/22-flsa-hours-worked

Source 3 FDA Retail Food Protection

Model Food Code and state local and tribal oversight. No food handling time or temperature standard is prescribed by this toolkit.

https://www.fda.gov/food/guidance-regulation-food-and-dietary-supplements/retail-food-protection

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Menu Costing and Pricing

Turn invoices and portion standards into clearer menu decisions



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Cost one representative menu item, verify the physical portion, then apply the same method to the rest of the menu. This toolkit separates recipe cost, contribution, and whole-business profit so a low food-cost percentage does not become a misleading goal. All ingredient prices, yields, sales volumes, and results are hypothetical. Use current invoices and your own measured yields. This is an operating planning tool, not accounting, tax, nutrition, or legal advice.

Inside this toolkit

1. Start with accurate units and yields
2. Build the complete plate cost
3. Price for contribution and guest value
4. Review menu mix instead of one item
5. Implement and check the change

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

The companion Excel workbook contains editable inputs and live formulas or planning fields. Read its instructions before changing values. Its hypothetical examples may use a more detailed set of assumptions than the guide. Use consistent units and cost definitions, and never treat contribution as full accounting profit.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Start with accurate units and yields

Choose a recent invoice and a current recipe version. Record the product specification, pack size, invoice cost after relevant discounts, measurement unit, and date. A “case” is not a usable costing unit until you know what is inside it. Do not mix fluid ounces with weight ounces or raw weights with cooked portions.

- Convert the purchased quantity into the recipe’s measurement unit. For US weight measures, one pound contains 16 ounces. Do not use that conversion for volume.
- Measure usable yield under the restaurant’s normal preparation method. Purchased weight, trimmed weight, and cooked weight describe different stages.
- Yield fraction = usable quantity ÷ purchased quantity. Usable unit cost = purchased cost ÷ usable quantity. Record which losses the yield already includes.
- Do not add the same trim or cooking loss again as a blanket waste percentage. Separately identify avoidable spoilage or overproduction if you model it.
- Use repeated representative tests rather than one unusually good batch. Record operator, equipment, and method when these change the result.

Hypothetical chicken test: 40 lb costs $160 and produces 30 lb of usable cooked chicken. Yield is 30 ÷ 40 = 75%. Cooked cost is $160 ÷ 30 = $5.333 per lb. A 6 oz cooked portion costs $2.00, because 30 lb produces 80 portions of 6 oz. Costing it as 6 oz of raw chicken would understate the cost.

USDA’s Food Buying Guide distinguishes purchased quantities and edible-portion yields. It is designed for Child Nutrition Programs; use it as a conceptual reference rather than assuming its yields match your restaurant’s exact ingredients and process. (Source 1)

Build the complete plate cost

A plate includes more than the main ingredient. Cost every component served to the guest, including sauces, garnishes, oils, sides, and bread if included. For a batch recipe, divide total ingredient cost by the measured number of usable portions, not the number you hoped to produce.

Hypothetical chicken bowl	Portion basis	Food cost
Cooked chicken	6 oz from measured yield	$2.00
Rice	Standard cooked scoop	$0.65
Vegetables	Standard prepared portion	$0.85
Sauce	Measured ladle	$0.40
Garnish	Documented portion	$0.10
Total food cost	One complete bowl	$4.00

Photograph the finished portion and write the utensils or weights that produce it. Ask two cooks to assemble the same item independently. If one bowl uses 7 oz of chicken instead of 6 oz, the extra ounce costs about $0.33 at this yield. Across 100 bowls that is roughly $33, before any other difference.

- Keep ingredient purchase data separate from recipe quantities so an invoice update can flow through related recipes.
- Cost subrecipes once, such as a sauce batch, then use their per-ounce or per-portion cost in every dish. Do not also add the full sauce batch to each dish.
- Record substitution rules. A substitute ingredient may change cost, allergens, labeling, flavor, and preparation.
- Add packaging and other variable selling costs in a separate layer. Keep them out of “food cost” if you want that measure to remain comparable.

Hypothetical takeaway layer: $4.00 food + $0.60 packaging + $0.50 modeled payment cost = $5.10 variable cost per sale. The payment figure is an assumption, not a provider quote. Add actual platform commissions or other costs for the channel used.

Price for contribution and guest value

Food-cost percentage = food cost ÷ net selling price. It is one measure, not a universal pricing rule. A price derived from a target percentage still has to cover labor, overhead, channel costs, and the value guests perceive. There is no single percentage target that suits every restaurant.

Hypothetical bowl: at a $16 net selling price and $4 food cost, food-cost percentage is 25%. With $5.10 modeled variable costs, contribution is $10.90 per sale. That contribution helps pay costs not included in the model; it is not profit. General break-even analysis uses selling price less variable cost to assess how sales cover fixed costs. (Source 2)

- Check the local guest proposition and comparable alternatives without copying a competitor’s price blindly. Their recipe, rent, portion, and service may differ.
- Run a range of candidate prices with your real recipe and selling costs. A percentage-derived price is a starting point for review, not an instruction to publish it.
- Check each channel separately. Delivery packaging, commission, promotions, and payment charges can materially change the contribution.
- Treat price changes, portion changes, recipe changes, and menu removal as different choices with different guest consequences.

Hypothetical cost increase: the bowl’s modeled variable cost rises from $5.10 to $5.70. At $17, new unit contribution is $11.30. To match the prior contribution from 100 bowls at $10.90, it needs $1,090 ÷ $11.30 = 96.46, rounded up to 97 bowls. At 95 bowls, contribution falls to $1,073.50. This is a sensitivity test, not a forecast of customer response.

Review menu mix instead of one item

Export item-level sales for a comparable period and pair them with current standard costs. Group similar items before comparing them: mains with mains, sides with sides, and the same channel with itself. Decide what “high” demand and contribution mean in your own category rather than importing a generic benchmark.

Pattern	Question to investigate	Possible test
Popular and stronger contribution	Can we execute it consistently at volume?	Protect quality and availability
Popular and weaker contribution	Is portion drift or an uncosted extra eroding value?	Correct the recipe or test a careful change
Less popular and stronger contribution	Do guests understand the item?	Improve factual description or placement
Less popular and weaker contribution	Does it serve a strategic need?	Simplify replace or remove after review

Hypothetical comparison: Item A sells 100 units at $10.90 contribution, producing $1,090. Item B sells 40 at $13 contribution, producing $520. B has stronger contribution per unit, but A currently contributes more total dollars. Removing A solely because B has a better percentage could damage the business.

- Check prep time, bottleneck equipment, waste, ingredient overlap, guest dietary needs, and brand fit before cutting an item.
- Do not count discounts as full-price revenue. Use realized net sales and investigate comps separately.
- If a dish brings guests who also buy other items, review the basket before judging it alone. Avoid assuming every sale is truly incremental.
- Flag stale cost dates. An elegant menu matrix built from last year’s invoice prices is not decision-ready.

Use the review worksheet to choose one or two actions, not a total menu overhaul. Keep a dated recipe and price record so you can explain the change later.

Implement and check the change

Choose a change with a clear reason, owner, effective date, and review window. The kitchen, POS, printed menu, website, delivery channels, and staff explanation must agree. A good analysis can still create a bad guest experience if an old price remains visible.

- Before launch: approve the recipe and portion, recost all affected subrecipes, check channel fees, and confirm the published description still matches the food.
- Check whether ingredient, portion, or description changes require updates to allergen information, nutrition disclosures, or other applicable requirements. FDA menu-labeling rules cover certain establishments, including qualifying chains; other rules may also apply. (Source 3)
- Brief staff on the factual change. Avoid inventing a justification or blaming a supplier if that is not accurate.
- After launch: compare unit sales, realized price, contribution, waste, refunds, and guest feedback with a comparable baseline. Note other changes in hours, traffic, season, and promotion.
- Recheck physical portions and invoices. Decide whether to keep, adjust, or reverse the change based on evidence and service impact.

Hypothetical rollout: Cedar Table changes the bowl price to $17 after the cost increase, keeps the documented portion, updates every channel before opening, and reviews two comparable weeks. If units fall to 95 per baseline-equivalent period, the modeled contribution is lower than before. The owner investigates guest response and other traffic changes rather than assuming the higher price solved the problem.

Create a review rhythm: refresh volatile ingredients when invoices change, inspect a small set of portions each week, and review the full menu on a schedule appropriate to the operation. These are management suggestions, not legal or industry-required intervals.

Ingredient and yield record

Record one ingredient and one preparation stage per sheet. Use the same unit for purchased and usable quantities before calculating yield.

Field	Your record
Ingredient and supplier specification	_____
Invoice date and reference	_____
Pack description and purchased quantity	_____
Net cost allocated to this quantity	_____
Preparation method and stage measured	_____
Usable quantity in matching units	_____
Yield fraction or percent	_____
Cost per usable unit	_____
Losses already included	_____
Test operator and equipment	_____

Repeated test	Purchased quantity	Usable quantity	Yield
1	_____	_____	_____
2	_____	_____	_____
3	_____	_____	_____

Hypothetical completed check
Purchased: 40 lb chicken for $160. Usable cooked weight: 30 lb. Yield: 75%. Cost: $5.333 per cooked lb. Eighty 6 oz portions cost $2 each. The 75% yield already includes the loss between the purchased and final cooked stages used in this test.

Approved planning yield and reason: _____
Next test trigger or review date: _____

Recipe and portion costing

Menu item: _____ Recipe version: _____ Date costed: _____
Channel: _____ Batch yield: _____ Portion standard: _____

Component	Usable quantity	Cost per unit	Extended cost
Main ingredient	_____	_____	_____
Side or starch	_____	_____	_____
Vegetable	_____	_____	_____
Sauce or dressing	_____	_____	_____
Garnish and extras	_____	_____	_____
Other	_____	_____	_____

Total ingredient cost: _____
Measured usable portions in this batch: _____
Food cost per portion = total ingredient cost ÷ usable portions: _____
Packaging per sale: _____ Other variable costs per sale: _____
Total modeled variable cost per sale: _____

Hypothetical plate check
Chicken $2.00 + rice $0.65 + vegetables $0.85 + sauce $0.40 + garnish $0.10 = $4.00 food cost. Packaging $0.60 and modeled payment cost $0.50 bring the total to $5.10. Use actual fees for your channel.

Portion utensil or weight and photo reference: _____
Subrecipe versions used: _____
Cost assumptions or exclusions: _____
Checked by kitchen lead: _____ Approved by: _____

Portion consistency check

Observe normal preparation without changing food-safety procedures. Use appropriate equipment and avoid returning handled test food to service. The purpose is process coaching, not punishment.

Item and component	Target portion	Observed portion	Reason for difference
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Date and shift: _____ Recipe version: _____ Observer: _____
Measurement unit: _____ Scale or utensil checked: _____

Calculate the cost effect
Difference per portion = observed quantity − target quantity.
Cost difference per portion = quantity difference × cost per usable unit.
Estimated period effect = cost difference × relevant portions sold.
Treat the period result as an estimate unless the observation is representative.

Hypothetical example: 7 oz cooked chicken instead of 6 oz adds 1 oz. At $5.333 per lb, the extra cost is about $0.33 per bowl, or roughly $33 for 100 bowls. It does not follow that every bowl in the period was overportioned.

Likely cause: unclear recipe / wrong utensil / training / deliberate change / other
Corrective action and owner: _____
Staff demonstration completed: _____
Recheck date and observed result: _____

Pricing scenario worksheet

Compare the same cost definitions across scenarios. Use net realized selling prices. If fees depend on selling price, recalculate them for every scenario.

Input or result	Current	Scenario A	Scenario B
Net selling price	_____	_____	_____
Food cost per sale	_____	_____	_____
Other modeled variable costs	_____	_____	_____
Total modeled variable cost	_____	_____	_____
Contribution per sale	_____	_____	_____
Food cost percentage	_____	_____	_____
Expected units for sensitivity test	_____	_____	_____
Total contribution	_____	_____	_____

Formulas
Contribution per sale = price − modeled variable cost.
Food-cost percentage = food cost ÷ price.
Total contribution = contribution per sale × units.
Units to match baseline contribution = baseline total contribution ÷ new positive contribution per sale, rounded up.

Hypothetical check: current 100 units × $10.90 = $1,090. New contribution of $11.30 requires 97 units to match or exceed that amount. At 95 units, the result is $1,073.50.

Guest-value reason for the candidate price: _____
Demand assumption and uncertainty: _____
Channel-specific charges checked: _____
Decision owner and review date: _____

Menu review worksheet

Category: _____ Channel: _____ Baseline dates: _____
Costs refreshed through: _____ Excluded unusual dates: _____

Item	Units sold	Contribution per unit	Total contribution
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Your category comparison thresholds
Demand measure and threshold: _____
Contribution measure and threshold: _____
Why these comparisons are useful for this menu: _____

Item to investigate	Operational or guest factor	Proposed next step
_____	_____	_____
_____	_____	_____
_____	_____	_____

Check before removing an item
Does it meet a guest need that the remaining menu will not? _____
Does it share ingredients efficiently or create avoidable waste? _____
Does it create a bottleneck or require unique preparation? _____
Do basket data or staff observations suggest a broader role? _____

Choose no more than two changes for the next test. Owner: _____
Information still missing: _____
Next review date: _____

Menu change and results plan

Item and channel: _____ Owner: _____ Effective date: _____
Change type: Price / Portion / Recipe / Description / Availability

Before launch	Owner and completion
Reason and intended measurable result documented	_____
Recipe portions and costs approved	_____
Allergen nutrition and other disclosure review completed	_____
POS print web and ordering channels updated	_____
Staff explanation and escalation route briefed	_____
Old materials removed or corrected	_____

Measure	Baseline	Review result
Units sold in comparable period	_____	_____
Realized net price per unit	_____	_____
Modeled contribution per unit	_____	_____
Total contribution	_____	_____
Waste refunds and guest issues	_____	_____

Other factors affecting comparison: _____
Physical portion check result: _____
Guest feedback themes without personal details: _____
Keep adjust or reverse and why: _____
Next action owner and date: _____

Plain staff explanation template
“The [item] is now [accurate price or recipe description]. [State any material portion or ingredient change clearly]. I can check the current ingredient information with [designated person] if you have a question.” Do not substitute a sales script for accurate disclosure.

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

Source 1 USDA About the Food Buying Guide

Distinguishing as-purchased quantities and edible-portion yields. The source is designed for Child Nutrition Programs; the toolkit does not adopt its specific yields as restaurant standards.

https://foodbuyingguide.fns.usda.gov/Home/About

Source 2 SBA Break Even Point

Contribution and break-even reasoning. All example prices and demand scenarios are original hypothetical arithmetic, not forecasts.

https://legacy.sba.gov/business-guide/plan-your-business/calculate-your-startup-costs/break-even-point

Source 3 FDA Menu and Vending Machine Labeling

Certain establishments have federal menu-labeling obligations; applicability and other local requirements need separate review.

https://www.fda.gov/food/nutrition-food-labeling-and-critical-foods/menu-and-vending-machine-labeling

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Restaurant Merchandise

Launch a small useful product line without burying cash in unsold stock



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Start with one product guests genuinely want, one approved design, and one small inventory decision. This toolkit covers product selection, supplier checks, pricing, preorders, staff presentation, and stock review. It does not cover food products, alcohol, children’s products, or product-safety certification. All quoted costs, selling prices, suppliers, and results in the examples are hypothetical. Financial examples exclude sales tax and require your actual fees and costs.

Inside this toolkit

1. Choose one product guests will use
2. Approve the sample and the supplier
3. Separate contribution from cash exposure
4. Use preorders with clear promises
5. Sell naturally and review the stock

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

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Choose one product guests will use

Merchandise works best when it fits an existing connection to the restaurant. A useful item with a recognizable design is easier to test than a large collection of logos on unfamiliar products. Begin with evidence: repeated guest requests, a popular existing design, or a small number of clearly recorded expressions of interest.

Product	Useful advantage	Main complication
Tote	One size and easy display	Fabric, construction, and print quality
Adult T shirt	Wearable reminder of the restaurant	Size mix, fit, and exchanges
Cap	Visible brand and compact storage	Fit, embroidery, and style preference
Sticker	Small checkout item	Low cash contribution and durability claims

- Ask a neutral question: “Which of these would you actually use, and what would stop you buying it?” Compliments are not orders.
- Show one or two designs, not a dozen. Record first choice and objections without collecting unnecessary personal details.
- Set a maximum cash exposure and storage limit before requesting bulk quotes.
- Avoid too many variants. Two colors across five sizes create ten stock-keeping units before a single item sells.

Hypothetical choice: Cedar Table tests an adult tote in one color after guests repeatedly ask about its illustrated storefront. It chooses a tote over shirts because there is no size inventory to predict. The owner treats 18 expressions of interest as a reason to order a sample, not as 18 guaranteed sales.

Use artwork you own or have permission to reproduce on merchandise. Confirm that a designer or stock-asset license covers the intended product use; paying for a design does not by itself tell you the license scope. Obtain permission when needed. (Source 1)

Approve the sample and the supplier

Compare suppliers using the same specification: product, material, dimensions, print method, colors, quantity, label requirements, packaging, destination, and deadline. A low unit quote is not comparable if it excludes setup, freight, or a different blank product.

- Request a physical sample when practical. Inspect construction, print placement, color, packaging, and any required labels. Photograph the approved version.
- Test normal use using the supplier’s care instructions. Do not make “dishwasher safe,” “organic,” “locally made,” or similar claims without appropriate support.
- Get the artwork proof, permitted print tolerance, defect handling, replacement process, minimum order, reorder terms, and expected lead time in writing.
- Confirm whether a quoted delivery date is a commitment or estimate. Allow time for sample approval and possible correction.
- Check who is responsible for applicable product labeling and safety documentation. A supplier’s reassuring email is not a substitute for verifying the requirements.

For US apparel and many textile items, FTC rules address fiber content, origin, and responsible-business identification; care-label obligations also apply to covered clothing. Ask the supplier which rules apply to the exact item and do not remove required labels to make room for your branding. (Source 2)

Hypothetical comparison: Supplier A quotes $9 per tote plus $100 setup and $60 freight for 40 units; Supplier B quotes $10 plus $80 setup and $40 freight. A costs $520 and B costs $520 before any other charges. The owner selects only after comparing the approved sample, lead time, and defect remedy, not the $9 headline.

Separate contribution from cash exposure

Calculate two things: the contribution from each sold unit and the cash committed to the whole order. Unsold stock can look harmless in a unit-margin calculation while consuming money you need for the restaurant.

Hypothetical tote inputs	Amount
Order quantity	40 units
Landed cost per unit including inbound freight	$11
Upfront sample and setup cost	$80
Retail price before sales tax	$24
Packaging and payment cost per sale	$1.50
Contribution per sold unit	$11.50

Contribution per sold unit = price − landed cost − per-sale costs. At 30 sales, contribution is 30 × $11.50 = $345; after the $80 setup, it is $265 before overhead and other excluded costs. That is not the same as cash recovered.

The full order and setup require $520 upfront: 40 × $11 + $80. Thirty sales bring in $720, with $45 selling costs, leaving $155 cash above that initial outlay. Ten unsold totes still tie up $110 at landed cost. This illustration assumes no returns, defects, discounts, or extra labor.

Cash payback units = upfront order cash ÷ (price − per-sale costs), rounded up. Here, $520 ÷ $22.50 means 24 sales are needed to recover the initial outlay. The separate setup-only contribution hurdle is $80 ÷ $11.50, rounded up to 7 units; do not confuse it with whole-order cash payback.

- Run a slow-sales case before committing. If only 15 sell, cash received after selling costs is $337.50, leaving $182.50 unrecovered.
- Add actual taxes that are your cost, returns, fulfillment labor, platform fees, and shipping subsidies as applicable. Use qualified accounting advice for tax treatment.

Use preorders with clear promises

A preorder can reduce demand uncertainty, but taking payment creates a fulfillment obligation. Begin with an unpaid interest list if you cannot yet give a reliable product specification or delivery plan. Clearly distinguish “interested” from “paid order.”

- Before accepting payment, approve the sample, confirm supply, set the order window, and write a realistic fulfillment date or window.
- Show the exact product, total price and applicable charges, size or dimensions, fulfillment method, and your reviewed cancellation, exchange, and refund terms.
- If a minimum production quantity is needed, say what happens if it is not reached and when customers will be told. Do not quietly replace a promised refund with store credit.
- Use your approved POS or ordering system. Keep payment credentials out of spreadsheets and paper logs.
- Assign one person to monitor supplier progress, answer questions, reconcile orders, and handle delays.

For covered US mail, internet, and telephone merchandise orders, the FTC requires a reasonable basis for the advertised shipping time; if none is stated, the rule generally uses 30 days. If shipment cannot occur on time, required delay-consent or refund procedures apply. Review the official guidance for your exact flow, including repeat delays. Do not assume a restaurant pickup arrangement has identical rules. (Source 3)

Hypothetical plan: Cedar Table first gathers interest, then approves a sample and confirms a supplier schedule. Its paid preorder clearly says when orders close, when pickup is expected, and what happens if production is cancelled. The manager checks progress before the promised date rather than waiting for guests to complain.

Sell naturally and review the stock

Merchandise should support the guest experience, not turn every table interaction into a sales pitch. Display one clean sample with a readable price and a simple way to buy. Keep sellable stock protected from food, grease, and handling damage.

- Create a separate POS item for each variant. Record discounts, staff-use items, samples, gifts, returns, and damaged units rather than letting stock disappear.
- Teach staff a brief factual answer: item, price, available variants, and how to buy. No pressure, invented scarcity, or claims that sales support a charity unless verified and approved.
- Offer a sample for inspection and use the actual size chart where relevant. Do not promise a fit or delivery date beyond the approved information.
- Count stock weekly during the pilot. Reconcile beginning stock + received + sellable returns − sales − gifts − damage = ending stock.
- Review contribution and cash recovery alongside guest questions, returns, and staff effort. High sales are less useful if exchanges absorb the margin.

Hypothetical review: after four weeks, Cedar Table sold 30 of 40 totes, a 75% unit sell-through for the original batch, with no returns. Ten remain. The owner does not automatically reorder another 40. It checks the recent weekly sales pace, upcoming demand, supplier lead time, and whether the original cash is recovered.

Set a reorder point from expected demand during supplier lead time plus a chosen buffer, then subtract stock already on order when planning a purchase. Treat the result as a planning estimate. If the first design stalls, improve the display or ask guests why before discounting every remaining unit.

Product selection worksheet

Compare no more than three ideas. A score organizes discussion; it does not turn compliments into demand. Set a score from 1 low to 3 strong and write the evidence.

Criterion	Idea A	Idea B	Idea C
Product and variant count	_____	_____	_____
Evidence of guest demand	_____	_____	_____
Fit with restaurant identity	_____	_____	_____
Ease of storage and fulfillment	_____	_____	_____
Sample quality and practical use	_____	_____	_____
Contribution at a plausible price	_____	_____	_____
Minimum order cash required	_____	_____	_____
Returns or sizing complication	_____	_____	_____

Selected first product and reason: _____
Guest evidence and date collected: _____
Maximum upfront cash exposure: _____
Maximum units and storage space: _____
Artwork owner and permission record: _____

Hypothetical decision: “One-color adult tote. Guests asked about the storefront illustration, one size reduces stock complexity, and a 40-unit batch fits our storage limit. Interest still needs testing.”

- Stop if the sample fails, product claims cannot be supported, artwork permission is unclear, or the order exceeds the owner’s limit.
- Decision owner: _____ Next review: _____

Supplier comparison and sample approval

Send an identical specification to each supplier. Include destination and desired delivery date. All quotations below should use the same currency and tax basis.

Specification or cost	Supplier A	Supplier B
Product material and dimensions	_____	_____
Print or decoration method	_____	_____
Quantity and variants	_____	_____
Unit production cost	_____	_____
Sample and setup charges	_____	_____
Freight and other charges	_____	_____
Total delivered order cost	_____	_____
Approval and production lead time	_____	_____
Defect remedy and deadline to report	_____	_____
Required labeling documentation	_____	_____
Reorder minimum and cost	_____	_____

Physical sample checks
Construction: _____ Print: _____ Color: _____
Normal-use test under care instructions: _____
Labels and packaging checked: _____
Approved proof file and version: _____

Selected supplier and evidence-based reason: _____
Unresolved questions before payment: _____
Sample approved by: _____ Date: _____

Hypothetical check: 40 × $9 + $100 setup + $60 freight = $520. A lower unit price does not guarantee a lower delivered order cost.

Cost and order plan

Complete before approving a purchase. Use one row per product variant in your companion calculator. Do not combine production setup with per-unit costs twice.

Input or calculation	Your figure
Quantity to buy	_____
Total production and inbound freight	_____
Landed cost per usable unit	_____
Separate upfront sample or setup	_____
Selling price before sales tax	_____
Per-sale packaging payment and fulfillment	_____
Contribution per sold unit	_____
Total upfront order cash	_____
Units for whole-order cash payback	_____

Sales scenario	Units	Cash recovered after per-sale costs
Slow case	_____	_____
Planning case	_____	_____
Full sell-through	_____	_____

Hypothetical check: 40 units at $11 landed plus $80 setup = $520 upfront. Selling at $24 with $1.50 per-sale costs needs 24 sales for cash payback. At 30 sales, cash received after per-sale costs is $675; the $155 difference is not the same as full accounting profit.

Returns and defect assumption: _____
Costs excluded and why: _____
Approved order quantity: _____ Approved cash limit: _____
Owner: _____ Review date: _____

Preorder and fulfillment planner

Use this as a planning form, not a legal terms document. Review the customer terms for your sales channel and location before taking money.

Customer-facing detail	Approved wording
Exact item variant and description	_____
Price and applicable charges	_____
Order opening and closing dates	_____
Minimum quantity if applicable	_____
Shipping or pickup date or window	_____
Where and how fulfillment occurs	_____
What happens if minimum is not reached	_____
Cancellation exchange and refund policy	_____
Delay contact and customer support route	_____

Preorder announcement draft
“Our [item] is available to preorder from [date] to [date]. [Description and dimensions or sizing]. Price: [price and charges]. [Shipping or pickup timing and method]. [Minimum-quantity condition if any]. Please review [terms location] before ordering. Questions: [contact].”

Internal checkpoint	Owner and date
Supplier schedule reconfirmed	_____
Paid orders reconciled with production quantity	_____
Delay review before promised fulfillment date	_____
Pickup or shipment completion reconciled	_____

Order records belong in your approved system. Reference IDs are enough for this worksheet; do not copy card details or full customer addresses into it.

Display and staff prompt sheet

Launch owner: _____ Launch date: _____ POS item tested: _____
One clean sample displayed at: _____

A natural guest prompt
“If you liked the [design], we also have it on a [product]. It is [price], and [available options]. You can take a look at the sample by [location].”

Answering a sizing question
“Here is the supplier’s size chart and our approved exchange information. I can show you the measurements, but I do not want to promise a fit.”

Answering a preorder question
“This is a preorder, not stock to take home today. The current [shipping or pickup] window is [window]. The full terms and contact details are [location].”

Answering an unavailable request
“That [variant] is not available right now. We do not have a confirmed restock date. [Offer the approved interest-list option only if one exists].”

Launch check	Owner and status
Price visible and consistent with POS	_____
Actual item and approved description shown	_____
Stock safely stored and counted	_____
Staff know returns and support process	_____
No unsupported material or origin claims	_____
Samples gifts and staff items tracked	_____

Questions staff could not answer: _____
Manager response and updated briefing: _____

Inventory and reorder review

Count the same day each week during the pilot. Use sellable returns separately from damaged returns. Investigate differences before changing stock records.

Stock movement	Units
Beginning sellable stock	_____
Receipts	_____
Sellable returns	_____
Sales	_____
Gifts samples or staff use	_____
Damage or loss	_____
Expected ending stock	_____
Physical count	_____
Unexplained difference	_____

Product and variant: _____ Period: _____ Counter: _____
Net sales after refunds: _____ Contribution estimate: _____
Original order cash recovered: _____ Unsold stock at cost: _____

Reorder input	Your estimate
Recent weekly sales pace	_____
Supplier lead time in weeks	_____
Chosen buffer units	_____
Current stock and units already ordered	_____
Proposed reorder quantity and cash cost	_____

Hypothetical review: 30 of the original 40 totes sold, giving 75% sell-through. Ten remain. Before reordering, compare recent demand over the supplier’s lead time with those ten units and any stock already ordered.

Decision: Reorder / Hold / Improve display / Discontinue
Reason and guest evidence: _____
Next review date and owner: _____

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

Source 1 US Copyright Office How to Obtain Permission

Obtaining permission or a license for use of copyrighted work. Product and artwork rights need case-specific review.

https://www.copyright.gov/circs/m10.pdf

Source 2 FTC Apparel and Labeling

US textile identification and covered clothing care-label requirements. Exact applicability depends on the product.

https://www.ftc.gov/news-events/topics/tools-consumers/apparel-labeling

Source 3 FTC Business Guide to the Mail Internet or Telephone Order Merchandise Rule

Reasonable shipping promises and delay-consent or refund requirements for covered orders. Local pickup and other consumer rules require separate review.

https://www.ftc.gov/business-guidance/resources/business-guide-ftcs-mail-internet-or-telephone-order-merchandise-rule

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Catering and Private Events

A practical system for qualifying, costing and running events without losing the details.



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Build one repeatable event offer before adding more. Use this guide and six editable planning sheets to connect inquiry, internal estimate, preparation, delivery and review. All examples are hypothetical; adapt staffing, costs and service promises to your restaurant.

Inside this toolkit

1. Define the event you can deliver
2. Cost the complete event not just the food
3. Control the commitment and every change
4. Build the run sheet backward from service
5. Close the event and improve the package

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

The companion Excel workbook contains editable inputs and live formulas or planning fields. Read its instructions before changing values. Its hypothetical examples may use a more detailed set of assumptions than the guide. Use consistent units and cost definitions, and never treat contribution as full accounting profit.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Define the event you can deliver

Start with one service format: pickup platters, staffed on-site service or delivered-and-set-up meals. These are different jobs. A package that works for pickup may fail when it also needs transport, venue access, equipment and an attendant. Write the start and finish of your responsibility before choosing a menu.

- Set an initial service area, minimum lead time and guest-count range using your actual production and transport capacity. These are operating choices, not industry benchmarks.
- List what the package includes: menu, portions, serving pieces, setup, staffing and removal. State exclusions explicitly.
- Qualify the inquiry before pricing: date, venue, service time, guest count, format, budget range and decision deadline. Ask about dietary requests without promising an allergen-free result.
- Check venue access, storage, power, water, equipment and permissions before treating the job as feasible. Record the person responsible for unresolved details.

Scope: these are business-planning tools, not a food-safety plan, permit checklist or contract. FDA’s Food Code is a model; locally adopted rules and your person in charge (PIC) govern the actual operation. Confirm off-site permissions, food controls and required records with the appropriate local authority. (Source 1)

First-week action: complete the package sheet for one familiar menu, then run a small internal rehearsal. Do not accept a larger event simply because the customer is willing to pay.

Cost the complete event not just the food

Build the internal estimate from the confirmed scope. Cost the recipe quantities for the planned portions, then add packaging, event-specific labor, rentals and transport. Include paid preparation, loading, travel, setup, service and cleanup time. Use your own loaded labor-cost estimate and have payroll assumptions reviewed when needed.

Illustrative 40-guest event	Amount
Revenue: 40 × $28	$1,120
Food and packaging	$360
Event labor	$240
Rentals and transport	$140
Estimated direct costs	$740
Contribution before other costs	$380

Here, contribution is $1,120 − $740 = $380, or 33.9% of revenue. It is not profit: overhead, other labor, payment costs, taxes and unlisted expenses may still apply. Keep customer tax, gratuity and pass-through amounts separate; ask your accountant how to treat them.

- Specify the revenue basis consistently: before applicable taxes, after discounts, with each approved fee identified.
- Add a scenario for a smaller guest count or extra labor hour. If the package only works at the best case, revise the scope or price.
- Verify rental minimums, delivery charges and supplier pack sizes before sending a quote.
- Use the workbook to compare scenarios, not to replace a documented estimate or your reviewed customer terms.

Control the commitment and every change

Use one event ID from inquiry to final review. Maintain a single current version of the menu, guest count, timing and price. A message in a server’s phone is not a reliable production instruction.

Stage	Required evidence	Decision owner
Qualify	Completed inquiry and feasibility gaps	Event lead
Estimate	Costed package and capacity check	Manager
Confirm	Customer approval using reviewed terms	Authorized manager
Freeze plan	Current guest count and production version	Event lead
Release	Final checklist and PIC controls ready	Event lead / PIC

- Use your existing professionally reviewed booking, payment, cancellation and change policies. This toolkit intentionally supplies no contract or deposit percentage.
- Set a documented deadline for final numbers and menu choices, then communicate it using your approved terms. Record late requests rather than silently absorbing them.
- Before approving a change, recheck ingredient availability, equipment, labor, transport space, allergens and the revised cost.
- Give the kitchen, service lead and driver the same dated version. Withdraw obsolete copies.
- If a payment or customer decision is missing, mark the status clearly and escalate under your booking policy. Do not imply the event is confirmed merely because a quote exists.

Example: an increase from 40 to 55 guests changes more than portions. Recheck vehicle capacity, serving equipment, staffing and the setup window before agreeing.

Build the run sheet backward from service

Start with the customer’s required ready-to-serve time. Work backward through venue access, unloading, travel, pack-out and preparation. Assign an owner and fallback to every dependency. These are scheduling milestones, not food-safety time limits.

Illustrative milestone	Owner	Verification
11:30 service ready	Event lead	Setup accepted
11:00 venue access	Venue contact	Access confirmed
10:15 departure	Driver	Route and load checked
Before loading	PIC / packer	Approved food controls checked

- Separate the food checklist from the equipment checklist. Count serving utensils, labels, containers, table items and returnable assets.
- Use the PIC’s approved transport and service procedures, including monitoring, corrective action and handoff records. Delivery guidance addresses packaging, temperature, contamination and allergen controls; a run sheet does not replace those procedures. (Source 2)
- Confirm the receiver’s name and phone number and the exact access point. Record arrival and handoff, not merely departure.
- Define the fallback for an inaccessible venue, late service, failed equipment or missing receiver. Escalate safety questions to the PIC rather than improvising.
- Record who retains custody of returnable equipment and when collection is expected.

Readiness check: can another trained lead execute the event using the final packet without searching old messages? If not, add the missing instruction or decision.

Close the event and improve the package

After service, collect actual labor, ingredient usage, rental changes, refunds, transport costs and customer feedback. Reconcile estimated versus actual direct contribution on the same basis. Retain payment and accounting records through your normal systems; do not place card details in these worksheets.

Illustrative review: the $740 direct-cost estimate becomes $800 after one extra labor allocation of $60. With unchanged revenue of $1,120, contribution falls from $380 to $320. The event was not necessarily unprofitable or profitable; this comparison only identifies the $60 variance before other costs.

- Log one operational cause for each meaningful variance: unpriced setup, longer travel, excessive portions, missing gear or a late scope change.
- Choose one fix with an owner and date. For example: require a venue-access check before quoting setup labor.
- Track on-time readiness as events ready by the agreed time divided by completed events. Record the cause of every late event.
- Track quote conversion only for decided quotes: won ÷ (won + lost). Keep pending quotes outside the denominator.
- Review guest feedback separately from safety incidents, which follow your established escalation procedure immediately.

Repeat for three comparable events before changing the standard package. Compare events with similar size and service format. A large wedding and a small pickup order should not share one labor benchmark.

Your next move: finish the inquiry, package and cost sheets for the next real inquiry. Do not wait until the event is booked to test feasibility.

Inquiry and feasibility worksheet

Use before preparing an estimate. Record customer contact details only in your normal access-controlled records. Event ID: _____ Date received: _____ Owner: _____

Question	Details / decision
Event date, venue and access point	_____
Service ready time / end time	_____
Guest count / format / budget range	_____
Menu interests / dietary requests	_____
Venue facilities / equipment available	_____
Setup, service and removal required	_____
Decision deadline / final-count deadline	_____
Contact record reference	_____

Feasibility: production ___ staffing ___ transport ___ venue permissions ___ PIC review ___

Open question: _____ Owner: _____ Due: _____

Decision: proceed to estimate / revise scope / decline. Reason: _____

Reusable package specification

Complete one sheet per service format. Package name: _____ Version/date: _____
Approved by: _____

Component	Standard specification
Service format and area	_____
Guest-count range and lead time	_____
Menu / recipe version / portions	_____
Included packaging and serving items	_____
Included setup / staffing / removal	_____
Exclusions and optional additions	_____
Capacity bottleneck / maximum	_____
Required venue conditions	_____

Dietary request process / responsible person: _____

Customer-facing description reviewed: ___ Cost sheet current: ___ PIC procedures linked: ___

Test event/date: _____ What failed: _____

Next revision and owner: _____

Internal event estimate and quote brief

INTERNAL PLANNING ONLY. Not a customer offer, agreement or acceptance form. Use separately approved customer terms. Event ID: _____ Version: _____ Currency: _____

Revenue or cost line	Basis / quantity	Amount
Planned event revenue	_____	_____
Food	_____	_____
Packaging / service supplies	_____	_____
Event-specific labor	_____	_____
Rentals / transport	_____	_____
Other direct costs	_____	_____
Total direct costs	Sum cost lines	_____
Direct contribution	Revenue − direct costs	_____

Excluded costs and accounting assumptions: _____

Lower guest-count / extra labor scenario: _____

Scope to include in approved quote: _____

Payment / cancellation / change policy reference: _____

Cost checked by: _____ Quote release approved by: _____ Date: _____

Final event plan and run sheet

Event ID: _____ Current version: _____ Lead: _____ Service date: _____

Final guest count: _____ Menu version: _____ Ready-to-serve time: _____ Venue access: _____

Milestone	Time	Owner	Evidence / fallback
Preparation complete	_____	_____	_____
Pack-out verified	_____	_____	_____
Departure	_____	_____	_____
Venue arrival / access	_____	_____	_____
Setup complete	_____	_____	_____
Service / handoff	_____	_____	_____
Removal / returns	_____	_____	_____

Venue contact reference: _____ Route / access instructions: _____

Latest change / cost impact / approval: _____

PIC-approved controls and records reference: _____

All affected staff received this version: ___ Obsolete copies removed: ___

Pack out handoff and return checklist

Event ID: _____ Packer: _____ Checker: _____ Vehicle / carrier: _____

Item / category	Required	Packed	Verified by
Food / menu portions	_____	_____	_____
Labels / order information	_____	_____	_____
Serving utensils / disposables	_____	_____	_____
Approved transport equipment	_____	_____	_____
Venue / service equipment	_____	_____	_____
PIC monitoring supplies / records	_____	_____	_____
Returnable items	_____	_____	_____

PIC release check completed per approved procedure: _____ Time: _____

Arrival: _____ Receiver record: _____ Handoff time: _____

Missing item / corrective action / responsible person: _____

Returnable equipment due: _____ Returned / checked: _____

Do not use this count sheet as a substitute for required food-safety records.

Event results and next improvement

Event ID: _____ Review date: _____ Lead: _____

Measure	Estimated	Actual	Reason for difference
Revenue, same accounting basis	_____	_____	_____
Food / packaging costs	_____	_____	_____
Event labor cost / hours	_____	_____	_____
Other direct costs	_____	_____	_____
Direct contribution	_____	_____	_____
Ready-to-serve time	_____	_____	_____

Customer feedback and source: _____

Operational issue to prevent next time: _____

One change: _____ Owner: _____ Due: _____

Package / estimate / checklist updated on: _____ Verified by: _____

Safety or serious service incidents were escalated through the established procedure: ___ / not applicable.

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

Source 1 FDA Food Code

The Food Code is a model for adoption by jurisdictions; the establishment must verify the locally applicable rules. Accessed 23 October 2026.

https://www.fda.gov/food/retail-food-protection/fda-food-code

Source 2 FDA: Food Safety Best Practices for Online Delivery Services

Delivery planning should address packaging, temperature control, contamination and allergen controls. Accessed 23 October 2026.

https://www.fda.gov/food/hfp-constituent-updates/fda-highlights-best-practices-food-safety-online-delivery-services

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Local Restaurant Marketing

A practical neighborhood visibility and first-visit playbook



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

For an owner or manager who wants a repeatable way to help nearby guests find the restaurant and decide to visit. Start with accurate information, one useful message and one measurable experiment. All examples are hypothetical. Adapt platform settings, advertising claims and outreach practices to your market; this is an operating toolkit, not a promise of rankings, revenue or legal compliance.

Inside this toolkit

1. Pick one neighborhood occasion
2. Remove discovery and booking friction
3. Make useful local content
4. Build a small partner test
5. Run a 30 day learning cycle

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Pick one neighborhood occasion

Start with a visit you can serve well, not an audience as broad as “everyone nearby.” Choose one occasion: a nearby worker’s lunch, an early family dinner, a post-event meal or a convenient pickup. Identify the service window, likely travel distance and practical friction, such as parking, ordering time or unclear prices.

- Review the last four comparable weeks by weekday and service period. Record transactions, net sales, average ticket and available capacity. Note closures, weather and large events. Use your own data, not an industry benchmark.
- Describe one guest need in plain language: “An office team needs individually labeled lunches ready for pickup.” Choose only claims that operations can consistently support.
- Select one action for the guest: view the menu, place an order or reserve a table. Open the destination on a phone and complete a test path before promotion.
- Set an owner, a modest spend ceiling and a stop rule. Pause if the offer creates long waits, product shortages or contribution below your minimum.

Hypothetical example: a lunch counter averages 42 Tuesday lunch orders and has capacity for 55. It tests a pickup menu with clear portions and ordering instructions, rather than a blanket discount. Its first question is whether guests can find and understand the offer, not whether a post gets more likes.

Before moving on: write the occasion, service window, available capacity, next action and success measure on one line. If any field is unclear, narrow the experiment.

Remove discovery and booking friction

Audit your own website, Google Business Profile and the two other places guests actually use to find you. Search the restaurant name and neighborhood on a phone. Follow every menu, reservation and ordering link. A strong promotion cannot fix an incorrect closing time or a broken checkout.

- Verify the business name, address, map pin, phone, regular hours and special hours against current operations. Show practical access information only after checking it in person.
- Use accurate business categories and descriptions. Keep current menus readable on small screens, including item names, prices and relevant availability. Replace outdated menu images.
- Check dine-in, takeaway and delivery options separately. Show where orders are fulfilled and what the customer should do on arrival.
- Record each issue, its owner and a retest date. After editing, inspect the public view; do not assume a submitted change is already visible.

Platform checkpoint: Google recommends complete, accurate profile information and explains that local results depend on relevance, distance and prominence. There is no way to pay Google for a better organic local ranking. Paid advertising is a separate activity. Source 1.

Hypothetical fix: a Saturday campaign links to a menu that says “closed Saturdays.” Correct the inconsistency before buying traffic. Your quality check is a completed mobile ordering or reservation test, not a screenshot of the editing screen.

Make useful local content

Build content around questions that stop a visit: What can I order? What does it cost? Where do I enter? Can I collect it on the way home? Photograph the real product and show the actual service experience. A short, accurate answer is more useful than a daily stream of generic offers.

- Create four reusable content groups: signature item, how to visit, people/process and timely availability. Rotate them to avoid repeating the same discount.
- Capture the storefront, entrance, one representative interior view and several current dishes. Use normal portions and avoid edits that misrepresent the food.
- For each post, include one main point, one verified practical detail and one next step. Check links, dates, prices and stock before publishing.
- Use only images, music, logos and guest quotations you have rights or permission to use. Get permission before featuring identifiable guests or staff, and avoid exposing receipts or order screens.

Hypothetical caption: “Lunch pickup without guessing the entrance. Collect from our side counter on [street] during [hours]. See today’s menu at [link].” Replace every bracket and verify the route before use.

Choose a sustainable rhythm, such as two useful posts a week and one profile check. Reuse a photo only while the dish and presentation remain accurate. Measure menu visits or completed orders where possible; reach and likes show attention, not confirmed restaurant visits.

Build a small partner test

Look for a nearby organization whose guests have an unmet dining need at a time you have capacity. Examples include an office, independent hotel, event venue or neighborhood shop. Choose relevance over audience size. Do not exchange customer lists or imply a partnership before both parties agree.

- Identify one contact and why the fit is specific. Read the business’s preferred contact method. Use a warm introduction or permission-based conversation where possible.
- Propose one limited test: a menu card at a reception desk, a clearly described group-order option or an agreed cross-promotion. Define dates, who does what and any costs before launch.
- Give the partner a clean menu link and a tracking code that staff can recognize. Avoid broad discounts unless the economics work.
- Confirm permission for names and logos. Review any paid endorsement, commission or promotional arrangement before it goes live; do not conceal a material relationship.

Hypothetical example: a café and a nearby coworking host test a Tuesday pickup menu for two weeks. The host chooses whether to display a card; the café does not obtain the host’s member list. Code DESK identifies orders, but some customers may have purchased anyway.

Review actual redemptions, contribution, preparation load and partner feedback. Continue only if both sides find the arrangement useful. Do not turn one unanswered invitation into repeated automated follow-ups.

Run a 30 day learning cycle

- Week 1: record the baseline, repair essential information and choose one occasion. Test links and brief staff.
- Week 2: publish two practical pieces of content and start one approved partner test. Keep the offer and tracking method consistent.
- Week 3: check fulfillment, cost and customer questions. Correct errors immediately; log any change so the results remain interpretable.
- Week 4: compare comparable service periods. Decide to continue, change one variable or stop. Record what the data cannot establish.

Track completed actions before vanity metrics. Code redemptions show attributed orders, not proven incremental sales. Self-reported “how did you hear about us?” answers can overlap with other channels. A before-and-after increase may reflect weather, events, seasonality or other changes.

Hypothetical calculation: 20 coded orders produce $360 in net sales. Deduct $140 in direct food, packaging and transaction costs and $60 in campaign cost: $160 remains before other labor and overhead. This is campaign-attributed contribution, not $160 of incremental profit.

Reviews are separate from rewards. Request honest feedback neutrally from genuine guests, without incentives, review gating or pressure. Google prohibits incentivized reviews and selective requests for positive reviews. Do not set staff quotas for obtaining reviews. Source 2.

End-of-cycle check: can you explain what happened, what it cost, how service held up and what remains uncertain? If not, simplify the next test rather than adding more channels.

Business listing audit

Restaurant: [name] | Reviewer: [name] | Audit date: [date]. Open each listing as a customer on a phone. Mark Pass, Fix or Not applicable, then retest after changes appear publicly.

Check	Website	Google profile	Other listing
Name, address, pin, phone	[status]	[status]	[status]
Regular and special hours	[status]	[status]	[status]
Current menu and prices	[status]	[status]	[status]
Order/reserve link works	[status]	[status]	[status]
Pickup/access instructions	[status]	[status]	[status]
Current photos and offers	[status]	[status]	[status]

Priority issue	Owner	Due	Public retest
[guest impact + exact URL]	[name]	[date]	[pass/date]
[guest impact + exact URL]	[name]	[date]	[pass/date]
[guest impact + exact URL]	[name]	[date]	[pass/date]

Highest-risk error to fix first: [incorrect hours / wrong location / broken checkout / other]. Evidence of completed test: [what was checked and result]. Next routine review: [date].

Photo and practical content audit

Use this as an audit, not a requirement to publish every image. Remove outdated or misleading assets from the active folder. Retain source files and permission records separately.

Asset needed	Guest question answered	Current file	Action
Storefront and entrance	Will I recognize the place?	[file/date]	[keep/reshoot]
Pickup point	Where do I collect?	[file/date]	[keep/reshoot]
Signature dish	What arrives at the table?	[file/date]	[keep/reshoot]
Menu or menu link	What can I order and pay?	[URL/date]	[keep/update]
Interior / seating	Will this suit my occasion?	[file/date]	[keep/reshoot]
Team / process	Who prepares the food?	[file/date]	[permission/check]

- Accuracy check: [portion, garnish, packaging and availability match current service].
- Rights/privacy check: [photographer permission, people consent, no private screens or receipts].
- Three unanswered guest questions to turn into posts: [1] [2] [3].
- Next shoot owner and date: [name/date]. Approved storage folder: [link].

Partnership conversation and draft

Partner: [business] | Contact and role: [name/role] | Why our audiences overlap: [specific reason] | Our spare capacity: [day/time]. Start with a conversation or agreed contact channel. This draft is not a bulk-mail sequence.

Opening: “Hello [name], I run [restaurant] near [landmark]. You mentioned [specific dining need / permitted introduction]. Would a small [pickup/menu-card] test for [audience] be useful? We could provide [exact service] during [dates], with [clear responsibility]. There is no commitment at this stage. If it seems relevant, may I send a one-page outline?”

If you send a commercial email, check applicable rules. U.S. CAN-SPAM also covers business-to-business commercial messages. Use truthful sender/subject details, the appropriate advertising identification, a valid postal address and a working opt-out process. Source 3.

Agree before launch	Decision
Dates and service capacity	[start/end; maximum volume]
Partner and restaurant responsibilities	[who supplies/displays/answers]
Costs, terms and permissions	[amounts; logo permission; disclosures]
Tracking and review date	[code/link; review date]
How either party stops the test	[contact and process]

Response: [interested / declined / pending]. Next action only if appropriate: [action/owner/date].

Four week action plan

Occasion: [specific need] | Guest action: [order / reserve / visit menu] | Campaign owner: [name] | Spending ceiling: [amount] | Minimum acceptable contribution: [amount].

Week	Priority	Output	Owner / due
1	Remove friction	[verified listings + tested link]	[name/date]
2	Launch one message	[two posts + one agreed test]	[name/date]
3	Check service and costs	[issues corrected; change log]	[name/date]
4	Review evidence	[continue/change/stop decision]	[name/date]

- Baseline period and exclusions: [dates; closed days; unusual events].
- Tracking method: [POS code / tagged link / optional guest question].
- Staff briefing: [who recognizes offer; fulfillment steps; escalation contact].
- Pause immediately if: [unavailable product / misleading claim / service overload / cost threshold].
- One thing we will not change during the test: [offer/channel/measurement].

Local campaign scorecard

Use the same definitions and comparable service periods. Net sales means sales after discounts and refunds, excluding tax and tips. Do not combine reach, clicks and transactions into one “results” number.

Measure	Baseline	Test	Interpretation
Comparable transactions	[count/dates]	[count/dates]	[volume change]
Campaign-coded orders	[not applicable/count]	[count]	[attributed only]
Net coded sales	[amount]	[amount]	[not incremental proof]
Direct variable costs	[amount]	[amount]	[food/packaging/fees]
Campaign costs	[amount]	[amount]	[ads/print/extra labor]
Guest/service problems	[count/types]	[count/types]	[capacity impact]

Attributed contribution = coded net sales minus directly associated variable costs minus campaign costs. Avoid deducting a discount twice when it is already reflected in net sales. Include additional labor if the campaign caused it; state what costs are excluded.

- Confounders: [weather, local events, other promotions, price changes].
- Decision and evidence: [continue / adjust / stop because…].
- Next test: [one change, owner and review date].

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

1. Google Business Profile: Tips to improve your local ranking

Accuracy, local ranking factors and no paid improvement to organic local ranking. Checked 23 October 2026.

https://support.google.com/business/answer/7091?hl=en

2. Google Maps: Prohibited and restricted content

Genuine reviews; no incentives, selective positive solicitation, pressure or staff review quotas. Checked 23 October 2026.

https://support.google.com/contributionpolicy/answer/7400114?hl=en

3. FTC: CAN-SPAM Act compliance guide for business

U.S. commercial-email requirements, including business-to-business messages. Not a global compliance checklist. Checked 23 October 2026.

https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Daily Operations

A practical shift system for opening, service, closing and follow-through.



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Make the restaurant less dependent on memory. These five guide pages and five editable sheets connect recurring checks to named owners, visible exceptions and verified handovers. Start with one shift, adapt the checks to your site and improve what staff actually use.

Inside this toolkit

1. Turn recurring work into a reliable shift
2. Open with a release decision not a tick count
3. Run service with short actionable check ins
4. Close safely and leave a useful handover
5. Use the weekly review to remove repeat failures

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Turn recurring work into a reliable shift

Choose one recurring problem: late opening, missing prep, forgotten maintenance or weak shift handover. Watch one complete shift and list the work that must happen before, during and after service. Put each task at the point when someone can still correct a problem.

- Give each check one responsible role and one due point, such as “opening lead, before guests enter.” Avoid assigning a task to “everyone.”
- Define observable evidence: supplies present, count reconciled or a referenced approved record completed. “Looks good” is not a useful test.
- Keep safety, service readiness and administrative tasks distinguishable. A complete cash count does not compensate for an unresolved safety issue.
- Write the escalation path: who decides, what activity pauses and how the team learns about it.
- Pilot the sheet for three shifts, ask staff where it interrupts work and remove duplicate recording.

Scope: this is an operating organizer, not a complete food-safety, labor-law, emergency or occupational-safety program. FDA’s Food Code is a model; use locally adopted rules and the person in charge (PIC)’s approved procedures. Do not copy a generic checklist instead of required site-specific checks. (Source 1)

Practical setup: place the current checklist where the work occurs. Keep one controlled master and archive dated completed records through your normal retention policy. Staff should know where the live version is without asking the manager.

Open with a release decision not a tick count

Work in dependency order: access and facilities, required food-safety checks, equipment readiness, staffing and prep, then guest-facing readiness. The opening lead should know what prevents opening, what restricts part of the operation and what can be corrected without compromising service.

Check type	Useful evidence	If unresolved
Food-safety readiness	PIC-approved checks and records	PIC decides appropriate action
Equipment readiness	Required function verified safely	Restrict affected operation
People and prep	Coverage and priority list	Reassign or adjust service
Guest-facing systems	Menu, ordering and seating ready	Correct before promising service

Mark each item done, exception or not applicable. Add initials and time when the evidence is available; never pre-tick a shift. An exception needs an owner, immediate response and review time. A legitimate “not applicable” needs a reason, not a convenient shortcut.

FDA describes active managerial control as part of retail food-safety management. In this toolkit, named checks and corrective-action ownership support that approach, but the form itself is not proof that an operation is safe. (Source 2)

Example: an ordering tablet works, but a listed item is unavailable. Update availability before orders arrive, assign a person to verify every sales channel and record the time. Do not leave the correction for the first guest complaint.

Run service with short actionable check ins

Use a brief pre-service huddle to name the expected demand, staffing gaps, unavailable items, reservations or large orders, and the manager on duty. Share only necessary information about guests or employees. Safety and allergen concerns follow the PIC’s approved process, not a quick improvised workaround.

- Name one expediter or coordinating role for each service period. Clarify who can pause a channel, change quoted waits or authorize recovery.
- Set operating triggers based on your kitchen: queued tickets, oldest-ticket age or station workload. These are business controls, not food-safety limits.
- When a trigger is reached, assign an action and recheck time. “Watch the kitchen” is less useful than “reduce new delivery availability and reassess at 7:15.”
- Record repeated exceptions once in the shift log, rather than scattering them across texts and scraps.
- Escalate urgent safety or injury issues immediately under your existing procedure. Do not hold them for the shift review.

Hypothetical example: a restaurant chooses eight queued delivery orders as a pilot trigger. At nine, the authorized manager adjusts availability, tells the front team what guests should hear and checks the queue again after the chosen interval. The threshold must be tested against real capacity, not copied blindly.

Measure the result: compare promise misses and guest corrections across similar service periods. If the queue improves but dine-in delays rise, the intervention moved the problem rather than solving it.

Close safely and leave a useful handover

Closing is preparation for the next shift, not simply making the room look clean. Separate food disposition and required records, cleaning and sanitation under approved procedures, equipment status, cash reconciliation, and site security. Do not record passwords, alarm codes or payment-card details in a shared checklist.

- The PIC determines food storage, labeling, disposition and any safety corrective action. Reference those approved records instead of inventing storage rules on this form.
- Record incomplete work with a next action, owner and deadline. “Low stock” should become “four portions available; prep lead to confirm tomorrow’s requirement before opening.”
- Share unavailable items, expected deliveries, guest commitments and unresolved equipment issues with the next lead.
- Have the incoming lead acknowledge critical open items. A message sent is not the same as a handover understood.
- For suspect equipment, stop affected use and follow the site’s isolation and maintenance procedure. Only appropriately trained and authorized personnel should perform hazardous servicing. OSHA identifies unexpected energy release as a maintenance hazard. (Source 3)

Example handover: “Printer failed at 20:10. Manual ticket process in use. Manager assigned repair ticket 184. Opening lead must test the approved replacement workflow before service.” This provides context, containment, an owner and a verification step.

Final check: the closing lead confirms what is complete and makes every unresolved exception visible. Never sign for work that was not observed or completed.

Use the weekly review to remove repeat failures

Set aside one short weekly review. Bring the opening and closing exceptions, handovers, equipment issues and guest corrections. Look for recurring causes before adding more checklist lines. A checklist that grows every week eventually becomes paperwork nobody reads.

Measure	Calculation or question
On-time opening	Shifts ready by planned opening ÷ scheduled shifts
Exception closure	Exceptions closed by due time ÷ exceptions due
Repeat issues	Same cause returning after a claimed fix
Verification quality	Can a sample of signed checks be evidenced?

Worked example: 42 of 48 due tasks were verified on time, giving 87.5%. Investigate the six misses by severity; do not celebrate the percentage if any critical issue remains unresolved. Keep not-applicable tasks outside the denominator and record why.

- Choose one recurring issue, identify where the process broke and agree on one practical change.
- Set the owner, due date and verification method. “Retrain team” needs a named skill and a demonstration, not only a meeting.
- Check the next comparable shifts to see whether the change worked.
- Retire obsolete instructions and update the controlled master. Tell affected staff what changed.
- Keep safety and incident records in their appropriate restricted systems; the weekly sheet is a summary, not a replacement.

Thirty-day outcome: a new trained lead should be able to find current instructions, identify exceptions and run a handover without relying on the previous manager’s memory.

Opening readiness checklist

Location: _____ Date / shift: _____ Lead: _____ Planned opening: _____

Customize checks to your approved procedures. Status: D = done, E = exception, N = not applicable with reason. Do not pre-complete.

Check / procedure reference	Status	Initials / time	Exception / owner
Facilities and access checks	___	_____	_____
PIC-required safety checks	___	_____	_____
Equipment readiness	___	_____	_____
Staff coverage / roles	___	_____	_____
Priority prep / availability	___	_____	_____
Ordering and payment systems	___	_____	_____
Dining / pickup area readiness	___	_____	_____
Pre-service briefing	___	_____	_____

Required record references: _____

Restricted activity / immediate action: _____

Release decision by authorized lead: _____ Time: _____

Outstanding item / owner / next review: _____

Closing completion checklist

Location: _____ Date / shift: _____ Closing lead: _____

Use site-approved safety, cleaning, equipment and security procedures. This sheet does not prescribe them.

Check / procedure reference	Status	Initials / time	Exception / owner
Food disposition and records	___	_____	_____
Storage / labels per PIC procedure	___	_____	_____
Cleaning / sanitation checks	___	_____	_____
Equipment status / maintenance	___	_____	_____
Waste and stock records	___	_____	_____
Cash / transaction reconciliation	___	_____	_____
Next-shift prep / availability	___	_____	_____
Site security procedure	___	_____	_____

Status: done / exception / not applicable with reason. No passwords or security codes here.

Incomplete work / containment: _____

Next owner / due time: _____

Handover sent to: _____ Critical items acknowledged at: _____

Closing verification by: _____ Time: _____

Shift handover brief

Date: _____ Outgoing lead: _____ Incoming lead: _____ Handover time: _____

Topic	Current facts	Next action	Owner / due
Service / guest commitments	_____	_____	_____
Menu availability / prep	_____	_____	_____
Expected deliveries	_____	_____	_____
Staffing / station coverage	_____	_____	_____
Equipment / systems	_____	_____	_____
Open operational exceptions	_____	_____	_____

Critical approved-procedure or restricted-record references: _____

Next shift’s top three priorities: 1. _____ 2. _____ 3. _____

Incoming lead questions / clarifications: _____

Critical items understood and accepted by: _____ At: _____

A handover does not close an issue. Close it only when the corrective action has been verified.

Equipment issue and return to service record

Issue ID: _____ Date / time: _____ Reporter: _____ Equipment / location: _____

Observed symptom, without guessing the cause: _____

Affected operation / product or service impact: _____

Immediate response under approved procedure: _____

Step	Responsible person	Time / reference
Manager / PIC informed	_____	_____
Use restriction communicated	_____	_____
Authorized service requested	_____	_____
Repair / inspection documented	_____	_____
Return-to-service authorization	_____	_____

Service provider / ticket reference: _____ Next update due: _____

Approved temporary workflow: _____

Verification required before reuse: _____

Final status / approver: _____

Do not attempt repairs, bypass guards or improvise energy isolation. Follow trained, authorized procedures.

Weekly manager review

Week ending: _____ Reviewer: _____ Location: _____

Measure	This week	Prior comparable week	Comment
On-time openings / scheduled	_____	_____	_____
Exceptions closed / due	_____	_____	_____
Repeat issues by cause	_____	_____	_____
Guest corrections by cause	_____	_____	_____
Overdue equipment issues	_____	_____	_____

One recurring issue and evidence: _____

Likely process cause, to verify: _____

Change to test: _____

Owner: _____ Due: _____ Verification method: _____

Result checked on: _____ Keep / adjust / stop: _____

Master checklist revision and staff communication: _____

Urgent safety, injury and serious service matters follow the immediate escalation procedure, not this weekly meeting.

Sources and use notes

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Source 1 FDA Food Code

The Food Code is a model for adoption by jurisdictions; the establishment must verify the locally applicable rules. Accessed 23 October 2026.

https://www.fda.gov/food/retail-food-protection/fda-food-code

Source 2 FDA: Retail & Food Service HACCP

Active managerial control and establishment-specific food-safety management. Accessed 23 October 2026.

https://www.fda.gov/food/hazard-analysis-critical-control-point-haccp/retail-food-service-haccp

Source 3 OSHA: Control of Hazardous Energy

Unexpected startup and energy release can injure workers during servicing and maintenance; use the applicable trained energy-control program. Accessed 23 October 2026.

https://www.osha.gov/control-hazardous-energy/

Before use

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Food Waste and Inventory

A practical system for measuring waste, counting usable stock and preparing the right amount.



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Replace guesswork with a small set of consistent records. Use the five guide pages and five editable sheets to identify preventable waste, tighten counts and connect expected demand to prep and ordering. Begin with a handful of costly or frequently wasted items, not the entire storeroom.

Inside this toolkit

1. Establish a useful waste baseline
2. Read the cost and the cause together
3. Count consistently before trusting the reorder
4. Link prep and replenishment to demand
5. Run one prevention experiment at a time

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

The companion Excel workbook contains editable inputs and live formulas or planning fields. Read its instructions before changing values. Its hypothetical examples may use a more detailed set of assumptions than the guide. Use consistent units and cost definitions, and never treat contribution as full accounting profit.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Establish a useful waste baseline

Pick three to five ingredients or prepared items that matter to your operation. Track a full representative trading cycle, including quiet and busy days. EPA provides tools for measuring the amount, type and source of wasted food; use that measurement-first approach before changing purchasing or portions. (Source 1)

- Define what you will measure: edible preparation loss, overproduction, spoilage or guest plate returns. Keep unavoidable trim distinct from potentially preventable loss.
- Record item, quantity, unit, stage, reason and destination at the point of waste. Use one weight unit and subtract container weight when weighing.
- Keep donations and other recovery destinations visible. A destination change is not necessarily a reduction in food generated as surplus.
- Estimate ingredient or recipe cost, not menu selling price. Mark estimates so they are not mistaken for accounting records.
- Tell the team the purpose is better planning, not blame. Reward accurate reporting; a sudden drop caused by missing records is not improvement.

Scope: this toolkit does not authorize reuse, donation, extended storage or changed food-safety controls. The PIC and locally adopted rules determine what may be retained, served, donated or discarded. FDA’s Food Code is a model, not a substitute for those local rules. (Source 3)

First check: can two team members record the same item in the same unit and category? If not, clarify the definitions before collecting more data.

Read the cost and the cause together

Calculate waste ingredient cost as recorded quantity × ingredient cost per matching unit. For prepared food, use the standard recipe cost per portion or weight. Do not multiply by selling price and call the result lost profit; an unsold portion does not prove a sale would have occurred.

Illustrative record	Calculation	Ingredient cost
Spoiled produce	3 kg × $4/kg	$12
Extra soup portions	8 portions × $1.50	$12
Total recorded loss	Two records	$24

Rank the recurring causes, not just the biggest single incident. “Overproduction at the end of lunch” is actionable. “Kitchen waste” is not. Keep short reason codes such as prep error, overproduction, deterioration, order error and unknown; investigate unknown rather than inventing a cause.

- Compare like periods using waste per cover or per order, alongside total weight and cost. Use one denominator consistently.
- Example: 12 lb across 200 covers is 0.060 lb per cover. Nine lb across 180 covers is 0.050 lb per cover, a 16.7% reduction per cover, not the 25% suggested by weight alone.
- Separate menu or service-format changes from process changes. A buffet and a plated lunch can produce different patterns.
- Choose one cause and a test: smaller final batch, revised portion tool or a better demand estimate. Assign a review date.

Keep the baseline intact. Do not change units, omit a waste category or switch from weighed to guessed quantities without marking the change.

Count consistently before trusting the reorder

Choose a repeatable count time and route through storage. Pause movements where practical; otherwise record receipts, issues and transfers during the count so they can be reconciled. Count high-value or fast-moving items more frequently than stable low-value items, using your own risk and workload judgment.

- Create one item description and one count unit per stock item. Record pack size and conversion, such as one case = six 1 kg bags.
- Separate usable stock from quarantined, damaged or otherwise unavailable stock. Ask the PIC to decide usability; never turn a stock count into a safety judgment.
- Count open packs using the agreed method. Mark estimates; use a second count for meaningful discrepancies.
- Record each location once, including prep areas and approved off-site storage. Avoid counting a transferred container at both locations.
- Match received quantities to the inventory record. Investigate timing, units, unrecorded transfers and counting errors before assuming loss or theft.

Worked example: two full cases containing six 1 kg bags each, plus three loose 1 kg bags, equal 15 kg. If 2 kg is unavailable under the PIC’s decision, record total physical stock of 15 kg and usable stock of 13 kg separately. Do not silently erase the unavailable quantity.

Measurable check: sample five items after the count. Another trained counter should be able to reproduce the quantity and explain any differences using recorded movements and units.

Link prep and replenishment to demand

For preparation, use forecast portions + chosen operating buffer − approved usable carryover. Example: 60 forecast portions + 6 buffer − 18 usable carryover = 48 portions to prepare. Round only to a practical batch and record the decision. The buffer is a demand assumption, not permission to exceed safe storage or holding limits.

For ordering, first calculate stock position: usable on hand + confirmed receipts due in time − separately committed demand. Do not subtract an event commitment again if it is already included in the forecast.

Illustrative item, all in kg	Value
Usable on hand + incoming − separate commitment	9 + 5 − 2 = 12
Reorder trigger: 4/day × 3-day lead time + 6 buffer	18
Chosen target stock position	26
Need to reach target: 26 − 12	14
Order in 5 kg cases, if feasible	15

The 18 kg trigger tells you when to review an order. The 26 kg target is a separate choice covering the intended order cycle, lead time and buffer. Check delivery reliability, forecast, shelf life, storage capacity and cash before rounding to 15 kg. If the rounded amount cannot be used safely, change the plan or pack size rather than overbuying.

Use the workbook to expose assumptions and scenarios. It cannot decide whether stock is safe or whether a supplier will arrive on time.

Run one prevention experiment at a time

EPA identifies purchasing, menu choices and production or handling practices as opportunities for source reduction. Translate that into one controlled operational experiment, rather than an across-the-board cut that creates stockouts. (Source 2)

- Pick the recurring item with a clear cause and sufficient records. State the change precisely, for example “reduce the final prep batch from 20 to 12 portions and reassess demand before making more.”
- Compare a representative before-and-after period using waste per cover, stockouts and guest experience. Keep service format and unit definitions consistent.
- Track a balancing measure. Less waste is not a success if guests repeatedly cannot order the item.
- Ask staff what the change did to workload and service. A technically lower waste number can hide excessive last-minute prep.
- Keep, revise or stop the test. Update the prep sheet or reorder assumptions only after the result is understood.

Illustrative result: soup waste falls from eight to four portions per 100 covers, but the item sells out during three services. The next test could move a small batch later in service rather than simply restoring all previous overproduction. The PIC’s approved controls still govern preparation and service.

Weekly review: confirm record completion, inspect the top three causes, check inventory exceptions and assign one improvement. Keep a dated decision log so future managers know why a par level changed.

Next step: choose your first five items, define the units and train the team on one sample record before starting the baseline.

Waste observation log

Location: _____ Date / shift: _____ Recorder: _____ Weight unit: _____

Record at the point of waste. Subtract container weight. Reason codes: prep error / overproduction / deterioration / order error / plate return / other / unknown.

Time / item	Quantity / unit	Stage / reason	Unit cost / est.	Destination
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Covers or orders in this period, using chosen denominator: _____

Recorded ingredient-cost estimate: _____ Weighed or estimated: _____

Most useful observation / cause to investigate: _____

PIC-approved disposition record reference where applicable: _____

Never change food disposition to improve the waste metric.

Inventory count and discrepancy sheet

Location: _____ Count date / cutoff: _____ Counter: _____ Reviewer: _____

Count stock once by location. Record movements during counting. Use matching units; separate unavailable stock from usable stock.

Item / location	Count unit	Physical qty	Usable qty	Recount / variance
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Pack-size conversions used: _____

Unavailable stock / PIC record reference: _____

Receipts, issues or transfers during count: _____

Discrepancy / likely explanation / evidence: _____

Adjustment approved by: _____ Recorded on: _____

Demand-based prep planner

Service date: _____ Planner: _____ Forecast basis: _____

Formula: forecast + chosen buffer − approved usable carryover = planned prep, then review batch size and capacity. All quantities below must use portions or the stated matching unit.

Item / unit	Forecast	Buffer	Usable carryover	Planned prep
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Batch sizes / staged release plan: _____

Special demand not already counted: _____

PIC approval or procedure references for carryover and production: _____

Mid-service demand check time / owner: _____

Actual portions used: _____ Remaining disposition record: _____ Stockouts: _____

Tomorrow’s adjustment and evidence: _____

Reorder review worksheet

Item: _____ Count unit / pack size: _____ Review date: _____

Input or calculation	Quantity / assumption
Usable on-hand stock	_____
Confirmed receipts due in time	_____
Separate commitments not in forecast	_____
Stock position: on hand + receipts − commitments	_____
Expected use per day / lead time	_____
Chosen buffer / reorder trigger	_____
Target stock position / order cycle	_____
Order need / rounded pack quantity	_____

Forecast and supplier evidence: _____

Shelf-life / storage / cash / minimum-order review: _____

Committed demand counted only once: ___ Units checked: ___ PIC concerns resolved: ___

Proposed quantity: _____ Approved quantity: _____ Approver: _____

Order reference / expected arrival: _____

Weekly waste prevention test

Week: _____ Item / process: _____ Owner: _____

Observed problem and source records: _____

Specific change to test: _____

Measure	Baseline	Test period	Notes
Waste quantity / chosen unit	_____	_____	_____
Covers or orders	_____	_____	_____
Waste per cover or order	_____	_____	_____
Estimated ingredient cost	_____	_____	_____
Stockouts / service issues	_____	_____	_____

Periods comparable? Record menu, demand or format changes: _____

Staff observations: _____

Decision: keep / adjust / stop. Reason: _____

Prep or reorder assumption updated: _____

Next verification date / responsible person: _____

Sources and use notes

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EPA: Resources for Assessing Wasted Food

Measurement tools for tracking amounts, types and sources of food and packaging waste. Accessed 23 October 2026.

https://www.epa.gov/sustainable-management-food/resources-assessing-wasted-food

EPA: Prevent Wasted Food Through Source Reduction

Measurement and prevention through purchasing, menu and production practice changes. Accessed 23 October 2026.

https://www.epa.gov/sustainable-management-food/prevent-wasted-food-through-source-reduction

FDA Food Code

The Food Code is a model for adoption by jurisdictions; the establishment must verify the locally applicable rules. Accessed 23 October 2026.

https://www.fda.gov/food/retail-food-protection/fda-food-code

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Customer Service Training

A practical front-of-house training and coaching system



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

For managers training counter, host, server and pickup teams. Use short demonstrations, realistic practice and observed shifts to make service more consistent. Replace every placeholder with your restaurant’s actual policy. This is not a food-safety certification, emergency-response course or legal compliance program. All scenarios and numbers are hypothetical.

Inside this toolkit

1. Turn good service into observable actions
2. Teach the menu without teaching guesses
3. Recover a complaint with a clear owner
4. Practice hard moments before the rush
5. Coach with evidence and close the loop

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

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Turn good service into observable actions

“Be friendly” is hard to coach. Define behaviors a supervisor can see: acknowledge the guest, explain the next step, confirm the order, communicate changes and check that the issue is resolved. Adapt the sequence to counter service, table service and pickup rather than forcing every role into the same script.

- Before the first shift, show the employee where to find today’s menu, unavailable items, ingredient information, approved modifications and manager contacts.
- Write a short standard for arrival, ordering, waiting, handoff and departure. Set realistic timing targets from your operation, then test them during busy periods.
- Teach the handoff between roles. The guest should know who is helping; the next employee should know what has already been agreed.
- Use clear, respectful language with every guest. Ask how you can help instead of making assumptions about a person’s ability, language, budget or preferences.

Hypothetical standard: “Acknowledge waiting guests promptly, explain the queue and update them if the estimate changes.” The manager chooses an achievable local target after observing the team. A timing target is a coaching aid, not a reason to rush guests or hide delays.

Run a ten-minute pre-shift practice: two minutes on the standard, three on a demonstration, three on role-play and two on feedback. Check one behavior in real service afterward.

Teach the menu without teaching guesses

A useful menu explanation covers what the item is, its portion, price, preparation, available modifications and expected timing. Keep a dated reference that the kitchen approves. The training quiz should test whether employees know where to verify facts, not whether they can improvise an answer.

- Choose five high-volume items first. Demonstrate how to describe each in one sentence without unsupported health, dietary or sourcing claims.
- Practice a relevant recommendation: ask one preference question, offer one suitable option and state any extra cost. Accept “no” without pressure.
- For allergies, stop and follow the restaurant’s written allergy procedure. Verify current ingredients and preparation with the responsible person; never infer safety from an item name or remove a garnish as a substitute for the procedure.
- Tell the guest honestly if the kitchen cannot meet the request. Do not promise an allergen-free meal or assume that a small amount is safe. Escalate suspected reactions immediately under the site’s emergency plan.

CDC restaurant guidance highlights staff allergy knowledge, ingredient information and a clear plan for serving guests with food allergies. Source 1. This toolkit’s service practice supplements, rather than replaces, qualified food-safety training.

Hypothetical script: “Thank you for telling me. I need to check the ingredients and preparation with our manager before advising you. I will not guess.” Require every trainee to demonstrate this escalation correctly before independent service.

Recover a complaint with a clear owner

Use five steps: listen, clarify, acknowledge, act within authority and check back. The purpose is to resolve the guest’s actual problem, not to win an argument or immediately offer a discount. Let the guest explain without interruption when it is safe to do so.

- Clarify: “To make sure I understand, the missing item is [item], correct?” Separate facts you know from facts that still need checking.
- Acknowledge the impact: “You expected the full order, and this has delayed your meal.” Apologize for a confirmed mistake without inventing an explanation.
- Offer only available options: a verified replacement time, an approved refund process or a manager review. State any limitation before the guest chooses.
- Own the handoff: tell the manager what happened, what was promised and what the guest prefers. Check that the guest received the agreed resolution.

Hypothetical example: a guest reports a missing side. The employee verifies the order, checks availability, offers the approved remedy and gives a realistic timing update. The manager records the packing failure and changes the check, rather than treating each missing side as an isolated incident.

Pause routine recovery for injury, suspected foodborne illness, allergy concerns, discrimination allegations, threats or payment-security issues. Bring in the designated manager and follow the relevant protocol. Never bargain over safety or ask a guest to remove a review in return for help.

Practice hard moments before the rush

Create a three-person drill: guest, employee and observer. Give the guest a realistic situation without a hidden “gotcha.” Let the employee attempt the response, then replay it once with feedback. Rotate roles. The observer records exact words and actions, not personality labels.

- Delay: the kitchen estimate has changed. Verify the new estimate, update the guest before another promised time passes and offer only approved alternatives.
- Incorrect order: confirm the requested item and the guest’s preferred remedy, notify the right station and check the replacement before handoff.
- Unavailable dish: acknowledge the disappointment, offer a relevant alternative with its price and avoid claiming it is identical.
- Upset or abusive guest: keep a calm tone, involve the manager and follow the restaurant’s safety boundaries. Employees do not need to tolerate threats or physical danger.
- Accessibility request: ask what would help, describe what you can provide and get assistance when needed. Do not disclose or speculate about a guest’s health.

Hypothetical feedback: “You verified the replacement time and repeated the guest’s preference. Next time, say when you will return with an update.” This gives the employee one behavior to repeat and one to improve.

Check for transfer to real service. Passing a role-play does not prove an employee can perform the same steps during a crowded shift; schedule a short observed follow-up.

Coach with evidence and close the loop

Use a small scorecard rather than ranking employees by vague impressions. Record whether each behavior was observed, needs practice or was not applicable. Consider shift conditions and experience level. Do not use complaint counts alone as a performance verdict.

- Observe: select one service period and two or three relevant behaviors. Write a factual example immediately afterward.
- Discuss privately: ask what the employee noticed, recognize a specific action and agree one improvement. Demonstrate the desired behavior.
- Rehearse: run a short scenario, then assign supported practice on the next shift. Set a review date and name the coach.
- Recheck: confirm that the employee can perform the behavior, not merely explain it. Safety escalation must be correct even if the overall score looks good.

Hypothetical measurement: 18 of 20 observed pickup handoffs included an item check, compared with 12 of 20 before coaching. This suggests the behavior improved in those observations. It does not prove training alone reduced complaints, since order volume, staffing and menu complexity may also change.

Review recurring themes weekly: misunderstood menu descriptions, unrealistic wait estimates, missing items and unclear refund authority. Fix the system as well as coaching the individual. Keep logs factual, restrict access and avoid unnecessary guest medical details or payment information.

Completion standard: the employee demonstrates the service sequence, finds current menu facts, uses the escalation route and closes an ordinary recovery case with supervision. Record unresolved practice needs.

Template 1. Service standards and authority card

Restaurant: [name] | Role: [role] | Version/date: [date] | Manager on duty: [contact]. Complete this with the team and keep it available at the service point.

Moment	Required action	Our local standard
Arrival	Acknowledge and explain next step	[words/timing]
Order	Confirm key details and price	[repeat-back/check]
Wait	Update when estimates change	[owner/update timing]
Handoff	Verify items and identify guest appropriately	[method]
Departure	Check needs and thank guest	[method]

Decision	Employee authority	Escalate to
Replacement / remake	[specific limits]	[role]
Refund / discount	[specific limits]	[role]
Allergy / safety concern	[written protocol location]	[responsible role]
Threat / sensitive complaint	[safety protocol location]	[role/emergency route]

Do not promise a remedy outside these limits. Staff sign-off confirms this version was explained and practiced: [employee/date] [coach/date].

Template 2. Complaint scripts to adapt

Practice these aloud, then use natural language. Replace bracketed details with verified facts. A script does not authorize a refund, guarantee timing or replace emergency procedures.

Situation	Useful wording
Listen and clarify	“Please tell me what happened. To check I understood, [fact] is the issue, correct?”
Confirmed mistake	“I am sorry we missed [item/action]. I can [approved option], or ask my manager about [other request]. Which would help?”
Delay	“The updated estimate is [verified estimate]. I will check back by [time]. If that no longer works, I can ask about [approved alternative].”
Need authority	“I do not want to promise something I cannot arrange. I will bring [manager] over and explain what we have discussed.”
Allergy uncertainty	“I need to verify ingredients and preparation with our responsible manager. I will not guess.”
Close the loop	“Has [agreed remedy] arrived as expected? Is anything still unresolved?”

Avoid: “Calm down,” “That is not my job,” “It is definitely safe,” blaming another team member or promising compensation for changing a review. Our approved wording for setting a respectful safety boundary: [manager-approved script].

Template 3. Role-play scenario cards

Run each drill for three minutes, then allow two minutes of feedback and one replay. Choose scenarios relevant to the role. The goal is the action sequence, not memorized wording.

Scenario	Employee must demonstrate	Observer notes
Missing pickup item	Verify order, explain approved remedy, check handoff	[words/actions]
Wait exceeds estimate	Check facts, update honestly, agree next check-in	[words/actions]
Dish sells out	Apologize, offer suitable alternative, state price	[words/actions]
Guest mentions allergy	Stop guessing, use written procedure, involve responsible manager	[words/actions]
Guest disputes bill	Review discreetly, avoid blame, use approval limits	[words/actions]
Guest becomes threatening	Prioritize safety, get manager, follow emergency protocol	[words/actions]

- Observed well: [exact action].
- One action to improve: [specific behavior].
- Replay outcome: [demonstrated / needs support].
- Real-shift observation booked: [coach/date].

Template 4. Menu knowledge quiz and answer key

Trainee: [name] | Menu version: [date] | Coach: [name]. The coach fills the answer-key fields using the current kitchen-approved menu before administering the quiz. Do not invent ingredient answers.

Question	Trainee answer	Verified answer / source
Describe our five most ordered dishes in one sentence each.	[answers]	[approved descriptions]
What does [dish] include and cost?	[answer]	[menu/date]
Which modifications can we actually make?	[answer]	[kitchen-approved list]
Where do you check ingredients and allergy procedure?	[answer]	[reference/role]
What do you do if ingredient information is uncertain?	[answer]	Stop; verify with responsible manager; do not guess.
What is unavailable today and what can you offer instead?	[answer]	[pre-shift list/date]
How do you communicate an added charge?	[answer]	State it before the guest agrees.

Knowledge gaps to practice: [items]. Safety escalation correctly demonstrated: [yes/no]. Next check: [date]. A high total score does not override an incorrect allergy or safety response.

Template 5. Coaching observation and practice plan

Employee/role: [name] | Shift and conditions: [date, volume, staffing] | Coach: [name]. Mark Demonstrated, Practice needed or Not observed. Do not treat Not observed as failure.

Behavior	Rating	Factual example
Acknowledges and explains next step	[rating]	[words/actions]
Confirms order and relevant charges	[rating]	[words/actions]
Verifies facts rather than guessing	[rating]	[words/actions]
Updates delays and owns handoff	[rating]	[words/actions]
Uses authority and safety escalation	[rating]	[words/actions]
Checks agreed resolution	[rating]	[words/actions]

- Employee’s view: [what helped or made the task difficult].
- Keep doing: [specific behavior and why].
- Practice next: [one behavior, demonstration and support].
- Review on: [date/shift]. Outcome: [demonstrated / more support needed].
- System issue to fix: [menu/reference/staffing/POS problem; owner].

Template 6. Recovery and recurring-issue log

Record only what is necessary. Use an order reference rather than full guest details. Store sensitive incidents under the restaurant’s restricted incident procedure, not in this general coaching log.

Case / date	Issue and verified facts	Action / owner	Closed / follow-up
[reference/date]	[what happened; no speculation]	[approved action; name]	[guest outcome/date]
[reference/date]	[what happened; no speculation]	[approved action; name]	[guest outcome/date]
[reference/date]	[what happened; no speculation]	[approved action; name]	[guest outcome/date]

- This week’s recurring issue: [pattern and number of cases].
- Relevant volume: [orders/covers during the same period].
- Likely process gap to investigate, not assumed cause: [gap].
- Corrective action: [change, owner and due date].
- Verification: [how we will check the change worked].

If a public review is involved, keep the reply short, courteous and free of private guest information. Move specific case details to a suitable private channel. Source 2.

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

1. CDC: Food Allergy Reactions

Restaurant allergy knowledge, ingredient information and planning. This toolkit is not allergy certification or medical advice. Checked 23 October 2026.

https://www.cdc.gov/restaurant-food-safety/php/practices/food-allergy-reactions.html

2. Google Business Profile: Tips to get more reviews

Professional review replies and protection of private reviewer information. Checked 23 October 2026.

https://support.google.com/business/answer/3474122?hl=en

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Repeat Customer Promotions

A practical loyalty, bounceback and opted-in messaging toolkit



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

For restaurants testing a clear reason for existing guests to return. Build one offer around a useful occasion, explain it plainly and check both guest experience and economics. All examples are hypothetical. This toolkit does not establish legal compliance or cover prepaid stored value, gift-card accounting, sweepstakes or regulated-product promotions.

Inside this toolkit

1. Give guests a relevant reason to return
2. Cost the reward and the visits it replaces
3. Make loyalty and bouncebacks easy to use
4. Send only to the right opted-in audience
5. Learn from feedback without buying reviews

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Give guests a relevant reason to return

Choose one return occasion that fits your service: another weekday lunch, a quiet early dinner or the next family pickup. Start with the guest’s need and available capacity. A promotion that shifts a full-price Saturday visit to a discounted Saturday visit may add cost without adding useful demand.

- Use only data you may appropriately use. Define a simple group such as recent lunch guests who separately opted into email. Do not infer sensitive personal traits or buy contact lists.
- Pick one mechanism: a clearly defined earned reward, a next-visit bounceback or an update about something relevant. Do not launch several overlapping offers at once.
- Set dates, eligibility, qualifying purchase, reward, redemption channel, exclusions and capacity. Explain these before the guest commits.
- Write a service plan: what the cashier checks, how the POS records it and who resolves disputes. Test the complete path before launch.

Hypothetical example: a neighborhood restaurant has spare capacity from 5-6 p.m. on weekdays. It tests a next-visit side with a qualifying main, instead of discounting the whole bill during its busiest period. The specific item, dates and limits appear on the offer.

Start small enough to learn safely. Stop issuing new offers if service cannot fulfill them, while handling already-issued commitments under the published terms and applicable requirements. Do not silently change an offer guests already earned.

Cost the reward and the visits it replaces

Price the real redemption, not just the headline discount. Include food, packaging, payment fees, extra labor and any campaign cost. Net sales already reflect discounts; do not deduct the same discount again when calculating the contribution of an actual transaction.

- For a discounted purchase: contribution per redemption = net sales after the offer minus directly associated variable costs.
- For a free item: include its actual variable cost and any paid-sale displacement. Retail value is not the same as cost.
- For earned loyalty: estimate the cost of future rewards created by qualifying visits. Track rewards earned, redeemed and still outstanding. Ask your accountant how to treat program obligations.
- Set a minimum acceptable contribution and a maximum issuance quantity before launch. Model higher redemption and lower additional-visit assumptions, not only your favorite case.

Hypothetical example: an offer reduces contribution from $12 to $9 on each redemption. Of 40 redemptions, suppose 10 are genuinely additional visits and 30 would have happened at full price. The additional visits contribute $90; the other 30 lose $90 of contribution; an $80 campaign cost leaves an estimated $80 loss versus no offer. The assumed 10 additional visits are not verified facts.

A high redemption rate can coexist with poor economics. Use observed transactions to measure attributed results, then label any estimate of incremental impact separately. Reward limits should simplify fulfillment and protect capacity, not hide conditions.

Make loyalty and bouncebacks easy to use

Choose rules a cashier can explain in one sentence. A paper card can be enough for a small pilot; a digital program needs tested enrollment, reward tracking and opt-out settings. Loyalty enrollment and permission to receive marketing are separate decisions.

- Loyalty: define what earns credit, when credit is added, what reward is earned and how redemption works. Decide how duplicate accounts, forgotten cards, refunds and corrections are handled.
- Bounceback: issue one clearly dated next-visit offer with a unique or controlled code. State whether it is one use, who may redeem it and which items or service periods qualify.
- Train staff with three test cases: valid redemption, expired or ineligible offer and a guest dispute. Staff should explain the rule without shaming the guest.
- Record earned and redeemed benefits consistently. Restrict manual overrides to named roles and review unusual patterns without assuming fraud.

Hypothetical loyalty structure: after five qualifying lunches, earn one specified side with a subsequent qualifying lunch. Before using it, fill in the purchase threshold, item, dates, redemption limits and any exclusions. Check local rules and your platform’s terms, including whether expiry conditions are allowed.

Pilot check: can a new employee explain the program, enter a redemption and find the dispute policy without calling the owner? If not, simplify the rules before inviting more guests.

Send only to the right opted-in audience

This toolkit uses an opted-in-only approach for marketing messages. A reservation, receipt address or order-status phone number is not a shortcut to a marketing list. Use your provider’s approved enrollment flow and retain a record of channel, scope, time and consent language. This is not a universal consent form.

- Before each send, select the intended audience and suppress unsubscribed or ineligible contacts. Test the message, link, date, price and redemption instructions with staff.
- Identify the restaurant, explain one useful offer and use one next action. Set a frequency that matches the enrollment promise and guest expectations.
- Separate service messages from marketing. Do not append an offer to an order update to bypass marketing preferences.
- Use the provider’s unsubscribe tools, confirm they work and review applicable local requirements, carrier rules and allowed sending times.

Provider checkpoint: Twilio requires prior express written consent for promotional messaging, identifies consent as subject-specific and prohibits bought or transferred consent. It also requires clear sender identification and a straightforward opt-out. These are Twilio rules, not a complete statement of every country’s law. Source 1.

For U.S. commercial email, check the FTC guidance on truthful identification, subject lines, postal address and opt-out handling. Source 2. Have your provider or qualified adviser review the enrollment and sending setup before starting automated campaigns.

Learn from feedback without buying reviews

Ask a short, neutral question that can improve the operation: “What would make your next visit easier?” Keep private feedback separate from public-review requests and from rewards. A guest should receive the stated benefit regardless of whether their feedback is positive.

- Keep a feedback form short: occasion, one rating if useful, one open question and optional permission for a reply. Collect only information you need.
- Do not route only satisfied guests to a public-review link or condition a reward on posting, editing or removing a review. Google prohibits incentivized reviews and selective positive-review solicitation. Source 3.
- Review return behavior using a consistent cohort and window. State how customers are identified and which visits are unobservable, such as anonymous cash transactions.
- Track opt-outs, complaints, fulfillment errors and reward cost alongside redemptions. A promotion that irritates guests or creates service failures needs adjustment.

Hypothetical cohort check: of 80 identifiable guests issued an offer, 16 return within 30 days, a 20% observed return rate. That rate does not establish a 20% lift. Some guests would have returned anyway, and unidentified visits may be missed. Compare with a suitable baseline or thoughtfully designed test if you want stronger evidence.

At the review date, choose continue, revise or stop. Document both the numbers and the reason. Keep a plain-language record of commitments still owed to guests when winding down a program.

Template 1. Repeat-visit offer brief

Campaign: [name] | Owner: [name] | Intended return occasion: [specific visit] | Spare service capacity: [day/time/volume]. Complete every field before printing or sending.

Decision	Our offer
Who qualifies	[guest group and conditions]
Qualifying purchase	[items/minimum spend; exclusions]
Benefit and actual cost	[reward; estimated variable cost]
Issue and redemption dates	[start/end; time zone if needed]
Redemption method and limits	[code/channel; uses; stacking policy]
Capacity and issuance cap	[maximum issued and fulfillment plan]
Guest questions / disputes	[contact; staff authority]

- Minimum contribution per redemption: [amount].
- Expected redemptions / high case: [count] / [count].
- Likely full-price visits displaced: [estimate and rationale].
- Stop/new-issuance pause rule: [threshold].
- Legal/platform/operations review complete: [reviewer/date].

Template 2. Loyalty program rules and ledger

Guest-facing draft: “Earn [one credit] for each [qualifying purchase]. After [number] credits, receive [specific reward] on [eligible visit]. [Dates, exclusions, limits and redemption details]. Ask us at [contact] if a credit is missing. Marketing messages are optional and require separate enrollment.”

Rule to resolve	Approved answer
Multiple purchases / split bills	[what earns credit]
Refunds and canceled orders	[credit adjustment rule]
Lost card / duplicate account	[verification and correction method]
Reward expiry and program changes	[reviewed terms and notice method]
Manual adjustments	[authorized roles and audit trail]

Record / date	Credit earned	Reward redeemed	Balance / approver
[non-sensitive ID/date]	[number]	[reward/reference]	[balance/name]
[non-sensitive ID/date]	[number]	[reward/reference]	[balance/name]
[non-sensitive ID/date]	[number]	[reward/reference]	[balance/name]

Manager weekly check: [credits/rewards reconcile; outstanding benefits reviewed; exceptions resolved]. Do not place full contact or payment details in this working ledger.

Template 3. Bounceback card and cashier check

Guest-facing draft: “A reason to come back: enjoy [specific benefit] when you buy [qualifying item/purchase] on your next visit. Valid [dates and service times] at [location/channel]. Show code [code] before payment. [One-use limit, exclusions, combination rules and other material conditions]. Questions? [contact].”

Keep essential conditions on the offer, not hidden behind an unexplained link. Use a terms page for additional detail only after the core offer is clear.

Cashier check	Result
Correct date, location and service period	[yes/no]
Qualifying purchase present	[yes/no]
Code valid and unused where required	[yes/no]
Guest knows final price before payment	[yes/no]
POS code and issued benefit recorded	[reference]
If declined, explain reason and approved next step	[reason/manager]

- Test purchase completed by: [name/date].
- Hypothetical one-sentence explanation: “This card gives you [side] with [main] on a return visit during [dates].”
- Unused printed cards withdrawn after: [date]. Existing guest commitments handled by: [plan].

Template 4. Private guest feedback form

Opening: “We would like to make your next visit better. This short feedback form is optional. Please avoid including payment details or sensitive personal information.”

- 1. What brought you in today? [lunch / dinner / pickup / other].
- 2. How easy was it to order and receive what you expected? [very easy / easy / mixed / difficult / very difficult / not applicable].
- 3. What one thing should we improve? [open response].
- 4. Is there anything you would like us to keep doing? [open response].
- 5. Would you like a reply about this feedback? [no / yes, contact method]. Explain how the contact information will be used and retained before collection.

Internal routing: [person] reviews by [cadence]. Urgent safety concerns go immediately to [role/protocol]. Routine themes go into the weekly operations review.

Keep this form separate from public-review requests. Do not use a score threshold to decide who is allowed to see a review link. Do not treat permission to reply about feedback as permission for future marketing.

Theme / action / owner / review date: [fill in].

Template 5. Opted-in message pack

For eligible marketing subscribers only. Replace all brackets, verify terms and use your platform’s required footer and opt-out controls. These drafts do not replace consent, registration or local-law review.

Email subject: “[Restaurant]: [specific reason] for your next [occasion]”

Email body: “Planning your next [occasion]? [Specific offer or useful update] is available [dates/times] at [location]. [Qualifying purchase and main conditions]. See the details or order here: [verified link]. Questions? [contact]. [Restaurant name and valid postal address]. Unsubscribe from marketing: [working link]. [Advertising identification where required].”

SMS draft: “[Restaurant]: [specific offer] on [dates], with [key condition]. Details: [verified link]. Reply STOP to unsubscribe.” Check length, segment cost and supported opt-out behavior in your actual platform.

Non-discount email alternative: “Our [item/service] is back for [verified period]. If it suits your next [occasion], see the current menu at [link]. [Required footer and unsubscribe link].”

- Audience and consent source checked: [name/date].
- Suppression list and unsubscribe test passed: [name/date].
- Offer, stock, capacity and links approved: [name/date].
- Send window, frequency and platform requirements reviewed: [name/date].

Template 6. Promotion review and permission audit

Measure	Result	Definition / limitation
Offers issued	[count]	[unique guests/cards]
Offers redeemed	[count]	[valid recorded redemptions]
Identifiable guests returning	[count / eligible cohort]	[window; missing anonymous visits]
Net redemption sales	[amount]	[after discounts/refunds]
Variable and campaign costs	[amount]	[included costs listed]
Opt-outs / service issues	[counts]	[denominator and themes]

Attributed contribution: [net redemption sales minus direct costs minus campaign costs]. Estimated incremental contribution, if modeled: [amount], using [additional-visit and displacement assumptions]. Do not label the estimate as verified profit.

Permission control	Evidence / owner
Separate channel-specific enrollment	[consent record location; no raw contacts here]
Current scope and frequency	[enrollment version/date]
Suppression and opt-out processing	[tested process/owner]
Only necessary data retained	[review date/access owner]

Decision: [continue / revise / stop]. Reason: [evidence]. Outstanding rewards and guest commitments: [count/handling plan]. Next review: [date].

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

1. Twilio Messaging Policy

Provider requirements for consent, identification and opt-out in messaging. Other providers and jurisdictions may differ. Checked 23 October 2026.

https://www.twilio.com/en-us/legal/messaging-policy

2. FTC: CAN-SPAM Act compliance guide for business

U.S. commercial-email sender, content and unsubscribe requirements. Checked 23 October 2026.

https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business

3. Google Maps: Prohibited and restricted content

No incentivized reviews or selective solicitation of positive reviews. Checked 23 October 2026.

https://support.google.com/contributionpolicy/answer/7400114?hl=en

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Takeout and Delivery

A practical system for travel-ready menus, accurate orders and clearer channel economics.



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Treat off-premise service as its own operating system, not a dining-room order in a bag. These five guide pages and six editable sheets help you test a smaller menu, specify packaging, check orders and compare direct contribution by channel.

Inside this toolkit

1. Choose a menu that survives the journey
2. Specify packaging as carefully as a recipe
3. Build an accuracy check before sealing
4. Calculate contribution on the actual fee basis
5. Pilot capacity before adding more orders

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

The companion Excel workbook contains editable inputs and live formulas or planning fields. Read its instructions before changing values. Its hypothetical examples may use a more detailed set of assumptions than the guide. Use consistent units and cost definitions, and never treat contribution as full accounting profit.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Choose a menu that survives the journey

Start with a small set of dishes your kitchen can produce consistently during existing service. Test the complete journey: waiting, packing, travel, customer unpacking and eating. A dish that looks good at the pass may arrive with mixed textures, spilled sauce or unclear assembly instructions.

- Record the exact dish version, portion, packaging and intended channel. Test the same recipe that will be sold.
- Assess appearance, texture, leakage, ease of eating and completeness at the realistic delivery intervals you are evaluating. These quality-test intervals are not safe holding limits.
- Try separating wet and crisp components, simplifying garnish or changing the package before changing the whole recipe.
- Remove dishes that cannot reliably meet your standards under approved food-safety controls. More menu items can create more mistakes and slower service.
- Confirm the description, modifiers, price and availability on each channel. Give one person responsibility for keeping versions synchronized.

Scope: this toolkit does not establish safe delivery times, temperatures, allergen guarantees or labeling compliance. FDA’s Food Code is a model; your PIC, locally adopted rules and approved procedures govern the operation. (Source 1)

Pilot check: can a colleague unfamiliar with the dish unpack it, identify each component and eat it as intended without guessing? Record what needs to change before listing it for guests.

Specify packaging as carefully as a recipe

Create a package specification for each item: container, lid, liner where appropriate, separate sauce cup, label, bag and tamper-evident feature where required or chosen. Verify that the supplier’s product is suitable for its intended food contact and use; do not infer suitability from appearance.

- Test fit, sealing, leakage, stacking and whether the full order stays stable in its bag.
- Check temperature and moisture interactions under your approved process. Keep incompatible hot, cold, wet or crisp components arranged as the PIC and quality test require.
- Make the packing sequence repeatable: container, components, label, order check, closure and handoff.
- Record the approved packaging SKU and a reviewed substitute. A visually similar lid may not fit or perform the same way.
- Use only substantiated disposal or environmental claims; local collection rules and packaging details can differ.

FDA’s delivery guidance highlights packaging, temperature control, contamination prevention and allergen controls. Use these as subjects for your site-specific procedure review, not as a claim that a particular container makes food safe. (Source 2)

Hypothetical test	Observed issue	Next test
Crisp item packed with sauce	Texture softened	Separate sauce
Two bowls stacked in bag	Lower lid deformed	Different load arrangement
Label on steam-prone surface	Order ID became unreadable	Approved alternate placement

Cost check: total every packaging component per order, including small items often omitted. A better container can still be the better option if it reduces verified spills or remakes; test the complete cost rather than only unit price.

Build an accuracy check before sealing

Use a single readable order ticket. An assembler builds the order; a checker verifies the contents before the bag is sealed. Where one person fills both roles, use two distinct passes rather than checking from memory while packing.

- Check item name, quantity, size, requested modifiers, included sides, sauces, drinks and any separately packed components against the current ticket.
- Route allergen requests through the PIC-approved process. Do not rely on a bag note to replace recipe knowledge or cross-contact controls, and never silently substitute.
- Mark multi-bag orders clearly, for example “1 of 2” and “2 of 2,” using an order ID rather than unnecessary personal details.
- Record ready time and release time, then verify the order identity with the authorized collector under your process. Do not leave handoff responsibility unclear.
- Define what happens when a driver is late, an item is missing or a seal is damaged. The PIC decides safety questions; the authorized manager handles service recovery.

Worked example: a two-person order includes two mains, two drinks and one side packed separately. The check should cover five components and both bags, not merely two main dishes. Attach the final order identifier only after confirming the contents.

Measure order accuracy as orders without a verified restaurant-caused error divided by fulfilled orders. Keep a reason code for each error. A refund alone may not identify whether the cause was restaurant packing, courier handling or another issue.

Calculate contribution on the actual fee basis

Use a representative order for each channel. Read the current merchant agreement and settlement statement for fee bases, discounts and adjustments. Commission may use a different base from the cash received. Avoid counting a processing fee twice if it is already included.

Illustrative order, dollars	Amount
Menu subtotal less $2 restaurant-funded discount	30 − 2 = 28.00
Commission: assumed 20% of $30 subtotal	6.00
Food cost	9.00
Packaging	1.20
Incremental fulfillment labor	3.00
Separate processing fee, if actually charged	0.90
Direct contribution before other costs	7.90

Calculation: $28 − $6 − $9 − $1.20 − $3 − $0.90 = $7.90. This is not profit. Rent, other labor, overhead, tax treatment and unlisted costs are excluded. The rates are hypothetical, not current platform pricing. Exclude sales tax and tips from this simplified revenue basis and confirm accounting treatment with your adviser.

- Use restaurant-funded discounts and actual refunds once. Do not subtract a platform-funded promotion unless the settlement charges it to you.
- Separate fixed monthly fees from per-order costs, then test their allocation at realistic order volume.
- Include incremental labor without also allocating the same labor cost elsewhere in the model.
- Compare expected contribution with actual settlement results. A positive estimate is not evidence that the whole channel is profitable.

Pilot capacity before adding more orders

Run a limited pilot with a clear menu, service window and responsible lead. Measure off-premise orders alongside dine-in performance. New sales are not useful if the combined operation repeatedly misses promises or overwhelms the team.

Measure	How to use it
Promise misses / fulfilled orders	Shows whether quoted readiness is realistic
Verified restaurant errors / fulfilled orders	Identifies packing and ticket weaknesses
Ready-to-release delay	Separates kitchen readiness from collection delay
Contribution per order	Compares channels on a consistent basis
Dine-in delay / complaints	Checks whether capacity was displaced

Hypothetical week: seven verified restaurant errors across 200 fulfilled orders is a 3.5% error rate. If five are missing drinks, revise the drink handoff rather than retraining every kitchen process. Review whether the fix works over the next comparable period.

- Assign authority to adjust availability, quoted times or channel pauses using actual workload.
- Investigate differences by dish, time and channel before changing the full menu.
- Keep refund and incident records linked to order IDs in your normal restricted systems.
- Recheck packaging after supplier substitutions and menu tests after recipe changes.
- Expand one constraint at a time: menu, hours or order capacity. Preserve a comparison period so you can see what changed.

Next step: select five candidate dishes, complete the journey test and cost one typical order before widening availability.

Menu travel-suitability test

Dish / recipe version: _____ Date: _____ Tester: _____ Channel: _____

Packaging version: _____ Journey conditions: _____ PIC procedure reference: _____

Observation point	Texture / appearance	Leakage / integrity	Ease of eating
At pack-out	_____	_____	_____
Test interval: _____	_____	_____	_____
Test interval: _____	_____	_____	_____
Customer unpacking	_____	_____	_____

Missing / unclear components: _____

Change to dish, package or instructions: _____

Retest date / result: _____

Decision: list / revise / omit. Approved by: _____

Quality test only. Intervals and observations do not establish food safety or replace the PIC’s required controls.

Packaging specification and test record

Dish or order type: _____ Specification version: _____ Owner: _____

Component	Approved SKU / size	Unit cost	Reviewed substitute
Main container / lid	_____	_____	_____
Sauce / side container	_____	_____	_____
Label / seal	_____	_____	_____
Bag / support	_____	_____	_____
Other included item	_____	_____	_____

Supplier intended-use information reference: _____

Packing sequence: _____

Leak / stack / fit / readability test and result: _____

Temperature, contamination and allergen procedure references: _____

Total packaging cost per typical order: _____ Calculation checked by: _____

Substitution review trigger / retest date: _____

Order assembly and accuracy check

Order ID: _____ Channel: _____ Promised ready time: _____

Assembler: _____ Checker: _____ Total bags: _____

Check before sealing	Result / initials
Correct order ticket / version	_____
Items, quantities and sizes match	_____
Modifiers reviewed and fulfilled	_____
Allergen requests handled per approved process	_____
Sides, sauces, drinks and utensils as ordered	_____
Separate components and all bags identified	_____
Packaging / seal / label checked	_____
Required PIC release checks completed	_____

Exception / action / approving person: _____

Ready time: _____ Released time: _____ Release verified by: _____

Do not silently substitute or seal an order with an unresolved required check.

Dispatch and handoff exception log

Date / shift: _____ Lead: _____ Approved handoff procedure: _____

Order ID	Ready / release	Exception	Action / owner	Closed at
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Reason codes: delayed collection / wrong collector or order / missing component / damaged package / other.

PIC decision record reference where required: _____

Service recovery authorization / record reference: _____

Recurring issue for the weekly review: _____

Use order references, not unnecessary customer information. Do not treat waiting-time entries as approved food-safety limits.

Per-order contribution worksheet

Channel: _____ Order type: _____ Date: _____ Currency: _____

Use a consistent before-tax, excluding-tip basis. Verify actual fee bases and avoid double counting.

Revenue or cost	Basis / source	Amount
Menu subtotal	_____	_____
Restaurant-funded discount / refund	_____	_____
Net restaurant revenue	Subtotal less adjustments	_____
Commission	Rate and applicable base	_____
Food cost	Recipe / inventory basis	_____
Packaging	All components	_____
Incremental labor	Time and cost assumption	_____
Other separate per-order charges	Check not already included	_____
Direct contribution	Net revenue − listed costs	_____

Fixed fees / overhead / other excluded costs: _____

Volume or cost sensitivity tested: _____

Settlement statement checked on: _____ Reviewer: _____

Direct contribution is not net profit.

Weekly channel performance review

Week: _____ Channel: _____ Reviewer: _____

Measure	Current period	Comparable period	Cause / action
Fulfilled orders	_____	_____	_____
Promise misses / orders	_____	_____	_____
Restaurant errors / orders	_____	_____	_____
Typical ready-to-release delay	_____	_____	_____
Direct contribution per order	_____	_____	_____
Dine-in impact	_____	_____	_____

Top recurring error and source order IDs: _____

One change to test: _____

Owner / start date / review date: _____

Menu, package or availability version changed: _____

Decision: retain / revise / pause / expand. Evidence and authority: _____

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

FDA Food Code

The Food Code is a model for adoption by jurisdictions; the establishment must verify the locally applicable rules. Accessed 23 October 2026.

https://www.fda.gov/food/retail-food-protection/fda-food-code

FDA: Food Safety Best Practices for Online Delivery Services

Delivery planning should address packaging, temperature control, contamination and allergen controls. Accessed 23 October 2026.

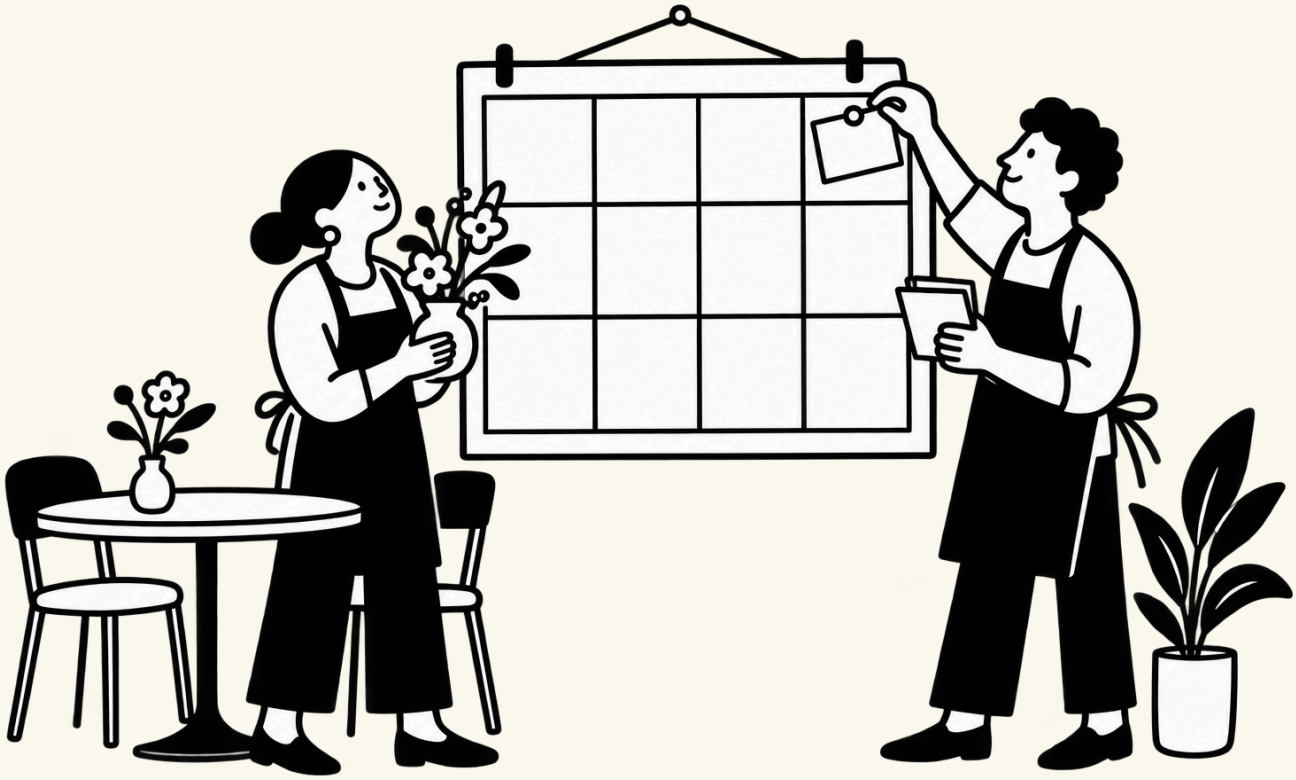
https://www.fda.gov/food/hfp-constituent-updates/fda-highlights-best-practices-food-safety-online-delivery-services

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Seasonal Marketing Calendar

A reusable 12-month campaign planning and content system



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

For restaurant owners who want a manageable year of relevant campaigns rather than last-minute holiday posts. This undated planner contains editable monthly ideas, briefs, captions and production checks. Adapt it to your country, climate, community and opening schedule. It does not update automatically or include a promise of future updates. All campaign examples are hypothetical.

Inside this toolkit

1. Build the calendar around your operation
2. Verify dates and choose relevant occasions
3. Work backward from the launch
4. Turn one idea into a useful content set
5. Review the season and improve the next plan

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

The companion Excel workbook contains editable inputs and live formulas or planning fields. Read its instructions before changing values. Its hypothetical examples may use a more detailed set of assumptions than the guide. Use consistent units and cost definitions, and never treat contribution as full accounting profit.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Build the calendar around your operation

Begin with the restaurant’s real rhythm. Mark busy periods, quiet service windows, closures, staff leave, supplier constraints and menu changes. Marketing should support a service you can deliver, not create demand at a time you already struggle to fulfill orders.

- Review at least the available comparable sales history. Separate typical demand from unusual events, major price changes and closures.
- Choose a practical objective for each month: fill a quiet service, explain a new menu, support pickup or improve advance bookings. One primary objective is enough.
- Use the monthly starter ideas as prompts, not a required sequence. Move warm-weather, cold-weather and school-related ideas to match local conditions.
- Leave space for operational updates and unexpected changes. You do not need a promotion for every observance or a new offer every week.

Hypothetical example: a restaurant routinely fills Friday dinner but has room on Tuesday. Its seasonal dish campaign points guests toward Tuesday reservations. A second campaign aimed at Friday would compete with demand it already has.

Complete the year in pencil, the next quarter in outline and the next month in detail. Assign one calendar owner who checks that menus, service capacity and public information agree before any campaign begins.

Verify dates and choose relevant occasions

A reusable calendar cannot verify next year’s holidays, school terms, sporting fixtures or festival dates for you. Check each chosen occasion with its organizer or another authoritative local source. Record the source, date checked and whether plans are confirmed or tentative.

- Prioritize occasions connected to your actual guests. Ask what practical dining need the event creates: earlier meals, group orders, pickup, visitors or changed operating hours.
- Treat cultural and religious occasions respectfully. Avoid stereotypes, unsupported claims of authenticity or promotional language that trivializes the occasion.
- Check whether event names, logos, photographs or music require permission. Do not imply sponsorship, affiliation or an official partnership that does not exist.
- Confirm whether roads, parking, opening hours or suppliers will be affected. A relevant service update may be more helpful than a discount.

Hypothetical verification entry: “[Local theatre matinee], [date/time], confirmed on organizer website [URL], checked [date]. Our kitchen can offer pickup until [time].” If the event moves, update every affected channel and staff brief.

For Google Business Profile, offers and events have specific date/time fields, and submitted posts can remain pending or be rejected. Check the public status rather than treating scheduling as proof of visibility. Source 1. Recheck current channel rules before each launch.

Work backward from the launch

Use a production timeline sized to the campaign. A simple menu reminder may need only a short check; a limited menu or group-order service needs more lead time. The schedule below is a planning example, not a universal deadline.

When	Decision or output	Gate before next step
4 weeks before	Choose occasion, audience and service capacity	Kitchen and manager agree
3 weeks before	Cost offer and verify dates/conditions	Economics and fulfillment approved
2 weeks before	Photograph, write and build links	Assets accurate and rights checked
1 week before	Test order/reservation path and brief staff	End-to-end test passes
Launch and during	Publish, verify public view and monitor	Stop or correct errors quickly
After close	Remove expired content and review results	Commitments and findings recorded

Hypothetical campaign: a limited pickup menu needs packaging samples, a test order and a quantity cap before any caption is scheduled. If the supplier cannot confirm the key ingredient, delay the promise or use a verified alternative.

Keep one approved brief as the source for dates, prices and conditions. Copying from an old social caption is a common way to publish last year’s hours or an expired offer.

Turn one idea into a useful content set

One campaign can produce several distinct messages without repeating the same sales line. Show what is available, explain the practical details, demonstrate the product and remind guests of a real deadline. Each piece should answer a different question.

- Announcement: what is new, who it suits and when it is available. Include the main terms and one next action.
- Detail: show a real dish, portion, packaging or process. Explain a relevant feature without unsupported health or environmental claims.
- Planning help: publish booking, ordering, collection, access or special-hours information. Keep it aligned with the live destination.
- Reminder: use only a genuine cutoff or current availability. Do not invent scarcity, imply a sold-out risk you cannot support or keep “last chance” running indefinitely.

Hypothetical set: one dish photo announces a seasonal menu; a second post shows pickup packaging; a third explains the verified order deadline. The team reuses approved facts, but changes the visual and purpose of each piece.

Use email or SMS only for appropriately opted-in marketing audiences, with tested unsubscribe tools and provider-approved settings. Do not turn order-status contacts into a seasonal mailing list. Twilio’s messaging policy and U.S. FTC email guidance are starting references, not complete global compliance advice. Sources 2-3.

Make content usable without sound, add accurate captions to video where possible and describe important visual information in the channel’s accessibility fields.

Review the season and improve the next plan

Choose the primary measure before launch. A reservation campaign should track completed reservations or covers where measurable, not just impressions. An ordering campaign should track completed eligible orders. Keep attention metrics separate from commercial outcomes.

- Record campaign-coded net sales, direct costs, campaign costs, fulfillment issues and guest questions. Note the exact period and which channels could be measured.
- Compare relevant periods, accounting for closures, weather, local events, staffing and price changes. Different weekdays or holiday patterns can make a comparison misleading.
- Distinguish attributed transactions from additional transactions caused by the campaign. Codes, links and guest recollection do not establish the counterfactual.
- Record what to repeat, change or stop. Archive final assets with their dates and terms so an expired graphic is not accidentally reused.

Hypothetical review: a campaign generated 24 code-tagged pickup orders. That is a useful observed count, not proof of 24 extra orders. Six guests asked where to collect, so the next campaign improves collection instructions before increasing its budget.

At month end, review the next six weeks: verify dates, adjust capacity and assign missing assets. At quarter end, revisit the broader calendar. At year end, duplicate the blank planner and recheck every external date; do not simply change the year on old promotions.

Template 1. January-June campaign calendar

Planning year: [year] | Location/climate: [place] | Owner: [name]. Starter themes below are optional. Replace them with occasions relevant to your guests. Enter verified dates, not assumed holiday dates.

Month	Starter idea to adapt	Local date / evidence	Goal / channel	Owner / launch
January	Easy return-to-routine meals	[occasion] [date / source]	[goal/channel]	[name/date]
February	A shared meal or small gathering	[occasion] [date / source]	[goal/channel]	[name/date]
March	Introduce a seasonal ingredient	[occasion] [date / source]	[goal/channel]	[name/date]
April	Explain a new menu or service	[occasion] [date / source]	[goal/channel]	[name/date]
May	Convenient group pickup	[occasion] [date / source]	[goal/channel]	[name/date]
June	Show a neighborhood favorite	[occasion] [date / source]	[goal/channel]	[name/date]

- Closures, peak dates and staffing limits: [dates/constraints].
- Quarter-one campaign budget ceiling: [amount/currency].
- Quarter-two campaign budget ceiling: [amount/currency].
- Date verification owner and next review: [name/date].
- Campaigns deliberately skipped and why: [capacity/relevance/cost].

Template 2. July-December campaign calendar

Use the same year, location and objective definitions as the first half. Shift weather-related themes to your actual season. Confirm local school and event dates rather than importing another region’s calendar.

Month	Starter idea to adapt	Local date / evidence	Goal / channel	Owner / launch
July	Make pickup or dine-in easier	[occasion] [date / source]	[goal/channel]	[name/date]
August	Test a neighborhood partnership	[occasion] [date / source]	[goal/channel]	[name/date]
September	Support a changing weekly routine	[occasion] [date / source]	[goal/channel]	[name/date]
October	Tell a seasonal menu story	[occasion] [date / source]	[goal/channel]	[name/date]
November	Plan ahead for group meals	[occasion] [date / source]	[goal/channel]	[name/date]
December	Publish clear booking and special hours	[occasion] [date / source]	[goal/channel]	[name/date]

- Closures, peak dates and staffing limits: [dates/constraints].
- Quarter-three campaign budget ceiling: [amount/currency].
- Quarter-four campaign budget ceiling: [amount/currency].
- Next year’s dates requiring fresh verification: [list].
- Owner of expired-content cleanup: [name/date].

Template 3. One-page campaign brief

Campaign name: [name] | Owner: [name] | Objective: [one outcome] | Guest occasion: [specific need] | Launch / end: [dates and times].

Brief field	Approved answer
Guest promise	[what is available; no unverified claims]
Offer and material terms	[items, price, eligibility, dates, limits]
Operational capacity	[maximum orders/covers; staff and stock]
Primary action and destination	[order/reserve/menu; tested URL]
Channels and audience	[organic channels; opted-in list if used]
Budget and cost assumptions	[amount/currency; included costs]
Primary measure and baseline	[definition; comparison period]
Pause / contingency plan	[trigger; who updates guests/channels]

Date evidence: [official source URL and checked date]. Approval: [kitchen] [operations] [marketing/owner]. Missing decision that blocks launch: [decision or none]. Review date: [date].

Template 4. Adaptable seasonal captions

Replace every bracket and check the live menu, availability and terms. These are draft structures, not permission to make unsupported claims or send unsolicited messages.

Announcement: “[Seasonal item/menu] is available at [restaurant] from [start] to [end]. Expect [accurate ingredient/portion detail]. [Main conditions]. See the menu or book here: [link].”

Practical planning: “Planning [occasion]? Our [pickup/reservation] option works like this: [one or two steps]. Order/book by [real cutoff] for [service dates]. [Availability or quantity limits]. Details: [link].”

Behind the dish: “Meet [item]. We prepare it with [verified process/ingredient detail] and serve it with [actual accompaniment]. Available [times/dates]. Current menu: [link].”

Honest reminder: “A reminder that [offer/menu] ends [verified date/time]. [Qualifying terms]. If it suits your plans, [action/link].” Delete the deadline line if no real cutoff exists.

Hours update: “Our hours on [date] are [hours], with [pickup/dine-in differences]. [Normal service resumes date, if verified]. Check details at [link].”

For opted-in email, add the required sender/footer/unsubscribe details. For SMS, use the provider’s approved sender and opt-out format. Do not copy a social caption into a message without checking those requirements.

Template 5. Asset and approval tracker

Campaign: [name] | Approved fact sheet: [file/link] | Asset folder: [link]. One current version prevents mismatched dates, prices and conditions.

Asset	Purpose / destination	Owner / due	Approval / status
Main dish photo	[menu/social/listing]	[name/date]	[rights/accuracy/status]
Vertical short video	[process/practical detail]	[name/date]	[captions/audio/status]
Offer graphic	[dates/terms/channel]	[name/date]	[facts checked/status]
Landing page or menu	[customer action]	[name/date]	[mobile test/status]
Email or SMS copy	[opted-in audience]	[name/date]	[consent/footer/status]
Staff briefing	[redemption/fulfillment]	[name/date]	[team trained/status]

- Files with an expiry or removal date: [file/date/owner].
- People, photography, music and logo permissions checked: [records].
- Accessibility checks: [captions, readable text, useful image descriptions].
- Final approved versions: [links].
- Blocked asset and fallback: [issue; safe alternative].

Template 6. Launch, close and results checklist

- Before launch: [ ] official dates verified [ ] menu/stock confirmed [ ] economics approved [ ] terms visible [ ] mobile link tested [ ] staff briefed [ ] rights checked [ ] audience permissions checked.
- On launch: [ ] public post/page visible [ ] date/time zone correct [ ] actual order/reservation test passed [ ] inquiries routed to owner.
- During: [ ] stock/capacity monitored [ ] changes logged [ ] errors corrected [ ] no false urgency or unavailable offer left live.
- At close: [ ] expired content removed or clearly marked [ ] outstanding guest commitments handled [ ] assets archived [ ] results reviewed.

Result	Value	What it means
Primary completed action	[count]	[definition and period]
Attributed net sales / costs	[amounts]	[what is included/excluded]
Service issues / guest questions	[count/themes]	[operational lesson]
Comparison and confounders	[baseline/changes]	[limits on causal claims]

Keep: [action]. Change: [one improvement]. Stop: [low-value activity]. Next campaign owner and decision date: [name/date].

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

1. Google Business Profile: Create and manage posts

Offer/event date fields and public post statuses. Platform interfaces and policies can change. Checked 23 October 2026.

https://support.google.com/business/answer/7342169?hl=en

2. Twilio Messaging Policy

Provider rules for marketing consent, sender identification and opt-out. Checked 23 October 2026.

https://www.twilio.com/en-us/legal/messaging-policy

3. FTC: CAN-SPAM Act compliance guide for business

U.S. commercial-email requirements. Local requirements and other providers may differ. Checked 23 October 2026.

https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Vendor and Purchasing

A practical system for supplier comparisons, approved orders and receiving discrepancies.



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Buy against a clear specification, record the approval and close the loop at delivery. These five guide pages and six editable sheets focus on supplier selection, purchasing controls, receiving and credits. Use your inventory process to determine quantity; use this toolkit to control how that purchase is made.

Inside this toolkit

1. Define the item and the buying authority
2. Compare the cost of equivalent usable product
3. Move from request to approved order
4. Receive against the order, not memory
5. Close credits and review supplier performance

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Define the item and the buying authority

Before requesting prices, write the item specification. Include the product type, acceptable grade or quality attributes, pack size, unit, intended use and required documentation. A lower price is not a fair comparison if the portion yield, product formulation or package size differs.

- Assign roles: requester proposes need; buyer checks the specification and quote; owner or authorized approver approves; receiver verifies delivery; accounts reviewer matches the invoice. In a small team, one person may hold multiple roles, but the checks still need to happen.
- Keep an approved supplier and item reference. Record contact details, delivery pattern, minimums, ordering cutoff and escalation route.
- Define who can approve substitutions and price changes. An apparently equivalent ingredient can change a recipe or allergen information.
- Use supplier payment and account systems securely. Do not copy bank details, card numbers or account passwords into shared purchasing sheets.
- Specify what requires renewed approval: different supplier, changed item, higher total, revised terms or an unplanned commitment.

Scope: these are internal business-planning tools, not contracts, purchasing authority, legal advice or a complete supplier-approval program. FDA’s Food Code is a model; the PIC must apply locally adopted source, receiving and record requirements. A competitive quote does not establish food-safety acceptability. (Source 1)

Start with ten frequently purchased items and one clear approval route. Do not redesign the whole supplier list before the team can follow a single order from request to invoice.

Compare the cost of equivalent usable product

Ask suppliers to quote the same specification and quantity basis. Record the quote date, validity, delivery charge, minimum order, lead time and substitution policy. Compare the total delivered cost, not just the number printed beside the case.

Hypothetical offer	Pack price	Allocated delivery	Usable quantity	Cost / usable lb
Supplier A, 20 lb case	$44	$4	18 lb	$2.67
Supplier B, 25 lb case	$60	$0	22.5 lb	$2.67

Both examples assume a verified 90% usable yield. Supplier A costs ($44 + $4) ÷ 18 = $2.67 per usable pound; Supplier B costs $60 ÷ 22.5 = $2.67. The larger case is not automatically cheaper or better. Check that the full quantity can be used safely and that delivery allocation is consistent.

- Use actual yield tests or known specifications, not optimistic percentages supplied without verification.
- Identify whether prices include or exclude applicable taxes, fuel surcharges and other charges. Keep the comparison basis consistent with your accounting policy.
- Compare reliability, quality consistency and response to problems alongside cost. State the evidence rather than assigning unsupported ratings.
- Keep a qualified backup for critical items where feasible, with reviewed alternatives rather than emergency improvisation.
- Do not split orders to avoid an approval threshold or hide the full commitment.

Decision check: if the preferred supplier is more expensive, write the operational reason, such as a smaller usable pack or reliable delivery, and identify how you will verify that benefit.

Move from request to approved order

Treat the internal purchase-order draft as a request for approval, not a message ready to send. Issuing an order can create obligations. Only the owner or authorized buyer should release the separately reviewed order through the restaurant’s approved purchasing process.

Stage	Record to retain	Control
Request	Item, need date and quantity basis	No duplicate request
Check	Current quote and specification	Units and total checked
Approve	Approver, amount and scope	Before release
Release	Actual order and reference	Authorized sender only
Confirm	Supplier acknowledgement	Differences reapproved
Receive / match	Receipt and invoice records	Discrepancies resolved

- Review the complete total, delivery details, payment terms, cancellation restrictions and any agreement before committing. This toolkit does not supply those terms.
- Record the supplier’s confirmation and expected delivery. An order sent is not an order accepted on the same details.
- Recheck changed quantities, substitutions, delivery dates and price differences before accepting them.
- Use one order reference across the request, confirmation, receiving record and invoice.
- If the supplier misses the needed date, involve the authorized buyer before placing a duplicate emergency order.

Worked example: a request for four cases of six units means 24 units, not four units. Record both the order unit and pack conversion. Have the approver review the full amount and any delivery charge before release.

Receive against the order, not memory

Prepare the receiver with the approved order and the PIC’s receiving procedures. Compare supplier, item, pack size, quantity and agreed commercial details. Complete required safety checks using approved instructions and instruments; this worksheet intentionally contains no temperature thresholds.

- Keep ordered, delivered and accepted quantities distinct. Record rejected or held goods under the PIC’s procedure and prevent them being treated as usable stock.
- Photograph discrepancies only under your normal policy, and link the evidence to the order and invoice. Keep relevant product identifiers and required records.
- Record the exact issue: short quantity, wrong pack, unapproved substitute, damaged packaging or price difference. “Bad delivery” will not resolve a credit.
- Notify the authorized buyer promptly. Record what was requested from the supplier, what was agreed and when the next update is due.
- Match the invoice to the approved order and accepted receipt before payment approval. Never alter the original record to make a mismatch disappear.

Illustrative example: ten cases were ordered, nine arrived and one of those nine was rejected under the approved process. Record 10 ordered, 9 delivered, 8 accepted and 1 rejected. A claim may concern two cases, but verify the invoice and supplier resolution before assuming a credit.

Check: can a manager who was not present understand the discrepancy, locate the evidence and see who owns the resolution? If not, the receiving record is incomplete.

Close credits and review supplier performance

Maintain an open-discrepancy list. A promised credit is not a received credit. Record the supplier reference, expected amount, due date, actual credit note and how it was applied. Reconcile it with your accounting records before closing the issue.

Measure	Definition for this toolkit
On-time, in-full deliveries	Deliveries meeting both agreed date/window and quantity ÷ deliveries due
Unapproved substitutions	Count and affected order references
Accepted quality discrepancies	Issues under your specification, not assumptions
Open credit value	Verified claims not yet reconciled
Total comparable cost	Delivered cost on the same unit and scope

Example: 18 of 20 due deliveries arrive on time and in full, giving 90%. Inspect the two misses by operational impact. One late critical ingredient may matter more than several small paperwork issues. Do not use a headline rate as proof of supplier suitability.

- Review the suppliers and items that caused actual disruption, not just the largest invoices.
- Agree on one improvement and a verification date. Retain evidence of changed performance.
- Assign responsibility for relevant supplier and official recall notices. FDA describes product identifiers in recall notices and points to FDA and USDA recall sources; use the actual notice and PIC response procedure. (Source 2)
- Keep required traceability and receiving records accessible under the applicable retention policy. This worksheet does not determine legal record requirements.
- Requalify substitutions or new suppliers through the approved process before relying on them.

Next step: review the next order from draft through invoice and close one unresolved discrepancy before expanding the system.

Supplier and item specification card

Supplier: _____ Item / SKU: _____ Version / date: _____ Owner: _____

Specification or operating detail	Approved information
Product / quality / intended use	_____
Pack size / order unit / conversion	_____
Required product or source records	_____
Delivery days / cutoff / lead time	_____
Minimum order / quoted charges	_____
Contact / escalation record reference	_____
Substitution review requirement	_____
Backup supplier / item reference	_____

PIC source / receiving procedure reference: _____

Commercial review by: _____ PIC review by: _____ Date: _____

Next review date / trigger: _____

Store account credentials and financial details only in approved secure systems.

Supplier comparison worksheet

Item specification: _____ Quantity basis: _____ Comparison date: _____

Comparison point	Supplier A	Supplier B	Supplier C
Pack / order unit	_____	_____	_____
Quote price / expiry	_____	_____	_____
Delivery / other charges	_____	_____	_____
Verified usable quantity	_____	_____	_____
Cost per usable unit	_____	_____	_____
Minimum / lead time	_____	_____	_____
Reliability / quality evidence	_____	_____	_____
Unresolved conditions	_____	_____	_____

Cost basis: (pack cost + consistently allocated charges − confirmed applicable credits) ÷ usable quantity. Keep taxes and units consistent.

Preferred option and reason: _____

Specification / PIC review complete: ___ Full commitment reviewed: ___

Decision approved by: _____ Date: _____

Purchase-order planning draft

NON-BINDING INTERNAL DRAFT. Not a contract or an order for supplier acceptance. Owner approval is required before any separately reviewed order is issued. Do not send this worksheet to a supplier.

Draft reference: _____ Requester: _____ Date: _____ Supplier: _____

Needed date / destination: _____ Quote reference / expiry: _____

Item / spec reference	Qty	Order unit / pack	Unit price	Line total
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Subtotal: _____ Delivery / charges: _____ Applicable tax: _____ Total / currency: _____

Need and quantity basis / duplicate-order check: _____

Terms requiring review / substitution restrictions: _____

Owner approval: pending / approved / declined. Name: _____ Date: _____ Limit: _____

Actual authorized order reference, entered only after release: _____

Order approval and confirmation tracker

Order reference: _____ Supplier: _____ Responsible buyer: _____

Workflow step	Owner	Date / evidence	Status
Need and specification checked	_____	_____	_____
Current quote / full total checked	_____	_____	_____
Owner approval recorded	_____	_____	_____
Actual order released by authority	_____	_____	_____
Supplier confirmation compared	_____	_____	_____
Changes reapproved if needed	_____	_____	_____
Receiver informed / records ready	_____	_____	_____
Receipt / invoice / credit matched	_____	_____	_____

Confirmed delivery window: _____ Supplier confirmation reference: _____

Difference from approved order: _____

Decision / approving authority / date: _____

Next action / owner / due: _____

Receiving discrepancy and credit log

Order / invoice reference: _____ Supplier: _____ Received at: _____

Receiver: _____ PIC procedure and record reference: _____

Item / identifier	Ordered	Delivered	Accepted	Discrepancy
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Held or rejected quantity / approved disposition record: _____

Evidence reference / exact issue: _____

Supplier notified by / date / response: _____

Claim amount / currency: _____ Expected resolution: _____

Actual credit note / amount / applied invoice: _____

Next owner / due: _____ Reconciled and closed by / date: _____

Do not treat a promised credit or an unresolved receiving exception as complete.

Supplier performance review

Supplier: _____ Review period: _____ Reviewer: _____

Measure	Result	Evidence / order references
On-time, in-full deliveries / due	_____	_____
Unapproved substitutions	_____	_____
Specification discrepancies	_____	_____
Open credit value / oldest item	_____	_____
Comparable delivered unit cost	_____	_____

Most significant operational impact: _____

Improvement requested / agreed / date: _____

Responsible buyer / verification date: _____

Recall-notice responsibility and current contact route verified: _____

Backup supplier readiness / unresolved review: _____

Decision: retain / improve / reassess. Approved by: _____ Date: _____

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

1. FDA Food Code

The Food Code is a model for adoption by jurisdictions; the establishment must verify the locally applicable rules. Accessed 23 October 2026.

https://www.fda.gov/food/retail-food-protection/fda-food-code

2. FDA: Food Recalls: What You Need to Know

Official recall sources, product-identification details and following product-specific recall instructions. Accessed 23 October 2026.

https://www.fda.gov/food/buy-store-serve-safe-food/food-recalls-what-you-need-know

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Restaurant Event Partnerships

Find compatible local collaborators and run a clear low-risk pilot together



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

This toolkit helps restaurants work with local hosts, performers, creators, and community organizations. Its focus is the partnership: choosing the right collaborator, making a relevant approach, clarifying responsibilities, and reviewing the result. It does not provide a trivia or open-mic format, a binding contract, a waiver, or a legal compliance checklist. All partner names, fees, attendance, and results are hypothetical. Commercial commitments, insurance, permits, rights, and cancellation terms need the appropriate separate review.

Inside this toolkit

1. Choose a partnership with a real fit
2. Build and qualify a short prospect list
3. Agree the working model before promotion
4. Assign every handoff and verify the room
5. Debrief the relationship as well as the event

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Choose a partnership with a real fit

Start with the overlap between the restaurant's guests and a partner's actual community. "They have followers" is not enough. A good pilot serves both sides without requiring either to promise attendance they cannot control.

Partner type	Possible shared value	Check before approaching
Local bookshop or discussion host	A welcoming place for an adult discussion and meal	Who facilitates and what material is used
Illustrator or maker	A short demonstration alongside normal hospitality	Materials space cleanup and rights
Neighborhood organization	A convenient gathering place for existing members	Named organizer and realistic group size
Professional performer	A defined guest experience with a trained host	Technical needs sound level and performance rights

- Choose one outcome: introduce nearby guests, strengthen a community relationship, test a recurring format, or use an underused space. Do not call every possible benefit a goal.
- Define the guest experience in one sentence. The restaurant should still be able to explain it when the partner is not present.
- Set your practical limits: capacity, time window, noise, setup space, staffing, budget, and which activities are outside scope.
- Select one partner for the first pilot. Multiple partners create extra handoffs and unclear ownership before you know the format works.

Hypothetical pilot: Cedar Table considers a 45-minute botanical illustration demonstration with local creator Fern Studio, followed by normal dinner service. The event uses a defined 20-seat area and no guest art-making materials. The restaurant wants to learn whether a small hosted experience is operationally manageable; the creator wants to meet interested local adults. Neither promises a sold-out room.

Build and qualify a short prospect list

Find prospects through nearby businesses, community calendars, actual events, guest recommendations, and professional directories. Read what each prospect already does. A specific, informed approach is more credible than a mass message about “exposure.”

- Verify the organization, the decision-maker’s role, a suitable business contact route, and recent activity. A social profile alone does not establish who can agree to a paid booking.
- Look for comparable past events, relevant audience, reliable communication, and practical fit. Ask for a reference or example when the stakes justify it.
- Ask how the partner normally attracts attendees, what they can realistically promote, and whether that audience is local. Treat reach and turnout as different measures.
- Request the full technical and space needs early: equipment, arrival time, power, amplification, materials, staff assistance, and cleanup.
- Ask what makes a collaboration worthwhile for them. A fixed fee, a suitable sales opportunity, or a well-run venue may matter more than follower counts.

Hypothetical comparison: Fern Studio has a smaller online audience than another prospect but has run two nearby restaurant demonstrations and can work without amplification. The larger account has no evidence of local attendance and needs a stage. Cedar Table explores Fern Studio first because the operating fit is stronger, not because a small account is inherently better.

Record a clear status: research, contacted, discussing, approved for planning, declined, or closed. Do not announce a partner, use their logo, or describe a date as confirmed before the appropriate permission and agreement are in place. A friendly reply is not a complete event plan.

Agree the working model before promotion

Discuss the full arrangement before either side starts selling or advertising. Use the collaboration brief to expose missing decisions; use your normal reviewed agreement process for actual commitments. The worksheet is not designed for signatures or legal acceptance.

- Guest offer: what happens, what is included, what food or drink is separate, whether there is an admission charge, and how guests book.
- Money: fee model, approved amount, reimbursable costs, who collects each type of payment, applicable taxes or fees, and how records will be reconciled. Do not leave “we will split the proceeds” undefined.
- Promotion: specific deliverables, dates, approved images and wording, who approves changes, and the single source of current booking information.
- Contingencies: cancellation decision-maker, weather or illness procedure, late arrival, technical failure, customer notices, and who handles any applicable refunds.
- Information: each side’s customer-data needs, permitted use, retention, and contact route. Attendance does not automatically mean permission to share a mailing list.

Hypothetical planning choice: Cedar Table considers a fixed $120 host fee instead of an undefined revenue share. It also expects $60 in extra labor. A simplified pilot model needs more than $180 in additional contribution to cover those two extra costs, before any other expense or displaced regular business. These are planning assumptions, not agreed commercial terms.

If a partner endorses the restaurant in exchange for payment, free products, or another material benefit, consider the required clear disclosure of the connection. FTC guidance explains that unexpected material connections can affect how an audience evaluates an endorsement. A vague partner tag may not communicate enough. (Source 1)

Assign every handoff and verify the room

A partnership fails most often at the boundary between teams: both think the other sent the reminder, reserved the equipment, or told the guest about a change. Give every critical task one named owner, one deadline, and one backup.

- Complete a short site walk or verified remote walkthrough. Check sightlines, power, equipment, service routes, loading, storage, and cleanup. Keep emergency routes and service paths clear.
- Confirm the published capacity and room layout with the responsible venue manager. Check applicable permits, noise restrictions, insurance, and food or alcohol conditions through the appropriate local or professional sources.
- Ask about communication and access needs early, and provide a clear contact route. US ADA guidance requires covered businesses to communicate effectively with people with communication disabilities; appropriate solutions depend on the situation. (Source 2)
- Check permissions for artwork, photographs, films, readings, and music. Public-performance rights may be relevant; do not assume a performer’s booking fee or a personal streaming account resolves the venue’s rights questions. Exceptions and licenses need case-specific review. (Source 3)
- Reconfirm the final brief shortly before the event and identify who can stop or modify the activity if it interferes with safe operation.

Hypothetical handoff: Fern Studio supplies the demonstration materials and arrives 45 minutes early. The restaurant supplies the approved table and seating layout, manages bookings, and handles food service. One manager gives the start cue. Nobody assumes the creator will answer restaurant allergy questions or that the host will operate unfamiliar equipment without checking it.

If a requirement remains unresolved, reduce the scope or postpone rather than letting the public announcement force an unsafe or unreviewed decision.

Debrief the relationship as well as the event

Hold a short debrief within a few working days. First reconcile commitments and outstanding practical matters, then discuss results. A pleasant event with unclear payments or unreturned equipment leaves a damaged relationship.

- Record bookings, actual attendance, no-shows, food and beverage sales through the agreed reporting method, incremental costs, and any displaced regular trade.
- Check delivery: arrival, start and finish times, promised promotion, equipment, guest information, accessibility arrangements, and cleanup.
- Ask each side what worked, what caused friction, and whether the workload was reasonable. Distinguish a one-off problem from a structural mismatch.
- Use aggregate guest feedback where possible. Do not pass a named attendee list to the partner without an appropriate basis and permission.
- Close payment, equipment return, photo permissions, and customer follow-up through the previously agreed process before proposing another date.

Hypothetical review: 18 guests booked and 16 attended a 20-seat demonstration. The activity started on time and the room returned to normal service promptly, but four guests expected materials to take home because the listing was unclear. The partners revise that description before considering a second event. Attendance alone does not determine success.

Choose repeat, revise, or end politely. A useful repeat condition might be “confirm the next promotion plan and correct the materials description before proposing a date.” Do not turn one friendly pilot into a standing financial commitment. Thank the partner with specific observations and ask before using a quote, photo, or testimonial in future promotion.

Partner prospect worksheet

Research a short list and prioritize genuine fit. Keep business contact details in your approved system; this worksheet can use a reference rather than copying personal information.

Prospect	Fit evidence	Unknown to check	Status
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Priority prospect: _____
Verified organization and decision-maker role: _____
Business contact source and date checked: _____
Relevant local event or work example: _____
What their audience gains: _____
What our guests and restaurant gain: _____

Qualification questions
1. What comparable events have you delivered? _____
2. What does a workable audience size look like? _____
3. What space, equipment, time, and assistance do you need? _____
4. How do you normally price or structure this work? _____
5. What promotion can you actually commit to? _____

Hypothetical selection reason: “Fern Studio has relevant local experience and can use our existing space without a stage. We still need to confirm the fee, materials, and promotional deliverables.”

Owner and next action date: _____

Outreach and followup scripts

Personalize the observed connection and use a suitable business channel. These are drafts, not messages already sent or promises to book.

First approach
“Hi [name], I manage [restaurant] in [area]. I saw your [specific local work or event] and thought there might be a good fit with our guests. We are exploring a small [format] for [approximate timing and capacity]. We can offer [factual venue or operational benefit] and would like to understand your normal fee and requirements. Would a short conversation be useful? No date is confirmed yet.”

Useful followup
“Hi [name], following up once on the [format] idea at [restaurant]. The main question is whether [specific practical point] fits the way you work. If it is not a fit or now is not a good time, no problem. I can close the inquiry for now.”

Discovery recap
“Thanks for speaking. My understanding is that we are exploring [format], with [open date window], [capacity], and [working fee model]. Still to resolve: [items]. I will send the planning brief for discussion. We will use our normal approval and agreement process before making commitments or public announcements.”

Polite decline
“Thank you for discussing it. We are not moving ahead with this format because [specific neutral operational reason]. I appreciate your time and do not want to hold your availability while we reconsider.”

Before sending: verify recipient; remove unsupported praise; do not imply free work; state no unapproved price or date commitment; respect an opt-out.
Contact owner: _____ Followup date if appropriate: _____

Collaboration planning brief

Internal working document for discussion. Not a contract, waiver, or signature page. Record unresolved items and route commercial terms through your normal reviewed process.

Planning decision	Current proposal or open question
Restaurant partner and named contacts	_____
Shared objective and guest experience	_____
Proposed date arrival start finish and cleanup	_____
Space layout and capacity	_____
Exact inclusions and exclusions for guests	_____
Booking method and information owner	_____
Fee model and total budget for review	_____
Who takes payments and handles records	_____
Technical equipment and materials	_____
Promotion deliverables and approval owner	_____
Rights insurance permits and access checks	_____
Cancellation communication and refund owner	_____

Hypothetical brief summary: “A 45-minute botanical illustration demonstration for up to 20 adults, followed by normal dinner service. No take-home materials are included. Restaurant manages bookings and food; creator manages demonstration materials. Fee and cancellation terms require separate approval.”

Unresolved before announcement: _____
Next decision owner and date: _____

Responsibilities and readiness checklist

Give each task one primary owner. A blank owner is an unresolved task, not shared responsibility. Use restaurant or partner role names that remain clear if staff change.

Task	Owner	Deadline	Verified
Reviewed commercial arrangement	_____	_____	____
Final guest description and price details	_____	_____	____
Booking page and capacity control	_____	_____	____
Approved artwork and promotion copy	_____	_____	____
Agreed promotion deliverables	_____	_____	____
Permissions and required local checks	_____	_____	____
Access and communication arrangements	_____	_____	____
Equipment and layout confirmation	_____	_____	____
Staff and partner briefing	_____	_____	____
Guest change or cancellation notices	_____	_____	____
Payment records and reconciliation	_____	_____	____
Cleanup equipment return and review	_____	_____	____

Restaurant day-of lead: _____ Backup: _____
Partner day-of lead: _____ Backup: _____
Who can pause the activity: _____
How both teams receive urgent changes: _____

Go or no go decision time: _____ Decision owner: _____
Any unresolved safety, access, rights, or operating issue: _____
Resolution or scope reduction before launch: _____

Event handoff and contingency sheet

Keep at the manager station. This is an operational handoff, not a substitute for emergency procedures or the separately reviewed commercial arrangement.

Moment	Action and owner
Partner arrival	Confirm contact, equipment, and approved setup: _____
Before guests arrive	Check layout, routes, booking list, and information: _____
Start cue	Named manager and partner confirm readiness: _____
During activity	Monitor service and guest questions: _____
Finish cue	Confirm transition to normal service: _____
Closeout	Count equipment, restore area, log issues: _____

If this happens	Immediate operational response
Partner is late or absent	Contact _____; guest notice owner _____
Equipment fails	Use approved fallback _____ or pause
Activity disrupts safe service	Manager _____ pauses or adjusts it
Guest reports unclear inclusion	Lead _____ explains and resolves under policy
Cancellation is necessary	Decision owner _____; communication owner _____

Guest update draft
“Today’s [activity] has [accurate change]. [What remains available]. If you booked or paid, please contact [approved route] for the options under the published terms. We are sorry for the disruption.”

Issue log with time and action: _____
Outstanding follow-through after service: _____
Owner and due date: _____

Partner debrief and next step

Date: _____ Restaurant lead: _____ Partner lead: _____
Event and baseline comparison window: _____

Result	Record
Bookings and actual attendance	_____
Sales or contribution measure used	_____
Incremental costs and displaced trade	_____
Guest feedback themes	_____
Promotion deliverables completed	_____
Service technical or timing issues	_____
Outstanding payment or equipment matters	_____

Three debrief questions
What worked that we should keep? _____
What took more effort than expected? _____
What must change before another event? _____

Decision: Repeat proposal / Revise first / Close the collaboration
Conditions before any new commitment: _____
Action owner and date: _____

Followup draft
“Thank you for [specific contribution] at [event]. We recorded [verified result] and heard [accurate feedback theme]. The main improvement is [issue and proposed action]. We will close [outstanding matter] by [date already approved]. Would you be interested in discussing another pilot once [condition] is resolved?”

Hypothetical conclusion: “16 of 18 booked guests attended. The operating handoff worked, but the listing must say no take-home materials. Discuss another pilot only after that change and the outstanding payment reconciliation are complete.”

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

1. FTC Endorsement Guides Questions and Answers

Clear disclosure of unexpected material connections in endorsements, including compensation and other benefits. Context-specific guidance, not a safe-harbor guarantee.

https://www.ftc.gov/business-guidance/resources/ftcs-endorsement-guides-what-people-are-asking

2. US Department of Justice Effective Communication

Effective communication responsibilities of covered businesses and context-dependent aids or services. This toolkit does not determine full ADA compliance.

https://www.ada.gov/topics/effective-communication/

3. US Copyright Office Copyright Law Chapter 1

Public-performance and other exclusive rights, subject to statutory limitations and exceptions. Event-specific licensing requires separate review.

https://www.copyright.gov/title17/92chap1.html

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Menu Photography and Content Creation

A practical phone-photo, short-video and content production system



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

For restaurant teams creating accurate, reusable food images without a full studio. This toolkit covers planning, simple lighting, realistic styling, short video, permissions, asset management and captions. It goes beyond a photo audit to help you run a complete small shoot. All examples are hypothetical. Adapt camera controls and export settings to your device and destination.

Inside this toolkit

1. Plan the image before the dish arrives
2. Use simple light and stable framing
3. Style food honestly and capture a useful set
4. Check rights, people and private details
5. Edit, label, publish and learn

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Plan the image before the dish arrives

Choose the image’s job: help someone understand a menu item, show a portion, explain pickup or communicate the atmosphere. A beautiful close-up may be poor menu information if the guest cannot see what comes with the dish. Write one purpose for each planned shot.

- Choose two or three priority dishes for a small first shoot. Confirm current recipes, portions, plates, garnishes and availability with the kitchen.
- Assign a shoot lead, food preparer and service contact. Schedule outside the busiest preparation period and agree what must stop if service needs the space.
- Prepare the location, clean lens, charged phone, stable support, clean background and an approved asset folder before food arrives.
- List required orientations and crops. Leave room around the dish so one original can support several formats without cutting off important details.

Hypothetical 45-minute plan: 10 minutes to set up and test an empty plate, 20 minutes to photograph three dishes as they arrive, 10 minutes for storefront and pickup details, and five minutes to label files. Add time if preparation or permissions need it.

Keep the shoot compatible with food-safety procedures. Do not place phones or props on food-contact surfaces, obstruct exits or return handled display food to customer service unless your approved procedure allows it. The shoot must not create a safety shortcut.

Use simple light and stable framing

Start beside a large window with indirect light, or use a consistent existing light source. Place the dish so the light comes from the side rather than directly behind the phone. Take a test image and look for visible texture, believable color and distracting glare.

- If direct sun creates harsh patches, move the table farther from the window or choose a different time. Do not improvise unsafe covers near heat sources.
- Avoid mixing strongly different light colors when possible. If a dish looks orange or green, change the lighting setup before relying on a heavy filter.
- Use the main camera at a normal setting and move to compose the frame instead of relying on heavy digital zoom. Keep the phone stable and check focus at full size.
- Try overhead for a flat spread, a three-quarter angle for a plated meal and eye level for a tall item. Let the shape of the food choose the angle.

Hypothetical test: photograph the same bowl from overhead and at a three-quarter angle. Compare whether the toppings, depth and portion are clear. Select the image that answers the guest’s question rather than the one with the most dramatic blur.

Quality gate: the important food is sharp, bright areas retain detail, colors look plausible and the background does not compete. Check the image on a second screen if available. Camera features vary, so verify focus and exposure controls on your device.

Style food honestly and capture a useful set

Use the portion, ingredients, packaging and garnish the guest can actually receive. Wipe accidental plate smears and arrange the real components neatly. Do not create an oversized “hero” serving, add unavailable ingredients or edit in a topping that is not included.

- Capture a complete dish first. Then make a detail, a portion/context image and a usable alternate crop. A set is more useful than ten nearly identical close-ups.
- Keep props relevant and minimal. If a drink or side is not included, compose carefully and explain that in accompanying copy where needed.
- For short video, film one action at a time: plating, a pour, packaging or a handoff. Hold a stable frame before and after the action so editing is easier.
- Show genuine kitchen practices. If a setup reveals an operational problem, fix the practice rather than merely cropping it out for marketing.

Hypothetical sequence: a full sandwich-and-side image for the menu, a close-up of the cut sandwich for texture and a boxed pickup image for convenience. The same approved portion appears in all three.

Google’s Business Profile photo guidance calls for focused, well-lit images that represent reality without significant alterations or excessive filtering. Source 1. As a practical standard, keep edits to useful corrections such as crop, straightening and restrained exposure/color adjustment. Review the result against the actual product.

Check rights, people and private details

Owning the restaurant does not automatically mean owning every photograph taken there. Keep a record of who created each asset and what uses are permitted. The U.S. Copyright Office explains that the photographer generally begins as the copyright owner, subject to exceptions such as qualifying work made for hire. Source 2. Other jurisdictions can differ.

- For a hired photographer, confirm the written license or ownership terms, permitted channels, paid-ad use, editing rights, credit and duration before relying on the images.
- For guest-created content, request specific permission from the actual rights holder. A tag, hashtag or public post is not your permission record.
- Get appropriate permission before featuring identifiable people. Staff should be able to decline without pressure. Avoid featuring children unless the relevant guardian permissions and local requirements are properly addressed.
- Inspect backgrounds for receipts, contact details, order screens, payment information and private conversations. Stage a clean example rather than exposing live customer data.

Use original audio or audio licensed for the intended commercial use. Availability in an app does not by itself establish that the same track is permitted in paid advertising or on another platform.

The included permission checklist is a planning record, not a legal release. Use a suitable reviewed agreement when needed. Restrict access to signed records and avoid putting personal details in shared asset filenames.

Edit, label, publish and learn

Keep original files unchanged and export separate publishing copies. A simple folder structure can be Originals, Selects, Approved and Archived. Use filenames that identify the item, shoot date and version, such as itemname_YYYYMMDD_angle_v01, without guest names or other private information.

- Select for accuracy first, then clarity and visual appeal. Reject soft focus, misleading portions, strange color and clutter that cannot be safely removed.
- Make restrained edits and compare the export with the original. Check each destination’s current size, aspect ratio and file requirements instead of assuming one export fits everywhere.
- Pair each asset with a clear caption, verified availability, one next action and useful accessibility text. Describe the image rather than filling image-description fields with keywords.
- After publishing, inspect the actual crop, text readability, audio/captions and link on a phone. A scheduled or uploaded asset may not yet be public.

Hypothetical test: publish two accurate images of the same item in otherwise similar posts on comparable dates. Record reach, menu clicks and measurable orders. A difference is a useful clue, not proof the image caused the result; timing and audience can differ.

Review monthly: retire discontinued items, refresh changed portions and remove expired offer graphics from the active folder. Keep a small library of approved images that staff can find quickly. Success includes fewer wrong or outdated assets, not just higher engagement.

Template 1. Small-shoot planner

Shoot date/time: [date] | Lead: [name] | Kitchen contact: [name] | Service priority contact: [name] | Location: [place].

Decision	Plan
Business purpose	[menu clarity / launch / pickup / atmosphere]
Priority dishes	[two or three current items]
Accurate portion and presentation	[kitchen-approved reference]
Light and background	[window/light; clean surface]
Phone, support and storage	[device; battery; folder]
People / asset permissions	[needed records and owner]
Safety and service limits	[approved space; stop condition]

Time block	Shot / action	Owner
[start-finish]	[setup + empty-plate test]	[name]
[start-finish]	[dish sequence]	[name]
[start-finish]	[location/process images]	[name]
[start-finish]	[select, label and back up]	[name]

Before food arrives: [ ] lens clean [ ] background checked [ ] lighting tested [ ] permissions confirmed [ ] shot list visible. Missing item that blocks the shoot: [issue or none].

Template 2. Full restaurant shot list

Select only shots you can use. Capture actual offerings and spaces. Mark each Complete, Reshoot or Not needed. Check consent before including identifiable people.

Shot	What the guest should understand	File / status
Complete signature dish	Normal portion and included components	[file/status]
Food detail	Texture without hiding overall portion	[file/status]
Overhead spread	Which items are separate or included	[file/status]
Eye-level tall item	Height and real presentation	[file/status]
Actual pickup packaging	What travels and how it is packed	[file/status]
Current menu display	Readable and accurate information	[file/status]
Storefront and entrance	How to recognize and enter	[file/status]
Pickup counter	Where to collect an order	[file/status]
Representative seating	Actual layout and atmosphere	[file/status]
Team or preparation	Authentic process with permission	[file/status]

For each priority dish: [ ] complete view [ ] detail [ ] context [ ] alternate crop. Common quality check: sharp subject, believable color, no misleading extras and no private information. Reshoot priorities: [list].

Template 3. Short-video storyboard

Video purpose: [one useful message] | Intended destination: [channel] | Featured item: [item] | Target duration: [brief length appropriate to destination]. Check current platform requirements before export.

Sequence	Picture / action	Text or audio	Check
Opening	[finished item or guest question]	[clear opening line]	[subject visible immediately]
Detail	[one preparation action]	[verified ingredient/process]	[safe practice; stable frame]
Context	[portion/packaging/service]	[what guest receives]	[no misleading extras]
Next step	[finished item or practical location]	[availability + action]	[accurate link/terms]

Hypothetical script: “What is in our [pickup meal]? [Show actual main]. [Show included side]. Packed like this for collection at [verified point]. See today’s menu at [link].” Do not imply the meal travels well unless that is a tested, accurate claim.

- Audio rights/source: [original or licensed; permitted uses].
- People and background privacy checked: [name/date].
- Captions reviewed against spoken words: [name/date].
- Final phone playback test: [crop, readable text, sound-off clarity].

Template 4. Rights and privacy checkpoint

Asset/group: [ID] | Reviewer: [name] | Date: [date]. This checklist records decisions and evidence; it is not a model release or substitute for a suitable license.

Question	Evidence / action
Who created it and controls the rights?	[creator; agreement reference]
Which uses are authorized?	[website/social/paid ads/print; limits]
May we crop, edit or add text?	[permission terms]
Are recognizable people featured?	[permission record or reshoot plan]
Are children visible?	[avoid / appropriately reviewed permissions]
Do music, art, logos or props need rights?	[license or remove/replace]
Any private data in image or audio?	[inspect; reshoot/redact safely]
Any expiry, credit or withdrawal conditions?	[requirements and owner]

Permission-request draft for a rights holder: “May [restaurant] use your photo [exact asset/link] on [specific channels] for [purpose], including [organic or paid use], during [period]? We would [permitted edits] and credit you as [credit]. Please confirm the scope you approve. No use will begin without agreement.”

Store the response with the asset record. If ownership, authority or scope is unclear, pause that asset and choose one you can verify.

Template 5. Asset library and export checklist

Asset ID / file	Item / shoot date	Rights / accuracy	Use / review date
[file]	[item/date]	[permission ref; approved by]	[channel/date]
[file]	[item/date]	[permission ref; approved by]	[channel/date]
[file]	[item/date]	[permission ref; approved by]	[channel/date]
[file]	[item/date]	[permission ref; approved by]	[channel/date]

- Original preserved: [location]. Approved export: [file/version].
- Accuracy: [ ] correct portion [ ] current garnish/packaging [ ] extras clearly explained [ ] item still available.
- Image: [ ] focus [ ] natural color [ ] restrained edits [ ] clean background [ ] crop does not mislead.
- Destination: [ ] current file specifications checked [ ] text readable [ ] accessibility text included [ ] link tested.
- Rights/privacy: [ ] scope covers use [ ] people/audio permissions checked [ ] no sensitive background details.
- After upload: [ ] public appearance checked [ ] status recorded [ ] expired graphics scheduled for removal.

Retire or reshoot when: [recipe/portion/packaging changes; rights expire; item leaves menu]. Library owner: [name]. Next monthly check: [date].

Template 6. Caption worksheet and content test

Asset ID: [file] | Guest question: [what they need to know] | One message: [main point] | Verified detail: [fact] | Next action: [menu/order/reserve].

Menu caption draft: “[Item] with [actual components], served as [accurate portion/detail]. Available [verified times/dates]. [Included/excluded extras if needed]. Current menu: [link].”

Process caption draft: “A look at how we prepare [item]: [one accurate process detail]. Here is the finished portion you can order at [location/channel]. [Availability and link].”

Useful image description: “[Main dish and visible components] on [plate/packaging], shown [angle/context].” Describe essential visual information; do not add unverified ingredients or subjective claims as facts.

Test record	Entry
Question and one variable	[complete dish vs detail; other factors kept similar]
Post dates / audience / channel	[conditions]
Observed reach and menu clicks	[counts; definition]
Measurable completed actions	[orders/reservations, if available]
Limits on conclusion	[timing/audience/other changes]
Decision	[keep/reshoot/test again; reason]

Final approval: [name/date]. Publish only after every factual placeholder and permission requirement is resolved.

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

1. Google Business Profile: Manage photos and videos

Accurate, focused, well-lit imagery; limited alterations; current upload specifications and statuses. Checked 23 October 2026.

https://support.google.com/business/answer/6103862?hl=en

2. U.S. Copyright Office: What photographers should know about copyright

General U.S. photograph ownership and work-made-for-hire distinctions. Does not replace a reviewed license or local legal advice. Checked 23 October 2026.

https://www.copyright.gov/engage/photographers/

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.

Trivia Host Kit

Host your next trivia night.

160 questions / 4 complete games / 38 pages

A concise operating guide for restaurant, cafe and bar owners. Set up the room, run a welcoming game, and keep the night moving.



Four rounds per game. Separate answer keys.
Host scripts and six reusable operating forms.

Start here

Bring people together for an easy-to-run entertainment night. This kit uses spoken questions and written answers, with no screen, music clips or special software required.

Section	Pages
Quick start, people and room	3-4
80-minute run of show	5
Rules, host scripts and scoring	6-8
Promotion and repeat events	9
Game finder and print plan	10
Four complete game packets	11-30
Eight numerical tiebreakers	31
Six reusable operating forms	32-37
Edition notes and reference checks	38

Read a little. Run the night.

Owners: start with pages 3-5 and 9-10. Hosts: add pages 6-8, the five-page packet for your chosen game and page 31. Print the forms you need; you do not need to read all four games before running one.

> The concise edition contains 160 regular questions, plus 8 tiebreakers. Each game has four rounds of ten questions and its own answer key. The maximum regular score is 40.

Your first night, in order

1 Agree the essentials

Choose a date, start and finish time, team limit, seating plan and modest confirmed prize. Start with free entry and teams of two to six. The manager checks venue policies and any local requirements before advertising entry terms or prizes.

2 Give each job an owner

Name a manager, host, scorer and floor lead. In a small room, the host may also score. Above eight teams, a separate scorer helps. Complete the event brief on page 36 so everyone works from the same plan.

3 Pick one game

Use the finder on page 10. Read its questions and answer key aloud beforehand; check pronunciation and acceptable variants. Keep the packet private. Reserve the two tiebreakers assigned to that game on page 31.

4 Prepare a small packet

Print four copies of the answer sheet per team, plus spares. Bring the chosen game, rules, scoreboard, registration sheet and checklist. Ten teams need 40 answer sheets, plus a sensible spare supply.

5 Make the room ready

Test the microphone and every seating area. Set pens, confirm staff coverage and register teams before the start. Explain the rules, prize and finish time, then begin. Keep the manager available for service or safety concerns.

People, room and equipment

Manager and floor lead

The manager confirms staffing, capacity, prize terms and the finish time. The floor lead coordinates orders, the break and guest concerns. Keep normal service running; do not make a busy server score while carrying a full section.

Host and scorer

The host reads clearly, repeats questions and keeps time. The scorer collects sheets, checks against the key and records round totals. Use team numbers to avoid mixing up similar names. A clipboard or folder keeps answer keys out of view.

A simple equipment list

Bring the printed packet, spare answer sheets, pens, clipboards, a timer and a calculator for scoring or ties. Use a microphone and speaker only if the room needs them. Test the actual setup before guests arrive.

Seat for hearing and service

Listen from the nearest and farthest tables. Keep exits, service routes and accessible paths clear. Protect cable crossings and keep drinks away from electrical equipment. Offer a quieter seat or a written question copy when practical.

A welcoming room

Announce the team-size limit and invite solo guests to join a willing team. Read numbers, units and names slowly. Agree access arrangements privately. Never require someone to disclose a diagnosis or publicly explain their needs.

If something goes wrong

Pause for inaudible questions or equipment failure. Restate the affected question to everyone and allow equal time. For a service or safety issue, let the manager decide whether to pause, move or end the event.

An 80-minute run of show

Example: 7:00-8:20 p.m. with four rounds of ten questions. Open registration 20-30 minutes early. This schedule includes collection and answer review within each round.

Time	What happens	Min
6:30-7:00	Registration, seating, early orders and checks	-
7:00-7:06	Welcome, rules, prize and team numbers	6
7:06-7:19	Round 1: questions, collect, answers and score	13
7:19-7:32	Round 2: questions, collect, answers and score	13
7:32-7:42	Service break; announce the halfway standings	10
7:42-7:55	Round 3: questions, collect, answers and score	13
7:55-8:08	Round 4: questions, collect, answers and score	13
8:08-8:20	Check totals, resolve ties, award and close	12

A steady round rhythm

Allow roughly 8-9 minutes to read ten questions twice with writing time, then 1 minute for final checks and collection. Use the remaining 3-4 minutes for answers and scoring. Do not read answers until every sheet is collected.

For a larger room or a host who also scores, plan 90 minutes and advertise that finish. If you fall behind, shorten optional commentary rather than rushing writing time or dropping a promised round.

Rules everyone can follow

Read these before Round 1. Keep them consistent for the whole night.

Teams and answers

Two to six people per team. One answer sheet per team per round. Write the team number, game number and round number on every sheet. One clear answer per question; cross out any answer you are replacing.

Scoring

One point per correct answer. Ten points per round, forty per game. No wagers, negative points or speed bonuses. If a question asks for several parts, all parts are needed for the single point. No partial credit.

Fair play

No searching, outside help or viewing another team's sheet. Ask players to put phones and smartwatches away during questions. Allow agreed access aids that do not supply answers; handle necessary calls away from play.

Spelling and disputes

Accept an unmistakable intended answer, ordinary spelling variants and the alternatives in the key. A surname is enough when identity is clear. Conflicting alternatives on one line do not earn a point. One team representative may raise a scoring concern privately before final results.

Prizes and tied scores

State the confirmed prize and any redemption limits before play. Use the assigned numerical tiebreaker, then the backup if necessary. Announce a shared-place and prize-sharing fallback before starting, in case both leave teams tied.

> If a question is materially wrong or ambiguous, remove it for every team and reduce the maximum score. Explain the correction calmly. Never change a rule only for the team that complains.

Host words you can use

Welcome

“Welcome to trivia at [venue]. I'm [host]. We have four rounds of ten questions and a break after Round 2. Each answer is worth one point. We expect to finish at [time]. Tonight's prize is [prize and terms].”

Before the first question

“Choose one writer and put your team number on each sheet. Teams can have two to six players. Please put away search devices during questions; speak with me privately about an access arrangement. I'll read every question twice.”

“Hand in one sheet after each round. Spelling is fine if your answer is clear. All parts are required when a question asks for more than one. Ask me about scoring before the final results. Tied teams use a closest-number question, then a backup; [state prize-sharing fallback].”

Collect and review

“That is question ten. You have one minute to check your answers. Please leave one clear answer on each line. Pens down now; [collection method]. I'll read the answers once all sheets are in.”

Break and finish

“We are halfway through. We'll restart at [time]. This is a good moment to order and stretch; please keep the staff routes clear.”

“Our final scores are [results]. Thank you to every team and the staff. Congratulations to [winner]. Our next confirmed night is [date and time]. Please leave answer sheets with us and take your belongings.”

Score calmly. Resolve fairly.

Collect before revealing

Ask the same team member to hand in each sheet. Check the team, game and round fields. Count sheets before reading answers. Keep late sheets separate and apply the announced deadline consistently.

Mark and record

Use the key for the chosen game. Mark each answer, total the round out of ten, then enter that number on the scoreboard. Have the scorer initial the sheet. Keep all marked sheets until final results are settled.

Check the arithmetic

After Round 2, announce the top teams and their totals without sharing private information. At the end, add all four round totals and check the leading teams twice. The regular maximum is 40 unless a question was removed for everyone.

Hear a challenge once

Ask the team representative which question and why. Review the exact wording, written answer and key. If needed, pause and consult a reliable reference privately. Apply any correction to every affected team and announce the revised score.

Run a numerical tie

Only tied teams answer. Read the assigned primary question from page 31, including units. Allow 30 seconds and collect all estimates before revealing the answer. Closest absolute difference wins, whether above or below; an exact answer has a difference of zero.

Use the backup only when needed

If differences are equal, use the assigned backup with the teams still tied. If that also ties, apply the shared-place and prize-sharing fallback announced at the start. Record the result. Do not invent a new deciding rule under pressure.

Promote once. Improve each time.

A ready-to-adapt announcement

“Trivia night at [venue], [date], [start-finish]. Four general-knowledge rounds, teams of two to six and [confirmed prize]. Free entry. Arrive by [time]; [booking or walk-in details]. [Age policy, address and access contact].”

Replace every bracket before posting. Confirm the date, prize, seating and booking method first. Avoid promises of a full room, guaranteed revenue or an ongoing weekly event until the venue has committed.

A short reminder

“Trivia is on at [venue] this [day] at [time]. Bring a team or ask us about joining one. [Confirmed availability and booking details]. Please arrive [minutes] early so we can start together.”

Know the cost of one night

Beforehand, note host time/pay, extra staffing, prize cost, printing and equipment. Afterward, compare the night with a similar normal service period. Count event costs and contribution margin, not just gross sales. Use page 37 to record the result.

Repeat thoughtfully

Record which game you used and who hosted. Use a different complete game next time so regulars do not see the same answers. After four games, obtain or prepare a fresh, checked set before advertising new questions.

Ask separately before adding guests to a future-event mailing list. The registration sheet needs only a team name and player count; it is not permission for marketing contact.

Choose a game. Print a packet.

Each packet is five pages: four host question pages and one separate answer key. Every game contains 40 questions. Use the entire packet for one event.

Game 01 / pages 11-15

Around the World / Food and Drink / Screen and Story / Science and Nature

Game 02 / pages 16-20

Places and Landmarks / At the Table / Music and Literature / Numbers and Games

Game 03 / pages 21-25

American Places / Kitchen Basics / Animals Big and Small / Sports Equipment

Game 04 / pages 26-30

History Milestones / Restaurant Vocabulary / Stage and Theater / Color Light and Sound

Print only what you need

Host: rules (6), scripts (7), one game packet and tiebreakers (31). Scorer: one scoreboard (33). Each team: four answer sheets (32), one for each round. Venue: registration (34), checklist (35), event brief (36) and debrief (37) as needed.

Use US Letter paper at actual size. Print team answer sheets single-sided for separate collection. The six forms have white backgrounds to save ink. Host pages and keys stay off guest tables.

Around the World

Ten questions. One point each. Read every question twice.

01 What is the capital city of France?

02 Which ocean lies directly east of Africa and west of Australia?

03 Which country is home to the city of Kyoto?

04 What is the largest hot desert on Earth?

05 Which river flows through London?

06 In which country would you find Machu Picchu?

07 Which US state is nicknamed the Aloha State?

08 What currency is used in the United Kingdom?

09 Which mountain range forms a natural boundary between France and Spain?

10 What is the capital city of Canada?

Game 01 answer key: page 15.
Collect all sheets before reading answers.

Food and Drink

Ten questions. One point each. Read every question twice.

01 Which fruit is the main ingredient in guacamole?

02 What type of pasta is shaped like small rice grains?

03 Which bean is traditionally used to make hummus?

04 What is the main spirit in a classic margarita?

05 Which spice gives many traditional paella recipes their yellow color?

06 Tofu is made primarily from which beans?

07 Which Italian dessert has a name that translates roughly as pick me up?

08 What French culinary term means having ingredients prepared and in place before cooking?

09 Which nut is traditionally used in pesto alla genovese?

10 What is the Japanese name for the savory taste recognized as a basic taste?

Game 01 answer key: page 15.
Collect all sheets before reading answers.

Screen and Story

Ten questions. One point each. Read every question twice.

01 What is the name of the cowboy toy voiced by Tom Hanks in Toy Story?

02 Which fictional detective lives at 221B Baker Street?

03 In The Lion King, what is the name of Simba's father?

04 Which author wrote Pride and Prejudice?

05 Which 1985 movie features a time machine built from a DeLorean?

06 What surname is shared by the animated characters Homer, Marge, Bart, Lisa and Maggie?

07 Which actor played Jack Dawson in the 1997 film Titanic?

08 In The Lord of the Rings, what is the name of Frodo's gardener and companion?

09 Which fictional country is the home of Marvel's Black Panther?

10 Who wrote the novel Frankenstein?

Game 01 answer key: page 15.
Collect all sheets before reading answers.

Science and Nature

Ten questions. One point each. Read every question twice.

01 Which planet is commonly called the Red Planet?

02 What gas do humans need to breathe to support cellular respiration?

03 What is the chemical symbol for gold?

04 How many legs does an adult insect normally have?

05 What force keeps planets in orbit around the Sun?

06 Which organ pumps blood around the human body?

07 What is the process by which liquid water changes into water vapor at its surface?

08 Which part of a flowering plant typically absorbs water from the soil?

09 What is the hardest naturally occurring mineral on the Mohs scale?

10 What is the term for an animal that eats both plants and animals?

Game 01 answer key: page 15.
Collect all sheets before reading answers.

Game 01 answer key

One point per answer. All listed parts required. Total: 40.

Round 1
Around the World

01 Paris
02 Indian Ocean
03 Japan
04 Sahara
05 Thames
06 Peru
07 Hawaii
08 Pound sterling; accept British pound
09 Pyrenees
10 Ottawa

Round 2
Food and Drink

01 Avocado
02 Orzo
03 Chickpea; accept garbanzo bean
04 Tequila
05 Saffron
06 Soybeans
07 Tiramisu
08 Mise en place
09 Pine nut
10 Umami

Round 3
Screen and Story

01 Woody
02 Sherlock Holmes
03 Mufasa
04 Jane Austen
05 Back to the Future
06 Simpson
07 Leonardo DiCaprio
08 Samwise Gamgee; accept Sam
09 Wakanda
10 Mary Shelley

Round 4
Science and Nature

01 Mars
02 Oxygen
03 Au
04 Six
05 Gravity
06 Heart
07 Evaporation
08 Roots
09 Diamond
10 Omnivore

Accept clear spelling variants. Keep marked sheets until final results are settled; see the scoring process on page 8.

Places and Landmarks

Ten questions. One point each. Read every question twice.

01 In which city is the Colosseum?

02 Which country has a maple leaf on its national flag?

03 What is the capital city of Australia?

04 Which US state contains the Grand Canyon?

05 Which continent is home to the South Pole?

06 Which country is home to the Taj Mahal?

07 Which European city is famous for canals and gondolas?

08 What is the largest island in the Mediterranean Sea?

09 Which strait separates southern Spain from northern Morocco?

10 What is the capital city of New Zealand?

Game 02 answer key: page 20.
Collect all sheets before reading answers.

At the Table

Ten questions. One point each. Read every question twice.

01 What fruit is dried to make a raisin?

02 Which grain is used to make traditional risotto?

03 What is the main ingredient in sauerkraut?

04 Which herb is the main green ingredient in a classic mojito?

05 Which pastry is used to make profiteroles?

06 What espresso-based coffee is traditionally made by pouring hot water over espresso?

07 Which cheese is traditionally used in a Greek salad?

08 Bibimbap is a rice dish from which national cuisine?

09 What is the French name for a bundle of herbs used to flavor stock or soup?

10 What is the name of the browning reaction between amino acids and reducing sugars during cooking?

Game 02 answer key: page 20.
Collect all sheets before reading answers.

Music and Literature

Ten questions. One point each. Read every question twice.

01 How many strings does a standard violin have?

02 Who wrote Romeo and Juliet?

03 Which band released the album Abbey Road?

04 Which instrument has black and white keys and strings struck by hammers?

05 What is the name of the hobbit played by Elijah Wood in The Lord of the Rings films?

06 Which singer was born Farrokh Bulsara?

07 Who wrote The Hobbit?

08 What musical term means gradually getting louder?

09 Who wrote the novel 1984?

10 Which composer wrote The Four Seasons violin concertos?

Game 02 answer key: page 20.
Collect all sheets before reading answers.

Numbers and Games

Ten questions. One point each. Read every question twice.

01 How many sides does a hexagon have?

02 How many cards are in a standard playing card deck without jokers?

03 What is the next prime number after 7?

04 How many points is a touchdown worth before any conversion attempt in American football?

05 In chess, which piece moves in an L shape?

06 What is the sum of the interior angles of a triangle in Euclidean geometry?

07 Which Olympic racket sport uses a shuttlecock?

08 In the standard English-language edition of Scrabble, what is the face value of a Q tile?

09 How many faces does a cube have?

10 What is the probability of rolling a six on one roll of a fair six-sided die, expressed as a fraction?

Game 02 answer key: page 20.
Collect all sheets before reading answers.

Game 02 answer key

One point per answer. All listed parts required. Total: 40.

Round 1
Places and Landmarks

01 Rome
02 Canada
03 Canberra
04 Arizona
05 Antarctica
06 India
07 Venice
08 Sicily
09 Strait of Gibraltar
10 Wellington

Round 2
At the Table

01 Grape
02 Rice
03 Cabbage
04 Mint
05 Choux pastry
06 Americano; accept caffe Americano
07 Feta
08 Korean; accept Korea or South Korea
09 Bouquet garni
10 Maillard reaction

Round 3
Music and Literature

01 Four
02 William Shakespeare
03 The Beatles
04 Piano
05 Frodo Baggins; accept Frodo
06 Freddie Mercury
07 J. R. R. Tolkien; accept Tolkien
08 Crescendo
09 George Orwell
10 Antonio Vivaldi; accept Vivaldi

Round 4
Numbers and Games

01 Six
02 52
03 11
04 Six
05 Knight
06 180 degrees
07 Badminton
08 10 points
09 Six
10 1/6; accept one in six

Accept clear spelling variants. Keep marked sheets until final results are settled; see the scoring process on page 8.

American Places

Ten questions. One point each. Read every question twice.

01 Which US city is nicknamed the Big Apple?

02 What is the capital of California?

03 Which US state is known as the Sunshine State?

04 Which US state contains Mount Rushmore?

05 In which US city is the Space Needle?

06 What is the capital of Texas?

07 Which US state contains the city of Honolulu?

08 Which US city is famous for the French Quarter?

09 What is the capital of Massachusetts?

10 Which US state borders only one other US state?

Game 03 answer key: page 25.
Collect all sheets before reading answers.

Kitchen Basics

Ten questions. One point each. Read every question twice.

01 What bowl-shaped kitchen tool with holes drains cooked pasta?

02 What cooking method means cooking food in gently bubbling liquid below a full boil?

03 What are small cubes of toasted or fried bread often added to salads called?

04 Which vegetable is caramelized for the French soup traditionally topped with bread and melted cheese?

05 Which ingredient makes a traditional meringue foam when beaten?

06 What general cooking term means cutting food into uniform cubes?

07 What is the process of soaking food in a seasoned liquid before cooking called?

08 Which tool removes the colored outer peel of a lemon in fine shreds?

09 What cooking method briefly boils food, often followed by rapid cooling in ice water?

10 What is a mixture of flour and fat cooked together to thicken a sauce called?

Game 03 answer key: page 25.
Collect all sheets before reading answers.

Animals Big and Small

Ten questions. One point each. Read every question twice.

01 What is the tallest living land animal?

02 What is the largest living animal species?

03 What black and white bear is known for eating bamboo?

04 What is a baby goat called?

05 Which egg-laying mammal has a ducklike bill?

06 Which bird is commonly associated with delivering babies in folklore?

07 Which albatross species is famous for the largest wingspan of any living bird?

08 What is the name for a group of lions?

09 What is the only mammal group capable of sustained powered flight?

10 What is a young frog in its aquatic larval stage called?

Game 03 answer key: page 25.
Collect all sheets before reading answers.

Sports Equipment

Ten questions. One point each. Read every question twice.

01 What implement does an archer use to launch an arrow?

02 What implements do rowers use to propel a boat?

03 What handheld implement is used to hit the ball in table tennis?

04 What protective headgear is worn by baseball batters?

05 What flying object is thrown toward a basket of chains to complete a hole?

06 What blade-equipped footwear is used in ice hockey?

07 Which field sport uses a stick with a netted pocket to catch and carry a ball?

08 Which sliding winter sport uses a small sled ridden face down and head first?

09 What is the round rubber object used in ice hockey called?

10 In curling, what name is given to the target of concentric rings?

Game 03 answer key: page 25.
Collect all sheets before reading answers.

Game 03 answer key

One point per answer. All listed parts required. Total: 40.

Round 1
American Places

01 New York City
02 Sacramento
03 Florida
04 South Dakota
05 Seattle
06 Austin
07 Hawaii
08 New Orleans
09 Boston
10 Maine

Round 2
Kitchen Basics

01 Colander; accept strainer
02 Simmering
03 Croutons
04 Onion
05 Egg whites
06 Dicing; accept dice
07 Marinating
08 Zester; accept fine grater
09 Blanching
10 Roux

Round 3
Animals Big and Small

01 Giraffe
02 Blue whale
03 Giant panda; accept panda
04 Kid
05 Platypus
06 Stork
07 Wandering albatross; accept snowy albatross
08 Pride
09 Bats
10 Tadpole; accept polliwog

Round 4
Sports Equipment

01 Bow
02 Oars
03 Paddle; accept racket or bat
04 Batting helmet; accept helmet
05 Disc; accept flying disc
06 Ice skates
07 Lacrosse
08 Skeleton
09 Puck
10 House

Accept clear spelling variants. Keep marked sheets until final results are settled; see the scoring process on page 8.

History Milestones

Ten questions. One point each. Read every question twice.

01 In what year did the Berlin Wall fall?

02 In what year did humans first land on the Moon?

03 What ocean did the Titanic sink in during its 1912 voyage?

04 Which ancient civilization built the pyramids at Giza?

05 Which civilization built the ancient city of Machu Picchu?

06 Which city was buried by the eruption of Mount Vesuvius in 79 CE along with Herculaneum?

07 Who was the first president of the United States?

08 What document agreed in England in 1215 is also known as the Great Charter?

09 What ship carried the Pilgrims to New England in 1620?

10 Which French military leader was defeated at Waterloo in 1815?

Game 04 answer key: page 30.
Collect all sheets before reading answers.

Restaurant Vocabulary

Ten questions. One point each. Read every question twice.

01 What is the French menu term for ordering individual dishes separately rather than a set meal?

02 What two-word French term means a menu offered for one fixed price?

03 What is the restaurant term for a person who greets guests and manages seating?

04 What is the printed or digital list of available dishes called?

05 What is the term for a small complimentary bite sent by the chef before the meal?

06 What is the term for food prepared to be taken away rather than eaten at the restaurant?

07 What is the word for a booking that holds a restaurant table for a guest?

08 What restaurant employee is specially responsible for wine service and selection?

09 What is the term for a drink served before a meal to stimulate appetite?

10 What French term names a drink traditionally served after a meal?

Game 04 answer key: page 30.
Collect all sheets before reading answers.

Stage and Theater

Ten questions. One point each. Read every question twice.

01 What is the text of the spoken dialogue and stage directions in a play called?

02 What is the person who oversees the artistic staging of a play called?

03 What is the raised area where actors perform called?

04 What is a play's final rehearsal in full costume commonly called?

05 What is the audience area of a theater generally called?

06 What is a speech delivered by a character alone on stage that expresses private thoughts called?

07 What is the term for a brief spoken remark to the audience that other characters are not meant to hear?

08 What is the break between acts of a play called?

09 What term refers to objects handled by performers on stage?

10 What is the name for a written list of actors and their roles in a production?

Game 04 answer key: page 30.
Collect all sheets before reading answers.

Color Light and Sound

Ten questions. One point each. Read every question twice.

01 What are the three primary colors of light in the RGB model? Name all three.

02 What color results from combining equal red and green light in the additive RGB model?

03 What color results when all three primary colors of light combine at full intensity in the additive RGB model?

04 What unit is used to measure sound frequency?

05 What is a reflected sound heard after the original sound called?

06 What term describes sound with a frequency above the typical upper limit of human hearing?

07 What term describes sound with a frequency below the typical lower limit of human hearing?

08 What part of the electromagnetic spectrum lies just beyond violet visible light?

09 What part of the electromagnetic spectrum lies just beyond red visible light?

10 What term describes the change in observed frequency caused by relative motion between a source and observer?

Game 04 answer key: page 30.
Collect all sheets before reading answers.

Game 04 answer key

One point per answer. All listed parts required. Total: 40.

Round 1
History Milestones

01 1989
02 1969
03 Atlantic Ocean; accept North Atlantic
04 Ancient Egyptians; accept Egyptians
05 Inca; accept Inca Empire
06 Pompeii
07 George Washington
08 Magna Carta
09 Mayflower
10 Napoleon Bonaparte; accept Napoleon

Round 2
Restaurant Vocabulary

01 A la carte
02 Prix fixe
03 Host; accept hostess or maitre d'
04 Menu
05 Amuse-bouche
06 Takeout; accept takeaway or to-go
07 Reservation
08 Sommelier; accept wine steward
09 Aperitif
10 Digestif

Round 3
Stage and Theater

01 Script
02 Director
03 Stage
04 Dress rehearsal
05 Auditorium; accept house
06 Soliloquy
07 Aside
08 Intermission; accept interval
09 Props; accept properties
10 Cast list

Round 4
Color Light and Sound

01 Red, green and blue; all required
02 Yellow
03 White
04 Hertz; accept Hz or cycles per second
05 Echo
06 Ultrasound; accept ultrasonic sound
07 Infrasound; accept infrasonic sound
08 Ultraviolet; accept UV
09 Infrared; accept IR
10 Doppler effect

Accept clear spelling variants. Keep marked sheets until final results are settled; see the scoring process on page 8.

Eight numerical tiebreakers

Thirty seconds. One written estimate per tied team. Closest absolute difference wins. Use the backup only if the primary leaves a tie. These eight extras do not count toward the 160 regular questions.

Game 01

Primary: How many minutes are in seven 24-hour days? Answer: 10,080.

Backup: How many inches are in one statute mile? Answer: 63,360.

Game 02

Primary: Counting all sizes, how many squares are formed by the grid lines of an 8 by 8 chessboard? Answer: 204.

Backup: How many dots are on all 28 tiles in a standard double-six domino set? Answer: 168.

Game 03

Primary: How many seconds are in exactly 24 hours? Answer: 86,400.

Backup: How many minutes are in 365 days of 24 hours each? Answer: 525,600.

Game 04

Primary: How many centimeters are in three kilometers? Answer: 300,000.

Backup: How many millimeters are in twelve meters? Answer: 12,000.

Check: 204 = 1 squared + 2 squared + ... + 8 squared. For dominoes, each number 0-6 appears eight times across all tile ends: 8 x (0+1+2+3+4+5+6) = 168.

Team answer sheet

Team no. _____ Team name _____

Game _____ Round _____ Date _____

One clear answer per line. Cross out any answer you replace.

Question	Your answer
01	
02	
03	
04	
05	
06	
07	
08	
09	
10	

For the scorer: round score _____ / 10 Initials _____

Team captain: keep this sheet face down until collection.
Host: collect every team's sheet before revealing answers.

Host scoreboard

Date _____ Game _____ Scorer _____

No.	Team name	R1	R2	R3	R4	Total
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						

Each round: /10. Total: /40. If a question is removed for everyone, note the new maximum here: _____

Tie result / prize awarded / corrections:

Team registration

Date _____ Host _____ Game _____

Assign a team number and confirm two to six players. Do not put phone numbers, email addresses or private access notes on this sheet.

No.	Team name	Players	Table
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			

Teams registered _____ Players present _____

Walk-in seats available _____ Venue limit checked [ ]

Ready-to-host checklist

Date _____ Host _____ Manager _____

Before guests arrive

- ☐ Date, finish time, capacity, staffing and prize confirmed
- ☐ Game and answer key read aloud; pronunciation checked
- ☐ Two assigned tiebreakers reserved; sharing fallback agreed
- ☐ Four answer sheets per team, spare sheets and pens ready
- ☐ Microphone, timer and hearing checked at every table
- ☐ Exits, service routes and accessible paths clear
- ☐ Answer keys hidden; manager and floor lead briefed

At opening and closing

- ☐ Team numbers assigned; rules and prize terms announced
- ☐ Every round collected before answers are revealed
- ☐ Final totals checked; corrections and ties recorded
- ☐ Prize awarded; next date stated only if confirmed
- ☐ Forms stored or disposed of appropriately; debrief completed

Owner event brief

Venue / date / game:

Start / finish / guest arrival time:

Manager / host / scorer / floor lead:

Team limit / table plan / age policy / access contact:

Entry and booking details:

Prize and redemption terms / shared-place fallback:

Service break / collection method / changes to announce:

All details checked by _____ Date _____

Keep the next night simple

Date _____ Game _____ Host _____

Teams _____ Players _____ Actual finish _____

Event cost	Planned	Actual
Host / extra staff		
Prize / printing		
Equipment / other		
Total event costs		

What helped service or kept guests engaged?

Question, scoring or timing issue to fix:

One change for next time / person responsible:

Next confirmed date and unused game:

Used games: [ ] 01 [ ] 02 [ ] 03 [ ] 04

Fresh checked questions needed after all four are used.

Ready for your first night?

What this edition includes

A concise restaurant entertainment kit: four complete games, sixteen rounds, 160 regular questions, four separate answer keys, eight numerical tiebreakers and six reusable operating forms. No extra software or recorded media is needed.

A practical standard

Read the chosen packet before hosting. Allow clear answer variants, apply the same rules to every team and pause if a question needs checking. If you replace a question, write and verify its answer before the event and update the host key.

Use only the pages you need

Keep host questions, keys and numerical answers out of guest view until the right moment. Print fresh team sheets for each round. Keep registration data minimal and dispose of unnecessary copies after the event.

Reference checks

Selected references and arithmetic checks support the specific facts noted below. They are useful starting points for resolving a challenge; they are not sponsors of this kit.

Film detail: Back to the Future (1985)
https://www.backtothefuture.com/movies/backtothefuture1

Coffee preparation: Americano and long black
https://www.lavazzausa.com/en/recipes-and-coffee-hacks/how-to-make-long-black-coffee

Wandering albatross wingspan: British Antarctic Survey
https://www.bas.ac.uk/news/albatrosses-fine-tuned-to-wind-conditions/

Unit conversion: statute mile, NIST
https://www.nist.gov/pml/us-surveyfoot/revised-unit-conversion-factors

63Labs / Concise edition / October 2026
Entertainment should feel welcoming, clear and easy to join.

Open Mics Host Kit

Host your next open mic night.

Music / comedy / poetry / spoken word

A practical operating guide for restaurant, cafe and bar owners. Plan a welcoming night, keep the lineup moving, and make the next event easier.



Host scripts, schedules and 15 reusable printables.
Print only what your venue needs.

Start here

Run a small-room open mic with a clear format, a fair lineup and a predictable finish. This kit is for the venue and host; performers bring their own material.

Section	Pages
Quick start and format choices	3-5
People, room, equipment and soundcheck	6-9
Sign-ups, lineup and host scripts	10-13
Welcome, safety, rights and recording	14-16
Promotion, budget and repeat events	17-19
Print guide	20
Fifteen reusable operating printables	21-35
Source notes and final readiness check	36

The starting format

Try a 90-minute mixed open mic: 12 acts, up to 4 minutes each, plus 1-minute changeovers. Reserve time for the welcome, a service break and closing. The minute-by-minute example is on page 5.

> Adapt every template before use. This is an operating toolkit, not a legal waiver, a music license, professional safety advice or a promise of attendance or revenue.

Plan your first night

Before you announce it

Choose the audience, date, room, start and finish time, age policy, sign-up method and set limit. Confirm the venue can host live performance and ask the manager to resolve permissions, sound restrictions, staffing and capacity first.

Keep the first version simple

Use one microphone and a small, tested sound system. Avoid drum kits, complex backing tracks, competitions and unplanned guest features until the team can handle them. A consistent finish matters more than fitting in one extra act.

Make four decisions together

The manager owns the room and safety. The host owns the running order. The sound lead controls the system. The floor lead protects service and access. In a small room people can combine roles, but no role should be silently unassigned.

Work backward from opening

One week out: confirm details and promote. One day out: brief staff, check equipment and print sheets. One hour out: set the room and soundcheck. Thirty minutes out: open sign-ups. Five minutes out: confirm the first three acts.

Your minimum event packet

Bring the event brief (21), opening and soundcheck lists (22-23), public sign-up (24), performer cards (25), running order (26), timing cards (27) and debrief (33). Keep private forms with the host.

Choose the format

Use one shared time limit for a mixed night. For a single-artform event, choose a limit that fits the room and announce it before sign-ups open. These are planning starting points.

Format	Suggested start	Plan around
Music	5 minutes + 2 minutes to change	Solo or duo; specify inputs and permitted instruments. A song count is not a time limit.
Comedy	4 minutes + 1 minute to change	Clear audience/content policy; no targeting unwilling guests. Keep intros brief.
Poetry or spoken word	4 minutes + 1 minute to change	A stable reading light, adjustable mic and quiet listening area. Leave room for a breath.
Mixed night	4 minutes + 1 minute to change	Rotate styles where practical; use one clock and the same warning for everyone.

Publish the boundaries

Say whether originals, covers, backing tracks, groups and adult language are allowed. State age restrictions and whether the room is family-friendly. Do not describe a night as uncensored if venue rules still apply.

Add complexity later

For full bands or multi-input acts, plan a separate music night with a capable operator and longer changeovers. Reserve any featured set in advance and show it in the running order.

Fit the acts to the clock

Example only: a 7:00-8:30 p.m. mixed night with 12 acts. Each slot contains 4 minutes of performance and 1 minute to introduce and change performers.

Time	What happens	Minutes
6:30	Sign-ups and individual check-in open	-
6:50	Close the first lineup; confirm next acts	-
7:00-7:05	Welcome, boundaries and timing signal	5
7:05-7:35	Acts 1-6: six 5-minute slots	30
7:35-7:45	Service break and equipment reset	10
7:45-8:15	Acts 7-12: six 5-minute slots	30
8:15-8:25	Recovery buffer; no promised extra slots	10
8:25-8:30	Thank performers and close	5

Calculate capacity before inviting acts

Available slot minutes = event length minus welcome, break, closing and buffer. Divide by performance plus changeover time; round down. Here: (90 - 5 - 10 - 5 - 10) / (4 + 1) = 12 slots.

For music with a 5-minute set and 2-minute changeover, the same 60 slot minutes hold 8 acts, with 4 extra minutes left. Soundcheck happens before doors, not inside every set.

> The buffer absorbs delays. If it is unused, close early or offer a clearly optional extra slot using the published waitlist rule. Never extend the venue finish without manager approval.

Give each job an owner

Manager or venue lead

Confirms capacity, age policy, any admission terms, staffing, permissions and the finish time. Owns the decision to pause or end the event and the response to a safety concern. Brief the team on exits and the venue emergency plan.

Host and timekeeper

Checks names and introductions, builds a fair order, explains boundaries and timing, and keeps transitions short. If one person does both jobs, use a visible timer and prepare cue cards before opening.

Sound lead

Checks equipment, labels channels, agrees levels with the manager and operates all changes. Performers describe what they need; they do not rewire the venue system. A sound lead needs enough skill for the equipment being used.

Floor lead

Coordinates service, watches walkways and audience comfort, and receives private concerns. They alert the manager without forcing the performer or host to manage a confrontation alone.

Agree the hand signals

One minute left: show the printed card. Time up: show the stop card. Technical pause: host holds the next introduction. Safety pause: manager directs the host to stop. Rehearse where each person will stand and how to reach backup.

If you are short-staffed

Reduce the number of acts or simplify the format. Do not assign a busy server to watch the clock, mix sound and handle a packed section at the same time.

Set the room for listening

Make one obvious performance area

Face the microphone toward listeners, with speakers in front of the microphone and pointed away from it. Leave a clear approach, stable floor area and enough space for a seated performer. Follow the equipment instructions for placement.

Protect access and exits

Keep exits, accessible routes, service paths and emergency equipment clear. Route cables away from walkways; secure crossings with suitable cable protection. Keep liquids away from electrical gear and keep the audience off the equipment area.

Give guests a real choice

If the room allows, provide a quieter area away from the loudspeaker and a clear view for people who need it. Do not promise step-free access, accessible toilets or quiet seating until someone has checked the actual route and facilities.

Coordinate food and drink service

Ask the floor lead when orders, check-ins and table clearing are least disruptive. A planned break can help, but necessary service should continue. Tell guests how to order and where to step out for a conversation.

Check the room with someone speaking

Listen from the nearest and farthest seats, the service station and any neighboring space. Aim for intelligibility at a comfortable level rather than maximum volume. The manager sets the acceptable operating limit.

Write down the result

Use the service plan on page 28. Mark the microphone, speaker, host station, performer waiting area, exits and cable routes. Recheck when furniture moves.

Bring only what you can run

Basic spoken-word setup

A reliable dynamic microphone, compatible cable, stable adjustable stand, suitable PA speaker or venue system, and the correct mixer if needed. Add a second tested microphone or spare cable, a timer, reading light and printed host packet.

Music additions

Confirm instrument connections before the event. A vocal plus acoustic instrument may need a second channel, a DI box or a second microphone. Agree power, cables, stands and any monitor needs with the sound lead. Do not promise equipment you have not checked.

Backing tracks

Decide whether you can support them. If yes, require the file and a tested playback method before sign-ups close. Use a suitable wired connection where practical, turn off notifications and confirm rights for the intended use. Do not rely on a live internet stream.

A small kit that prevents delays

Spare compatible cables, batteries where required, tape suitable for the floor, cable covers where needed, pens, a clipboard, water in a safe location, and a printed channel list. Only use power distribution approved by the venue.

Know the limits

No unapproved mains wiring, overloaded outlets, improvised repairs or mystery adapters. Stop using damaged equipment. If the setup exceeds the operator's experience, simplify the event or bring in a qualified professional.

Before shutdown

Lower outputs and follow the manufacturer's power-down procedure. Count equipment, coil cables safely and note anything damaged. The usual practice is powered speakers on last and off first; follow the actual system instructions.

Run a calm soundcheck

1 Inspect before powering up

Check stands, connectors, cables, power and the path to the microphone. Keep drinks away. Set output levels low; connect only equipment the operator understands. Follow the system's setup and power sequence.

2 Test one input at a time

Have a performer speak or sing at their expected level, with the microphone at a usable height. Set input gain without clipping, then bring the output up gradually. Do not tap or blow into the microphone.

3 Listen from the seats

Check that words are clear at the back without becoming harsh at the front. If feedback starts, reduce the relevant level first. Check speaker and microphone position; avoid pointing a live microphone at a speaker or cupping its grille.

4 Test the hardest transition

Try the instrument or backing track with the most complex setup. Label the inputs. Save or note a safe starting setting. Agree who will mute channels before plugging, unplugging or moving equipment.

5 Confirm the performer experience

Ask whether the performer can hear what they need and see the timing cards. Confirm the route, stand height and any seating or reading-light request. Keep adjustments practical and private.

6 Keep a recovery option

Have the spare cable or microphone ready. For a failure, pause, mute the affected channel and let the sound lead diagnose it. If safe and suitable, switch to an unamplified spoken-word format; otherwise end or postpone affected sets.

Make sign-ups straightforward

Publish the process

State when and where sign-ups open, whether advance requests exist, the set limit and how remaining slots are assigned. Use a first-come list, a random draw or a clearly stated rotation. Pick one method before people arrive.

Keep the public sheet minimal

Ask only for stage name and performance type on page 24. Keep phone numbers, email, access requests and media choices off the public clipboard. Store individual performer cards with the host, out of audience view.

Confirm before promising a slot

Check the set length, equipment, age eligibility and content fit. Ask how to pronounce the stage name and whether the person wants a short introduction. Confirm any needs privately; do not request a diagnosis.

Close and post the order

Tell people when the first order is final and where they can see it. Mark checked-in acts on the running order. Announce only stage names and performance types, never private notes.

Use a visible waitlist rule

A waitlist is not a guaranteed set. If someone is absent, move to the next ready act. Return to the absent act only if time remains under the same published rule. Do not displace someone who waited for a last-minute friend of the host.

Ask separately about future contact

Event sign-up does not mean permission for a mailing list. Make any future-event opt-in separate and optional, say what will be sent and provide a way to stop it. Follow your local privacy requirements.

Run a fair lineup

Use the same clock for everyone

Start timing when the performance begins. Keep the introduction and standard changeover in the slot plan. Tell acts that spoken introductions, tuning and audience conversation within their set count toward their limit.

One minute left

Show the agreed card where the performer can see it. Do not flash lights unexpectedly or rely only on color. Offer an agreed accessible alternative, such as a spoken cue, before the set.

When time is up

Show the stop card. If the performer does not finish, the host steps in with a calm closing line. Avoid a surprise audio cut except where the manager or sound lead needs to stop an immediate problem.

Keep two acts ready

The host quietly checks the next performer and the one after them. Confirm equipment before calling the name. Explain any swap, and note it on the running order so the sound and floor leads share the same plan.

When the event is running late

Use recovery time first. Remove optional announcements, not someone's promised set without explanation. If a change is necessary, tell every affected performer before their turn and use the same rule consistently.

No secret queue advantages

Disclose reserved or featured slots in advance. Avoid pay-to-skip requests, hidden friend slots or audience-pressure contests. Ask before moving someone for an access need; solve the practical problem without publicly sharing the reason.

Open the night clearly

Fill every bracket before you read this. Keep the opening to about three minutes, then introduce the first act.

Welcome

“Good evening, and welcome to [event name] at [venue]. I'm [host]. Tonight we're sharing [formats]. First-time performers are welcome, and listening is part of the night too.”

How the lineup works

“Each act has [minutes]. I'll show a one-minute card, then a time-up card. Please help us give everyone their turn. The order is [location]. If you need to leave or change your setup, tell me before your slot.”

How we treat each other

“Please keep conversations low, silence alerts and let each act finish. No heckling, threats, harassment or unwanted touching. Don't record or photograph performers without permission. If you need help or something feels wrong, speak privately to [floor lead/location].”

How the room works

“You can order [method]. Our break is around [time], and we finish by [time]. The toilets are [location]. Please keep [route] clear. [Add only verified access information.]”

First introduction

“Our first performer is [stage name, pronunciation checked], sharing [short approved description]. Please welcome [stage name].”

> For a no-recording night, say “Tonight is a no-recording event.” Do not announce that all performers have agreed to recording unless each relevant permission has actually been obtained.

Keep useful lines ready

Between acts

“Thank you, [stage name]. Next up is [stage name]. We'll take a moment to adjust the microphone, then we'll begin.”

When a performer is absent

“We'll move to our next ready performer, [name]. If you've stepped away, please check back in with me.”

When time has run out

“Thank you, [name]. That's our time for this set. Let's give them a hand as we make room for our next performer.”

For a technical pause

“We're pausing briefly to fix the sound. Please keep the performance area clear while our sound lead checks it.”

For the service break

“We'll restart at [time]. This is a good moment to order or stretch. [Names of next two acts], please check in with me before we resume.”

To reset the room

“Please give this performer a listening room. Keep conversation low and let them finish their set.”

To close

“Thank you to every performer, listener and member of the venue team. Please [checkout/order detail]. Our next confirmed event is [date/details], or check [verified channel] for updates. Get home safely.”

Make the welcome practical

Describe the room honestly

Share verified entrance, seating, toilet and sound information before the event. Give a contact for access questions. If you cannot meet a request, say what is possible and work with the guest on an alternative; do not promise a fully accessible experience without checking.

Offer choices without spotlighting people

Ask privately about microphone height, a chair, a reading light, a clear route or another timing cue. Let performers use a stage name. Never introduce someone through their disability, identity or personal history unless they specifically asked you to.

Set boundaries around behavior

No threats, targeted harassment, slurs directed at people, unwanted contact or interruptions. The manager should apply the venue policy consistently. A performer can explore difficult subjects without making an unwilling guest part of the act.

Clarify the audience

Choose and advertise the age policy and content expectations. If you run an all-ages event, confirm the venue's safeguarding and alcohol-service arrangements separately. This kit is not a youth-event policy or parental permission form.

Give people a discreet route to help

Name the floor lead and show where to find them. Do not demand that someone explain a concern on stage. Allow guests to move seats or step out without being mocked or questioned publicly.

Ask for improvement

Use the optional feedback slips on page 31. Ask what made it easier to participate and what would help next time. Make no purchase, tip, social follow or feedback form a hidden condition of performing.

Respond without escalating

Low-level noise or an interruption

The host makes one calm room-wide request. The floor lead can then speak privately to the person if appropriate. Avoid a public argument, sarcasm or inviting the audience to take sides.

Harassment or a boundary crossing

Pause the set if needed. The manager applies the venue policy and checks on the affected person privately. Offer space and practical help. Do not pressure them to confront someone, accept an apology or continue performing.

An unsafe or impaired performer

Do not bring them on stage if they cannot use the area safely. The manager handles the conversation and support under venue procedures. Do not turn their condition into entertainment or promise another guest will take responsibility for them.

A threat, violence or urgent medical concern

Stop the event and use the venue emergency plan. Keep people away from danger; contact local emergency services when needed. Do not attempt physical restraint or a risky intervention. Follow instructions from trained staff and responders.

A technical failure or excessive sound

Pause, lower or mute the affected system and let the sound lead check it. The manager decides whether a safe, suitable fallback is possible. Unplugging unfamiliar powered equipment or making live repairs is not a host task.

Afterward

Write a factual, minimal record on page 32: time, observed behavior, action and who took over. Avoid speculation or diagnoses. Keep it secure, limit access and follow the venue's retention policy. Review what should change before another event.

Check rights before the show

The following is general planning guidance. Rules vary by country, location, repertoire and use. Ask the venue's licensing adviser or a qualified local professional to resolve uncertainty before you proceed.

Live music

For U.S. venues, confirm permissions for the music actually performed. BMI explains that its license covers its own repertoire; another organization's license does not automatically cover BMI music. A background-music service may not cover live performance. “Original songs only” is not a substitute for checking who controls the rights. [1]

Recording and posting are separate decisions

A song and a recording can be separate protected works. Before filming, livestreaming, posting clips or using backing tracks, check every intended use and the relevant rights. A performer agreeing to appear on camera does not by itself clear someone else's composition or recording. [2]

A workable default

Start with no venue recording or livestream. Ask the audience not to record. If you later want media, identify the operator, content, platforms and intended use, then obtain appropriate permissions before recording or sharing. Do not treat the sign-up sheet as a blanket release.

Use the forms carefully

Page 25 records preferences only; it is not a legal release. Page 34 tracks the checks and unresolved questions. Do not collect sensitive information you do not need. Keep any actual permissions in secure venue records.

> Also check local event, occupancy, noise, alcohol-service, insurance and accessibility requirements with the venue. The sources on page 36 explain U.S. music rights; they do not approve your specific event.

Promote a clear invitation

Replace every bracket and verify the details before publishing. Choose a single place for changes or cancellation notices. Never promise a guaranteed slot when capacity is limited.

Short listing

“Open Mic at [venue] - [date], [start-finish]. [Music/comedy/poetry/spoken word]. Sign-ups open [time/method]. Sets are up to [minutes], with [number] planned slots; [assignment rule]. [Entry details and age policy]. Performers and listeners welcome. Access questions and updates: [contact/link].”

Social caption

“Bring a song, a poem, a short set or your listening ears. [Venue] hosts [event] on [date] at [time]. [Allowed formats]. [Minutes] per act; sign up [how/when]. [Entry details]. [Age/content policy]. Please read the equipment and recording notes at [link].”

Reminder

“Open Mic is [day] at [venue]. Sign-ups: [time]. First act: [time]. Finish: [time]. Bring [required equipment/material]. We provide [verified equipment]. [Waitlist rule]. Latest details: [link].”

Change or cancellation

“Update for [event/date]: [specific change]. [What existing performers/guests should do]. [Any applicable admission refund or rebooking details confirmed by the venue]. Questions: [contact].”

Ask before using a performer's photo, name or quote in promotion. Replace old posters and update every channel when a material detail changes. Page 35 is a fill-in venue notice.

Know the cost of a night

Illustrative planning example only, in USD. These figures are invented for arithmetic, not market rates, expected earnings or a recommended selling price. Replace them with actual quotes and venue data.

Incremental event cost	Example
Host fee	$90
Extra staffing	$60
Equipment rental	$35
Printing and promotion	$15
Allocated licensing and other costs	$20
Contingency	$20
Total incremental event cost	$240

Use contribution, not gross sales

Suppose additional sales attributable to the event are $400 and the related variable food, drink and payment costs are $160. Additional contribution is $400 - $160 = $240. Against $240 of event costs, the estimated incremental result is $0.

If contribution is $8 per genuinely additional guest, $240 / $8 = 30 additional guests to cover the event costs. That is arithmetic, not a forecast. Existing customers who would have visited anyway are not automatically additional guests.

Avoid a misleading success story

Track ordinary comparable-night sales, seating displaced by the event, staff workload, refunds, discounts and actual costs. Use ticket or sponsor income only when confirmed; do not count it twice. Licensing and staffing costs may differ substantially from this example.

Use page 30 to compare planned and actual amounts. Decide how much the venue can spend on a test before committing.

Make the next night easier

Finish the evening properly

Thank the team, confirm equipment is complete and secure the performer cards. Pay any agreed fees through the venue process. Record unresolved concerns for the manager, not in the public event recap.

Review within a day or two

Compare the planned and actual finish, slots offered and used, estimated attendance, service impact and incremental costs. Use the debrief on page 33. Ask the staff what was difficult; a full room alone does not prove the format worked.

Change one or two things

If the show drifted late, shorten announcements or reduce slots. If service suffered, move the break or adjust staffing. If one format needed extra setup, give it a dedicated night. Record the change so the next host inherits it.

Build repeat participation fairly

Rotate opportunities according to the published rule. Welcome first-timers without guaranteeing a slot you cannot provide. If you reserve space for returning or new performers, say how many spots are reserved before sign-ups open.

Share only what you have permission to share

A recap can simply thank the room and announce the next confirmed date. Post names, quotes, images or recordings only under the relevant permissions. Do not publish audience contact details or private feedback.

Decide whether to repeat

Continue when the venue can sustain the cost, staff load and atmosphere. Change the format or pause if safety, permissions or service problems remain unresolved. Confirm the next event before advertising it.

Print only what you need

Pages 21-35 are reusable worksheets. Print at actual size on US Letter, or use fit-to-page on A4. The worksheet pages use a white background to reduce ink. Print single-sided for clipboards.

Page	Printable	How to use it
21	Event brief	One per event; manager and host
22	Opening checklist	One per event; named owners
23	Soundcheck checklist	One per setup; sound lead
24	Public performer sign-up	Twelve names per sheet; no contacts
25	Performer check-in card	One per act; keep private
26	Host running order	Twelve slots; host and sound lead
27	Timing cards	Cut into two; reuse
28	Room and service plan	One per layout
29	Promotion planner	One per event campaign
30	Event budget	One per event; planned and actual
31	Feedback slips	Two per page; optional
32	Incident record	Only when needed; keep secure
33	Event debrief	One per event; manager and team
34	Rights and media check log	Resolve before affected use
35	Venue information notice	Complete and post for guests

Keep public sheets separate from private records. Retain only what the venue needs, with an appropriate retention period. Page 25 is a planning card, not a legal release.

Event brief

Event name / date / venue

Doors / sign-up opens / sign-up closes / first act / finish

Formats / age and content policy / entry details

Minutes per act / changeover / slot count / waitlist rule

Manager / host / sound lead / floor lead and how to reach them

Equipment supplied / restrictions / access contact

Recording policy / permission checks / cancellation channel

Manager ready-to-run decision: _____ Date: _____

Opening checklist

Event/date: _____ Manager: _____

- ☐ Event brief completed; staffing and finish time agreed
- ☐ Capacity, local requirements and permissions checked
- ☐ Exits, accessible routes and service paths clear
- ☐ Stable performance area, seating and microphone route checked
- ☐ Cables protected; electrical setup checked by sound lead
- ☐ Equipment and backup tested; levels agreed with manager
- ☐ Age, content, sign-up and recording policies visible
- ☐ First three acts checked in; names and setup confirmed
- ☐ Timer, cue cards, pens and printed running order ready
- ☐ Host, sound and floor leads know pause and emergency signals
- ☐ Toilets, access information and help contact verified
- ☐ Order/service plan and planned break agreed with floor team

Unresolved item / owner / decision before opening

Ready to open? Yes / No Manager initials: _____

Soundcheck checklist

Date: _____ Operator: _____ Setup: _____

- ☐ Inspect power, stands, cables and equipment; remove damaged items
- ☐ Confirm microphone position and safe speaker placement
- ☐ Lower outputs; follow the system power-on sequence
- ☐ Check each input at expected performance level without clipping
- ☐ Listen from front, back and service area; agree operating level
- ☐ Test each instrument/backing-track connection that is permitted
- ☐ Confirm who mutes channels before connection or position changes
- ☐ Check timer visibility, stand height, chair and reading light
- ☐ Test spare microphone/cable; agree a safe fallback
- ☐ Record the shutdown procedure and equipment return owner

Channel	Source / performer	Connection / starting notes
1		
2		
3		

Issue to resolve before first act / owner

Performer sign-up

Event/date: _____ Sign-ups close: _____

Set limit: _____ minutes Slots: _____ Order method: _____

Stage names only here. Give contact details, access requests and recording preferences privately to the host. Signing up does not guarantee a slot.

No.	Stage name	Type of performance	Host check
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			

Waitlist rule: _____
_____

Host: _____ Where to check the order: _____

Performer check-in

Keep with the host. This card records event details and preferences; it is not a legal release or a transfer of rights.

Event/date / stage name / pronunciation

Format / brief introduction you want the host to use

Set minutes / instruments / inputs / backing-track needs

Optional access or timing request (no diagnosis needed)

Media preference for this event

☐ No venue photo, video or audio recording of my set

☐ Please ask me privately about a specific media proposal first

Neither choice authorizes recording or posting. Any later permission must identify the use and be handled separately; music and other rights may also need clearance.

Optional future-event contact

I want [venue] to send open-mic date updates by: email / text
Contact: _____
How to stop updates: _____

Leave blank if you do not want updates. The venue must complete the sender and stop method before offering this option.

Host check: time signal, boundaries and equipment agreed / initials

Host running order

Date: _____ First act: _____ Hard finish: _____

Set limit: _____ Changeover: _____ Break: _____

Slot	Start	Stage name	Setup / cue	Ready
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				

Waitlist (stage names only, in agreed order)

Approved changes / host and sound lead informed

Keep access details and private concerns off any posted copy.

Timing cards

Show these where the performer can see them. Agree an alternative cue privately when needed. Cut along the middle line.

ONE MINUTE

Please bring your set toward its close.

TIME IS UP

Thank you. Please finish your set now.

Timing method: begin at the start of the performance.
The host handles overruns calmly and consistently.

Room and service plan

Event/date: _____ Floor lead: _____

Sketch: mic, speakers, seats, host desk, waiting area, exits, accessible routes and service/cable paths. Check actual conditions.

Ordering method / service break / check or last-order timing

Quieter seating / verified access information / help point

Floor lead to host signal / who covers a concern

Layout or service problem to fix before opening

Promotion planner

Confirmed event name / date / venue / address / times

Formats / set limit / slot method / sign-up instructions

Entry and age details / equipment / recording policy / access contact

Channel	Post date	Owner	Updated if changed
Venue notice			
Website/listing			
Social post			
Reminder			

Approved short description and call to action

Where the latest updates and cancellation notice will live

Before posting: remove brackets; check every date, link and claim. Use performer images or quotes only with the relevant permission.

Event budget

Event/date: _____ Currency: _____

Incremental cost	Planned	Actual
Host / sound fees		
Extra staffing		
Equipment / transport		
Promotion / printing		
Licensing allocation / other		
Contingency / unexpected		
TOTAL COST (A)		

Incremental contribution	Planned	Actual
Additional sales attributable to event		
Less related variable costs		
= Sales contribution (B)		
Net admission / confirmed sponsor (C)		
RESULT: B + C - A		

Comparable-night baseline: _____ Additional guests: _____
Contribution per additional guest: ____ Cost to test: _____

Break-even additional guests = (A minus confirmed net non-sales contribution C) / contribution per additional guest. Round up; use only a positive contribution figure. If C covers A, no sales contribution is needed under these assumptions.

Include fees, discounts and refunds consistently. Do not count ordinary sales, gross revenue or sponsor income twice.

Guest and performer feedback

How was the open mic?

Date: _____ I attended as: listener / performer / staff

I could hear comfortably: Yes / Partly / No
The event felt welcoming: Yes / Partly / No
The timing and sign-up process were clear: Yes / Partly / No

One thing to keep

One thing to improve

Optional and anonymous. Please do not include private details about other people. For an urgent concern, speak to the venue manager.

How was the open mic?

Date: _____ I attended as: listener / performer / staff

I could hear comfortably: Yes / Partly / No
The event felt welcoming: Yes / Partly / No
The timing and sign-up process were clear: Yes / Partly / No

One thing to keep

One thing to improve

Optional and anonymous. Please do not include private details about other people. For an urgent concern, speak to the venue manager.

Incident record

Use the venue emergency plan first. This record is for necessary facts, not speculation. Store securely with access limited to people who need it.

Event/date / time / location / staff member completing record

What staff directly observed (separate any reported information)

Action taken / by whom / time / who assumed responsibility

Practical support offered / immediate outcome

Follow-up owner / deadline / venue record reference

Manager reviewed: _____ Date: _____
Stored at: _____ Retention review: _____

Collect only necessary personal details under the venue policy. Do not put this record on a public sign-up sheet or in a promotional recap.

Event debrief

Event/date: _____ Review date: _____

Measure	Planned	Actual
Start / finish		
Slots offered / performed		
Estimated attendance		
Incremental event result (page 30)		

What worked for performers and listeners

What affected service, access, sound or staff workload

Unresolved safety or permission issue / owner / next step

One or two changes / owner / completion date

Next step: Repeat / Change format / Pause
Next event confirmed? Yes / No Date if confirmed: _____

Invite future contact only from people who separately opted in. Do not publish private feedback or this internal review.

Rights and media check log

This is a planning record, not a license or release. Do not proceed with an unresolved use. Keep actual permissions and advice in secure venue records.

Venue/event / jurisdiction / responsible manager

Planned live formats / repertoire / backing tracks or other material

Licenses or other permissions checked / scope / expiry / record link

Any recording, stream or post: operator / material / platforms / purpose

People and rights needing permission / status / record location

Unresolved question / adviser or rights holder / next step / due date

Affected use approved to proceed? Yes / No
Responsible manager: _____ Date: _____

Performer participation alone is not permission to record or post. Check the intended use and third-party material separately.

Open mic information

Event name / venue / date

Sign-ups open / first act / break / finish

Formats / set limit / available slots / how the order is chosen

Entry details / age and content policy

Recording policy / equipment supplied / how to request help

Help make this a listening room

Keep conversations low. Let each act finish. No heckling, threats, harassment or unwanted contact. Keep the performance area and exits clear. Ask the host privately about a concern or access need.

Host / help point / latest updates and contact

Before you do it again

Keep these decisions current

- ☐ A named manager has resolved venue and permission questions
- ☐ The published format fits the available time and equipment
- ☐ Sign-up, waitlist and timing rules are visible and consistent
- ☐ Guests know the content, age, entry and recording policies
- ☐ Staff know how to pause, get help and handle service
- ☐ The next event reflects the last event's useful lessons

Official source notes

Checked 19 October 2026. The legal references below concern the United States. Check the appropriate local sources for events elsewhere, and recheck before changing how music or media is used.

[1] BMI - Music Licensing for Bars, Restaurants and other Food & Beverage Establishments. Its FAQ explains repertoire coverage, live music, personal streaming accounts and the limits of background-music services.

bmi.com/licensing/restaurant-bar-or-brewery

[2] U.S. Copyright Office - What Musicians Should Know about Copyright. Explains separate musical-work and recording rights, using others' work and checking each intended use.

copyright.gov/engage/musicians/

Use the kit as a working system

Keep a clean master, print fresh forms and update the brief each time. A strong open mic is a repeatable evening that respects performers, listeners and the people running the room.