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NEW CAFÉ OWNER

A GUIDE TO OPENING YOUR DREAM CAFÉ



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Negotiating With A Landlord And The Value Your Business Adds To A Space

Full disclosure, I am a painfully optimistic person. Sometimes I think my very eyelids have a silver-lining on them. Anything is possible, am I right? When I bought my first business I negotiated a deal: \$1,000 down and \$1,000 a month till the business was paid off. If at any point I didn't make good on my end of the deal the owner I was buying from would get the business, and everything in it back, no strings attached.



Why would I be so crazy to negotiate such a deal? Because I knew I had nothing to lose, and the seller had a great opportunity. It was going to be win-win-win. Win, for me because I was going to get a café without going through all the work of getting a loan. Also if things went south then I was free

and clear with only the sunk cost of how far I had made it. Win, for the seller because they were going to get the agreed amount. And if they didn't get the agreed amount then they would get back a business that they could just resell a second time. Win, for the customers, because I was (and did) make amazing coffee for them all.

But how did I arrange this deal? After visiting seven potential locations, I chatted with the owner of the drive-thru at his shop. He had dropped some hints that I didn't pick up on at the time, such as that they were looking at closing on a certain date. When he said that I thought to myself, "Oh, I don't want him to close and then lose all of those customers!" What I should have heard was that he is really trying to get out. Or I should have heard that I should come back after it has been closed for a week and buy it for even less.

Although I may have missed out on a cheaper business, I did end up with a great opportunity, and here's how I did it. I approached him with full transparency, I told him I knew he was losing a few dollars a day, and that meant it was hundreds of dollars per month. So I said, "You could go from losing money, to making money each month. No strings attached." He liked that.

Here are some pointers on negotiating the best rent you can:

- First renter in the building
 - You can negotiate a lowered rate, say 50% off, till the building is 50% occupied, then 75% of rent till the building is 75% rented
- Last renter in the building
 - You can convince the landlord that your coffee business will bring new shoppers to the area on a daily basis and help all the businesses in your area to thrive
- If you're leasing inside a business space or residence you can show how your café will improve occupancy happiness and keep them renting longer

The big point is to put yourself in the landlord's shoes and think about what they want and all the benefits of having your business there. Then after you have thought about it ask them what they think the benefits would be. Let them talk themselves into leasing to you.

Some big corporations are looking for coffee kiosks to enter their lobby area and help them with their employee morale. If you're looking at putting a kiosk in an office building meet with the HR department and show them how your café concept will put so many of their employees in a great mood as they go to work, or will serve as a fast and quality pick-me-up in the afternoon. There are a lot of people who need your wonderful business, you just need to find them and let them know about your vision.



"Give me six hours to chop down a tree and I will spend the first four sharpening the axe"

-ABRAHAM LINCOLN

Negotiating With A Landlord And The Value Your Business Adds To A Space

Timely Takeaways:

- Listen to what the seller is telling you and what it means for your approach to purchasing.
- Put yourself in the Landlord's shoes:
 - What do they want?
 - What does your business provide them?
- Try to negotiate better rent based on whether you're the **First** or **Last** renter in the complex.
- Planning ahead will save you lots of time, in the future:
 - Consider the benefits of your business for the larger space and sell that to the landlord/company.
 - Having a business plan will also demonstrate to the landlord/company that you are serious about what you're doing & that you've done your research.



Starting with the End in Mind



As I sit to write and tell you about “Starting with the End in Mind” I must admit, I had to ask myself exactly what I wanted the take-away, the epiphany, and the very essence of this advice to really be. It was a

funny thing to sit and think about. Here’s what I want for you, I want you to read this and save yourself however many days and hundreds of thousands of dollars worth of pain by doing this one simple step: **getting real with yourself.**

This February, I spoke at Coffee Fest Atlanta about opening a café (I love speaking at that event), I shared my own story (barista at career day, former drive-thru stand owner, current lead barista for three global coffee brands, and weekly pod-caster), then as a group we moved into the content of the presentation: What to Look for When Buying Your First Coffeeshouse.

Let me just launch to the ending point of that presentation, I’ll bet you can guess what it may have been all about. Well, it was all about being real about who you are. It was all about assessing your own skills and what interests you then taking all of the opportunities that best suit your current situation and where you want to go. Essentially, we’re talking about beginning with the end in mind.

So here are some questions that I want to challenge you with, these should help you shape what your ultimate vision for your café is:

- Starting a café is TOUGH:
 - Why am I starting a coffee shop?
 - Would it be easier to just hang out at cafés on the weekend and not over complicate things?
 - Am I prepared to spend the time and money needed to get my business started?
 - Is my partner on board to support as well?
- Ambiance:
 - What kind of ambiance do I want?
 - What can I afford? What fits the locale?
- Ideal customer:
 - How will my ideal customers resonate with my brand and café?
 - What will attract them to my shop?
 - Is there anything about my brand that alienates other customers?

- Menu:
 - What menu items will I have?
 - Besides coffee what about beer & cocktails?
 - Do I want to have a big food menu with fresh paninis or salads?
 - How will I get my items, especially if they are unique or special?
- Unique brand:
 - Is there a reason why no one has tried my specific idea before?
 - How will I advertise my business?
- Competition:
 - Who is my competition?
 - How will I be different?
 - Do I need to compete on price?
- Staff:
 - How much hiring and training will I need before I can sell a latte?
 - How many employees will I need?
 - Do I want my friends to work with me?
 - Where do I find great staff?
- Profit:
 - How long do I have until I start making a profit?
 - How much money do I need to get started and pass the 2 year mark?
- Legal:
 - What taxes do I need to set aside & pay?
 - What kind of insurance do I need?
- Exit plan:
 - Is there a certain time or sales revenue marker that I want to hit before selling?
 - Do I have a buyer in mind already, such as a friend or family member?
 - Do I want to sell and see the business thrive even better once I am gone?
- Ultimate goals
 - If you close the doors will you be devastated?
 - Is there someone else you’re trying to help with this business?
 - Is this business bigger than you?

Now if you took the time to think through and find answers to these questions then you should start to see what your end goal is.

Last year I was talking to a hopeful future drive-thru owner, she was driven but also perplexed. Being a military wife she knew that she had a lot of time on her hands, but would be leaving the area in exactly three year's time. Her big question to me was "Why start a drive-thru stand if she knew she was just going to sell it?" Great question. Amazing question actually. She had an insight that many of us don't have the fortune of knowing, she knew that she had to create an aggressive exit plan if she was to make this happen. And I really hope that she did give it a go!

So, what do you want to create? What is driving this idea of owning a coffee business? Is it just to hang out with friends? If so then great! How do you make them feel comfortable to hang out at your business and become your best patrons? Or do you want to serve the absolute best coffee history has ever seen? Well then you are up for a big challenge and best wishes to you! Whatever your end goal is, make sure each piece of your business is set up to support that.



Starting with the End in Mind

Timely Takeaways:

- Ask yourself the hard questions and honestly listen to your own answers.
- Think about the BIG picture before you jump right into making lattes.
- Why do you want to start a Cafe?
- What will you do and how will you handle it if things don't go well?
- Conversely... do you have a plan in case things go Really well? Success can be just as hard to handle as failure.
- Make sure you have a plan that looks at all the angles, including the legal and financial aspects.

How To Select The Physical Retail Location For Your Business Model And Target Demographic

Starting a business is a huge endeavor. Not to scare you, but it really is. Here is a little pro and con list for you to help discover what options are out there.

BUYING A BRAND NEW CAFÉ:

PROS

- Blank canvas
- Negotiate tenant improvements with landlord
- Negotiate that you'll anchor more daily business to the area
- Negotiate you need ramp-up time & reduced rent
- Good press or buzz when opening

CONS

- Setting up permits, licenses, & insurance
- Build-out costs & time
- Could be a new area with minimal traffic
- Customer base can take years to build
- Full staff & customer training needed
- Need to create every system in the café

BUYING AN EXISTING CAFÉ LOCATION:

PROS

- Built in customer-base
- All of the equipment is set up
- All of the systems are in place
- Great starting place to improve
- Possibly negotiate great deal

CONS

- Customers may not like any change
- Branding barriers
- Re-training staff is likely needed
- Purchasing outdated/used equipment
- Hidden contracts with vendors
- Abused space

Now that you know the direction you'd like to go, let's talk about the specific building location. What do you think about the landlord? What does your gut tell you? What do the other renters say about them? Do they make time to answer your questions? If you asked them a question that is a little unrelated to renting their building do they show their frustration or impatience? If yes, they may still make a great landlord, or maybe you and they will never jive.



Let's talk about your specific building selection:

- Mall, movie theater, ballet club, dance club, etc.
 - Do people come here to get coffee?
 - When was the last time you grabbed a cup of coffee BEFORE going to these locations?
 - If someone invited you to these locations would you think to get coffee there before or after?
- Hospital, park, library, corporate offices, etc.
 - Do people near here want coffee?
 - How much time do people spend at these locations?
- Talk to your neighboring businesses
 - Ask lots of questions
 - Ask what little surprises you will "Just need to get used to" to really get to the heart of renting woes
 - Are all the surrounding businesses pet shops and pet parks but you're allergic?
 - Do things look good on paper but your gut says no?

- Is the location missing a key component that you can bring
 - Energy, creativity, better products, vision, leadership, customer service, new décor or ambiance, more food options, artistic flair, marketing
- Is it a place where you could hang out all day, everyday?
 - This will be your second home for a few years
 - If you don't want to be there, why would anyone else want to visit?
- Foot traffic vs traffic
 - Nearby anchoring business that people visit, such as a grocery store?
 - Is there a traffic obstacle like a stop light that causes people to stop and visit your brand?
 - Place that gets people out of their car?
 - There is a difference of 500 cars vs 50 people on foot per hour passing by

Now that you know which opportunity is ideal for you it is time to search for a space you can rent or buy. Time to hit the streets and start looking at locations, asking questions, and letting the word out that you're doing this thing. Talking about what you want to do is a great way to stay inspired and build momentum. Personally, I found it very helpful to do. Take the opportunity to visit locations that you don't think are ideal for you because this is great practice.

Let's say that you have found an existing café that has an owner, in a great spot, but you get that feeling that they want to sell – what's stopping you from asking them?

Let's talk about speaking with the seller:

- Check the books:
 - Trust your gut
 - Have someone else double check you so you don't fall in love with the wrong business
 - Could the business work if it sunk just 25% for one month?
- Why do they want to sell:
 - Do they want to leave a legacy?
 - Are they just burned out?
 - If they sell would they keep some "Skin in the game" to show their good faith that the business is healthy?
- Competition:
 - Is there a nearby competitor who is selling for less?
 - Have you talked to the surrounding businesses to see what information you can learn?
 - Don't be afraid to ask if someone is selling, it's a compliment to their business not a bad thing

Certainly there is a lot that goes into opening a business. When it's a foodservice business, then a lot of what you need to consider is actually the location and ambiance itself. Spend extra time going over the location. Visit each potential site multiple times, visiting on different days and different times of the day is very important. You'd be surprised what you learn just from hanging out at the location. Don't neglect visiting other shops that are for sale. It's a good opportunity for you to sharpen your skills as a potential business owner and learn more about what to look for. The more you do it the better you'll get at it.

Don't think you're alone. Always reach out to local roasters and distributors and talk to them about your ideas. They have staff that help people like you day in and day out. Seek help, ask questions, and stay thirsty.

How To Select The Physical Retail Location For Your Business Model And Target Demographic

Timely Takeaways:

- There are very different Pro's and Con's to starting a Cafe from scratch or to buying an already existing business
- Again, listen to the landlord and get a feel for what they're really like - not just what they want to show you
- Where is the location situated? In a mall, business complex, small shopping center, or stand-alone location?
- Talk to neighboring businesses and find out what they think about the location, landlord, etc.
- If you're buying - why is the seller wanting to sell?
- What sort of competition would you have in the area?



Don't Let It Become A Nightmare

Opening a café or coffee shop can be a very challenging process. Every week, I talk to people who have just signed the lease and are very excited to get their café open as soon as possible. Over the last ten years in the café design business, I have heard the good, the bad and the ugly. The part that always seems to cause problems with new retailers is the two month time period from signing the lease to getting the building permit. Once permitted, it usually takes another two months for the contractor to build-out your space. So on average it takes four months to open your cafe from lease signing. The first two months of this process have all the variables and unknowns that can cause your dreams to become nightmares.

Many of the problems that occur in the first two months are not due to lack of effort but rather lack of experience and knowledge. Most new coffee shop owners have never signed a commercial lease, hired a commercial contractor or dealt with the local building department or the health department.

The following story is hypothetical. However, it has been experienced by far too many people in one way or another. Hopefully it will help a few new coffee shop owners open on time, stay on budget and avoid some very costly mistakes.

I had been searching for the ideal location for my new coffee shop for almost a year. I heard that the flower shop was going to expand and move to a new larger location down the street. Their old 1500 square foot space would be perfect! The leasing agent has several others interested in the space so it will not be available for very long. Afraid that I might miss out on this rare opportunity, I sign the lease. I cannot believe that the dream of owning my own coffee shop is about to come true! The flower shop will be out in about a month and the lease gives me an additional two months of free rent for the build-out. I figure that I will easily be open in three months.

Over the next few weeks, I finish my business plan, apply for a loan, work on the logo, design my floor plan, and look for a general contractor. This is hard to do while still working my regular job. Time is running out. With the \$2,800 rent payments starting in just over two months, I quit my job. Now things are moving along nicely, the loan is approved, the logo looks great and the floor plan is almost complete. Finding a general contractor is the hard part. Everyone seems to be so busy, but they promise to give me a bid when the plans are completed. One contractor, who had built several restaurants

in town, saw some problems with my plans. He asked if I had talked to the building and health department about parking, restrooms, fire exits, ADA codes and grease traps. I became worried and took my plans down to the city.

The nightmare was about to begin! I met first with the plumbing inspector. The flower shop had only one restroom. It was up to code and handicapped accessible. However, the plumbing codes required that I have two. I figured that there was room in the budget for the extra restroom but did not like losing the space for my seating. I also did not like spending \$6,000 of my money on a restroom that was really the landlords. Then the fire marshal looked at my plans and said I needed a second exit in case of a fire. This was strange; the flower shop only had one door, why should I need two? He explained that there would be more people in a coffee shop than in a flower shop which he referred to as occupancy load. This was going to be a challenge. There were tenants on both sides, and across the back of my space was the kitchen and storeroom. I really began to feel I was in trouble when the building inspector



said that the front door needed to swing out, and the two steps at the entrance needed to be removed and replaced with a handicapped ramp. How big a ramp I asked? He figured about 15 feet long by 4 feet wide. Wow, between the extra restroom, another door and the wheelchair ramp, I was going to lose half my seats! The electrical inspector wanted to have his input as well. He mentions that the current panel is not up to current codes and the amp load would need to be increased for all the equipment my coffee shop required. The health department was the best; all they wanted was a \$2,200 grease trap! They explained that the waste water department required all food establishments with a three compartment sink to install one. As I was about to leave, the city planner was looking at his site plans in the area where my coffee shop was located. It turns out that the flower shop only needed five parking spaces; however my coffee shop needed 14 due to that higher occupancy load issue. There was no way I could find nine more parking stalls! If I wanted to apply for a parking variance it would take about two months and the odds were against me. The people at the city were all very helpful and felt bad about all the time and money I had already spent. My begging, pleading and even a few tears did not help. Their job was to enforce the codes, not make them.

I wish this was all a bad dream but it wasn't. This nightmare was a reality. In less than an hour, I found out that I would need a second restroom, another fire exit, a handicapped wheelchair ramp, upgraded electrical panel, new grease trap and nine additional parking spaces. These improvements were way beyond my budget, even if I could solve the parking issue. I was also told that the lead time for getting my health department approvals and building permit was around a month. By the time I revised my plans and allowed the contractors a two month build-out, I would pay over \$5,000 in rent and still not

be open. How could this be happening to me? How could I sign a lease that did not even have enough parking spaces?

After discussing the parking issue with the landlord, he let me get out of the lease. I am back looking for that perfect location again. I also got a job selling flowers at the new shop down the street! But before I sign another lease, I am going to bring my floor plan down to the building department and spend an hour talking with my new friends at city hall.

Don't Let It Become A Nightmare

Timely Takeaways:

- If you are starting from scratch and will be designing your floorplan within an existing space, contact both a contractor and the city regarding permits and codes before you sign a lease.
- You should do your research ahead of time to avoid having monstrous headaches later.
- Your local city hall should have resources to help you in the case of permits and building codes.
- Also, you may contact your local Chamber of Commerce to get recommendations for local contractors.

Design It Right, Build It Once

A common approach to the design of a new café concept is to plan the space from the front to the back. The primary focus is on the atmosphere and design elements in the customer areas. These may include the style and type of seating, a roaster, retail displays, internet stations or a fireplace. Then architectural features such as soffits and lighting are combined with colors and finishes to create your image and identity. It is in the “front of the house” where your concept and brand identity are realized.

These design elements are crucial to differentiate your café concept in the marketplace. However, this approach has a tendency to underplay the importance of the service counters and the back room storage needs. These are the areas your employees depend on for logical equipment placement, functional work space and adequate storage needs. When the employee areas are designed last, efficiency, labor costs, speed of service, customer retention and profits are adversely affected. The challenge of any design is to balance the desires for unique and appealing design elements (customer areas) with the needs for functional work and storage areas (employee areas).

Before you can begin your layout, you must first decide what items will be served on your menu. Coffee, espresso, tea, smoothies, pastry, cookies, sandwiches, soup, salads, and ice cream are common menu items. This menu will dictate the equipment needed to support your menu. For example; bakery items purchased from a local bakery and delivered daily, will only require a display case for merchandising. However, when the cookies and muffins are baked on-site, your equipment will change to include a storage freezer, convection oven and a work table. If you will be preparing sandwiches on site, a separate vegetable prep sink, sandwich prep table and additional refrigeration will be required. Thus, the new

operator must decide early in the design process what items will be prepared and stored on-site and what items will be purchased from an outside vendor.

When designing a floor plan, start with the kitchen and storeroom. Working from the back of the space to the front, essential pieces of equipment ranging from dry storage, refrigerated storage, food prep and ware washing are designed into the space first. Remember, your health department codes will dictate the minimum requirements of a water heater, mop sink, three compartment sink, hand sinks, and adequate refrigeration and dry storage needs. So, before you begin designing the location for the fireplace and retail displays, get the storeroom and kitchen areas done first.

The front and back service counters are then designed into the floor plan. This is where employees must have efficient work space and the proper equipment to deliver orders quickly to the customers. The counters incorporate built-in equipment and supplies which are readily accessible to the employee (cups, ice, refrigeration, trash, plates etc.). Equipment should be strategically arranged so that each employee has their own work station (cash, espresso, sandwich).



The longer the lead time for an order, the further from the cash register the customer will move. This prevents a back-up at the cash register when a customer orders three espresso based drinks and the customer behind them just wants a large house blend coffee. With the operational areas of your café properly planned first, the remaining balance of the space is available for creating personal design elements in customer areas.

EMBRACE THE BUILDING TO ITS' FULL POTENTIAL!

Design It Right, Build It Once

Timely Takeaways:

- Before you begin designing, decide **what will be on your Menu**-this will inform what equipment you will need space for in the back-of-the-house.
- What items, ingredients, or components will you make in-house and what will you bring in from a vendor?
- Begin designing your cafe with the kitchen/prep area and the storeroom - working from the back of the space, to the front.
- Plan for equipment and storage needs: dry storage, fridge(s), freezer(s), working space, mop sink, etc.
- Then design the front and back counter areas for your employees, so you maximize efficiency.
- Equipment should be arranged strategically for flow of traffic, cash register, espresso machine, coffee brewer, hand-off station, etc.
- Finally, design the seating area and your ambience.



What Do You Need?



Opening a new coffee shop or café can be a daunting venture, you must first find an ideal location that's within your budget, remodel the space to meet your needs, and then you're faced with the task of stocking that new store. From the vast number of brands available to

the breadth of offerings that now seem standard items at coffee shops and cafés, how do you choose what you will serve at your shop? At a bare minimum, you're going to want to offer coffee, tea, and either deli or baked goods to accompany your beverages. Even with these basic product offerings, there are many decisions to make such as: what will be the protocol for drink preparation, which brand of tea or roaster for coffee will you choose, and how many different offerings should you serve? Before you let this discourage you from opening a shop, brew yourself another cup, sit back, and follow these tips to help you take the guesswork out of building a menu. These recommendations will help you align your menu with the desires of your customer base and, ultimately, sell!

What you need is a plan...

In today's economy, too many businesses try to cater an offering to every customer in the market which leads to an organization spreading itself too thin and sacrificing quality or consistency, in areas they once held a competitive advantage. Although the "something for everyone" model seems very profitable, the additional organizational costs outweigh the benefits of additional customer segments. That's why we recommend starting with a hyper-focused menu and product offering; then, once you've become accustomed to this routine experimenting with additional drink categories and introducing signature recipes.

Thus, before you do any product comparisons or menu planning, it is imperative you decide who your intended customers will be.

These customers are your target market, or the group of individuals you will be marketing to and expecting to convert into loyal customers. Once you have an idea of who you will be serving, then you will know what attributes to look for when selecting the products you will offer at your shop.

Who will you serve?

There are two basic ways to determine who and what you will serve. Both of which require understanding the demographics of your customers in order to be aware of how you can satisfy their preferences. Some people know they want to open a coffee shop because they love coffee and want to share their excitement for coffee with others. Some people open cafés because they want to engage and serve their local community while working their 'day job'. As you read on, be sure to think about the reasons you decided to open your shop and the goals you intend to achieve.

If you have already signed your lease and have your retail location finalized; the best place to start determining your target market is asking yourself the following questions: (If you don't have a physical space already, answering these questions will help to guide your search toward the specific areas that will be the most valuable for your retail location, based on the density of potential customers.)

"Who is my target market? Who is my ideal customer? What will I need in order to satisfy this customer base?" Or, "Do I want my business model to accommodate the preferences of the consumer already present in the area surrounding your retail location?"

Once you can answer these questions, you will be able to identify the key product attributes that your customer base will find as valuable. These attributes will be based on unique factors which differ between the various customers and their individual preferences. Although every consumer is unique, we can attribute certain purchasing preferences to groups of individuals if they ordinarily behave in similar manners. For example, if you serve daily commuters, speedy service and convenience will be valuable. On the other hand, if you have a larger physical space and intend to focus on in-house service, you will find more value through focusing on quality or providing new, unique options that separate you from your competition or introduce the community to an entirely new experience.

What is around you?

Begin by taking note of who or what occupies all of the buildings around you. Many times this will reveal your competition. When you identify competitors, too many people will only consider other coffee shops as competitors. Although this the most specific example, there are drastic repercussions for performing this narrow of an assessment. Not only will you need to recognize all the places that serve coffee, but you must also think about what need your shop's products fulfill, which is sustenance and energy whether that's via snacks, food, or caffeinated drinks. This idea of need fulfillment is crucial for accurately identifying the competitive businesses that offer comparable goods which your intended customer base might choose as a substitute for visiting your shop. For example, if you serve smoothies or blended iced coffees (frappés), you must now consider any businesses that offer smoothies such as a fast food restaurant, convenience store, grocery store, or smoothie bar. Are you considering serving food options? Again, you must include any business that offers coffee, or any other caffeinated beverage, alongside breakfast, lunch, or grab-n-go snacking options. The main point is that you will want to identify ALL of the businesses in your immediate area that offer a product which is similar or an exact substitute for what you sell. This research will help you to determine the benefit of directly competing either by offering the lowest price or unprecedented quality; or cutting your losses and deciding not to offer that item on your menu. A product might have astronomical sales in one location, but stagnant sales in another shop located in a more competitive landscape. This should solidify the idea that there is no perfect checklist of products or brands to carry. Even within franchised chains, you will find different offerings and decor across the various regions of our nation. Further, this also reveals that your shop's success is more correlated to finding an engaged customer base and properly adapting your business to fulfill their preferences.



However, there's additional value in identifying what's around your retail space. By analyzing the surrounding housing units or organizations, such as a non-competitive businesses, schools and universities, or gyms, you discover who will be your captive audience, or the individuals who will pass by your shop via car, foot or public transportation. This will determine who your target customer will be or it reveals that the key customer demographic you plan to target typically will not travel by your

shop. Later on, this information will be pivotal as you develop a plan for new customer acquisition.

So, you might be asking how do you analyze what's around you?

If you have a gym or health club near you, there's a good chance you won't become a part of any of their member's daily routines if you're serving smoothies that are sugary and high in calories. This type of product may appeal to them on an indulgence basis, but the product attributes directly conflict with their desire to be fit. People who have gym memberships are often much more aware of the health and dietary attributes of the product they consume on a daily basis and will avoid products that contain high amounts of sugar, fats, and calories. However, if you're serving all-natural smoothies or delicious (low-calorie) flavored teas that are high in antioxidants alongside snacking options with low fat content yet adequate caloric and protein levels your products are more likely to appeal to this consumer.

On the other hand, if you are located near a high school and you intend to target the students as your intended customer segment you will much different consumer preferences. For instance, younger consumers will value the experiential and aesthetic attributes of their order, as opposed to the utilitarian benefits. Bright colored drinks, sweet flavors, and a unique, fun atmosphere will help to drive business among these consumers as they want enjoy the experience instead of just satisfy the physiological need of caffeine for that jolt of energy. Do you serve students during their lunch hour? You might want to focus on setting up guidelines that streamline your drink preparation processes and reduce service times, because if you can't serve them quick enough to return to class on time you will begin to lose customers.

Speed of service is also a critical attribute for the early morning commuter who is in a rush to beat the traffic, but needs to be sharp when they arrive at work. Both of these consumers value a speedy service because they both have places they are expected at shortly. In this second instance, note that the functional attributes of caffeine or hydration are a higher priority for the commuter than the aesthetic appeal of the final product or the shop atmospherics from which it was ordered.

Cost is one of the main attributes of a product owners typically base their purchasing decision upon. Although you do need to be aware of and actively monitoring your costs, selecting products since they are low priced is not guaranteed to be the most profitable. As you've just seen, there are many factors that influence a consumer's purchasing behavior; not just price. Yes,

we typically like to pay the lowest price possible; however, it's imperative to understand consumers also value factors such as, taste, convenience, quality of ingredients, and, at an increasing rate, socially or environmentally responsible products.

Although, there are products, such as tape or facial tissues, that we will tend to purchase solely upon the lowest priced option; there are also products that we are willingly to pay higher prices for based the factors listed above and many more. Oddly enough, there are even times that a consumer will purchase an item based intangible elements. Let's consider Mercedes-Benz for a moment, many people would agree they are a premium line of automobiles, but can they tell you why you should accept paying a higher price for their cars? In this instance, there is an expected social status, or perceived value, attributed to owning a Mercedes-Benz. However, this perceived value will not be a valuable attribute for selling the car to a consumer who just wants to get from point A to point B, and could care less what others think about the brand of car they drive. At the same time, it is still true that tons of people aspire to own a Benz.

How will they know about you?



If you plan to target customers who regularly pass by your location, you will be able to utilize visible, creative and eye-catching signage to attract business. Bear in mind, as you're designing your signs, you must not only have an attention grabbing image, but it will also need to clearly communicate what your business is and what you offer, namely specialty beverages.

A java junkie may take note of your awesome sign, but if they don't know there's an equally awesome coffee shop in that space they may never stop.

However, if you are targeting customers who don't work, live, shop, or travel past your location then you will have to commit more attention and time toward your promotional strategy. Instead of relying on capturing attention you will have to search out opportunities, or communication channels, to introduce your brand. The communication channels you rely on to accomplish this could be any of the following, or a combination: print advertising, press releases, posting flyers in the area, as well as virtual channels which means you will want a strong online presence to facilitate discovery via search

engines or social media. Either way, your shop will have to be the main destination; or the main attraction that causes them to visit the area. When a strong brand leverages the proper communication platforms to reach their audience this can be accomplished; however, it will be important to isolate the customers who will be the most enthusiastic to engage with your brand in order to create an initial base of loyal supporters who will eventually become brand ambassadors for you.

If you're going to have a commitment to serving quality brewed coffee that is of utmost quality and focus on experiencing coffee; then you will have to get an understanding of the local coffee scene. Search out roasters to find out if there are local barista competitions or events. These events invaluable because nowhere else will you will find a captive audience which is the perfect opportunity to spread your message and brand. Or are you located near a university and you know you would like to service the college students looking for a caffeine fix. Research possible promotional channels Well consider placing advertisements within the school's newspaper, on housing and dining facilities bulletin boards, or anywhere else that will give you brand exposure. Do they host a welcome event? Sponsoring an event like this could be a great opportunity to sample products with potential customers in addition to the opportunity for brand exposure.

As you organize your marketing strategy, be creative don't allow yourself to believe that in order to market your brand you must buy billboards and run commercials. Traditional marketing is becoming so prevalent that it makes less of an impression on consumers, which means the more creative you are when promoting your brand to potential consumers, the more of an impact you will realize.

Hopefully, this article gives you an idea of how to begin the decision-making process for stocking your brand new café. In order to make this decision, you must remember to take an in-depth survey of the area around your location. Once you know your competitive landscape and the preferences of the consumers in the immediate surroundings, you will be able to select products that resonate with your potential customers as well as those that operationally fit within your business model. Whether that means, selecting products based upon ease of preparation, nutritional benefits, or specific flavor profiles. As we alluded to in the opening, there are numerous options to choose from and each has their own benefits; however, those benefits are only valuable for your business if they fulfill the needs or desires of your target market.

What Do You Need?

Timely Takeaways:

- 4 Key Questions: What is your focus and do you have a plan to execute it? Who will you serve? What is around you? How will they find out about you?
- To determine your focus, figure out what your desired customer looks like.
- Is this customer someone you're likely to find in your chosen area? Use this concept to help you determine your physical location (if you haven't signed a lease yet).
- What other businesses are around you and what needs/roles will your shop fulfill? What problem do you solve?
- Determine who your captive-audiences are likely to be (those in the same shopping center, those using a bus stop, walking by, etc).
- Signs will need to clearly communicate what your business is and what you offer.
- Consider having social media accounts and a website for customers who don't see you during their daily commute.
- From here, decide on your menu & your focus.



Signature Drinks - Power Up Your Profits

While those in the know may think they have fully capitalized on creating signature drinks for their retail specialty coffee business, there are many different ways to power up profits through signature drinks, and only a handful of savvy coffee retailers do it correctly.

In order to understand how signature drinks can add to your business, it's important to make sure that you first understand this question. What are signature drinks? From there, it helps to be aware of the tools needed to create signature drinks, the benefits and value signature drinks bring to your business, as well as tips on the best ways to promote signature drinks to your customers.

So what is a signature drink?

Contrary to what a lot of you may believe, Snickers-Mochas, Milky Ways, Almond Joys, Sugar Daddy's, etc. are not true signature drinks. These can be made by anyone, and chances are, it's going to taste the same or at least similar at Java Joe's down the street as it does at your place of business (not to mention the potential copyright issues involved with drinks including other brands).

Imagine the uniqueness of your own hand-written signature, I want you to keep that in mind when creating signature beverages.

Granted, you want signature drinks to be based off of best-sellers like a mocha or vanilla latte, but the key is that they have a secret recipe. Since mocha and vanilla lattes are the most popular flavored drinks sold at your coffee business, why not start with these two flavors as a foundation of what you already know your customers love?!

Since we want these drinks to be something your customers crave, offer drinks that can be promoted day-to-day and become part of your everyday menu. The key in creating your signature drinks is having offerings on your menu that someone is going to want to drink day after day and not feel as though it's simply a splurge item to be purchased every so often.

How do I get started?

So you understand the uniqueness of signature drinks and have gained a better understanding of what they are, but how do you get started in concocting them? As with just about anything that has ever been created, you need some sort of inspiration.

I've personally found it helpful to base new recipes off some of my favorite deserts, but play around with other ideas you may have such as ice cream or bubble gum flavors. The world is your oyster, people!

Once you have a basic idea of what you'd like your end result to taste like, begin your research. For example, if you want to make a Tiramisu-inspired signature drink, take a look at Tiramisu recipes and see what similarities and differences you come across. Google away at every idea you have and see where it takes you. A few clicks here and a click there, you may stumble across something great!



The final and most important step is to make sure you're getting creative and having fun! You need to be so excited and inspired that you can't help but want to flip bottles around like Tom Cruise in 'Cocktail'! Begin with your flavor foundation but tweak it a bit here and there and taste test it until you've achieved your desired flavor profile.

Why bother?

The extra effort that goes into creating signature drinks pays off in more ways than just extra pennies in your pocket at the end of the day.

As with everything in your business; whether it be a sign, your color scheme, the name and theme of your establishment, you want those all to be reaching towards a common goal of brand identity and awareness. Signature drinks allow you another venue to promote that identity. For example, if the name of your shop is Tiki Java, create a name for your signature drinks along that theme such as offering a Maui Mocha.

You can't help but build customer loyalty when you use this approach. Using the same example, if a customer of yours

goes to the coffee shop down the block and tries to order a Maui Mocha, your competition won't be able to duplicate that drink, therefore, steering the customer back to your coffee business.

Of course, customer loyalty is great and we love to see repeat customers, but the sweetest reward in adding signature drinks to your menu is definitely the financial payback for your efforts. What you've done in creating these signature drinks is added value to an item that actually cost you nothing more to create behind the bar! Simply use the same total volume of syrups as you would for a certain sized drink, but ratio it out using a combination of different syrups.



When in doubt, follow this rule: if your current 16 ounce drink typically contains 1 ½ ounces of syrup flavoring, you can create a signature drink using ½ ounce each of three different syrups. You can also change it up with ¼ ounce of two different syrups and ½ ounce of two other syrups—as long as the total adds up to what you would normally measure for the drink size.

On average, if you promote your signature drinks correctly, about 30% of your current customers will begin ordering them regularly. The best part? Because of the perceived added value, you are also able to charge approximately 10% more per drink with the only initial investment being the signage you create to promote them.

How do I promote my new signature drinks?!

As humans, we naturally have an emotional connection to what we see, whether it be a cute kitten (aww) or a delicious looking drink with whipped cream and a chocolate drizzle (yum!). The best way to get your customers to not even think about another drink on your menu is to put these enticing pictures right in front of their face so all they will want to do is point to a great looking drink and say, "I want that one!" Make sure the photos you use are professional and include a brief caption describing the basic flavor characteristics present in the drink.

With all of the options your customers already have when they pull up to your drive-thru window, walk into your café or come up to your kiosk; you want to make sure you aren't overwhelming them with your new signature drink offerings. Ideally, four to six signature drinks is what you would want to highlight on your menu.

Keep in mind that these all don't need to be coffee-based drinks. In fact, they shouldn't all be coffee-based drinks. Not every customer wants coffee, so change it up and offer a tea infusion, handmade soda, or fruit smoothie as one of your four to six drinks. That way, you're able to capitalize on every palette that comes through your door.

Get to it!

Are you excited to start creating your own signature drinks? I sure hope so! You now understand what signature drinks are, how to get started in creating them, the value they will bring to your business and the best way to promote them. Now you have no excuse to not add them to your menu! Just remember to have fun and get creative!

Signature Drinks - Power Up Your Profits

Timely Takeaways:

- A Signature drink is like your own hand-written signature - something that is versatile & unique.
- This drink should be different enough to set you apart, but cravable enough to become a part of people's every-day routines.
- Have fun! Get creative! Research all your ideas and see what you can come up with from there.
- Don't forget to tie in the drink's name to the overall focus/brand of your Cafe.
- Ideally, have 4-6 signature drinks on your menu - enough to appeal to different people without being overwhelming.
- Take photos and make signs! Imagery is very powerful.



Using Social Media to Reach Your Community



Recent studies have shown that 75% of buying decisions are made after consulting at least one social media site, and that eight out of every ten customers are influenced by what their peers post on social media. The question has evolved from “Do I need to be utilizing social media?” to “What can I afford to risk losing by not?” Social media has outlived the trend phase; if you haven’t embraced your place in cyber space, you could be letting your customers click through your competitor’s door. Customers want to connect with retailers through social media, and expect the option to do so. Providing these outlets strengthens connections with your customers while also serving to meet their expectations. Believe it or not, your customers want to engage with you just as much as you want them thinking about you.

In a world of iDevices and sky-high Wi-Fi connections, deciding which adorable miniature icon you’ll be devoting your screen time to can be daunting. Where will you get the most bang for your buck? Are there shortcuts to help you get more out of your efforts? And when you find time in your jam-packed schedule to devote to social media, when do you post, where do you post, how often do you post, and what do you post? Creating inactive social media profiles can be more detrimental than not having a presence at all.

The players with the biggest reach in the world of social media are Facebook, Twitter, and Instagram. While most people are familiar with the basics of these three platforms, a healthy understanding of their purposes will help you use your time with each medium more productively. Strategic use of these sites cultivates a level of customer engagement that both your business and customers are craving, helping to build healthy and happy relationships.

Facebook: Facebook is a profile-driven site that allows users to interact by “liking” pages (such as businesses and organizations), and connect as “friends.” Users can post photos, share links, ping their location, and interact with posts by other users. Facebook has become a pay-to-play environment. We’ve all seen sponsored links and we know exactly what they mean—someone is coughing up cash to get exposure. While we all make a solid effort to ignore them, those messages are stuck in the back of our mind—but they are paid messages, so what is a small business to do? Don’t let this

deter you from setting up a Facebook profile; customers will be looking for you on Facebook, so your presence is incredibly important. You should dive into Facebook with the expectation that unless you want to give them your AmEx number, your posts may not be seen as often as you’d like.

Posting guidelines: 2-4 times a day, not more than 6 though. Facebook keeps us humble and it’s important to remember that sharing is caring, so aim for 50% of your posts to be shared from someone you’re following (you can follow other pages with your own business page).

Instagram: Users interact with Instagram as an ongoing stream of photos, posted by other users that they “follow.” Businesses that use Instagram have the option to leave a powerful caption, but it’s important to recognize that this series of photos will be scrolled with little to no reading. Your customers are visually oriented, and in the world of go, go, go, we’re all suffering from a shortened attention span. Instagram is quickly becoming the most frequently trafficked platform—posting your enticing, freshly baked cinnamon rolls, or the latest and greatest coffee mocktail you’re serving is a quick (and sense-provoking) way to invite your customers in to your café.

Posting guidelines: At least once a day, but not more than once an hour. Make sure your posts are image worthy, they grab the viewer and leave them wanting to be part of that photo.

Twitter: Twitter combines characteristics of Facebook and Instagram. Operating in a scrolling-style feed, users can post photos, videos, and short statements, as long as they don’t exceed 140 characters. Users can use the #hashtag function to tag the subject of a post, or directly tag another user by typing @Username, such as a business. Because of the nature of its tagging features, Twitter is the most effective and easy way to connect and engage with your customers. However, running a successful Twitter campaign requires a whole lot more sweat equity. While Twitter can quickly and easily yield the most successful customer results, it’s essential you treat Twitter like a digital conversation—be aware of not only what’s being said about you, but be engaged when someone is saying anything about you. Did someone ask a question? Don’t leave them hanging; aim to have that answered within the hour. Someone give you kudos about their morning latte? Thank them, and maybe even retweet that! Did a customer have a one-off negative experience? Acknowledge it, and do

what you need to do to make the situation right. You'll not only save that customer, but you'll also show everyone in their social network that you're a great business that will go the extra mile to create a wonderful customer experience. Who wouldn't want to become a regular at your café?

Posting guidelines: Aim for 11-30 original tweets per day focusing on the 80/20 rule, but this time 80% your content and 20% retweets. The easiest way to maintain this is by scheduling out your tweets for the day utilizing hootsuite, leaving you the remainder of the day to retweet and engage in conversations.

Once you have your profiles developed and perfected, you need a trustworthy way to get the most bang for your buck. While there are many available applications for you to utilize for scheduling and cross-posting, Hootsuite has weathered the test of time for managing multiple social media platforms. While jumping into Hootsuite may initially be a little intimidating, know that your time invested in learning the program will pay off ten-fold. Are you slower between 11am and 2 pm? Run a special on those fantastic grab and go burritos you offer from 12-1, and schedule your posts in advance with Hootsuite. The app is quick to alert you when someone has mentioned you, replied to you, or retweeted you, sending alerts on your smartphone so you can quickly respond. Just like Twitter, Hootsuite requires a little sweat equity, but will pay off over, and over, and over again.

To complete your social media puzzle, there are a few essential elements we must review:

1. Page consistency: Keep all aspects of your social media profiles consistent, including your profile pictures, "About Us" information, and contact information.
2. Establish posting guidelines: When do you post? You'll typically see the highest click-through times between 1 and 3 pm, with a peak user reach on Wednesday at 3 pm.
3. Use photos: Always include a picture when posting (whenever possible). This will not only increase the engagement directly with your customer, but also your customer's engagement with the photo, in terms of shares, retweets, etc. If you're going to not post, try to plan your down periods between between 6 pm and 8 am; lets be honest, we're all watching The Bachelor, not planning our next latte.

Social media is the most cost-effective and efficient way to connect with your ideal customer. Using social media requires work, so as you move forward in the process, know that your commitment will pay off. You have the opportunity to play a proactive role in your customer's decision-making process. This is your opportunity to reinforce your goals, values, and mission as part of a direct interaction with your customer base. You're creating an emotion response and cultivating loyalty, and at the end of the day, if you're not on Facebook, Twitter or Instagram for your customer to reach out to, they will take their business elsewhere.

Using Social Media to Reach Your Community

Timely Takeaways:

- Customers want to connect with retailers through social media and they expect the option to be able to do so.
- Facebook is profile-driven and encourages customers to interact with and 'like' their favorite retailers.
- Aim to post on Facebook 2-4 times per day (not more than 6) and to be sharing content from others about 50% of the time.
- Instagram is all about the visual appeal - plan to post at least once a day, but not more than once per hour.
- Twitter should be treated like a digital conversation - know what others are saying about you and remember to Respond to those things (whether it was positive or negative).
- Keep your pages consistent! Profile image, about section, contact info, etc.
- Post with images whenever possible.
- Try to schedule posts ahead of time to free you up during your busy day.



“Should You be Doing That?”

Understanding the Value of Your Time



As an owner or manager of a specialty coffee business, you are faced daily with almost unlimited choices of what to do with your time. There are a lot of chores involved with running any business - run to the bank, take out the trash, wait on a customer. All these things are important to a successful business, but should you be the one doing these tasks? For many of us, the longer term projects easily take a back seat to stuff right in front of us that seems to have greater urgency. Working with your bank to improve your terms, negotiating or shopping for a higher value trash service, developing marketing to increase the flow of future customers that need to be waited on - these are simple examples of enhancements you can make to your business - but these projects can be tough to complete when you're a barista one minute and clearing tables the next minute. My goal is to encourage you to track how you spend your time for one week, and then to evaluate what tasks you can train someone else to do.

Tracking your time should be simple. Make a daily chart that has a column for every hour you work that day. For the rows of the chart, define your common tasks and leave a few blank rows to write in unanticipated jobs. Carry a timer with you and set it for an hour at the beginning of each hour (many cell phones have a timer or alarm feature) to remind you to stop and review what you've been doing. At the end of each hour, put a slash mark in the appropriate box for every 15 minutes you spent doing one of the tasks. Concentrate on determining what you spent the bulk of that 15 minutes doing. I realize that you're always multitasking, but try to get the general theme of how your time was spent that hour. Each column should end up with four slash marks in it (they might be all in the same box!) At the end of the day, add up the number of slash marks in each row and divide by four - this will convert your slash marks to hours. Now you know how your day (at least 8 hours of it) was spent.

How'd you do? Did you spend many hours improving your business? Did you spend most of your time working in your business as opposed to working on your business? If you can honestly say you spent most of your time making your business stronger, then congratulations! It might be a good idea to have your managers or shift supervisors run through the exercise to start moving them towards working on your business too. If

you're looking at this and realizing that you spend an awful lot of time working in your business, that's okay - you've made a critical observation and now you can work on improvement.

Start looking at all the tasks you put in the first column and organize them into a few groups. Your groups might be: "Mine", "Employee", "Outsource". For the example chart, you might decide that Bookkeeping can be outsourced, Banking and Scheduling needs to be done by you, and that Barista, Inventory, Ordering and Cleaning can all be done by an employee.

Once you've decided which tasks should be done by an employee, you may have to set some systems up. For example, if you've always done all of the inventory and ordering, you might have an informal way of doing it. This is the time to formalize it. Create a spreadsheet with all the products you order, grouped by vendor or type of product (ingredient or cleaning supply) and set up your par levels - a par level is the quantity you build your inventory to. You should then give your employee the guidelines for ordering from your vendors. Is there a minimum order? Do they ship on demand, or do they deliver once a week? Once your employee has the guidelines and is trained to do inventory, the next step is for them to place the order. How much time did you just get back? How are you going to use it?

While you were tracking your time, you may have noticed some projects that you could work on once you found the time. Always keep your eyes open for projects that will make your business better over time. Projects that cut costs can be good. Projects that increase revenues are better. We have a number of Ask The Pros articles that will inspire projects for you.

It can be easy to get off the track of working on your business. I know firsthand that it's often faster and easier for you to just take care of something yourself. If it's a unique task or something that you are really the best suited person on the staff to do, that's okay. If it's a recurring job, you should consider delegating it and developing a system to ensure it's done to your standards. It's unlikely that you chose to take on a small business just to provide yourself a job. Assign the jobs to someone else and enjoy the process of growing your business - no one is going to be more passionate about that than you!

“Should You be Doing That?” Understanding the Value of Your Time

Timely Takeaways:

- Identify how you’re spending your time: are you working ON your business or are you working IN your business?
- If you are doing tasks that can be delegated or out-sourced, determine what they are and whether their process needs to be formalized beforehand.
- Plan on time to train your employees/managers on how to handle these items with little to no input from you - still have check-ins and be available for questions, but the goal is to engender a sense of ownership in your staff and free yourself to do more for the business.
- Always look for more projects that cut costs or increase revenue (without sacrificing your quality or focus).
- Assign the ‘jobs’ to someone else and enjoy the process of growing your business!



BPS® Training Materials- Your Access to the Pros, After Hours

Better Tools. Better Baristas. Better Business.

This is not only the tagline that accompanies our logo, but it is also the guiding principle behind what we do here at Barista Pro Shop. When you think of BPS, you might think of an extensive line of syrup flavors or maybe you think of our personable and knowledgeable customer service staff; but, do you think of a resource library? It's true we have a whole lot more to offer than just one of largest selections of specialty coffee supplies for your cafe or coffee shop. Previously, you may have just thought about BaristaProShop.com as a virtual showroom or e-shopping outlet, but now you should think of it as your one-stop source for product specifications and information as well as a valuable asset to help inform and train your staff about the brands you carry and the beverages you serve.

Whenever you want to learn more about a brand or product all you have to do is check out the Training Materials section. Within this page, you have access to in depth product information from over 60 brands in our catalog. It doesn't stop there, you will also find over 65 videos that show you how to produce everything from frappes and smoothies to unique latte art. With over an hour of content, you will have a resource to train the basics of being a barista in today's specialty coffee shops to all of your new hires at almost no cost to you!

To find this amazing resource, either scroll to the bottom of any page and find the link in the black navigation bar or find the link from the drop down menu located under the Contact Us tab at the top right of any webpage.

Do you know which brand you need more information about? Go directly to the brand that interests you and select their exclusive Training Materials from the links located under the label "More Info From..."

The best part about this tool is that you have access to the Pro's knowledge anytime; after hours, on weekends, or even on holidays. So, if you can't contact one of our Pros directly; you will still be able to find answers and solutions to many of your questions or concerns. These Training Materials give you a wide array of information spanning from product ingredients, proper usages & applications, to recipes, and how-to videos. And that's just a few of the examples of the great resources available at Barista Pro Shop's Training Material library. In addition to resources for you and your staff, you will find PDF's for many of our products that you can utilize to promote new or seasonal products on social media channels, your website, or to print off and display in your shop. Whether it's information for you, your employees, or your customers; you can find just about anything you need in our Training Materials section.

**For additional resources, visit
www.BaristaProShop.com
or call 1-866-PRO LATTE**

To access a digital version of this and many other similarly useful documents, for FREE, visit:
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- Your Guide To The New Cafe **Forms & Logs**
- All of the New Cafe **Forms & Logs**
- Your Guide to Your Order-Guide
- Record Keeping: Binders, Files, & Folders
- Health Department - The Food Code, Forms, & SDS

FRONT-OF-THE-HOUSE ESSENTIALS CHECKLIST

EQUIPMENT

- Espresso Machine
- Espresso Grinder
- Grinder for Brewed Coffee
- Brewer and Airpots (Require Commercial Brewer)
- Manual: Pour overs and Presses
- Cold Brew: Toddy
- Pitchers for Cold Brew/Iced Coffee
- Blender
- Blender Pitchers
- Soda Siphon & Chargers
- Whipped Cream Profi
- Whipped Cream Chargers

SMALLWARES

- Steaming Pitchers (8-12, At least one small one)
- Shot glasses or pitchers (8)
- Long handled spoons (4-8)
- Scale: for dosing coffee water for manual brewing
- Mugs/Demitasses/Saucers/Cups if you will have in-house service and seating
- Bean Scoop (and coffee bags): If you plan to sell whole bean coffee
- Racks (various types): Display Tea and Grab-n-Go as well as efficiently store Sauces/Syrups
- Organizers for Disposables/Paperwares
- Cup and Lid Holders
- Squeeze Bottles
- Pumps for Sauces and Syrups (or a jigger if you choose to pour and measure)
- Espresso Machine Smallwares: Tamper, packing mats, and knock box (or chute)
- Aprons & Hooks to hang them
- Thermometers-Be sure to include thermometer calibration tools and clips
- Carafes for Milk/Cream
- Pitchers for Storing/Mixing Product
- Jars/Canisters for Open Product
- Clips to Seal Open Bags
- Drying Tiles/Mats/Racks

DISPOSABLES

- Hot Cups
- Cup Sleeves
- Hot Lids
- Cold Cups
- Cold Lids
- Cup Carrying Trays
- Lid Stoppers/Caps/Stickers
- Straws
- Stir Sticks
- Napkins
- Plastic Utensils
- Food/Soup Containers: To-go containers

PERISHABLES

- Coffee
- Espresso
- Tea - Hot/Iced
- Maté
- Chai: Powders or Liquid
- Smoothies
- Fresh Fruit?
- Frappes: Powders or Liquid Base
- Flavored Syrups
- Sauces: Chocolate, Caramel, White Chocolate, and more?
- Milk & Alternative Milks

GRAB-N-GO/FOOD ITEMS

- Nutrition Bars
- Nuts
- Oatmeal
- Breakfast/Baked Goods
- Lunch Options
- Candy

CLEANING SUPPLIES

- Espresso Machine cleaner
- Brew and Urn Cleaner
- Grinder Cleaner
- Coffee Equipment Cleaner
- Steam Wand Cleaner
- Group Head Brush
- Grinder Brush

BACK-OF-THE-HOUSE ESSENTIALS CHECKLIST

FINANCES

- Point-of-Sale System
- Cash Drawer
- Safe (or some other secure option)
- Quickbooks or other financial software
- Determine Menu Prices
- What Margins do your Prices give you?
- Company Credit-Card (is it necessary?)
- Set-Up a Business Bank Account
- Get Bank Bags for delivering Deposits
- What forms of Payment will you accept?
- If you accept Credit Cards - how will you process them?
- Will you require a Minimum Purchase amount?
- When/how will you pay employees?

LICENSES, ETC.

- Business License/Permits
- Taxes - Federal, State, County, City
- Food Handling Certification
- Phone Line(s) - how many?
- Internet
- Utilities
- Insurance

EQUIPMENT/SUPPLIES

- Cash Drawer (also listed under Finances)
- Dishwasher
- 3-Compartment Sink
- Hand-washing Sinks
- Mop Sink (plus bucket, mop, & way to hang the mop)
- Floor Cleaner
- General Purpose Cleaner
- Bathroom Cleaning Supplies
- Office Supplies for record-keeping, etc.
- Sanitizer Buckets/Disposable Towels
- Hazardous Waste Clean-Up Kit
- First Aid Kit/Supplies
- Trash Cans (with lids)
- Recycling?
- Hooks to hang Aprons
- Day-Dots or other Dating System

RECORD KEEPING

- Temperature Logs
- Thermometer Calibration
- Waste Logs
- Cleaning Schedule/List
- Order Guides
- Order Schedule/Frequency
- Receiving (for orders, etc)
- Inventory (and how often?)
- Open/Close Checklist or Guide
- Employee Records
- Pest Control
- Repairs

SIGNAGE/ADVERTISING

- Menu Board
- Table Toppers/Tents
- Hours of Operation
- Logo/Branding
- Business Cards
- Fliers or other Disposables? (stickers, personalized cups/sleeves, etc)
- T-Shirts, Tumblers, Mugs
- OSHA requirements
- Health Department requirements (i.e. hand-washing sink identified)
- Outside Signage - what requirements or restrictions does your landlord have?
- Website
- Social Media Presence
- Newspaper Advertising
- Local News (press releases)
- Local Chamber of Commerce

HIRING

- How many employees?
- Pay-rate (local requirements)
- Training
- Insurance
- Worker's Comp/Medicaid/Social Security Payments
- W-4's and W-2's
- Employee Handbook/Expectations

YOUR GUIDE TO THE NEW CAFE FORMS & LOGS

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• Two different calibration methods are described in this document. We've also included images/diagrams to make it easier to teach your team.	
THERMOMETER CALIBRATION LOG	31
• Keep an ongoing record of your thermometer's accuracy.	
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• Keep an ongoing record of your equipment's internal temperatures so you can identify problems before they become food safety or waste issues.	
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• An example checklist of tasks that can be done in the morning and night to help keep your cleaning and preparation expectations both clear and trackable.	
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• An example of a cleaning log, to ensure that items are addressed that may not need daily attention.	
WEEKLY WASTE LOG	35
• Keep an ongoing record of what and how much product you are wasting so you can address problems and create solutions to power your revenues.	
YOUR GUIDE TO YOUR ORDERING-GUIDE	36
• Lots of details here regarding why the Order Guide is divided into its particular sections and how I recommend structuring your ordering (based on my previous experiences running cafes - both good and bad).	
ORDER GUIDE	38
• The Order Guide to make sure you know what you have on-hand and what you need to bring in for your next delivery.	
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• Some great tips on how to approach Customer Service training with your staff. It's important for so many different aspects of your cafe.	
THE IDEAL TAMPER SIZE FOR YOUR ESPRESSO MACHINE	44
• As the title says - this will help you determine what size tamper you need for your particular machine.	
POSSIBLE MENU CATEGORIES & EQUIPMENT/SUPPLIES	45
• Stumped on where to begin with your menu? Here are some general categories and options that you can begin with and a 'yes/no/maybe' feature so you can make notes as you go with this worksheet.	
RECORD KEEPING - WHAT & HOW?	48
• A suggested list of what forms/records you should keep and how do you file or organize them.	

THERMOMETER CALIBRATION INSTRUCTIONS

Introduction:

Thermometers should always be calibrated to ensure that the temperatures they record are accurate. This doesn't necessarily need to be done every day (although it certainly wouldn't hurt), but the general rule-of-thumb is that they be calibrated once every 1-2 weeks. For the purposes of this document, we're assuming that you are using a Stem/Probe Thermometer (pictured below) with a dial or digital display.

Cold-Point Calibration Method:

This method is also called the Ice-Point or simply an Ice-Bath.

Fill a glass with ice and clean water (with enough room so the thermometer can be submerged 2" without touching the bottom or sides) and stir the ice water.

Hold the dial of the thermometer and submerge the stem at least 2" into the ice water and wait for at least 30 seconds.

If the temperature reads 32° then it's calibrated. Record the reading on your log & then check the next one.

If it reads anything aside from 32°, then see the next page for



Boiling-Point Calibration Method:

Of the two methods, this is not the recommended method because of the differences in boiling temperature (based on elevation) and the added risks of working so close to boiling water.

Bring clean water to a boil in a safe container.

Once it's boiling, pour it into a glass container if it isn't already in one (glass causes less disparity in temperature readings, than metal will, with the hot water).

Use wooden tongs (or some other hot-water safe tool that is Not metal) to hold the thermometer. The stem needs to be submerged at least 2" without touching the sides or bottom of the container. Leave it there for at least 30 seconds and then read the temperature.



Compare the temperature reading to the temperature at which water boils for your elevation and adjust your thermometer as needed.

NOTE: For every 500 feet of elevation, reduce the expected boiling point of water by 0.5°F/0.25°C.

Elevation / Boiling Point

Sea Level / 212° F
2,000 ft. / 208° F
5,000 ft. / 203° F
7,500 ft. / 198° F

THERMOMETER CALIBRATION INSTRUCTIONS

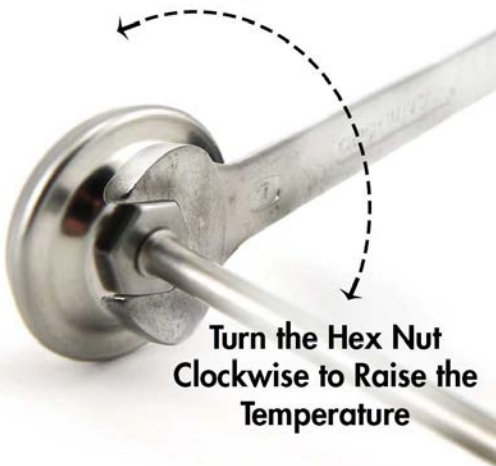
How-to Manually Adjust the Temperature Reading:

First, keep the thermometer in the water (whether iced or boiling).

Use a wrench, pliers, or other such tool that will properly grip the hex nut to turn it either clockwise or counter-clockwise.

When you are looking down at the dial, Counter-Clockwise will lower the temperature while Clockwise will raise the temperature.

Turn the Hex Nut Counter-Clockwise to Lower the Temperature



NOTE: This image has the thermometer upside-down just to demonstrate where the hex nut is actually located - you will want to be looking at the dial face to determine whether you are spinning the nut clockwise or counter-clockwise.

Thermometer Calibration Tool:

This tool is intended to serve as both a holder for your stem thermometer while you are calibrating it, as well as a way to turn the hex nut.

After you have prepared the water, you would thread the thermometer stem through the hole in the calibration tool.

Ensure that the nut on the underside of the thermometer face is aligned with the grooves in the calibration tool.

Insert the thermometer into the boiling or freezing water.

Turn the nut on the underside of the thermometer face with the calibration tool.

This will move the pointer.

We have this tool available for purchase and you can find a link to it on our New Cafe Guide Page: www.BaristaProShop.com/bps/NewCafe



Daily Refrigerator / Freezer Temperature Log

Instructions: This log will be maintained for ALL refrigerators and freezers (both walk-in and reach-in units) in the Cafe. A designated barista will record *their initials in the appropriate column (AM or PM) and the temperature for each fridge/freezer in the corresponding AM/PM column.* AM should be done before the Cafe opens and PM should be done after the Cafe closes to the public. The Cafe Owner/Supervisor will verify that baristas have taken the required temperatures by visually monitoring baristas & reviewing the log for completion and following up on any corrective action taken. The Cafe Owner/Supervisor will then initial and date the completed log at the end of each month and file it with their records. These logs should be maintained for a minimum of two years or until given permission, by your local Health Department, to discard it. *If corrective action is required on any day, circle the date in the first column and explain the action taken on the back of the chart or on an attached sheet of paper.*

Refrigerators should be between 33°F and 41° - Freezers should be between -20° and 0°.

Month:

Year:

Date	Initials		Fridge #1		Fridge #1		Fridge #3		Fridge #4		Freezer #1		Freezer #2	
	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
1														
2														
3														
4														
5														
6														
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31														

Supervisor's Initials and Date (at end of month): _____

Opening/Closing Checklist

Instructions: Write your initials by a task to indicate that it has been completed for the day listed.

Today's Date: _____ **Day of the Week:** _____

Opening Tasks	Initials
Fill the 3-compartment sinks with washing & sanitizer solution.	
Fill the sanitizer buckets & spray bottle with fresh sanitizer solution.	
Set the 2-hour timer for when the sanitizer solution will need to be tested.	
Turn on all the necessary equipment & warm up the espresso machine.	
Brew your morning coffee & set your timer for when it will expire.	
Brew/prep your iced teas & iced coffees.	
Prep your daily whipped cream.	
Fill the creamer carafes & set the 2-hour timer for when to replace them.	
Take the chairs off the tables and arrange them appropriately.	
Make sure your front ice-bin is full.	
Check that all your syrups are full and not-expired.	
Prep any pastries or food items that need to be filled or set-up.	
Tasks for Throughout the Day	Initials
Change out the Creamers & Sanitizer buckets as needed - based on the timers.	
Brew coffee as needed throughout the day - based on your store's protocols.	
Clean the Syrup bottles and pumps so there isn't any sugar residue.	
Clean-as-you-go throughout the day, so it's an easier job at closing.	
Keep up on dishes & walking through the dining/seating area to make sure tables are clean, etc.	
Record any wasted product throughout the day for final logging at Close.	
Closing Tasks	Initials
Check all product to make sure nothing is expiring tonight - if it is, add it to the waste log.	
Clean the coffee brewer & the coffee airpots.	
Clean the espresso machine & ancillary pieces: portafilter, grates, steam wand, etc.	
Clean all the dishes: mugs, shot glasses, spoons, thermometers, trays, scoops, etc.	
Clean all the counters - moving displays & fixtures when possible.	
Wipe out the fridges & make sure there are no spills.	
Clean the tables in the seating area & put the chairs up on the tables.	
Sweep & Mop both the front and back of the house - hang the mop to dry afterward.	
Empty your 3-compartment sink & make sure it's clean.	
Record any wasted product from the day in the nightly Waste Log.	
Count down the cash drawer and put together the deposit as needed.	
Leave any communication for the morning crew where they will quickly find it.	
Stock any products that are low: syrups, grab'n'go items, ready-to-drink beverages, milk, etc.	
Turn off any equipment that needs it and turn off the lights before leaving.	

Supervisor's Initials and Date (at end of day): _____

YOUR GUIDE TO YOUR ORDER-GUIDE

Breakdown of the Columns/Headings:

Item # - You may or may not need this column, but it can be useful when entering your order to verify that you are ordering the correct item (especially when names/descriptions might be similar).

Item Name/Description - This could be the name as listed from wherever you order or it could be your short-hand for the same item. Whatever you use is fine as long as you (and anyone else doing orders) knows what it refers to. (i.e. Vanilla Syrup, SF Vanilla Syrup, or DaVinci's Classic Vanilla Syrup)

Vendor/Brand - This can also help with differentiating items if you have similar products that come from different vendors or are different brands. (i.e. DaVinci, Barista Pro Shop, etc.)

Date: - You decide whether this is the date that you are submitting the order or the date on which it is supposed to arrive.

OH - This stands for "On Hand" as in how many of 'x' item you currently have in your inventory. Record this for all the items you will be checking on for your order.

Ord. - This is your Order - the amount that you will be ordering based on your On Hand numbers and when you will be planning to order next.

ORDER GUIDE				Date:	Date:	Date:	Date:			
Item #	Item Name/Description	Vendor/Brand	OH	Ord.	OH	Ord.	OH	Ord.	OH	Ord.

On-Hands & Order Records:

The reason it's important, that you record your OH numbers every single time you place an order, is because then you can accurately track how much of any individual product you are going through between orders. Your POS software may also give you reports with this information, but I still recommend going through the process of recording your physical On-Hands and then comparing that with the report from you software. This will help you identify any discrepancies and perhaps stop any product-loss issues before they get too unwieldy to manage.

It also provides you with a easy-to-see history of product inventory and orders so that if you have to have a barista jump in to do the order at the last minute - they already have a built-in guide as to what to order and how much.

One of my Cafes was already doing their orders in this manner and once I discovered the method, I shared it with everyone I could. It made ordering super simple and I was always confident that I was going to have enough product to get me to my next order. I could also see how holidays affected my inventory and sales right through my order guide.

If you order in this way, you may not even need to do a full-scale inventory because you'll already be doing it each time you order. However, this only works well if you give yourself the time to physically check all your products as you're filling out your order. If you make guesses, then it won't work.

Additionally I recommend that once you are ready to send your order in (whether digitally or calling it in), that you use a highlighter to highlight each order amount as you enter it. This way if you get interrupted in the middle of entering your order - you can easily see where you've already finished and need to pick back up. It also provides an easy method to double-check (before submitting the order) that you're actually submitting everything you need.

YOUR GUIDE TO YOUR ORDER-GUIDE



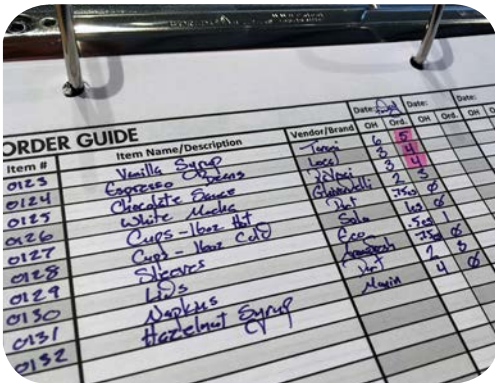
Doing the actual Order:

I found that keeping my order guide in its own binder, worked best. I used the binder much like a clipboard (pictured to the left) while I walked around recording On Hand amounts and deciding on my order totals.

I also kept the last 4 completed order guides tucked behind a divider in the binder so that I could always reference those if I had additional questions or just needed more data.

How to count/record your items:

In the editable Order Guide file, you may choose to add a column that indicates how each item is being recorded. I find that this is most easily determined by how you order each product or how you store the products.



We always kept our syrups out of the boxes and available on our dry storage shelves. So, I would count these as 'eaches,' but I did still keep in mind that I ordered them by the case. Some places (such as BPS) will let you order bottles by the 'eaches.'

I would count my cups by the case - estimating whether I had .75 of a case left or perhaps .25 of a case.

Try doing things different ways and see what you prefer. The trick is finding a balance between accurate recording and efficiency - so it doesn't take you all day to finish your order.

How often should I order?

The answer to this question depends on a few things... does your distributor have a limit to how often they can deliver to you? I have worked in cafes where we were only able to receive 1 order a week - maximum - and I wouldn't see my order for an entire week (order on Wednesday and receive my order the following Thursday). This made things very difficult and involved a lot more guesswork.

Other cafes have had the option of ordering twice or even three times in one week. This made things both easier and more difficult. Each time you submit an order you need to make sure you allot enough time to do an accurate count or it's not beneficial. So, ordering ate up a lot of my time (basically doing orders every day), but it did make the overall process go faster because I was more familiar with what I had in stock and I didn't usually need to order as much product.

The sweet-spot for me and my last cafe was ordering twice a week. Once to recover from the busy weekend and once to prepare for the upcoming weekend. You'll have to figure out what works best for you, your distributor, and your staffing needs. Just don't be afraid to change how you do things if you find that it's not working well - no one expects you to know it all the first-time.

"The Only Thing That Is Constant Is Change." **-HERACLITUS**

QUALITY CUSTOMER SERVICE

What is Customer Service?

Customer Service affects the _____ of your shop and a customer's _____ within your shop.

Customer Service Encompasses:

everything a customer sees, hears, touches, drinks eats and smells in your establishment.

Great service creates a space for *community* - which is a huge part of the coffee culture.

Why Does Customer Service Matter?

Typically...

Good Service = _____

- A more enjoyable day!
- Better tips
- Customer Loyalty

Customer loyalty leads to increased sales and keeps patrons coming back for more.

The Environment:

The environment or atmosphere of your shop is determined by:

- Cleanliness: _____
- Organization: _____
- The Music: _____
- The Lighting: _____
- The Temperature: _____
- The Seating: _____

The Customer's Experience:

Usually, the server affects a customer's experience more than anything else in an establishment.

The Best Baristas:

- _____
- _____
- _____

their customers' needs.

STEP ONE: Read Your Customer

With practice, this can be done in a glance.

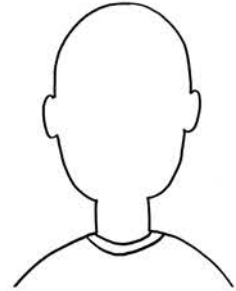
Before you can really help anyone you have to know what they need or want. Sometimes you'll get a chance to ask but most of the time you can read the body language and get a general idea.

Here are a few **generalizations** that can help you identify a customer's priorities or needs:

THE SOCIALIZER:

He/she is here to chat with you and others. Socializers may talk a little too much to the staff.

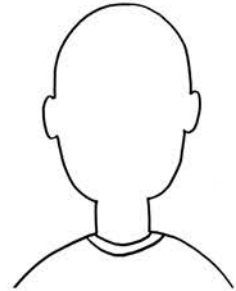
Dealing with this takes skill and tack. Keep your conversations short and polite. Remember to think about your other customers.



THE DASHER:

In a hurry, he/she bursts in with an order in mind hoping for immediate service. Unfortunately Dashers do not usually consider the other guests or your workload. Often Dashers want the staff to understand their problems and stop everything to serve them.

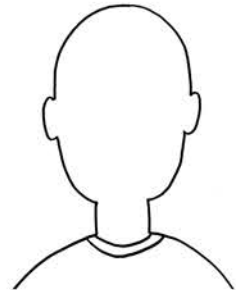
Unless he/she expects to be the exception to the rule every time, do your best to oblige the hurried guest. Helping a guest when he/she is rushed, often assures that he/she will, out of gratitude, become a patron and return when there is more time to relax. With teamwork, flexibility, good communication and a good spirit, the Dasher can be served in a few minutes.



THE GRUMBLER:

He/she may have gotten up on the wrong side of the bed (and obviously he/she has not had coffee yet). Not every guest will arrive wearing a smile.

Try to empathize - everybody has off days or rough mornings. Try to be polite, kind and accommodating even if it isn't reciprocated. Instead of letting the Grumbler's funk rub off on you let your positive attitude rub off on him/her.



Notes: _____

STEP TWO: *Greet Every Customer*

Smile and show that you are pleased to see the customer!

After quickly reading a customer, greet him/her appropriately. **Say hello...**

Sometimes you will need to wait for the customer to approach you once he/she makes a decision.

THE SOCIALIZER: ask about their day

THE DASHER: take the order and get ready to move

THE GRUMBLER: listen and offer empathy

Even if you cannot immediately serve a customer, make a point to greet him/her and let the individual know that you will be with him/her soon.

Typically customers are more content to wait when:

- They know that you see them and are trying to get to them
- They know what to expect (*About how long it will take? Are any menu items temporarily unavailable*)

Don't make a customer ask for help - try to read and offer assistance first!

STEP THREE: *Do Your Best To Meet Or Exceed The Customer's Expectations*

Take your customer's order and **REALLY** listen!

1. If something doesn't make sense - **ask clarifying questions...**

- "Did you mean...?"
- "You regularly order alternative milk, did you mean to order whole milk?"
- "This is our small size, when you said kid's size is that what you meant?"

2. Repeat the order back to make sure you understood correctly- the details matter!

3. **Up-selling/Recommendations:** Make suggestions based on your "read" of the customer

- Does the individual seem adventurous?
- Does he/she have time to listen to your recommendation or product description
- *Also are you in the middle of a rush?*

Only take this extra step to up-sell or recommend, if the situation is right otherwise you may end up frustrating a line of waiting customers or wasting your time. However, if the timing is right you might surprise your customer with a new favorite drink that he/she will return for!

Notes: _____

The Ideal Tamper Size For Your Espresso Machine

The ideal tamper should be slightly smaller than the inside diameter of the portafilter basket so that the tamper does not bind while compressing grounds - essentially there should be a little extra space between tamper and basket.

We recommend measuring the exact inside diameter of the portafilter basket and then selecting a tamper at least .75 mm smaller.



How To Measure A Portafilter Basket

Step 1:

Use machine calipers or a steel measuring tape with 1/32 inch divisions to carefully measure the distance inside the filter basket directly across the centerline (the diameter).

Step 2:

Convert the measurement to a decimal.
Example: 2 1/4 inches = 2.25 inches

Step 3:

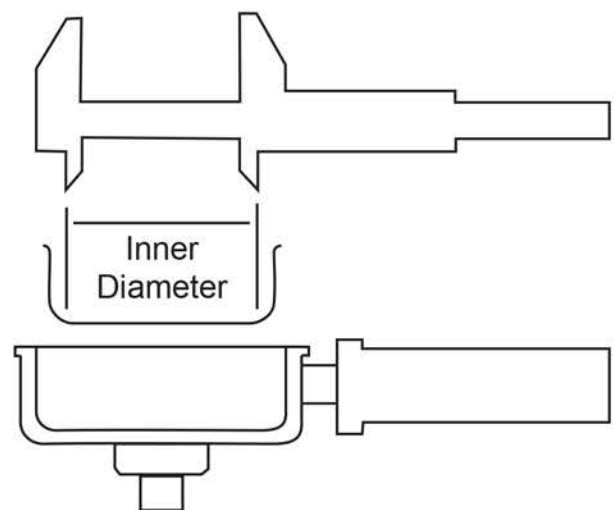
Convert the measurement to millimeters.
Example: 2.25 inches X 25.4 = 57.15 mm

Step 4:

Subtract at least 0.75 mm from the portafilter basket diameter measurement.

*Example: 57.15mm - .75mm = 56.4 mm then round
Voila 56mm is the ideal tamper size!*

Note: If the basket tapers or gets smaller toward the bottom, you will want to measure the most narrow diameter at the bottom of the basket so that the tamper does not get stuck.



Please see the following chart for suggested tamper sizes...

Recommended Tamper Sizes

*Espresso Machines
Most Commonly Used At Home*

Brand	Tamper Diameter (mm)
La Pavoni <i>older model</i>	49
Krups	49-52
Elektra Casa Models	49
Olympia Club	49
Olympia Cremina	49
Loympia Maximatic	49, 53
Pasquini Livietta	49
DeLonghi <i>older model</i>	49
Francis Francis <i>older model</i>	52, 53
Spaziale	53
Faema Family	53
Saeco	53, 52
La Spaciale	53
Starbucks	53, 52
Solis	53, 52
San Marco	53, 55
Estro	53
Dalla Corte	54
Mokita	55
La Marzocco <i>single filter</i>	55
Astra	56
Aurora	56
Francis Francis <i>newer model</i>	56, 57
La Pavoni <i>newer model</i>	56

*Espresso Machines
Most Commonly Used Commercially*

Brand	Tamper Diameter (mm)
Reneca	56
Unic	56
Ascaco	57
Cimbali	57
Innova	57
Pavoni Duet, Club	57
La Marzocco	57, 58
Astoria	58
Astra	58
Azykoyen	58
Brasilia	58
Bezzera	58
Bunn	58
Faema	58
Gaggia	58
Duet	58
Grimac	58
Isomac	58
Kitchen Aid	58
Iberital	58
La Pavoni Club Combo	58
La Valentina	58
BFC	58
Nuova Simonelli	58
Racilio	58
VMB	58
Wega	58
Elektra	58

OPTIONS FOR YOUR MENU CATEGORIES

Using These Categories:

These categories and sub-categories are not requirements for a cafe, but we've listed them here to begin the discussion of what you'd like your menu to look like. The "yes / no / maybe" options to the right are for you to circle as you make a decision regarding each item.

Feel free to take lots of notes on these pages, highlight/circle sub-headings that you're interested in or just cross things out entirely. We hope that these pages are useful in helping you make your menu-decisions!

Additionally, the categories and sub-headings correspond with the same headings on our website & catalog. So if you want to see examples of some of these items, print these pages out and make notes while you peruse the products and see what you like best. www.BaristaProShop.com

As always, if you have any questions about products or otherwise - just call our Customer Service Baristas and we'll get you squared away! **1-866-776-5288**

Coffee, Tea, & Mate:

- Coffee - organic, fair trade, locally roasted.....yes / no / maybe
- Iced Coffee - brew & then ice, concentrates, cold brew..... yes / no / maybe
- Hot Tea - bags/sachets, loose leaf, concentrates.....yes / no / maybe
- Iced Tea - filter bags (to brew), concentrates.....yes / no / maybe
- Mate - loose leaf, tea latte concentrates..... yes / no / maybe

Syrups:

- What Brand(s)? Monin, DaVinci, Torani, 1883, etc.....yes / no / maybe
- Varieties - classic, sugar free, organic, zero-calorie..... yes / no / maybe
- Liquid Sweeteners - cane sugar, honey, etc.....yes / no / maybe
- Flavor groups - nuts, fruit, chocolates.....yes / no / maybe
- Apple Cider..... yes / no / maybe

Chai & Alternative Milks:

- Chai - liquid concentrates, powder concentrates, sachets, 'super' concentrates.....yes / no / maybe
- Alternative Milks - almond, coconut, rice, hazelnut, etc..... yes / no / maybe

OPTIONS FOR YOUR MENU CATEGORIES

Frozen Drinks:

- Smoothies - liquid base, powder base, fresh fruit.....yes / no / maybe
- Blended Iced Coffee - powder base, liquid concentrates..... yes / no / maybe
- Blended Cremes - liquid or powder base.....yes / no / maybe
- Protein Drinks.....yes / no / maybe
- Blended Chai - powders or concentrates..... yes / no / maybe
- Kid-specific drinks - cremes, smoothies, etc.....yes / no / maybe

Chocolates & Caramels:

- Sauces - chocolate, white chocolate, caramel.....yes / no / maybe
- Ground Chocolate - powdered bases..... yes / no / maybe
- No Sugar Added options..... yes / no / maybe
- Hot Chocolate..... yes / no / maybe
- Confections & Retail Items - candy, caramels, fudge, bars, etc..... yes / no / maybe

Food & Grab'n'Go:

- Specialty Food Items - organic options.....yes / no / maybe
- Candy..... yes / no / maybe
- Meat Snacks - jerky, sticks, etc.....yes / no / maybe
- Nutrition Bars.....yes / no / maybe
- Nuts..... yes / no / maybe
- Oatmeal.....yes / no / maybe
- Biscotti.....yes / no / maybe
- Honey & Spices - cinnamon, nutmeg, ginger, pumpkin spice, pepper, salt.....yes / no / maybe

EQUIPMENT & SUPPLIES BASED ON YOUR MENU

Things to Consider:

Based on what you want to serve in your cafe, you will need to purchase and keep on-hand different equipment and supplies. Here are some categories that you will want to consider and some of the menu items that they deal with directly.

Look for equipment that is Food Grade or Commercial Grade. Especially for scales, blenders, and even grinders. Something you would buy to use in your home is probably not to the same standards required for food service businesses. Another certification to look for is 'NSF' - National Standard of Food Safety. Another note about Blenders: you need a blender with Ice Blades, not food processing blades. This will make a huge difference in the quality of your frappes, smoothies, and other blended drinks.

Again, these are similar to the same categories and sub-headings in our catalog if you'd like to see examples of all these items. www.BaristaProShop.com

Equipment:

- Blender(s).....for frappes & smoothies
- French Press, Pour Over set-up.....for manual coffee brewing
- Commercial Coffee Brewer & Airpots.....for your standard brewed coffee (can be used for hot tea, also)
- Cold Brew Coffee brewer & storage pitchers.....for cold brew coffee & tea
- Smallwares.....spoons, shot glasses, creamer carafes, kettles, teapots, tampers, saucers, mugs, thermometers, knock box, etc.
- Whipped Cream Profi, chargers, gaskets.....standard whipped cream & flavored
- Racks/Stand.....for sauces, syrups, etc.
- Cleaning Products, brushes, scrubbers.....for cleaning all the things
- Pumps & Dispensers.....for your syrups & sauces
- Scales.....for measuring & dosing coffee
- Grinders.....for your espresso machine (unless it's built-in) & brewed coffee
- Knock Boxes & Knock Chutes.....for your used espresso grounds

Supplies:

- Hot Cups & Lids
- Cold Cups & Lids
- Cup Sleeves
- To Go Products - drink carrier, etc.
- Straws & Stirrers
- Food Containers
- Plates & Utensils
- Recycled Content? Renewable & Compostable?
- Ceramic Mugs for dining-in?

WHAT DO YOU KEEP AND HOW DO YOU FILE IT?

RECORD KEEPING

Binders, Files, & Folders, oh-my!

Having a plan for how you will keep all these forms and records organized is just as important as knowing where you'll be storing your milk and the fridge it's kept in. Based on the forms that we've included in this guide, the way I organized my files is as follows:

- 1 Binder for my Order Guides - the current one I'm using, plus the most recent 4 that I've finished with (in the same binder, behind a divider)
- 1 Binder for my active Temperature Log, Thermometer Calibration, & Waste Log
 - The Temperature Log could also be posted on one of your Fridges so you can see that it has been done, at-a-glance
- 1 Clipboard with my Weekly Cleaning List - so it's very visible and easy to transport (if you staff has better access to it, then they're more likely to work on it)
- The Opening/Closing Checklist can be done a couple of ways... either keep it in the binder with your Temperature Logs (since both of those are daily items) or you could laminate it and have it posted in an easy-to-access place (then just use dry erase during the day and wipe it clean at the end of the night)
- 1 Administrative Binder - this would be a larger binder where you keep the most recent 4 iterations (4-weeks rolling) of your Temperature Logs, Thermometer Calibrations, Waste Logs, Weekly Cleaning Lists, & Opening/Closing Checklists.
 - This way, if the Health Department or anyone else needs to quickly see your records - you have it easily at hand.
- Safety Data Sheets (SDS) Binder - more details on these in a couple pages, but this binder should be in an easy-to-access-place and very clearly marked

As you move forms and logs from your active locations to the Administrative Binder, file the oldest away in a filing cabinet. I preferred having a small 2-drawer cabinet wherein the top was the first half of the year and the bottom was the second half.

- Each month had its own hanging file with 3 folders inside:
 - One for finished Orders, one for completed Logs, & one for Sales reports
 - Receiving paperwork would go into my Orders folder
 - Any repair or service-call paperwork/receipts would go into the hanging file for the appropriate month, but not into a folder

This way you have an entire year of reports and information to reference quickly. The sales reports can be very helpful so that you can see how busy you were last-year around a Holiday when you're looking to prepare for it again, this year.

Typically, 2 years is a safe length of time to keep these sorts of documents - after moving them from the filing cabinet, I would just box them up according to month. Financial information often needs to be kept longer, but check locally.



HEALTH DEPARTMENT

THE FOOD CODE, FORMS, & SDS

Federal & State Food Codes:

The federal Food Code is very expansive and may have a number of features that don't apply directly to your Cafe. However, it is still important to be familiar with it and ask your local Health Department representative whether a particular portion does apply to you, or not.

The entire code is too large to include in this guide, but we have provided links to it and other important food safety forms/guides on our website: www.BaristaProShop.com/bps/NewCafe

States will often choose to adopt all or part of the Federal Food Code - typically if they do not adopt a section it is because they have their own (more restrictive) version that they have already enacted. On our website, we have also included a link wherein you can select your State to see what your local requirements are. When in doubt, the best solution is to contact your local Health Department representative and ask them questions to verify the scope of your responsibilities.

Additionally, we have attached a few select forms as examples of things you should consider when opening a Cafe and considering how to handle staffing.

- Food Employee Interview: a form to include in interviews so you can rule out any exposure to food-borne illnesses prior to hiring (however, this can't be used to disqualify a candidate from being hired).
- Food Employee Medical Referral: a form to send with an employee (to the Doctor) if they are exhibiting symptoms of a food-borne illness or have been exposed to such recently - this way the medical professional can sign off on whether they are safe to return to work or not.
- Food Employee Reporting Agreement: this is for both you and your employee to sign - verifying that they will report any symptoms of food-borne illnesses to you and that you will, in turn, take whatever appropriate steps may be required to keep your establishment safe for the public.
- Food Inspection Report: this page is an example of a food inspection report that a health department inspector may use when they visit your establishment.
- OSHA quick reference sheet (more info below).

Safety Data Sheets:

The Safety Data Sheets (or SDS as they are often called) are forms that you need to have on-hand in your Cafe for every chemical that you use: whether it's something you buy from a vendor or picked up at the grocery store. The reason you need to have these on-hand is so that if someone ingests or comes in contact with a chemical and needs medical attention -- the form can be sent with them so that the Doctor knows exactly what caused the problem and they can accurately treat it. This is why the forms need to be easily accessible, identifiable, and available to both your staff and the public should an emergency occur.

We've included a document from OSHA that explains how all the SDS are structured. They are required to be formatted in this manner so that each form is consistent and it's easy to find the information you need. Also on our website, we have linked to the SDS that apply to our catalog (all are from the Urnex brand). For any products that you have gotten elsewhere, a quick google search for the product name and SDS should bring up the manufacturer's SDS.

We've also attached an OSHA fact sheet for new businesses as well as an example of the poster that summarizes an employee's rights through OSHA.

FORM
1-A

Conditional Employee and Food Employee Interview

Preventing Transmission of Diseases through Food by Infected Food Employees or Conditional Employees with Emphasis on Illness due to Norovirus, *Salmonella* Typhi (*S. Typhi*), *Shigella* spp., ShigaToxin-producing *Escherichia coli* (STEC), nontyphoidal *Salmonella* or Hepatitis A Virus

The purpose of this interview is to inform conditional employees and food employees to advise the person in charge of past and current conditions described so that the person in charge can take appropriate steps to preclude the transmission of foodborne illness.

Conditional Employee Name (print) _____

Food Employee Name (print) _____

Address _____

Telephone Daytime: _____ Evening: _____

Date _____

Are you suffering from any of the following symptoms? (Circle one)

If YES, Date of Onset

Diarrhea?	YES / NO	_____
Vomiting?	YES / NO	_____
Jaundice?	YES / NO	_____
Sore throat with fever?	YES / NO	_____

Or

Infected cut or wound that is open and draining, or lesions containing pus on the hand, wrist, an exposed body part, or other body part and the cut, wound, or lesion not properly covered?

YES / NO

(Examples: *boils and infected wounds, however small*)

In the Past:

Have you ever been diagnosed as being ill with typhoid fever (*S. Typhi*) YES / NO

If you have, what was the date of the diagnosis? _____

If within the past 3 months, did you take antibiotics for *S. Typhi*? YES / NO

If so, how many days did you take the antibiotics? _____

If you took antibiotics, did you finish the prescription? _____ YES / NO

History of Exposure:

1. Have you been suspected of causing, or have you been exposed to, a confirmed foodborne disease outbreak recently? YES / NO

If YES, date of outbreak: _____

a. If YES, what was the cause of the illness and did it meet the following criteria?

Cause: _____

i. Norovirus (last exposure within the past 48 hours) Date of illness outbreak _____

ii. *E. coli* O157:H7 infection (last exposure within the past 3 days) Date of illness outbreak _____

iii. Hepatitis A virus (last exposure within the past 30 days) Date of illness outbreak _____

iv. Typhoid fever (last exposure within the past 14 days) Date of illness outbreak _____

v. Shigellosis (last exposure within the past 3 days) Date of illness outbreak _____

- b. If YES, did you:
- i. Consume food implicated in the outbreak? _____
 - ii. Work in a food establishment that was the source of the outbreak? _____
 - iii. Consume food at an event that was prepared by person who is ill? _____

2. Did you attend an event or work in a setting, recently where there was a confirmed disease outbreak? YES / NO

If so, what was the cause of the confirmed disease outbreak? _____

If the cause was one of the following five pathogens, did exposure to the pathogen meet the following criteria?

- a. Norovirus (last exposure within the past 48 hours) YES / NO
- b. *E. coli* O157:H7 (or other STEC (last exposure within the past 3 days) YES / NO
- c. *Shigella* spp. (last exposure within the past 3 days) YES / NO
- d. *S. Typhi* (last exposure within the past 14 days) YES / NO
- e. Hepatitis A virus (last exposure within the past 30 days) YES / NO

Do you live in the same household as a person diagnosed with Norovirus, shigellosis, typhoid fever, hepatitis A, or illness due to *E. coli* O157:H7 or other STEC?
YES / NO Date of onset of illness _____

3. Do you have a household member attending or working in a setting where there is a confirmed disease outbreak of Norovirus, typhoid fever, shigellosis, STEC infection, or hepatitis A?
YES / NO Date of onset of illness _____

Name, Address, and Telephone Number of your Health Practitioner or doctor:

Name _____
 Address _____
 Telephone – Daytime: _____ Evening: _____

Signature of Conditional Employee _____ Date _____

Signature of Food Employee _____ Date _____

Signature of Permit Holder or Representative _____ Date _____

FORM

1-C

Conditional Employee or Food Employee Medical Referral

Preventing Transmission of Diseases through Food by Infected Food Employees with Emphasis on Illness due to Norovirus, Typhoid fever (*Salmonella Typhi*), Shigellosis (*Shigella* spp.), *Escherichia coli* O157:H7 or other Shiga Toxin-producing *Escherichia coli* (STEC), nontyphoidal *Salmonella* and Hepatitis A Virus

The **Food Code** specifies, under **Part 2-2 Employee Health Subpart 2-201 Disease or Medical Condition**, that Conditional Employees and Food Employees obtain medical clearance from a health practitioner licensed to practice medicine, unless the Food Employees have complied with the provisions specified as an alternative to providing medical documentation, whenever the individual:

1. Is chronically suffering from a symptom such as **diarrhea**; or
2. Has a **current illness** involving Norovirus, typhoid fever (**Salmonella Typhi**), shigellosis (**Shigella** spp.) **E. coli O157:H7** infection (or other STEC), nontyphoidal *Salmonella* or hepatitis A virus (hepatitis A), or
3. Reports **past illness** involving typhoid fever (**S. Typhi**) within the past three months (while salmonellosis is fairly common in U.S., typhoid fever, caused by infection with **S. Typhi**, is rare).

Conditional Employee being referred: (Name, please print) _____

Food Employee being referred: (Name, please print) _____

4. Is the employee assigned to a food establishment that serves a population that meets the Food Code definition of a **highly susceptible population** such as a day care center with preschool-age children, a hospital kitchen with immunocompromised persons, or an assisted living facility or nursing home with older adults?
YES **NO**

Reason for Medical Referral: The reason for this referral is checked below:

- Is chronically suffering from vomiting or diarrhea; or (specify) _____
- Diagnosed or suspected Norovirus, typhoid fever, shigellosis, **E. coli** O157:H7 (or other STEC) infection, nontyphoidal *Salmonella* or hepatitis A. (Specify) _____
- Reported past illness from typhoid fever within the past 3 months. (Date of illness) _____
- Other medical condition of concern per the following description: _____

Health Practitioner's Conclusion: (Circle the appropriate one; refer to reverse side of form)

- Food employee is free of **Norovirus** infection, typhoid fever (**S. Typhi** infection), **Shigella** spp. infection, **E. coli** O157:H7 (or other **STEC** infection), nontyphoidal *Salmonella* infection or **hepatitis A** virus infection, and may work as a food employee without restrictions.
- Food employee is an asymptomatic shedder of **E. coli** O157:H7 (or other **STEC**), **Shigella** spp., or Norovirus, and is restricted from working with exposed food; clean equipment, utensils, and linens; and unwrapped single-service and single-use articles in food establishments that do not serve highly susceptible populations.
- Food employee is not ill but continues as an asymptomatic shedder of **E. coli** O157:H7 (or other **STEC**), **Shigella** spp. and should be excluded from food establishments that serve highly susceptible populations such as those who are preschool-age, immunocompromised, or older adults and in a facility that provides preschool custodial care, health care, or assisted living.
- Food employee is an asymptomatic shedder of **hepatitis A** virus and should be excluded from working in a food establishment until medically cleared.
- Food employee is an asymptomatic shedder of **Norovirus** and should be excluded from working in a food establishment until medically cleared, or for at least 24 hours from the date of the diagnosis.
- Food employee is suffering from Norovirus, typhoid fever, shigellosis, **E. coli** O157:H7 (or other **STEC** infection), or **hepatitis A** and should be excluded from working in a food establishment.
- Food employee is diagnosed with an infection from nontyphoidal *Salmonella* and is asymptomatic and

should be restricted from working in food establishments serving a highly susceptible population and food establishments not serving a highly susceptible population.

COMMENTS: (In accordance with Title I of the Americans with Disabilities Act (ADA) and to provide only the information necessary to assist the food establishment operator in preventing foodborne disease transmission, please confine comments to explaining your conclusion and estimating when the employee may be reinstated.)

Signature of Health Practitioner _____ **Date** _____

FORM Conditional Employee or Food Employee Reporting Agreement

1-B

Preventing Transmission of Diseases through Food by Infected Conditional Employees or Food Employees with Emphasis on Illness due to Norovirus, *Salmonella* Typhi, *Shigella* spp., or Shiga toxin-producing *Escherichia coli* (STEC), nontyphoidal *Salmonella* or Hepatitis A Virus

The purpose of this agreement is to inform conditional employees or food employees of their responsibility to notify the person in charge when they experience any of the conditions listed so that the person in charge can take appropriate steps to preclude the transmission of foodborne illness.

I AGREE TO REPORT TO THE PERSON IN CHARGE:

Any Onset of the Following Symptoms, Either While at Work or Outside of Work, Including the Date of Onset:

- 1. Diarrhea
- 2. Vomiting
- 3. Jaundice
- 4. Sore throat with fever
- 5. Infected cuts or wounds, or lesions containing pus on the hand, wrist, an exposed body part, or other body part and the cuts, wounds, or lesions are not properly covered (such as boils and infected wounds, however small)

Future Medical Diagnosis:

Whenever diagnosed as being ill with Norovirus, typhoid fever (*Salmonella* Typhi), shigellosis (*Shigella* spp. infection), *Escherichia coli* O157:H7 or other STEC infection, nontyphoidal *Salmonella* or hepatitis A (hepatitis A virus infection)

Future Exposure to Foodborne Pathogens:

- 1. Exposure to or suspicion of causing any confirmed disease outbreak of Norovirus, typhoid fever, shigellosis, *E. coli* O157:H7 or other STEC infection, or hepatitis A.
- 2. A household member diagnosed with Norovirus, typhoid fever, shigellosis, illness due to STEC, or hepatitis A.
- 3. A household member attending or working in a setting experiencing a confirmed disease outbreak of Norovirus, typhoid fever, shigellosis, *E. coli* O157:H7 or other STEC infection, or hepatitis A.

I have read (or had explained to me) and understand the requirements concerning my responsibilities under the **Food Code** and this agreement to comply with:

- 1. Reporting requirements specified above involving symptoms, diagnoses, and exposure specified;
- 2. Work restrictions or exclusions that are imposed upon me; and
- 3. Good hygienic practices.

I understand that failure to comply with the terms of this agreement could lead to action by the food establishment or the food regulatory authority that may jeopardize my employment and may involve legal action against me.

Conditional Employee Name (please print) _____

Signature of Conditional Employee _____ Date _____

Food Employee Name (please print) _____

Signature of Food Employee _____ Date _____

Signature of Permit Holder or Representative _____ Date _____

Food Establishment Inspection Report

As Governed by State Code Section XXX.XXX		No. of Risk Factor/Intervention Violations		Date
Do Good County		No. of Repeat Risk Factor/Intervention Violations		Time In
12344 Any Street, Our Town, State 11111		Score (optional)		Time Out
Establishment	Address	City/State	Zip Code	Telephone
License/Permit #	Permit Holder	Purpose of Inspection	Est. Type	Risk Category

FOODBORNE ILLNESS RISK FACTORS AND PUBLIC HEALTH INTERVENTIONS

Circle designated compliance status (IN, OUT, N/O, N/A) for each numbered item

Mark "X" in appropriate box for COS and/or R

Compliance Status		COS		R	
Supervision					
1	IN OUT	Person in charge present, demonstrates knowledge, and performs duties			
2	IN OUT N/A	Certified Food Protection Manager			
Employee Health					
3	IN OUT	Management, food employee and conditional employee; knowledge, responsibilities and reporting			
4	IN OUT	Proper use of restriction and exclusion			
5	IN OUT	Procedures for responding to vomiting and diarrheal events			
Good Hygienic Practices					
6	IN OUT N/O	Proper eating, tasting, drinking, or tobacco use			
7	IN OUT N/O	No discharge from eyes, nose, and mouth			
Preventing Contamination by Hands					
8	IN OUT N/O	Hands clean & properly washed			
9	IN OUT N/A N/O	No bare hand contact with RTE food or a pre-approved alternative procedure properly allowed			
10	IN OUT	Adequate handwashing sinks properly supplied and accessible			
Approved Source					
11	IN OUT	Food obtained from approved source			
12	IN OUT N/A N/O	Food received at proper temperature			
13	IN OUT	Food in good condition, safe, & unadulterated			
14	IN OUT N/A N/O	Required records available: shellstock tags, parasite destruction			
Protection from Contamination					
15	IN OUT N/A N/O	Food separated and protected			
16	IN OUT N/A	Food-contact surfaces: cleaned & sanitized			

Compliance Status		COS		R	
17	IN OUT	Proper disposition of returned, previously served, reconditioned & unsafe food			
Time/Temperature Control for Safety					
18	IN OUT N/A N/O	Proper cooking time & temperatures			
19	IN OUT N/A N/O	Proper reheating procedures for hot holding			
20	IN OUT N/A N/O	Proper cooling time and temperature			
21	IN OUT N/A N/O	Proper hot holding temperatures			
22	IN OUT N/A N/O	Proper cold holding temperatures			
23	IN OUT N/A N/O	Proper date marking and disposition			
24	IN OUT N/A N/O	Time as a Public Health Control; procedures & records			
Consumer Advisory					
25	IN OUT N/A	Consumer advisory provided for raw/undercooked food			
Highly Susceptible Populations					
26	IN OUT N/A	Pasteurized foods used; prohibited foods not offered			
Food/Color Additives and Toxic Substances					
27	IN OUT N/A	Food additives: approved & properly used			
28	IN OUT N/A	Toxic substances properly identified, stored, & used			
Conformance with Approved Procedures					
29	IN OUT N/A	Compliance with variance/specialized process/HACCP			

Risk factors are important practices or procedures identified as the most prevalent contributing factors of foodborne illness or injury. Public health interventions are control measures to prevent foodborne illness or injury.

GOOD RETAIL PRACTICES

Good Retail Practices are preventative measures to control the addition of pathogens, chemicals, and physical objects into foods.

Compliance Status		COS		R	
Safe Food and Water					
30		Pasteurized eggs used where required			
31		Water & ice from approved source			
32		Variance obtained for specialized processing methods			
Food Temperature Control					
33		Proper cooling methods used; adequate equipment for temperature control			
34		Plant food properly cooked for hot holding			
35		Approved thawing methods used			
36		Thermometers provided & accurate			
Food Identification					
37		Food properly labeled; original container			
Prevention of Food Contamination					
38		Insects, rodents, & animals not present			
39		Contamination prevented during food preparation, storage & display			
40		Personal cleanliness			
41		Wiping cloths: properly used & stored			
42		Washing fruits & vegetables			
Proper Use of Utensils					
43		In-use utensils: properly stored			
44		Utensils, equipment & linens: properly stored, dried, & handled			
45		Single-use/single-service articles: properly stored & used			
46		Gloves used properly			
Utensils, Equipment and Vending					
47		Food & non-food contact surfaces cleanable, properly designed, constructed, & used			
48		Warewashing facilities: installed, maintained, & used; test strips			
49		Non-food contact surfaces clean			
Physical Facilities					
50		Hot & cold water available; adequate pressure			
51		Plumbing installed; proper backflow devices			
52		Sewage & waste water properly disposed			
53		Toilet facilities: properly constructed, supplied, & cleaned			
54		Garbage & refuse properly disposed; facilities maintained			
55		Physical facilities installed, maintained, & clean			
56		Adequate ventilation & lighting; designated areas used			

Person in Charge (Signature)	Date:
Inspector (Signature)	Follow-up: YES NO (Circle one) Follow-up Date:



Hazard Communication Safety Data Sheets

The Hazard Communication Standard (HCS) requires chemical manufacturers, distributors, or importers to provide Safety Data Sheets (SDSs) (formerly known as Material Safety Data Sheets or MSDSs) to communicate the hazards of hazardous chemical products. The HCS requires new SDSs to be in a uniform format, and include the section numbers, the headings, and associated information under the headings below:

Section 1, Identification includes product identifier; manufacturer or distributor name, address, phone number; emergency phone number; recommended use; restrictions on use.

Section 2, Hazard(s) identification includes all hazards regarding the chemical; required label elements.

Section 3, Composition/information on ingredients includes information on chemical ingredients; trade secret claims.

Section 4, First-aid measures includes important symptoms/effects, acute, delayed; required treatment.

Section 5, Fire-fighting measures lists suitable extinguishing techniques, equipment; chemical hazards from fire.

Section 6, Accidental release measures lists emergency procedures; protective equipment; proper methods of containment and cleanup.

Section 7, Handling and storage lists precautions for safe handling and storage, including incompatibilities.

(Continued on other side)

Section 8, Exposure controls/personal protection

lists OSHA's Permissible Exposure Limits (PELs); ACGIH Threshold Limit Values (TLVs); and any other exposure limit used or recommended by the chemical manufacturer, importer, or employer preparing the SDS where available as well as appropriate engineering controls; personal protective equipment (PPE).

Section 9, Physical and chemical properties lists the chemical's characteristics.

Section 10, Stability and reactivity lists chemical stability and possibility of hazardous reactions.

Section 11, Toxicological information includes routes of exposure; related symptoms, acute and chronic effects; numerical measures of toxicity.

Section 12, Ecological information*

Section 13, Disposal considerations*

Section 14, Transport information*

Section 15, Regulatory information*

Section 16, Other information, includes the date of preparation or last revision.

*Note: Since other Agencies regulate this information, OSHA will not be enforcing Sections 12 through 15 (29 CFR 1910.1200(g)(2)).

Employers must ensure that SDSs are readily accessible to employees.

See Appendix D of 29 CFR 1910.1200 for a detailed description of SDS contents.

For more information:



U.S. Department of Labor



Occupational
Safety and Health
Administration

www.osha.gov (800) 321-OSHA (6742)



OSHA FACT Sheet

OSHA Help for New Businesses

How can OSHA help new businesses?

Starting a new business can be challenging. OSHA can help by explaining the federal regulatory requirements concerning safety and health and help you create a safe and healthful workplace for your employees that conforms to federal law. States with OSHA-approved state plans have adopted standards equivalent to OSHA's. For additional information, visit us online at www.osha.gov.

What are your responsibilities as an employer?

Under the provisions of the *Occupational Safety and Health Act of 1970 (OSH Act)*, as the employer, you must provide a workplace free from recognized hazards that are causing, or are likely to cause, death or serious physical harm to your employees regardless of the size of your business. You must comply with OSHA standards and regulations under the *OSH Act*. You must also be familiar with those OSHA standards and regulations that apply to your workplace and make copies of them available to employees upon request.

Are employers required to maintain records of injuries and illnesses?

Yes. Most businesses with 11 or more employees at any time during the calendar year must maintain records of occupational injuries and illnesses as they occur using OSHA Form 300, *Log of Work-Related Injuries and Illnesses*. Such recordkeeping is not required for employers in most retail trade, finance, insurance, real estate, and service industries.

Must employers display OSHA safety and health information in the workplace?

Yes. You must display OSHA's *Safe and Healthful Workplaces* poster (OSHA 3165 or the state equivalent) in a conspicuous location in your workplace where workers and prospective

employees can see it. This publication informs employees of their rights and responsibilities under the *OSH Act*.

Are employers required to communicate information about hazardous chemicals in the workplace to their employees?

Yes. Employers must inform their workers about the dangers of chemical hazards in their workplaces and train their employees regarding proper safeguards. This includes providing information on the hazards and identities of chemicals employees may be exposed to on the job and describing protective measures to prevent adverse effects. Chemical producers and importers must evaluate their products for chemical hazards and provide hazard information to customers.

Is your business subject to inspection?

All businesses covered by the *OSH Act* must comply with federal workplace safety and health standards, or comparable state standards, if the workplace is under the jurisdiction of a state agency administering an OSHA-approved safety and health plan. Every establishment covered by the *OSH Act* is subject to inspection by federal or state compliance safety and health officers who are chosen for their knowledge and experience in the occupational safety and health field. OSHA conducts workplace inspections of businesses in federal jurisdictions, and OSHA-approved state plans are responsible for conducting workplace inspections of businesses under state jurisdiction to enforce their own standards that are "at least as effective" as federal requirements.

What services are available from OSHA to help you?

OSHA's Area Office staffs provide advice, education, and assistance to business (particularly small employers), trade associations, local labor affiliates, and other stakeholders who request help with occupational safety and health

issues. They work with professional organizations, unions, and community groups concerning issues of safety and health in the workplace. In addition, OSHA offers the following services:

- **Consultation** - Employers who want on-site assistance in identifying and correcting hazards and in improving safety and health programs can get help from a free and confidential consultation service largely funded by OSHA and delivered by state consultation staffs.
- **Instruction** - Training courses in safety and health subjects are available to the private sector through the OSHA Training Institute in Des Plaines, IL, and at 12 education centers throughout the nation. For locations, visit OSHA's Office of Training and Education online at http://www.osha-slc.gov/fso/ote/training/edcenters/edcenter_contact.html.
- **Publications** - Various publications are on-line at www.osha.gov to help small businesses comply with OSHA requirements.

- **Partnership** - In a partnership, OSHA enters into an extended, voluntary, cooperative relationship with groups of employers, employees, and employee representatives to encourage, assist, and recognize their efforts to eliminate serious hazards and achieve a high level of worker safety and health.

How can I get more information?

You can find more information about help for new businesses, including the full text of OSHA's standards, on OSHA's website at www.osha.gov. OSHA's rules and standards are in *Title 29 of the Code of Federal Regulations (CFR)* Parts 1900-1910, 1915, 1917, 1918, 1926, and 1928.

To file a complaint by phone, report an emergency, or get OSHA advice, assistance, or products, contact your nearest OSHA office under the "U.S. Department of Labor" listing in your phone book, or call **(800) 321-OSHA (6742)**; teletypewriter (TTY) number is (877) 889-5627. To file a complaint online or obtain more information on OSHA federal and state programs, visit OSHA's website at www.osha.gov.

This is one in a series of informational fact sheets highlighting OSHA programs, policies, or standards. It does not impose any new compliance requirements or carry the force of legal opinion. For compliance requirements of OSHA standards or regulations, refer to *Title 29 of the Code of Federal Regulations*. This information will be made available to sensory-impaired individuals upon request. Voice phone: (202) 693-1999. See also OSHA's website at www.osha.gov.





Job Safety and Health IT'S THE LAW!

All workers have the right to:

- A safe workplace.
- Raise a safety or health concern with your employer or OSHA, or report a work-related injury or illness, without being retaliated against.
- Receive information and training on job hazards, including all hazardous substances in your workplace.
- Request an OSHA inspection of your workplace if you believe there are unsafe or unhealthy conditions. OSHA will keep your name confidential. You have the right to have a representative contact OSHA on your behalf.
- Participate (or have your representative participate) in an OSHA inspection and speak in private to the inspector.
- File a complaint with OSHA within 30 days (by phone, online or by mail) if you have been retaliated against for using your rights.
- See any OSHA citations issued to your employer.
- Request copies of your medical records, tests that measure hazards in the workplace, and the workplace injury and illness log.

This poster is available free from OSHA.

Contact OSHA. We can help.

Employers must:

- Provide employees a workplace free from recognized hazards. It is illegal to retaliate against an employee for using any of their rights under the law, including raising a health and safety concern with you or with OSHA, or reporting a work-related injury or illness.
- Comply with all applicable OSHA standards.
- Report to OSHA all work-related fatalities within 8 hours, and all inpatient hospitalizations, amputations and losses of an eye within 24 hours.
- Provide required training to all workers in a language and vocabulary they can understand.
- Prominently display this poster in the workplace.
- Post OSHA citations at or near the place of the alleged violations.

FREE ASSISTANCE to identify and correct hazards is available to small and medium-sized employers, without citation or penalty, through OSHA-supported consultation programs in every state.



1-800-321-OSHA (6742) • TTY 1-877-889-5627 • www.osha.gov

OSHA 3165-Sub 2015

BARISTA PRO SHOP

SUMMARY & NEXT STEPS

Better Tools. Better Baristas. Better Business.

This guide has covered a lot of information, but we wanted to help make sure that you have all the information you need to get your business running before you get right in the middle of things. We fully expect that you may want to contact us for more help or to ask questions about certain portions of this guide - or even where to go from here!

Absolutely contact us if you have any questions at all. We are available by phone during the weekdays, you can also email us, and we have lots of great follow-up resources online:

www.BaristaProShop.com/bps/NewCafe

For additional resources,

Visit us:

www.BaristaProShop.com

Email us:

CustomerService@BaristaProShop.com

Call us:

1-866-PRO LATTE

LET'S CONTINUE THE CONVERSATION:



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