



COVID-19 RECOVERY & RESILIENCY WORKSHOP SERIES

# Cape Cod Business Resilience Workshops

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## FOOD SERVICE AND RESTAURANT BUSINESSES

More information at  
[capecodcommission.org/business](https://capecodcommission.org/business)

KITCHEN

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# BUSINESS RECOVERY & RESILIENCY PLANNING

INDUSTRY  
WORKSHOPS



BUSINESS  
TOOLKITS



ECONOMIC  
RESILIENCY  
PLAN





# Business Resilience for Food Service and Restaurant Businesses

Second of our two-part business resilience workshop series

## Business Recovery & Resilience Planning Toolkit



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REVBVY

# Covid-19 impact on the industry



Reversed trends of increased consumer spending on food outside the home.



Social distancing requirements and enhanced sanitary protocols meant restrictions on indoor gatherings and a changed customer dining experience.



Some businesses in this sector shifted operations to focus primarily or solely on take-out and delivery.

"The trend for **outside dining** here has been growing, but it advanced by several years with the pandemic."

-Cape Cod Times (March 2021)

# Why Resilience Matters?



## **Covid-19**

- The pandemic produced a dual threat to lives and livelihoods across the globe.
- The effects were amplified among community-based and seasonal businesses that traditionally rely on in-person commerce. Even more so among those without recovery and resilience plans.

## **Future Threats**

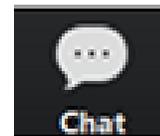
- The Covid-19 pandemic proved that a disaster can strike at any time, unexpectedly, and can disrupt an entire business model.
- Businesses need to have a solid business resilience plan to be prepared for future interruptions



Question  
#1

What does business  
resilience mean to you?

Use the **Chat** to share your answer





# What is Resilience?

"The ability of an organization to anticipate, prepare for, respond to, and adapt to both incremental changes and sudden disruptions"

- Axelos

# Toolkit Purpose Statement

- To help Cape Cod small businesses build resilience amid the Covid-19 pandemic
- Provide research-based frameworks, tools, and checklists designed to support efforts by Cape Cod business owners and their teams to recover and to utilize the Covid-19 experience as a catalyst to prepare and respond to future business interruptions.



# Toolkit Overview



## “Assess, Plan, and Test”

Assess:

- **Business Interruption Risk Matrix**
- **Business Operations Resilience Assessment**

Plan:

- **Business Operations Planning Checklist**
- **Business Continuity Plan Template**

Test

- **Test & Evaluation Checklist**



## Business Model Pivot Exercise

## Digital Strategy Checklist

**Resources:**

- Food Service and Restaurant Specific
- General Resources

## Additional Term Definitions

**Risk Matrix:** A table to visualize risks against various factors. This toolkit provides a risk matrix to assess potential business interruption events against factors that heighten risk of business impact and factors that may mitigate business impact.

**Business Operations:** Day-to-day and strategic level components that go into running a viable business that earns money and provides value.

**Business Continuity Plan:** A formal, documented plan with information and procedures on how a business or organization can continue to operate at some level during a significant, unplanned disruption.

# Business Interruption Risk Matrix

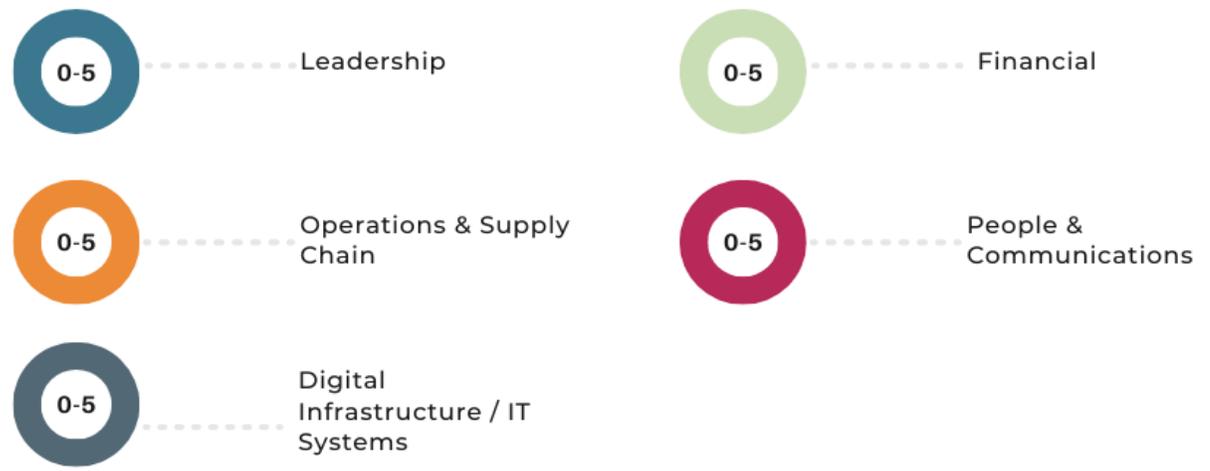
- Review interruption events; identify higher risk events
- Evaluate factors that create risk in your business
- Assess practices you have in place that may risk exposure
- Use open space to list other factors and practices

Business Interruption	High-Risk Factors	Risk Mitigation Practices in Place
Pandemic and Other Health Hazards	In-person interaction is a core part of business operations	<ul style="list-style-type: none"> <li>• Enhanced cleaning and sanitization measures and vendors in place; Stock of PPE supplies for employees and customers</li> <li>• eCommerce business model in place</li> </ul>
	Facilities may not allow for adequate social distancing	<ul style="list-style-type: none"> <li>• Limited access or capacity plans</li> <li>• Online reservation system</li> <li>• Outdoor space contingency plan</li> </ul>
	(open space to fill in)	(open space to fill in)
Fire	Nature of business is that open flames are present regularly	<ul style="list-style-type: none"> <li>• Regular checks on smoke alarms, fire extinguishers, and sprinkler system</li> <li>• Perform regular fire drills; train staff on safety protocols and how to use fire extinguishers</li> </ul>
	The kitchen area has un-emptied grease traps, dirty ducts, or improper storage of flammable items	<ul style="list-style-type: none"> <li>• Regular facilities cleaning schedule is in place; surfaces are kept free from grease accumulations that might ignite and cause a fire</li> </ul>
	(open space to fill in)	(open space to fill in)
Flood / Hurricane / Natural Disasters	Facilities are in a flood zone or adjacent to a water source	<ul style="list-style-type: none"> <li>• Rehearsed protocol to secure equipment and valuable assets to safer locations</li> <li>• Access to flood protection materials, such as sandbags, is established</li> </ul>
	Business facilities susceptible to natural disaster damage	<ul style="list-style-type: none"> <li>• Regular inspection schedule and insurance policies in place</li> <li>• Alternate work or foodservice location planned</li> <li>• Evacuation route planned</li> </ul>
	(open space to fill in)	(open space to fill in)
Safety and Security Threat	Frequent use of equipment that has a higher risk of injury	<ul style="list-style-type: none"> <li>• Regular inspection of facilities and equipment to assess damage to repair or replace as necessary</li> <li>• Inspection and maintenance schedule in place</li> </ul>

# Business Operations Assessment

- Worksheet to assess resilience in each core operations area
- Sampling of higher resilience indicators listed under each category
- Note your score next to each item

## BUSINESS OPERATIONS Assess your business's operational resilience



Leadership	Score	
	Yes=1	No=0
Are you familiar with at least one organizational change model? (e.g., Lewin's change model). See Figure 1.		
Do you have a reliable support system and a trusted network in your industry?		
Are you able to accept change, effectively lead through change, and adapt to a new environment?		
Do you have a daily practice to release work-related stress? (e.g., meditation, journaling, etc.)		
Are you physically active, get at least 7 hours of sleep regularly, and eat a balanced diet daily?		



# Business Operations

## Assessment

- Worksheet to assess resilience in each core operations area
- Sampling of higher resilience indicators listed under each category
- Note your score next to each item
- **Use scoring system to identify areas that need attention**

Financial	Score Yes=1 No=0
Do you have your financial statements (cash flow, balance sheet, income statement) accessible and up to date?	

Operations & Supply chain	Score Yes=1 No=0
Do you have a diverse set of offerings/revenue streams?	

People and communications	Score Yes=1 No=0
Do you have a career development, leadership, and cross-training program in place for employees?	

IT & Digital infrastructure	Score Yes=1 No=0
Do you have a robust digital marketing strategy that includes your website, social media, POS or CRM systems, and other digital channels?	



# Business Operations

## Plan Checklist

Financial	✓
Maintain current financial statements (monthly and yearly basis) that can be accessed at any time.	

People & Communications	✓
Implement ongoing training programs for employees. Identify, prepare, and cross-train a possible skeleton crew (backup personnel for essential business operations).	

Leadership	✓
Research and learn business organizational change models to adapt to your environment.	
Build a trusted network of industry peers to share best practices and a network of business professionals with expertise outside of your core capabilities that can serve as part of your extended team.	
Conduct leadership and change management training with managers and other employees.	
Maintain perspective and build a personal resilient mindset.	
Maintain a healthy lifestyle and self-care routine so you may be your best self in stressful situations.	

Operations & Supply chain	✓
Create multiple sources of revenue (e.g., multiple services, experiences, and audience/customer segments; in-person and online)	

Digital Infrastructure / IT Systems	✓
Implement cloud data solutions, so customer and business data are accessible anywhere. Include data backup protocols for computer equipment and on-premise servers.	



# Business Continuity Plan (BCP) Template

- Simplified template that may be adapted for most Food Service and Restaurant small businesses and can be further customized as needed.
- **Note:** You may extract your completed BCP template and save it as a shared file, digitally and in print, accessible to everyone on your team.

## A. Types of Significant Business Disruptions & Risk Mitigation Matrix

Use this table to outline risk mitigation strategies your business has in place to prepare for various business interruption events with corresponding response plans to be activated should an event occur.

Significant Business Disruption	Risk Mitigation and Safety Measures (Action before a disruption)	Response Plan (Action during a disorder)
Pandemic and Other Health Hazards		
Fire		
Flood / Natural Disasters		
Security Threat		
Cyberattack		
Power / Internet outage		

# Business Continuity Plan (BCP) Template

- Simplified template that may be adapted for most Food Service and Restaurant small businesses and can be further customized as needed.
- **Note:** You may extract your completed BCP template and save it as a shared file, digitally and in print, accessible to everyone on your team.

## B. Emergency Contacts and Mission Critical Roles

Identify the people with decision-making authority who should be alerted of an unexpected business interruption.

## D. Crisis Communications Plan

A clear and established crisis communication plan is critical as part of a business continuity plan. The following table assigns people responsible for communication to key stakeholder audiences and identifies the appropriate primary and alternate communication channels.

Audience	Company Contact (who is responsible for message and delivery to audience)	Primary Channel	Alternate Channels
Staff			
Customers			
Partners			
Creditors			
Media			
Neighbors business			
Industry			

## H. Testing and Evaluation

Use this space to outline your quarterly or annual schedule to test your Business Continuity Plan for areas to improve or update. (hint: proceed to the next section of this toolkit for guidance on creating your test plan)

## C. Leadership

Use the following space to identify your business's principal leadership roles.



# Test & Evaluation

Regular practice of testing your plans also helps to **instill resilience as a matter of process and culture**, not just a one-off activity

Test & Evaluation Checklist	✓
<b>Schedule:</b> Establish a quarterly or at least annual program to test each element of your resilience and business continuity plan	
<b>Meet:</b> Include in your testing plan an all-staff meeting to create scenarios, scrutinize feasibility, and evaluate methods for effectiveness and data accuracy	
<b>Scenario Drill:</b> Create practice scenarios for different event types and test components of your resilience and continuity plans.	
<b>Evaluate:</b> Analyze the results of your drills, including how effective alternates did in their roles, how long it took to gain control, communicate internally and externally, and how your resources/partners responded. It may also include the evaluation of performance at temporary locations.	
<b>Update:</b> Have a procedure in place to modify your plans as: <ul style="list-style-type: none"> <li>○ business models change</li> <li>○ employees change</li> <li>○ your suppliers change</li> <li>○ your customers change</li> <li>○ technologies change</li> <li>○ risks change</li> </ul>	



A man with a beard and short hair, wearing a light blue button-down shirt, is leaning on a wooden bar counter. He is looking towards the camera with a slight smile. The background is a blurred bar interior with warm lighting and shelves of bottles.

"Even before COVID-19 hit,  
92% of companies thought their  
business models would need to  
change given digitization."

- McKinsey & Company



**Digital offerings** were critical elements for increased engagement with current and new customers. **Easy online and mobile orders, loyalty programs**, among other digital experiences, are trends to persist even after the pandemic



**Delivery and pickup** gained more demand as Covid-19 restrictions were imposed. Some businesses partnered or increased their **presence with third-party platforms** (e.g., Uber Eats, DoorDash), **adapted spaces for in-person and curbside pickup**



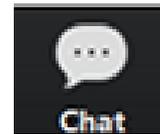
**Niche and value-driven menus** became another differentiator in the industry. Those with a strong message that appeals to trending *“food tribes”* were able to **retain and expand their customer** base.

# Trends observed during Covid-19

# Question #2

What business model  
pivot decisions were  
critical for your business?

Use the **chat** to share your feedback



# Business Model Pivot Exercise

"Business model resilience is often missing from traditional business continuity plans. Organizations plan for disruptions to resources and processes, but don't recognize that business models can be just as big a threat to the continuity of operations."  
- Gartner

Use this checklist as a tool to guide a brainstorming exercise among business leaders and the entire team.

<b>Business Model Pivot Checklist</b>	✓
Take inventory of core capabilities, resources, and network	
Consider where your customers are, how their needs have changed, and what new customer segment opportunities there may be in a changing environment	
Identify new ways to deliver value	
Line up the right staff, resources, and funding to execute	



# Business Model Pivot Exercise - Example

## Build Internal & External Awareness

### 1. Core Capabilities & Resources

- ✓ Focused, in demand menu
- ✓ Comprehensive customer data
- ✓ Modern POS system already in place
- ✓ Well-trained staff who can adapt to changing circumstances and constraints and provide quality dine-in and dine-out customer experiences

### 2. Understanding Customer's Needs

- ✓ Local customers are looking for take-out or delivery options when in-restaurant dining is not available.
- ✓ Out-of-town patrons may not be able to visit; they don't know what is available on Cape Cod right now; can only learn through digital channels
- ✓ Customers want to support their favorite restaurants.

## Plan & Implement

### 3. New Service / New Value

- ✓ Establish an email and social media engagement plan, segmented between local customers and seasonal, out-of-town customers
- ✓ Pivot to a more robust eCommerce / website solution that integrates well with the existing POS system
- ✓ Create value-add content around the menu

### 4. Resources to Implement Plan

- ✓ Reposition existing staff to focus on delivery, take-out, and curbside pickup food customer experiences.
- ✓ Renegotiate/restructure commitments to align with new business model
- ✓ Obtain disaster-relief funding (e.g., PPP, etc.) to support payroll and other eligible expenses
- ✓ Hire a person to implement new website solution
- ✓ Hire a person to manage email and social media

# Business Model Pivot Exercise

## Get Inspired by Innovation Categories Observed during the Covid-19 pandemic

**Social initiative:** Opportunities and activities that tap into societal altruism

**Delivery:** Innovative ways to physically deliver products, such as contactless or remote delivery

**Physical distancing:** Safe, social distancing protocols that retain your brand experience

**Remote presence:** Innovative ways to deliver services and experiences virtually

**Entertainment:** Activities to counteract boredom or offer distraction from a crisis

**Health and well-being:** Shift of brand experience or resources to a focus on mindfulness and stress reduction

**Professional consultation:** Pivot of a traditional product or service into expert guidance and resources for self-service / at-home experiences

**Social connection:** Innovations that tap into humans' need for social interaction and social value

**Education:** Opportunities for interactive, distance learning, and knowledge development



# Digital Strategy Checklist

Digital / eCommerce strategy is critical to today's operations as business switching online. Business must incorporate and maintain robust digital strategy.

- Email Marketing / Customer Data Strategy
  - ❑ Maintain a customer contact list with email, name, phone number, and address for marketing purposes. Consider implementing a loyalty program to incentivize customers to provide their information.
- Website / eCommerce / Online presence
  - ❑ Ensure all website pages and navigation experience work well on a mobile device.
- Social Media
  - ❑ Consider a social media content management platform to save time managing multiple social media accounts and posting schedules (e.g., Hootsuite, Buffer)
- Hardware / Point of Sale (POS) Systems / Software
  - ❑ Consider POS systems that integrate well with other apps and websites that you use in your business.



# Digital Strategy Checklist

Checklist with corresponding Google Search Queries may be used as a tool to build your business digital resilience and guide decision making on your business technology and software.

## Website / eCommerce / Online presence

- Establish a relationship with a website development professional for ongoing assistance.
- Maintain a company-branded website rather than relying solely on third-party sites, so you have a direct channel for content, messaging, and engagement.
- Optimize local marketing channels such as Google My Business, Yelp, etc.
- Ensure your website is SEO optimized for discoverability on Google and other search engines.
- Ensure all website pages and navigation are mobile device friendly.

Sample Google Queries for Further Research



## Hardware / Point of Sale (POS) Systems / Software

- Consider POS systems that integrate well with other apps and websites that you use in your business.
- Implement an antivirus solution for company computer hardware
- Create a policy to manage user access, password protection, and confidentiality of company and customer sensitive information
- Conduct regular maintenance and software updates
- Utilize cloud storage solutions ensuring that files are not just on-site

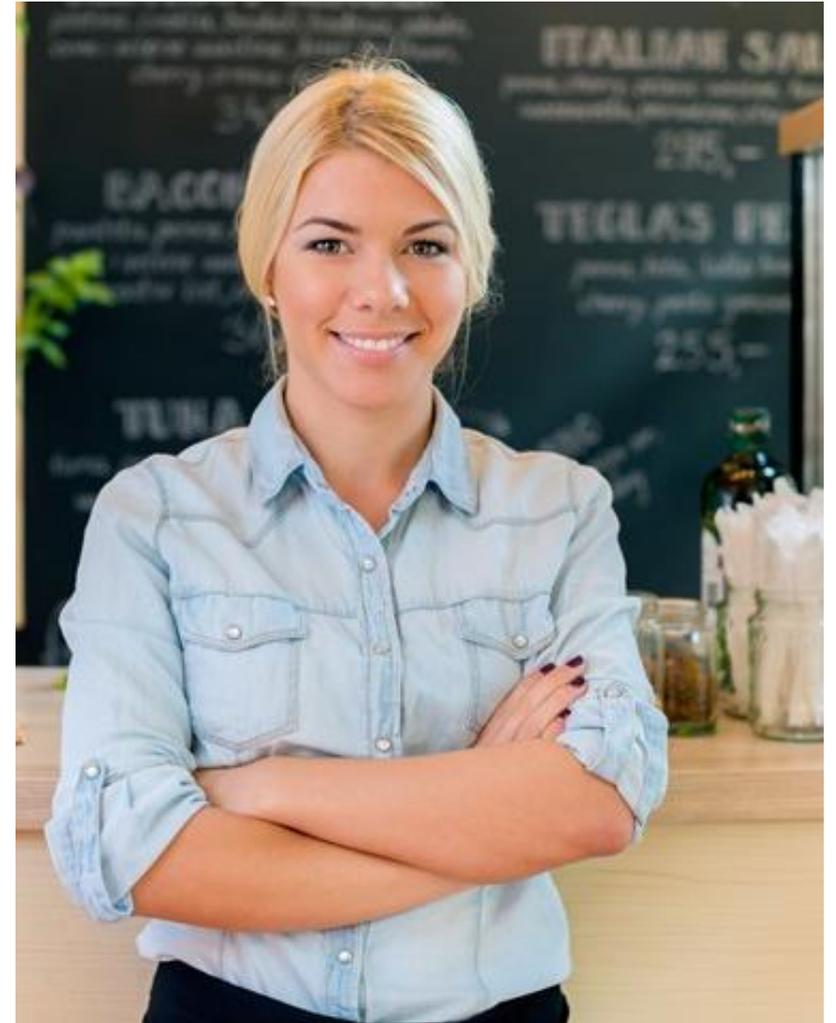
Sample Google Queries for Further Research



# Toolkit Summary

- Assess risks for various business interruption events, including a pandemic
- Build resilience across leadership and business operations
- Plan and execute business continuity before and during a crisis
- Pivot a business model
- Engage a digital strategy
- Connect with general and industry-specific resources for further learning and network building

Toolkits will be available in Mid-May 2021 on the Cape Cod Commission website. <http://capecodcommission.org/>  
All webinar attendees will be notified.



# Restaurant Revitalization Fund (RRF)

Provide support to eligible entities that suffered revenue losses related to the COVID-19 pandemic

- Grant for eligible food businesses. Funds for eligible uses by March 11, 2023
- Eligible entities are businesses that are not permanently closed
- Apply through your point-of-sale (POS) system (e.g., Clover, NCR Corporation, Square, and Toast)
- You can also apply through [restaurants.sba.gov](https://restaurants.sba.gov)
- SBA may provide funding of up to \$5,000,000 per location (not to exceed \$10,000,000 total for the Applicant and any affiliated businesses) for Applicants who meet eligibility requirements. The minimum funding amount is \$1,000

**Calculation** (for businesses with sales prior to or on January 1, 2019)

**2019 gross receipts *minus* 2020 gross receipts *minus* PPP loan amounts**

For details, see article by the  
US Chamber of Commerce  
<https://rb.gy/fheoit>

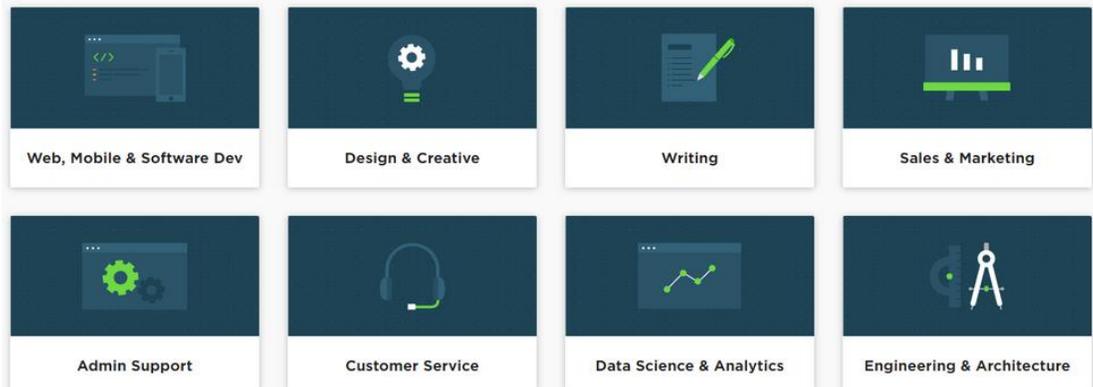


# Consider outsourcing through Freelancer / Contractor platforms such as Upwork.com

- Website / eCommerce setup
- Social Media
- Content creation / blog articles



Find quality talent or agencies



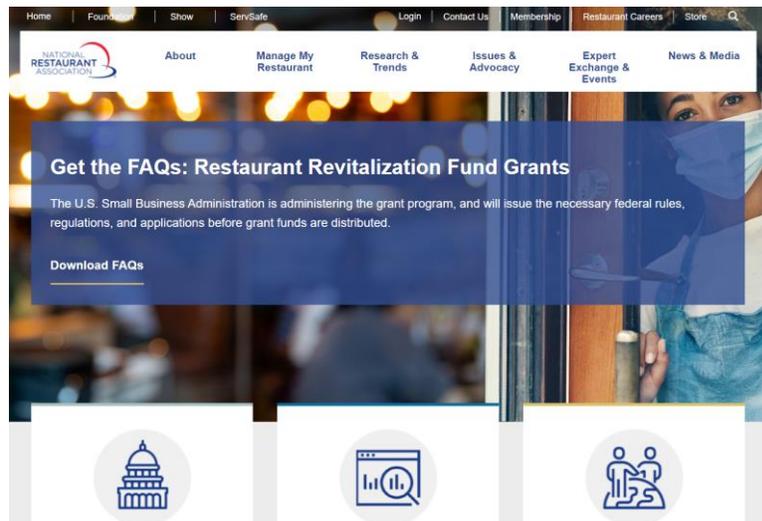
Ongoing  
Execution of  
your  
Business and  
Digital  
Strategy

A photograph of two women in a cafe setting. The woman on the left has curly hair and is wearing a blue shirt and a white apron with vertical stripes. The woman on the right has long straight hair and is wearing a light blue shirt and a white apron. They are both looking at a white tablet held by the woman on the right. The background shows a brick wall, a window with warm light, and a bar counter with various items. A semi-transparent white rectangle is overlaid on the image, containing the text 'Additional Resources'.

# Additional Resources

# Food Service and Restaurant Resources

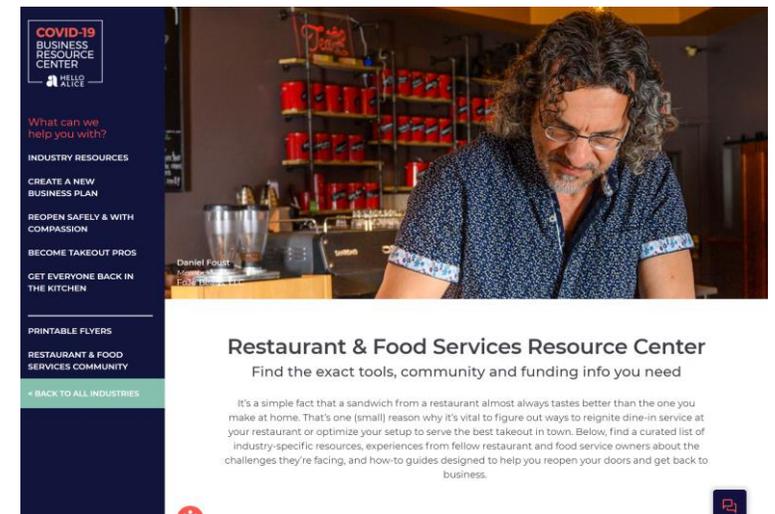
The National Restaurant Association



<https://rb.gy/rqwd71>



Hello Alice: Restaurant & Food Services Resource Center



<https://rb.gy/9jvsgy>



# General Resources



Cape Cod Commission  
Covid-19 Resources

<https://rb.gy/qnebeq>



Massachusetts Covid-19  
Resources and Guidance  
for Businesses

<https://rb.gy/pdfbjo>



Massachusetts  
Emergency Management  
Agency (MEMA)

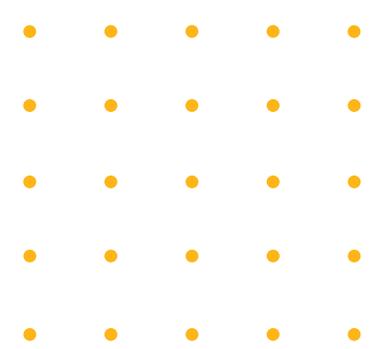
<https://rb.gy/ott3uj>



U.S. Chamber of  
Commerce Foundation:  
Resilience in a Box

<https://rb.gy/utw6v7>





# Q&A

THANK YOU!  
TIME FOR QUESTIONS

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