

..... DIAGEO .....

**BAR ACADEMY**

BUSINESS OF BARS

.....

PROFITABLE COCKTAIL PROGRAMS

# **COCKTAIL PROGRAM**

# PLANNING

# **EXERCISE**

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# Cocktail Program Planning Exercise

## STEP 1: Outline Your Program

### ASSIGN YOUR PROGRAM TEAM

Captain:

Steering Committee:

[a]

[b]

[c]

**TIP:** Your captain should be a member of your leadership team who is passionate and understands your brand and profitability. They are ultimately responsible for the program. Your steering committee should be made up of the team members who will help design and deliver the cocktail program.

### KEY MILESTONES

#### Market Research

Due by date:

Completed by [name]:

[a]

Date of presentation to management:

#### Staff Training

Session 1

Session 2

Session 3

Training Session Dates:

Conducted by [name]:

[b]

Location of training:

Staff notified by date:

#### Soft Launch

Soft launch date:

Soft launch location:

#### Cocktail Menus

Menus printed by date:

Designed by [name]:

[c]

#### Program Launch

Program launch date:

# Cocktail Program Planning Exercise

## STEP 2: Measure Your Program

Set a Development & Training Budget	
Market Research: \$	
Recipe Development: \$	
Staff Training: \$	Training Wages:
	Equipment & Supplies:
Menu Production: \$	
New Mixers: \$	
New Spirits: \$	
New Garnishes: \$	
New Glassware: \$	
Other: \$	
<b>Est Cost: \$</b>	
Approved by: _____	

Determine How Success Is Measured
THE KEY METRIC WE WILL MEASURE EACH WEEK TO DETERMINE IF THE PROGRAM IS WORKING IS...
<b>TIP:</b> Try measuring the success of your cocktail program in terms of volume (# of cocktails sold per week or shift), profitability (investment vs. output %), or timing (focus on the times of day/night you want cocktail sales to improve).

# Cocktail Program Planning Exercise

## STEP 3: Answer the 5 Ps

### 1. PURPOSE

THE PRIMARY PURPOSE OF OUR COCKTAIL PROGRAM IS TO...

**TIP:** Be very clear about the main purpose of your program. Is it to: Gain a competitive advantage with an advanced list? Expand your offer to current customers? Increase check totals? Drive a market segment?

### 2. PEOPLE

Fill in the names of **3 of your team members** who will be assigned to collect feedback from these 3 groups of people by the date you set in Step 1.

Customers

Competitors

Staff

Set a meeting date to review feedback:

**NEXT:** Give the worksheets that follow for each of these groups to your three market researchers.

### 3. PROFITABILITY

Complete the cocktail menu engineering Excel worksheet included in this program.

The screenshot displays the 'Cocktail Menu Engineering Dashboard' with the following structure:

- COCKTAIL MENU (Time Period) - Multiple Tabs:** Each tab lists 10 cocktail categories (Cocktail 1-10) with columns for Name, Description, Price, Cost, and Profit. A 'BENCHMARKS' tab is also visible, showing performance metrics.
- Input Fields:** Includes 'Enter Your Venue Name Here', 'Date', and 'Time'.
- Summary Section:** Contains 'Total Cocktails', 'Total Cost', and 'Total Profit'.

- 1 Begin by filling out product costs on the Mixes/Garnishes and Alcohol tabs.
- 2 Write your new cocktail recipes in the Menu tabs. Don't forget to fill out all the yellow fields including production time and complexity.
- 3 Fill out your profitability and time benchmarks on the Dashboard tab. Rate your team's technical capability (basic, intermediate, advanced) in the complexity benchmark.

**TIP:** When engineering your list, account for wholesale cost fluctuations throughout the year. Avoid cocktails that take too long or are too complex to prepare. Finally, tempt customers to move from the rail and boost profits with some enticing prices.

# Cocktail Program Planning Exercise

## 4. PHYSICAL WORKSPACE

Ask your bartenders...

What are the top 3 bottlenecks in drink production at the bar today?

What 3 changes would most help those bottlenecks?

What are your top 3 concerns about our new cocktail list?

How can we address them now, before we roll out the list?

**TIP:** For example, storage space for new glassware, back up stock, and equipment.

## 5. PRODUCTION

Book a couple days for soft launches. Start with your most experienced staff, then test with newer bartenders to discover the weak points where high volume ordering causes crashes.

Soft Launch Date 1:

Who will be working:

Soft Launch Date 2:

Who will be working:

Soft Launch Date 3:

Who will be working:

**TIP:** Use the soft launch report sheet included in this packet to record bottlenecks, issues and crashes. Pay particular attention to combinations of drink orders that cause problems. Use the shift notes to tweak, refine, and repeat.

# Cocktail Program Planning Exercise

## STEP 4:

### Draft Your Cocktail List

Use this worksheet to get a top-line review of your potential cocktail list before you design & print.

How many drinks are you offering? TOTAL:	
1	1
2	2
3	3
4	4
5	5
6	6

How many drinks are made by...			
Build:	Blend:	Shake:	Muddle:

What range are you offering your guests?		
LIGHT / SWEET ↑ ↓ HEAVY / DRY		
	SIMPLE / APPROACHABLE	COMPLEX / SOPHISTICATED

**TIP:** Consider offering a range of cocktail styles to appeal to your clientele. If your drinks cluster around a particular zone on the map, you may want to offer a few in other zones.

# Cocktail Program Planning Exercise

## STEP 5: Design Your List

<input type="checkbox"/>	Speak to your Diageo representative about their Menu Maker program
<input type="checkbox"/>	Be able to edit/print your list in house
<input type="checkbox"/>	Write drink descriptions that are intriguing and tempting
<input type="checkbox"/>	Highlight the drinks you want to move with bold type/boxes
<input type="checkbox"/>	Define a size & shape that works in your bar
<input type="checkbox"/>	Design for durability or disposability
<input type="checkbox"/>	Make it legible in low light
<input type="checkbox"/>	Build interest with a "hook": A photo, fact or tip
<input type="checkbox"/>	Make use of the back to list desserts, specials, or upcoming events
<input type="checkbox"/>	Brand all menus with logos/address/phone number

# Cocktail Program Planning Exercise

## Printable Worksheet: Market Research

Print one copy of this sheet for the person on your team who will interview three customers.

Ask three customers...		
1. Do you drink cocktails? <b>**Important:</b> Ensure you conduct your research with three cocktail drinkers.		
2. Where do you currently like to drink cocktails?		
3. What about that cocktail program do you like?		
4. What drinks do you most enjoy?		
5. What drinks do you not enjoy?		



# Cocktail Program Planning Exercise

## Printable Worksheet: Market Research

Print one copy of this sheet for the person on your team who will review three competitors.

Visit three competitors and complete the following questions...

1. Which three venues did you visit?

Venue 1:

Venue 2:

Venue 3:

2. What ideas from their cocktail program would work at our bar?

3. What did you think would never work at our bar?

4. What was their price range? Describe a couple examples of cocktails with ingredients and price.

Other notes:

# Cocktail Program Planning Exercise

## Printable Worksheet: Market Research

Print one copy of this sheet for the person on your team who will interview three staff members.

Ask three of your colleagues the following questions and record their answers...

1. What cocktails do our customers ask for?


2. What cocktails do you recommend we carry?


3. What cocktails or types of drinks do you recommend we avoid?


**NOTE:** Be sure to ask your bar staff for the SAME feedback about prospective additions to your venue's cocktail list.  
Before your Soft Launch: What do they love and what would they change about the cocktails you've proposed?

## Cocktail Program Planning Exercise

## Printable Worksheet: Soft Launch Log

Print copies of this sheet to keep on a clipboard at the bar.

Print copies of this sheet to keep on a clipboard at the bar. Use it to record problems, bottlenecks, and crashes during the soft launch of your cocktail program.

[illegible]