



Retailers Business Plan

(Abridged version for Tracker Agreement)

Applicant: _____

Address _____

Date completed: _____

Pub Name: _____

Business Development Manager: _____

Taking on a pub is a serious decision. It is important that you have thought hard about why you want to take such a step and have planned exactly what you will need to do to ensure your venture will be a success. Only then can you judge whether you are likely to be able to achieve the income and rewards that you desire.

ABOUT BUSINESS PLANNING

Marston's also wants to be convinced that you know what to do and why, and that your plans are right for you and the pub in question. For these reasons we ask all applicants to complete a business plan for the pub they are applying for.

A business plan can help you to:

- Consider all aspects of the business
- Decide the best course of action to take things forward
- Have a clear understanding of the pub and how you can make it work

Please complete each section including as much detail as possible. You can either use this template, or alternatively, write your own business plan. Guidance is also available should you need it from one of our Business development Managers or a member of our Business opportunities team.

Signed By Applicant(s) _____ Date _____

_____ Date _____

Signed By BDM _____ Date _____

BDM review notes – at interview

Check list – for Marston’s use only – completed at interview

- | | |
|--|--|
| <input type="checkbox"/> TUAY form fully completed | <input type="checkbox"/> Credit Check completed |
| <input type="checkbox"/> Two Character References | <input type="checkbox"/> Photocopy of Passport – initial by BDM |
| <input type="checkbox"/> Copy of 2 Utility Bills | <input type="checkbox"/> Proof of Funds – Choose from
Bank statements
Letter of Credit
B/S book |
| <input type="checkbox"/> Personal Licence | <input type="checkbox"/> Proof of alternative training course |
| <input type="checkbox"/> Date booked for RAPPID course | |
| <input type="checkbox"/> Training Matrix Completed and Forwarded to Skills Development Manager | |

Interview notes.....

Application form - skills analysis

		Experience level					
Point system		1	2	3	4	5	
		Little or no knowledge	Minimum knowledge	Average	Capable	Expert	
1	Work in a bar						Action plan:
2	Work in a commercial kitchen						
3	Work in a cellar						
4	Ran my own business						Action Plan:
5	Trading styles						
6	Accountants- req & Info						
7	Banks- services & Charges						
8	Inland Revenue						
9	Vat						
10	Insurances- essentials						
11	Licencing Law						
12	Responsibilities						
13	Stocktaking						
14	Reg. Food premises						
15	Business Plan						
16	Control your bus.						
17	Energy suppliers						
18	Budget & Forecasts						
19	Management controls						
20	Market research						
21	SWOT analysis						
22	Health & Safety						
23	Fire risk asses.						
24	Book Keeping						Action Plan:
25	Gross Profit						
26	Working with Vat						
27	Calculating GP						
28	Profit & Loss						
29	Fixed / Variable						
30	Cash flow						
31	Breakeven						
32	Merchandising						
33	Promotions						Action Plan:
34	Social Resp.						
35	Standards & Service						
36	Unique selling point						
37	Advertising Methods						
38	Menu Planning						Action Plan:
39	Stock control						
40	Dish Costing						
41	Equipment/ design						
42	Food safety						
43	Managing staff						Action Plan:
44	Employment law						
45	Wages						
46	Disciplinary						
47	NI & PAYE						
48	Customer Service						
49	Leadership						
50	Staff training						
Total point tally							
150 < RAPPID automatic		Little or no knowledge	Minimum knowledge	Average	Capable	Expert	Total=

Bdm to complete the above assessment with the prospective retailer at time of interview

CUSTOMER PROFILE			
Existing	am	pm	pm/late
<i>Who are your existing customers? Why do they use your pub?</i>			
Potential	am	pm	pm/late
<i>Are there customers you could move from your competitors, or aren't catered for in the area?</i>			
Target	am	pm	pm/late
<i>What should your target market be to increase and maximise your trade and profit?</i>			

THE OFFER

Describe what you intend to offer in order to attract custom. Make specific mention of drink, food, music, entertainment, promotions, games, etc. Show reasons why the people that you want to attract would want to come to your pub. What is the unique selling point of the pub? Also how you intend to market the offer.

General

- What sort of pub is it going to be? How will it differ during the course of the day?

Drink

- Is business going to be driven by cask ales, cream flow, standard draught lagers, premium draught lagers, bottled beers, spirits, wine?
- What will make your wet offer stand out from your competitors?

Food

- What sort of food is going to be on offer? How big will the menu be? Give some sample menu items. What will the price of the meals be? How will the food offer change during the day?
- What will make your food offer stand out from your competitors?
- Attach any draft menus

Music

- How will music be provided? What sort of music will it be? How will it change throughout the day?

Entertainment/promotions/games/etc

- Will entertainment play a part in your offer? What sort of entertainment? What else - pub games, quizzes, charity nights, promotions, etc?
- How much additional income would you expect to generate from entertainment activities?

Other

- Describe any other key parts of the offer

Marketing

- How will you tell people about what is on offer? Adverts, flyers, radio, A-boards, direct mail, etc?

OPENING HOURS

	Mon	Tues	Wed	Thu	Fri	Sat	Sun
Open							
Close							

Briefly summarise what you are trying to achieve. Constantly ask yourself “Why am I doing this?” to make sure there is a measurable cash benefit to any action or investment decision.

- *In a few words ..*
- *Who the customers are now and whether you intend to change them, attract different people as well, or build on this existing base*
- *How this fits into the opportunity in the area*
- *How you will attract these people by changing the look of the pub, the food you offer, etc.*

Any other comments.

12 MONTHS PROFIT AND LOSS FORECAST

SALES

Drink Sales	
Food Sales	
Machine Takings	
Accommodation	
Other (specify)	
Total Sales	

PURCHASES

Drinks Purchases	
Food Purchases	
Other (specify)	
Total Purchases	

GROSS PROFIT

Drinks		WET GP%
Food		DRY GP%
Machine Takings		
Accommodation		
Other (specify)		
Total Gross Profit		OVERALL GP%(2)

Net Profit (before drawings)	
Drawings	
Net Profit after Drawings	

WEEKLY BREAK EVEN SALES CALCULATION:

- 1) Total cost figure from above
- 2) Overall GP% from above
- 3) Divide (1) by (2) and multiply by 100
- 4) Multiply by 1.175 to add VAT
- 5) Divide by 52 to give weekly break even point

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OPERATING COSTS

Rent	
Business Rates	
Wages Inc. NI	
Insurance	
Utilities, Gas, Electric, Water	
Bank Charges	
Accountancy Fees	
Machine Rental	
Entertainment	
Promotions	
Staff Uniforms	
Travel and Transport	
Telephone and Postage	
Cleaning Materials	
Glassware and Crockery	
Stocktaking Fees	
Legal Fees	
Licenses	
Repairs and Decoration	
Training Courses	
Sundries	
Other	
Loan Repayments	
Total Costs (1)	

THE MONEY REQUIRED

Outline the overall cost of starting the business and if you have not already done so state the intended investment including VAT.

COSTS

Fixtures and Fittings	
Deposit	
Solicitors	
Training	
Stock on Valuation	
Survey	
Working Capital	
Investment Capital Inc. VAT	
TOTAL	

SOURCE OF FUNDS

Cash	
Secured Loan	
Unsecured Loan	
Overdraft	
Other please state	
TOTAL	

By completing this business Plan, Marston's Pub Company does not commit itself to accept your application and, for the avoidance of doubt, it does not constitute any offer, expressed or implied, of any appointment, lease, tenancy or business opportunity.