

# Running a Coffee Shop — Workbook

This workbook turns the course into the tools and decisions that keep a cafe profitable: a recipe-costing and pricing model, a labor-budget schedule built from your sales curve, a supplier negotiation playbook, and a regulars and loyalty system. Work through one section per module, completing each worksheet and checklist with your own real numbers. By the end you will have priced drinks to the cent, set a labor budget you can schedule to, run a roaster negotiation, and launched a loyalty program you can measure.

## Product Costing and Menu Pricing

Cost your core menu to the cent, price it to a target margin, and learn to read the prime cost that decides whether the shop survives.

### Exercise: Cost Your Signature Latte to the Cent

Pick your best-selling espresso drink and cost it line by line using your latest invoices. Work through coffee, milk, add-ins, and packaging, then total it and divide by your menu price to get the cost percentage. Repeat for one food item so you see how much lower food margins run.

- What does the coffee in one drink cost, given your price per pound and your shots per pound?
- What does the milk cost for this size, using your price per gallon and the ounces actually poured?
- Once you add packaging, what is the total cost, and what cost percentage and gross margin does your current price give you?

### Worksheet: Standard Recipe Cost Card

Build one card per menu item and size. Enter each ingredient, the quantity used, and the cost per unit, then total. Any item over a 35 percent cost is draining margin and needs a price or recipe fix.

Item name and size (e.g. 16 oz latte)

Coffee dose and cost (grams, cost per lb)

Milk or alternative (oz poured, cost per gallon)

Syrups / sauces / extra shot cost

Packaging cost (cup, lid, sleeve, straw)

TOTAL cost of goods per item

Current menu price

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Cost percentage and gross margin

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### Worksheet: Menu Pricing Calculator

For each item, divide its cost by your target cost percentage to get the price, then round to a clean menu number. Use a lower cost target (higher margin) for drinks and a higher one for food.

Item

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Total item cost

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Target cost percentage (e.g. 22% drinks, 35% food)

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Calculated price (cost / target %)

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Rounded menu price (charm pricing)

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Resulting gross margin

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Oat / alt-milk surcharge applied? (yes/no)

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### Checklist: Costing and Pricing Discipline Checklist

- Every menu item and size has a completed recipe cost card
- Packaging cost is included in every to-go drink
- Drinks priced to a 75 to 80 percent gross margin
- Oat and alternative milk carry a surcharge of 60 to 75 cents
- Top ten sellers re-costed against current invoices this quarter
- Blended menu cost percentage tracked and kept under 30 percent
- Prime cost (COGS plus labor) calculated and held at or below 60 to 65 percent

### Staff Scheduling and Labor Cost

Turn your hourly sales curve into a staffing grid, build a schedule to a dollar labor budget, and control overtime and creep.

### Exercise: Build Your Hourly Staffing Curve

Export four to six weeks of hourly sales from your POS and average each hour to get a typical weekday and weekend. Choose a sales-per-labor-hour target and divide each hour by it to find how many labor hours that hour needs. Sketch staggered start and end times that cover the peaks without overstaffing the valleys.

- Which hours are your true peak and your true valley, and how many people does each need at your chosen sales-per-labor-hour target?

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- Where can you stagger start and end times instead of clocking everyone in at open?

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- Which shifts could run on a single barista without hurting service?

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### Worksheet: Weekly Labor Budget Builder

Forecast next week's sales, multiply by your target labor percentage to get a dollar budget, then divide by your blended hourly wage to get the labor hours you can schedule. Build the schedule to fit this number, not the other way around.

Forecast sales for the week

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Target labor percentage (25 to 35%)

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Labor budget in dollars (sales x target %)

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Blended wage per hour (incl. payroll taxes)

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Labor hours available (budget / blended wage)

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Hours in current draft schedule

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Over or under budget? (trim slowest shifts if over)

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### Worksheet: Staggered Shift Schedule Grid

Lay out each day with shifts that match your staffing curve. Assign start and end times, the role, and which baristas are cross-trained to flex. Total the daily hours and check them against your labor budget.

Day of week

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Shift start and end time

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Barista name

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Primary role (bar / register / food)

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Cross-trained roles (for flexing)

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Shift hours

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Running daily labor hours vs budget

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### Checklist: Labor Control Checklist

- Schedule built from a sales forecast and a dollar labor budget
- Shifts staggered to the hourly sales curve, not blocked
- Required meal and rest breaks scheduled per local law
- Overtime monitored; hours above 40 flagged before they happen
- Photo or PIN clock-in used to prevent buddy punching

- [ ] Shift lead empowered to send staff home early or call extra in
- [ ] Actual labor percentage reviewed weekly against target

## Supplier Negotiation and Inventory

Run a real roaster and vendor negotiation, decide make versus buy, and set pars and a waste log that protect food cost.

### Exercise: Prepare Your Roaster Negotiation

Before you call or meet a roaster, gather your numbers and your competing quote, then plan which levers you will trade across. Decide your target price per pound, the payment terms you want, and the training or equipment support you will ask for. Write a one-line opener that leads with the relationship and your expected volume.

- What are your pounds per week now and projected, your target cost per pound, and your best competing quote?

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- Beyond price, which levers (net-30 terms, free delivery, equipment, training hours) matter most to you and why?

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- Who is your qualified backup roaster, so you are never negotiating without an alternative?

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### Worksheet: Supplier Comparison and Terms Sheet

Score each candidate supplier across the levers that matter, not just price. Use it for your roaster, dairy, bakery, and broadline distributor. The best total package wins, even if it is not the cheapest sticker price. Supplier name and category

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Price per unit and volume tiers

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Payment terms (e.g. net-30)

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Delivery cadence and minimum order

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Free delivery threshold

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Equipment / training support offered

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Quality and consistency rating (1 to 5)

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Total-package decision and notes

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### Worksheet: Par Level and Order Sheet

Set a par for each key item based on usage between deliveries plus a buffer. To order, count on hand and subtract from the par. Keep pars tight on perishables and looser on shelf-stable goods.

Item (coffee, milk, oat milk, cups, syrups, pastries)

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Usage between deliveries

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Par level (usage plus buffer)

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Count on hand today

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Quantity to order (par minus on hand)

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Supplier and delivery day

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Perishable? (tighten par if yes)

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### Checklist: Sourcing and Inventory Checklist

- Roaster chosen on quality, freshness, support, and terms, not price alone
- Volume tiers, payment terms, and delivery thresholds agreed in writing
- Oat and alternative milk surcharge covers their higher cost
- Make-versus-buy decided for food and each item costed on a card
- Par levels set for all key items from real usage
- Daily waste log in place recording what is dumped and why
- Weekly inventory count reconciled against sales and recipe-card cost

## Building a Loyal Base of Regulars

Engineer the experience that creates regulars, launch a loyalty program you can measure, and grow through local community and reviews.

### Exercise: Audit the Visit Through a Regular's Eyes

Walk your own cafe as if you were a morning-commute regular and a laptop worker. Note every friction and every comfort across speed, consistency, recognition, and space. List the top three frictions to remove and the top three habits (like learning names) to build into the team.

- Is the line predictable and quick at your busiest hour, and are pickup orders ready when promised?
- Does the same drink taste the same every visit, and how do you guarantee that across baristas?
- What will you train the team to do so regulars are recognized and greeted by name?

### Worksheet: Loyalty Program Design Sheet

Design a program that raises visit frequency, not just discounts. Choose a tool that fits your POS, set a simple reward, and define the data you will use. Keep the reward explainable in one sentence at the register.

Tool chosen (punch card / Square Loyalty / Toast Loyalty / app)

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Reward structure (e.g. 10th drink free, double-points afternoons)

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Birthday or come-back offer

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How baristas enroll a customer (target under 30 seconds)

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Where it is promoted (register, menu board, receipt)

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Data you will track (visits per member, lapsed members)

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Baseline repeat-visit rate before launch

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### Worksheet: Local Marketing and Reputation Tracker

Plan and measure the local tactics that actually move traffic. Log each tactic, what it cost, and the visit lift you can see in your POS or loyalty data. Keep the ones that work and drop the rest.

Tactic (Google profile, partner discount, event, seasonal special)

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Cost or effort

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Date launched

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How new customers heard about you (tally)

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Visit or sales lift observed

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Google review count and average rating this month

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Keep or drop?

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### Checklist: Retention and Growth Checklist

- Espresso dialed in and baristas trained for drink consistency
- Team trained to learn and use regulars' names and usual orders
- Loyalty program live with one simple, generous reward
- Lapsed-member come-back offers sent from program data
- Google Business Profile complete with photos and current hours
- Every review answered, especially the critical ones, with a fix
- Repeat-visit rate and visits-per-member tracked before and after each change

### Your Action Plan

1. Build a standard recipe cost card for every menu item and size, including packaging, and flag anything over 35 percent cost.
2. Re-price the menu to a 75 to 80 percent drink margin using the cost-divided-by-target formula, and add an oat-milk surcharge.
3. Calculate prime cost (COGS plus labor) weekly from your POS and hold it at or below 60 to 65 percent of sales.
4. Export hourly sales, build a staffing curve, and convert it into staggered shifts using a sales-per-labor-hour target.
5. Forecast next week's sales, set a dollar labor budget at 25 to 35 percent, and build the schedule to fit it in a tool like 7shifts or Homebase.
6. Prepare and run a roaster negotiation covering price tiers, net-30 terms, delivery, equipment, and training, and get it in writing.
7. Set par levels for all key items and start a daily waste log, then reconcile a weekly inventory count against sales.

8. Launch a POS-integrated loyalty program with one simple reward and train every barista to enroll customers in under thirty seconds.
9. Complete your Google Business Profile, gather recent reviews, and respond to every one, including the critical ones.
10. Track repeat-visit rate, visits per member, and review rating monthly, and double down on the local tactics that measurably lift traffic.













