



JW LEES BUSINESS PLAN

PUB NAME/ APPLICANT NAME

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APPLICATION FORM		
Name of pub		
Address of pub		
	APPLICANT 1	APPLICANT 2
Name		
Home address		
Contact number		
Email address		
Signature		
Date		

ABOUT YOURSELF

You/your experience and skills

Key members of your team and their experience and skills

ABOUT THE PUB

How are things now?
Give a clear view of what
the pub is like at present

- Describe the pub, its facilities and any outside trading areas
- Describe what condition the pub is currently in
- Describe the immediate area in which the pub is located
- Describe the current trading operation
- Describe any relevant trading history

DEVELOPMENTS

Are there any potential
developments in the area
which could influence
trade?

- Is the local area on the up or in decline?
- Are there any businesses opening or closing?
- Are there any planning applications that could affect trade?
- Are there any significant events under threat or gaining in importance?

DEMOGRAPHICS

What is the area like?

Who lives near your pub?

What do they like?

LOCAL MARKET

Where do people eat and drink in the local area?
Please provide any relevant maps as an attachment.
(Please also note competitor profile section overleaf)

- Who are the main competitors?
Which are the most successful and why?
- Is there a circuit (if relevant for your pub type). Where does the pub fit in it?
- Are there any notable gaps you could exploit?

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COMPETITORS			
Name			
Retail style			
Location and distance from your pub			
Who are their customers?			
What do they offer to attract customers?			
Will you try to attract their customers? If so, how?			
Price of a pint of standard lager?			
Price of a evening meal?			
Opening hours?			
How do you rate this competitor out of 10?	/10	/10	/10
Reason why?			

THE CURRENT RETAIL OFFER

What are the strengths and weaknesses of the current offer?

- Consider each of the following elements:
 - Product range
 - Pricing
 - Menus
 - Customer service
 - Facilities
 - Entertainments/events
 - Staffing levels
 - Standards

YOUR RETAIL OFFER

Describe what you plan to offer in order to grow the business.

Explain how this will attract the people you want to come to the pub.

What is the unique selling point of the pub?

- What sort of pub is it going to be?
- How will you position the wet offer? What will make it stand out from the competition?
- What will the food offer be? How big will the menu be? How will it be presented? How will the food offer change during the day?
- Attach any draft menus
- Will entertainment be part of the offer? If so, what form will it take e.g. games, quizzes, charity nights, promotions?
- Describe any other parts of the offer, e.g. accommodation.
- How will you tell people about what is on offer?

Please attach additional pages if required.

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SALES RHYTHM OF THE WEEK: KEY EVENTS TO DRIVE FOOTFALL IN THE PUB EACH WEEK

	Daytime activity	Evening activity	Pricing strategy & promotional activity	Opening hours
MONDAY				
TUESDAY				
WEDNESDAY				
THURSDAY				
FRIDAY				
SATURDAY				
SUNDAY				

YOUR TEAM

Staffing

- What employees will be taken on over the next three years, with which skills, in which areas of the business?
- How will you find these employees?
- Where do you expect these employees to come from?

Training Plans

- What training will be undertaken in order to build and maintain a skilled team?
- How will training address future market developments?

Reward & Recognition

- How will you motivate and retain your team?

Communication

- What methods will you use to communicate with your team?
- How often?

Your Role

- Are you going to work in the business day to day?
- What will your role be?

SUMMARY

Briefly summarise in a few sentences what you are trying to achieve.

Constantly ask yourself :
“Why am I doing this?” to
make sure all decisions fit
with your plan.

Please try to be specific
with targets if relevant.

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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 & fittings	
Deposit	
Brokers fee	
Training	
Stock on valuation	
Working capital	
Investment capital Inc VAT	
TOTAL	

SOURCE OF FUNDS	
Cash	
Secured loans	
Unsecured loans	
Overdraft	
Other please state	
TOTAL	

FINANCIAL PROJECTIONS

It is essential that you forecast how much money you are likely to make. This should be the major factor in deciding whether you want to proceed with your business plan.

If you are unsure how to do this yourself, seek the assistance of an accountant or another independent professional advisor.

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12 MONTH PROFIT AND LOSS FORECAST - YEAR 1

SALES

Drink sales	
Food sales	
Machine takings	
Accommodation	
Other (specify)	
Total sales (3)	

PURCHASES

Drinks purchases	
Food purchases	
Other (specify)	
Total purchases (1)	

GROSS PROFIT

Drink sales		
Food sales		
Machine takings		
Accommodation		
Other (specify)		
Total gross profit		OVERALL GP% (2)

Net profit (before drawings)
(=GP-total costs)

Drawings

Net profit after drawings

WEEKLY BREAK EVEN SALES CALCULATION:

- 1) Add Total Purchases (1) to Total Controllable Expenses (2)
- 2) Divide by Total Sales (3)
- 3) Deduct the above from £1.00
- 4) Divide Total Fixed costs (4) by the above
- 5) Divide by 52 to give weekly break even point

Total

OPERATING COSTS

Rent	
Business rates	
Loan interest	
Insurance	
Council tax	
Depreciation	
Total fixed expenses (4)	
Wages (incl. NI)	
Utilities, gas, electric, water	
Entertainment incl. music / tv	
Advertising / promotions	
Travel and transport	
Telephone, postage and internet	
Cleaning material	
Glassware and crockery	
Stocktaking fees	
Laundry	
Postage stationary	
Repairs and decoration	
Training	
Accountancy fees	
Machine rental	
Staff uniforms	
Sundries	
Other	
Total controllable expenses (2)	
Total costs	

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12 MONTH PROFIT AND LOSS FORECAST - YEAR 2

SALES

Drink sales	
Food sales	
Machine takings	
Accommodation	
Other (specify)	
Total sales (3)	

PURCHASES

Drinks purchases	
Food purchases	
Other (specify)	
Total purchases (1)	

GROSS PROFIT

Drink sales		
Food sales		
Machine takings		
Accommodation		
Other (specify)		
Total gross profit		OVERALL GP% (2)

Net profit (before drawings)
(=GP-total costs)

Drawings

Net profit after drawings

WEEKLY BREAK EVEN SALES CALCULATION:

- 1) Add Total Purchases (1) to Total Controllable Expenses (2)
- 2) Divide by Total Sales (3)
- 3) Deduct the above from £1.00
- 4) Divide Total Fixed costs (4) by the above
- 5) Divide by 52 to give weekly break even point

Total

OPERATING COSTS

Rent	
Business rates	
Loan interest	
Insurance	
Council tax	
Depreciation	
Total fixed expenses (4)	
Wages (incl. NI)	
Utilities, gas, electric, water	
Entertainment incl. music / tv	
Advertising / promotions	
Travel and transport	
Telephone, postage and internet	
Cleaning material	
Glassware and crockery	
Stocktaking fees	
Laundry	
Postage stationary	
Repairs and decoration	
Training	
Accountancy fees	
Machine rental	
Staff uniforms	
Sundries	
Other	
Total controllable expenses (2)	
Total costs	

CASH FLOW - YEAR 1

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Capital Introduced													
Drink Sales													
Food Sales													
Machines													
Other Income													
Total Income													
Drinks Purchases													
Food Purchases													
Rent													
Business Rates													
Licences													
Insurance													
Utilities, Gas, Electric, Water													
Loans													
Entertainment													
Stocktaking													
Wages Inc. NI													
Travel and Transport													
Telephone													
Cleaning Materials													
Accountancy Fees													
Stocktaking Fees													
Repairs and Decoration													
Training Fee													
Fixtures Purchased													
Drawings													
VAT Payments													
Other													
Other													
Other Advertising													
Total Expenses													
Incomeless Expenditure													
Balance Brought Forward													
Closing Bank Balance													



CASH FLOW - YEAR 2

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Capital Introduced													
Drink Sales													
Food Sales													
Machines													
Other Income													
Total Income													
Drinks Purchases													
Food Purchases													
Rent													
Business Rates													
Licences													
Insurance													
Utilities, Gas, Electric, Water													
Loans													
Entertainment													
Stocktaking													
Wages Inc. NI													
Travel and Transport													
Telephone													
Cleaning Materials													
Accountancy Fees													
Stocktaking Fees													
Repairs and Decoration													
Training Fee													
Fixtures Purchased													
Drawings													
VAT Payments													
Other													
Other													
Other Advertising													
Total Expenses													
Incomeless Expenditure													
Balance Brought Forward													
Closing Bank Balance													



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ADDITIONAL INFORMATION

The following area allows you to include any further information you feel may be appropriate to include in your business plan.

By completing this application form, JW Lees Brewery 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, tenancy or business opportunity.