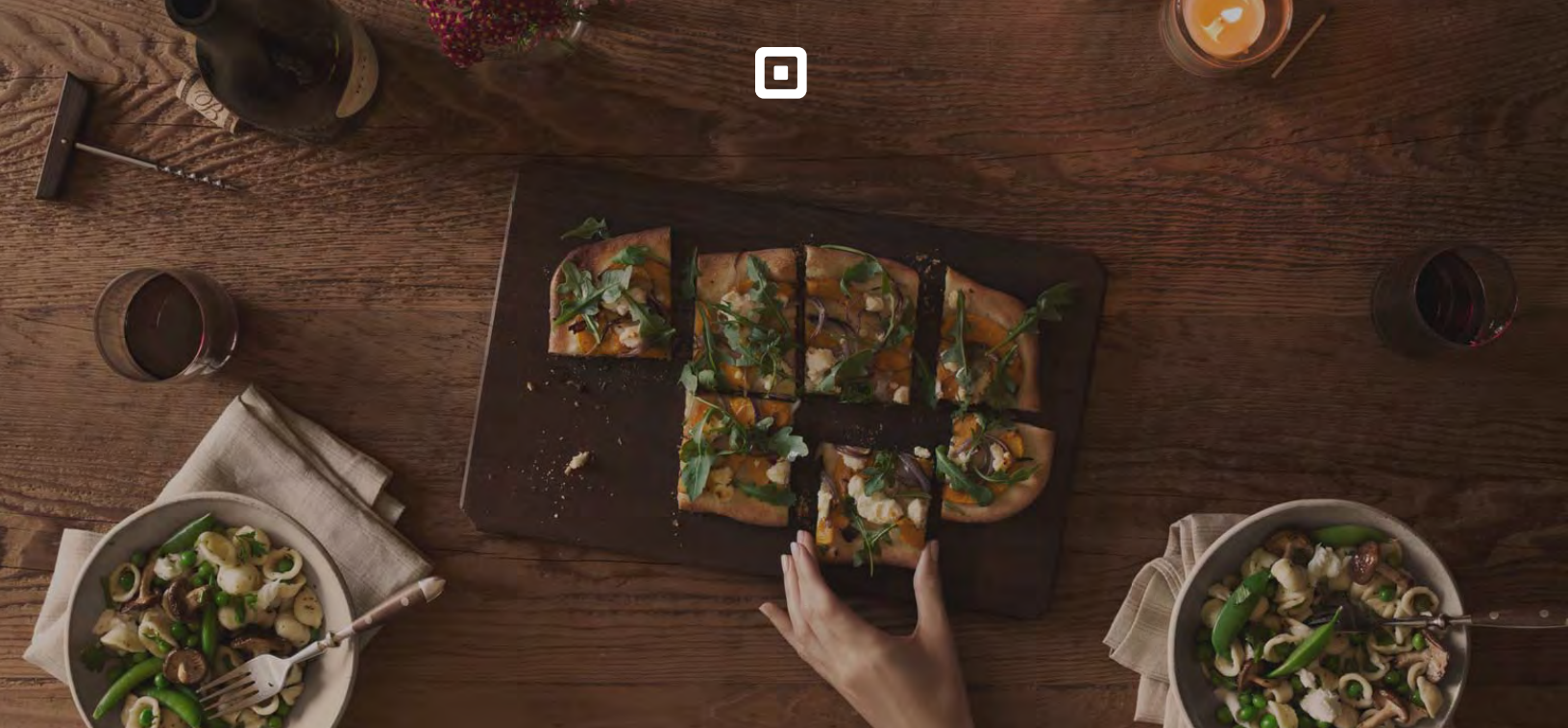


# SQUARE RESTAURANT GUIDES

## Maximize Your Soft Opening







**T**he soft-opening model is gaining popularity over grand openings, and for good reason. This e-book is designed to help you make your soft opening (and then ultimately your full-swing restaurant opening) as successful as possible. After all, you only have one chance to make a strong first impression. This e-book covers soft launch ideas for restaurants of all sizes, from large-scale restaurants to QSRs.

We take you through how to effectively preplan, manage the actual event, and incorporate what you learned from the soft open. Finally, we cover what to do post-launch when you're open to the public.

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## SOFT-OPENING VS. GRAND-OPENING

**F**rom challenges with rising rents and other costs to changes in culinary media, the restaurant landscape has changed in recent years. This means it's more important than ever for restaurant owners to make a great first impression on the community and journalists—starting with a well-planned and well-executed opening.

Why? A restaurant is a complicated operation with a lot of moving parts. The front-of-house and back-of-house need to work together as a well-oiled machine. You need to make sure dishes come out of the kitchen at the right time, your staff knows how to smoothly resolve conflicts, and guests leave full and satisfied.

Your staff might be brilliant chefs, servers, cooks, and bussers but if you're opening a new restaurant or another location, they likely haven't worked together before. If they're in a brand-new environment with an unfamiliar menu and point-of-sale system, they might need a little practice to get it right.

A restaurant soft opening acts as an important dress rehearsal before an official opening. A soft opening serves two main goals: testing operations and creating buzz. This way, once your restaurant opens to the public, everything runs more smoothly and you already have some fans as well as people who know about it.



## Soft-openings by Restaurant Type

The nature of a soft opening can depend on the type and size of the restaurant as well as your budget and your goals. We've outlined some ideas, based on restaurant types below:

### Large restaurants

Larger restaurants (200 to 250 seats) often have private dining spaces. If you fall into this category, consider having soft-launch events that are parties with cocktail-style food service, bite-size passed service, or family-style platters that allow mingling among guests

### Neighborhood restaurants

Restaurants with 40 to 60 seats can have family-style dinners or practice dinner service. We go into more detail below about different ways of structuring these events in terms of pricing, format, and guest list.

### Quick service restaurants

Since food at quality, casual QSRs is often inexpensive, soft launches usually involve discounts rather than giving the food away free. As with neighborhood restaurants, it's a good idea to get the word out to people who live and work in the area since they're likely to be your customers.

### Soft-opening formats

Soft openings don't have to be just one event. Try throwing a series of soft-opening events, perhaps over a one- to two-week period, starting with friends and family and progressing to wider invite-only events. Then move on to some public events with a limited menu, before finally opening your doors to the larger public. The idea is to ramp up slowly while your staff gets up to speed.

### Friends-and-family night

Restaurant soft openings often start off with a friends-and-family event, which can be a great way to try everything out before prime time. This is most common for small to medium-size restaurants. If you have a good relationship with any food writers and bloggers, you can invite them for a preview. Friends and family are also easy to follow up with afterwards for valuable feedback about what they liked and which areas need improvement.

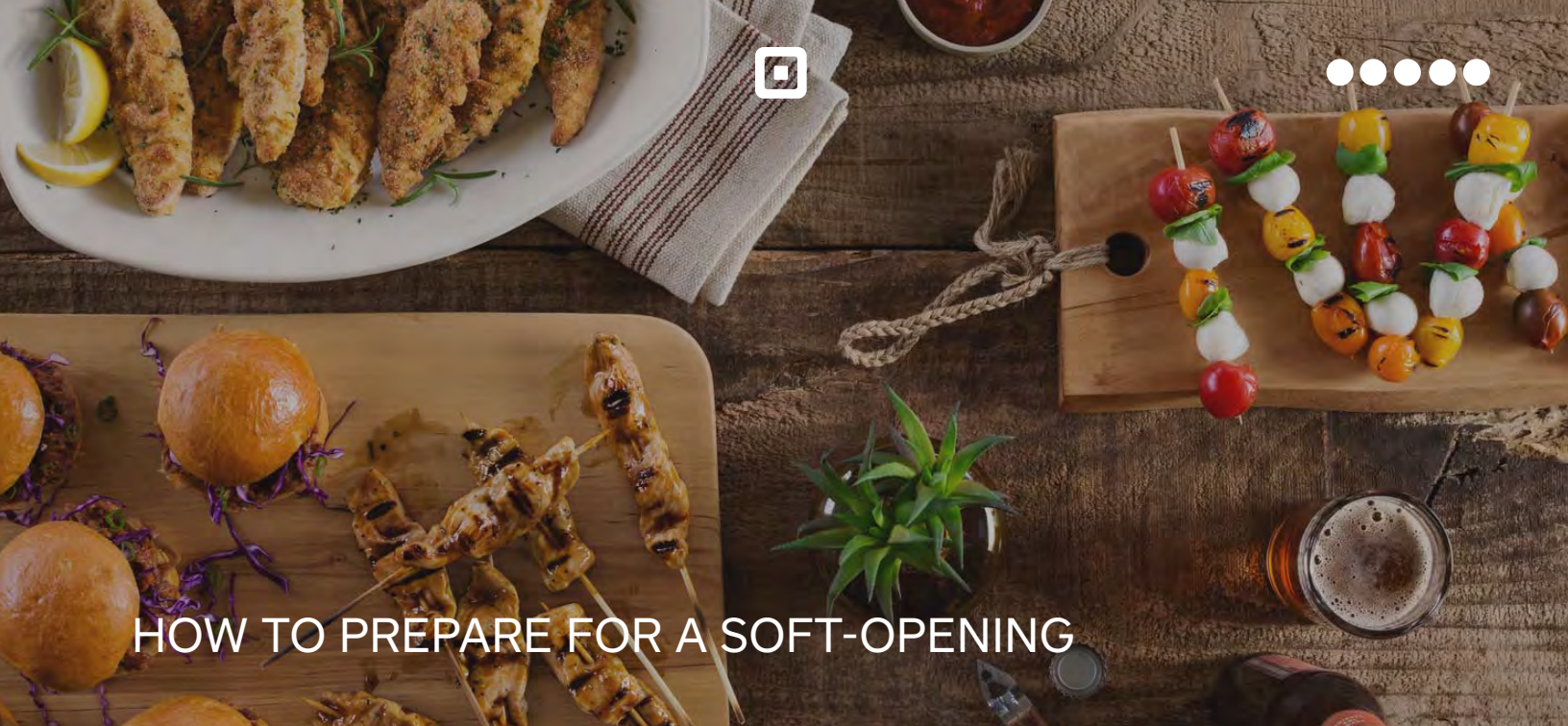
### Events for locals

There is a definite benefit to soft-opening events with guests you might not know personally. For these events, cast a wider net with local business owners, local representatives, neighborhood influencers, and Yelp Elite (if your menu is ready for it). While most of your guests should be people you invite, you can allow a few spots for walk-ins. You can also offer a discount during these sorts of soft-opening events, say 30 to 50 percent off.

### Public events

Restaurants sometimes choose to host soft-opening events that are open to the public. This is when you're ready for buzz about your restaurant. It's a good idea to invite social media influencers on Yelp, Instagram, and Tastemade.





## HOW TO PREPARE FOR A SOFT-OPENING

**F**or your guests, a soft-opening event can feel like a party with amazing food and free-flowing drinks. But behind the scenes, it's a lot of work: overseeing the final building renovations, hiring staff, and getting the word out. Since your soft opening is your best chance to practice your operations before opening your doors to the public, it's worthwhile to put a lot of thought into how you want these elements of your restaurant to look and feel.

### Be ready to move fast

Depending on location, remodeling and construction time, permits, and the health department, there may not be a lot of time to hire and train staff. Paying rent while a restaurant isn't open yet is prohibitively expensive in many cities. That means you need to move quickly as soon as the building and permits allow. The hitch is that you don't know exactly when you'll be ready until you're clear on your permitting timeline with final sign-offs. That means you need to make a lot of decisions ahead of time so you can hop to it once you get the green light.



## Prelaunch Checklist

The following is a top-level look at some of the things you need to decide:



### **How long will soft launch last?**

How long to have a soft opening depends on your restaurant and budget. Anywhere from a few days to a week or two is standard.



### **How many events will you have?**

The number of events will vary based on what you want to test and how much practice you feel you need.



### **What kinds of event(s) will you have?**

Have a range of different events, starting with a family-style dinner, or bite-size passed service, then move on to breakfast or lunch with a reduced menu before practicing dinner service with a limited menu. For your first seated service, it can be a good idea to invite people to attend during one-hour time slots to help control the flow of guests. Finally, if you're also a dinner restaurant, host a seated dinner service when guests are welcome to come at any time during the evening and order from a more extensive menu.



### **How many people do you want at each event?**

Again this depends on what you're testing. If you're menu-testing, you might want a smaller group with specific tastes. If you're testing the actual physical systems (POS and printers), you might want the restaurant from a quarter to half full to find out what doesn't work. If there's a mistake you can manually correct it, but if you have a full dining room it's pretty hard to process orders manually. (You can't handwrite tickets for a hundred guests.) Then once all your systems work, you can ramp up.



### What POS system will you use?

It makes sense to get a point-of-sale (POS) system that's affordable, simple to set up, and easy to use, and that connects with the tools you need to run your restaurant. You also want a POS that has open tickets and employee and location management; connects with a kitchen printer; and makes it easy to adjust the menu and item modifiers on the fly. Square's free POS app has all this as well as everything you need to run your restaurant. For example, our Customer Engagement tools give you email marketing to quickly reach diners, a rewards program that boosts loyalty, and a feedback feature that lets you resolve issues directly with diners instead of learning about problems on Yelp. The app gives you access to Square's online Dashboard, which shows you which items are your most popular and when your busiest times of day are, so you can make more informed ordering and scheduling decisions. The Square app also connects to useful third-party apps like Intuit QuickBooks, Xero, Whisk, and Fresh KDS.



### How will you take credit and debit card payments?

When choosing a credit card processor, it's important to understand how much you'll actually be paying. Many traditional credit card processors have a bevy of hidden fees, like charging extra for certain types of cards, PCI-compliance fees, payment gateway fees, chargeback fees, and more, and lock restaurants into long-term contracts. Square charges 2.75% per swipe, chip card dip, or NFC tap. There are no hidden fees or contracts. Plus, our secure, affordable contactless and chip reader is EMV- and PCI-compliant and lets you take payments any way your guests want to pay, like chip cards and NFC (contactless) payments like Apple Pay. You can even swipe magnetic-stripe cards with the included magstripe reader. For caterers, Square Invoices offers a secure and easy way to get paid. What's more, with our mPOS system, your roving servers can take payments from your guests at the table or guests can check out quickly at the counter (if you're running a QSR, for example).





### What will you serve?

Will there be a limited menu? If so, which dishes? It's important to choose unique dishes that give diners a good taste of what's special about your restaurant.



### What will you charge?

Will your soft-opening events be free, discounted, or full price? Alcohol might be offered free for a friends-and-family event, but otherwise it's usually charged for. If food is full price, it's considerate to offer a free drink or some other bonus to incentivize people to offer constructive feedback. If comping a ticket, it's a good idea for guests to know how much the meal would normally cost, so they know what to leave for gratuity and the press knows the right prices to report. For a free event, you might want to pay your team a higher hourly wage or banquet rate because they won't be tipped.



### How will you get the word out about your restaurant?

As with any publicity, it's effective to use a multipronged approach. Let people know about your new restaurant by sharing the news with friends and family, and telling people in the neighborhood like fellow local business owners. While the restaurant is still under construction/renovation, put a sign in the window to help create early buzz. A powerful way to build excitement is to give people a taste of your food and drink at local events where you can showcase your wares in the run-up to your public opening. Email marketing is a great way to let people know about your restaurant. Square's affordable email marketing makes it easy to build campaigns quickly using our clean, simple templates, and you can track results and ROI in your online Dashboard.







### **What's your social media strategy?**

Today, if you want to reach the die-hard foodies, it's still critical to get positive food press and positive social media influencer and blogger reviews on crowdsourced opinion sites like Yelp, Google reviews, OpenTable reviews, and Facebook. And to get off on the right foot with a successful restaurant opening, you need to have that social media strategy in place before you open your doors. You can also consider advertising on Facebook, with Square's Facebook integration.



### **How will you train your staff?**

Staff training typically includes food and wine menu training as well as logistical training on things like your POS system. Some POS systems are not very intuitive and require a lot of time to set up and train staff how to use them correctly. Square's free POS, on the other hand, is simple to set up, and it typically takes about half an hour to train staff on it. When Jack's Bar-B-Que in Nashville, Tennessee, got fed up with its old, unreliable POS, the restaurant switched to Square's system overnight.



### **How much serviceware will you need?**

For a lot of the physical setup, you simply need to give it your best guess and then fine-tune it based on your soft-opening events. For example, take a stab at the amount of serviceware you need; the best position of the tables, host station, and POS system; and the back-of-house setup. However, until everything is set in motion and you have actual guests in the restaurant, there's a lot you don't know. We discuss the sort of things to look out for during a soft opening more in the next section.



### **What kind of feedback do you want?**

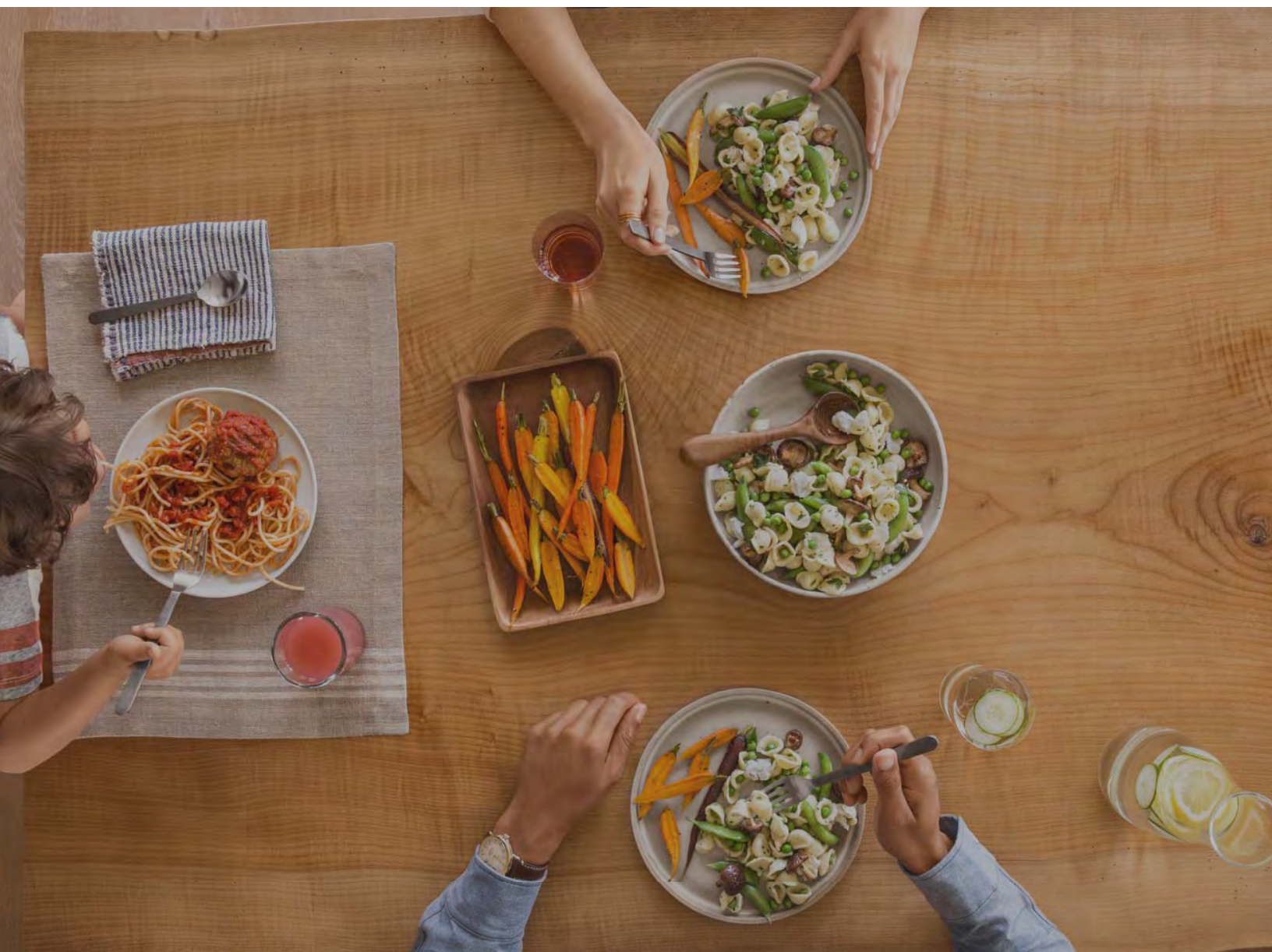
A big benefit to hosting soft-launch events is to gather feedback from your guests. Think about what you'd like to know. For example, you'll likely want to know their thoughts on the taste and presentation of the food, the restaurant's atmosphere, their server's customer service skills, perception of value for money, dining room layout, etc.





## Send out the invitations

Your goal should be to have made decisions about all of the above by the time you get final sign offs. That means as soon as you get the all clear, you'll be ready to send off the invitations to your soft-opening events. Next, set up your card processing system, tweak the menu, and train up your staff.







## HOW TO THROW A GREAT SOFT-OPENING EVENT

It's your restaurant's first soft-opening event. RSVPs are in and the expected turnout looks good. The front-of-house looks sharp, tables are set, the kitchen is stocked, and your staff is pumped and ready to go.

All you need now is a game plan for your soft-opening event so it runs as smoothly as possible and helps prepare your restaurant for opening to the public. To help you out, we put together the following checklist of things to consider during your soft opening.



### Line up

Right before dinner service, talk your servers through the menu and wine, having them taste everything so they can speak from experience about your offerings. Give them a rundown of the guests on the book, as well as special accommodations such as known allergies or food restrictions. This, of course, happens before every dinner service, but keep in mind this is the first time you're doing this. This first lineup sets the tone and gives the staff a chance to bond.



### Technology

Definitely use your POS, kitchen printers, card payment system, and other operations tech during your soft opening to make sure everything functions properly. If the event is free, it's still a good idea for servers to use the POS system and comp everything so they can practice using the system.



### Talk with your guests

Make time to shmooze. Chat with each table, thank your guests for being there, and check in to see if there's anything else they need. Feedback from your guests is critical to making improvements before your public launch.





### Pay attention

Provide all your staff with notebooks and have them write down anything they notice that's not working as efficiently as possible. These issues need to be addressed after the event. Do guests look cold? Are they putting a lot of extra salt on their food? Do you need more salad forks or other serveware?



### Feedback

It's critical to get as much feedback as you can from each event to inform any changes you might need to make. Your options include comment cards and pens at every table, guest reflection surveys (SurveyMonkey, Google Forms, and other online survey tools are great for this), or post-event digital feedback using Square's Customer Feedback tool. See the pre-launch checklist for some ideas for topics to include in your survey.



### Social media

Tell people to check in on Facebook and Foursquare, or write a positive review on Yelp, and give them an incentive to do so. For example, a free appetizer or a discount for the next time they come back. You'll definitely want to get your social media accounts set up and running prior to the soft-opening so you have this presence and guests can help create excitement for your new restaurant.

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## HOW TO KEEP THE MOMENTUM GOING AFTER A SOFT OPEN OR EVENT

**W**ell done. You've hosted a soft opening for your restaurant. Now is the time to look over all your feedback, make decisions about what needs to be changed, and communicate any changes to your staff.

Here's a helpful checklist:



### **Review feedback**

After each soft-opening event, review guest feedback from comment cards, surveys, digital customer feedback, conversations, and staff notes, then determine the take-aways. Consider the temperature of the space, noise level, and lighting as well as menu items and staffing.



### **Management meeting**

Hold a management meeting to discuss feedback, what worked, and what didn't. Together, make decisions about how to proceed, such as:

*Staffing* - Do some staff need additional training to help smooth out any trouble spots? Does anyone need to be let go?

*Layout* - Is the host stand in the best place to greet guests as they come in? How about the position of the POS system? Table placement? If anything isn't working, move it around until it is in the best place for efficiency.

*Steps of service* - Consider your normal routines of presetting tables before guests arrive, as well as how tables are presented, dishes served, checks delivered, and tables cleared. If anything feels clunky, find a way to streamline it.





### **Communicate with your larger team**

Consider having an all-staff meeting, or dedicate extra time during lineup to share lessons learned from the soft-opening events. Be sure to point out what went well as well as areas for improvement. Make sure everyone is on the same page for expectations moving forward.



### **Employee handbook**

Create an employee handbook that records policy and procedures. This is important for protecting you and your business. This document outlines your expectations for staff and your rights and responsibilities as an employer.



### **Monitor your social media channels**

What are people saying about their soft-open experience? What dishes are they photographing the most? The more aware you are of what's popular (and not) at your restaurant, the better. Take all this feedback to heart, respond to comments as appropriate, and make any changes you need to.



### **Menu**

Square's online Dashboard is a useful tool to show you exactly how many people ordered the Cobb salad vs. the curried corn soup. Talk with back-of-house staff to see if you can meet the capacity of your line. For example, do you have too many dishes you're trying to prepare in your fryer? When you were menu-testing before the soft opening, you likely invited people with similar palates (industry people, cooks, etc.). At the soft opening, you discover what people with broader palates want.



### **Systems**

Critically assess all your systems, logistics, and tech to make sure everything works as it should. If it doesn't, now is the time to troubleshoot and find a solution.

- Does the Wi-Fi work in the bar so it can receive orders punched in by servers?
- Have you correctly assigned all your table numbers?
- Do your floor plan and seating arrangements work? Can people comfortably get in and out of their seats?
- How many turns (number of seatings) can you accommodate in an evening?
- Does the POS system work correctly? Is the kitchen printer reliably printing orders for the back-of-house?



## Once You're Open to the Public

You've learned a lot from your soft opening, made any necessary changes, and are now ready to open your doors to the public. The first weeks of a restaurant's official opening are an extremely busy and important time.

### Continue monitoring your systems

Once you've been open for enough time and have started to collect sales data, start analyzing your data, figuring out which days and hours are your busiest so you can staff and order food and beverages accordingly. Square can help with this through our online Dashboard, which tracks real-time sales, inventory, and staff, all from one central location, accessible from any mobile device.

### Keep them coming back

You want to keep morale high, especially during the first few weeks after opening when everyone is working incredibly hard. The first six weeks in a restaurant's life are crucial because that's when all the reviews come in. During lineup, spotlight when someone had great service or positive guest feedback, which you can measure using Square's tip data or Customer Feedback segmented by employee. If a dish was well received—which you can measure by looking at your sales by item in your Square Dashboard—let the back-of-house know.

### Keep morale up

You want to keep morale high especially during the first few weeks after opening when everyone is working incredibly hard. The first six weeks in a restaurant's life are crucial because that's when all the reviews come in. During line up, spotlight when someone had great service or positive guest feedback, which you can measure using Square's Tip Data or Customer Feedback by segmented by employee. For back-of-house if a dish was well received -- which you can measure by looking at your sales by item in your Square Dashboard -- let them know.







Launching and running a restaurant is incredibly challenging, but with the right tools and resources it can also be extremely rewarding. When you work with Square, we're here for you every step of the way from pre-breakfast prep to back-office analytics at the end of a long night.



## ABOUT SQUARE

Square powers business of every size by offering custom processing rates, advance reporting, world-class data security, and partner integrations and APIs.

[CONTACT US](#)

or call us at 1-855-663-6154