



# ROUND 2 APPLICATION

## Responding to Key Questions

This guide has been produced to assist applicants in responding to key questions within the Beyond Open Round 2 Application.

[beyondopenclt.com](http://beyondopenclt.com)

### Example 1: Fabi's Pizza

*This is not a real business, but is meant to serve as an example on how to respond to questions within the application.*

#### COMMENT #1

*These two paragraphs clearly explain:*

- 1. what the business does*
- 2. who the target customer is*
- 3. how the business helps customers solve their problems*
- 4. and which goods and services are at the core of their business*

#### COMMENT #2

*This response is helpful to the people reviewing the applicant's goals because they explain two important points in each bullet point:*

- 1. Describe the existing challenge in the business*
- 2. Describe the solution to overcome the challenge in order to reach the goal*

**Describe your business in 400 words or less. What does your business do or offer? What problems do you solve for your customers? What services, goods or activities are at the core of your small business.**

When Charlottean Andrea Bellini opened Fabi's Pizzeria (named after her daughter, Fabiola), she had no idea it would become an uptown Charlotte favorite!

Andrea always dreamt of opening a restaurant. Pizza has always been Fabi's favorite food, so obviously, she decided on a pizzeria concept!

Fabi's Pizzeria strives to bring people together locally, as well as tourists who are getting to know Charlotte, and is proud to maintain a strong commitment to the community by creating fun and healthy eating options while sourcing sustainably. Fabiola was involved every step of the way building this from a dream to reality, even traveling to Italy to sample pizzas and pastas, picking out ingredients for the pizzas, and perfecting how to stretch our hand-made dough.

So why has Fabi's Pizzeria become an uptown Charlotte favorite? Because of their limitless toppings and healthy baked Buffalo Wings, to name a few reasons! Fabi's also offers huge hoagie sandwiches, popular pastas, large patio and a wide selection of local beers and wines for sale for on or off-premise consumption. Literally something for everyone in the family!

Fabi's Pizzeria has served all of the residents, guests, and Charlotte visitor's since 2009 and was named best pizza in Mecklenburg county in 2022.

**In no more than 400 words, what goals do you wish for your business to achieve in the next 3-5 years, especially those related to revenue and/or number of employees? Include any information you think would create a clear picture of success in your mind (for example: number of employees, revenue growth, etc.)**

- 1. Increase sales:** we plan to grow sales by 40% in the next three years and add five new restaurant positions.
  - Currently we only offer dine-in option; missing a lot of customers interested in eating the food in the comfort of their home. Within the next year, we plan to extend our business to take out and delivery. To guarantee the food arrives in perfect condition, we will be doing our own delivery, with an expectation to hire two drivers and two extra kitchen staff.
  - Offer event catering. We plan to start doing one event per month during the first year; two events per month the second year and four events per month the third year.
  - Grow our social media presence.

**Improve inventory management and reduce food waste by 10%:** Stringent inventory control will help manage food waste and shrinkage (loss of inventory through wastage or theft) and save a lot of money. Food waste can seriously

impact costs in many restaurants, so tackle this by having a constant overview of stock levels. Introducing a point of sale (POS) with a built-in inventory management system will allow to enter precisely how much of every ingredient each dish consumes so we can properly stock our kitchen.

**COMMENT #3**

*This response also does a good job of explaining the goals as it relates to number of employees and revenue growth.*

- 2. Boost employee performance and customer service:** develop a training plan for all employees and discuss plans for progression. Providing employees with the tools to improve customer service will lead to better tips and happy employees, reducing employee turnover.

**Please describe the asset(s) you wish to acquire. Please include information about the specific brands and models, a reasonable unit cost for each individual asset under \$20k in cost, and two (2) cost estimates/quotes for each asset over \$20k in cost.**

**Project: Kitchen update**

Fabi's Pizzeria opened its doors back in 2009 and kitchen equipment is in need of an upgrade.

I attached a file with a list of assets, including brand/model, description, quantity, unit cost and total cost. We are also including two quotes for the pizza oven.

ASSET	BRAND, MODEL	BRIEF DESCRIPTION: WHAT IS THIS ASSET FOR?	QUANTITY	UNIT COST	TOTAL COST	ADDITIONAL INFORMATION (i.e. website link)
Refrigerator	Avantco SS-2R-HC 54" Stainless Steel Solid Door Reach-In Refrigerator	Refrigerator to properly store food	1	\$2,749.00	\$2,749.00	<a href="https://www.therestaurantstore.com/items/228779">https://www.therestaurantstore.com/items/228779</a>
Fryer	Main Street Equipment Liquid Propane 40 lb. Stainless Steel Floor Fryer - 90,000 BTU	Gas fryer necessary to fry wings and other appetizers in our menu	1	\$699.00	\$699.00	<a href="https://www.therestaurantstore.com/items/563418">https://www.therestaurantstore.com/items/563418</a>
Mixer	Avantco MX40H 40 Qt. Planetary Floor Mixer with Guard & Standard Accessories - 240V	Dough mixer necessary for pizza dough, which is the core of our business	2	\$3,499.00	\$6,998.00	<a href="https://www.therestaurantstore.com/items/642416">https://www.therestaurantstore.com/items/642416</a>
Pizza oven	Bakers Pride Y-602 Double Deck 60" Gas Pizza Deck Oven   240,000 BTU	Pizza oven with capacity for 8 pizzas at a time	1	\$43,498.00	\$43,498.00	<a href="https://www.burkett.com/bakers-pride-y-602-double-deck-60-gas-pizza-deck-oven-240-000-btu?srsId=AfAwRE6-she_PNpluXY5_CqIkrx0TFSTzB3piD3oJOYddTgoWR8mZtg7DuQ">https://www.burkett.com/bakers-pride-y-602-double-deck-60-gas-pizza-deck-oven-240-000-btu?srsId=AfAwRE6-she_PNpluXY5_CqIkrx0TFSTzB3piD3oJOYddTgoWR8mZtg7DuQ</a>
Sink	Regency 124" 16-Gauge Stainless Steel Three Compartment Commercial Sink with 2 Drainboards	Sink to wash dishes and equipment. Three compartment sink provides conveniences and adds efficiency	1	\$917.00	\$917.00	<a href="https://www.webstaurantstore.com/regency-124-16-gauge-stainless-steel-three-compartment-commercial-sink-with-2-drainboards-24-x-24-x-14-bowls/6005324242X.html">https://www.webstaurantstore.com/regency-124-16-gauge-stainless-steel-three-compartment-commercial-sink-with-2-drainboards-24-x-24-x-14-bowls/6005324242X.html</a>
<b>TOTAL ASSET PURCHASE COST</b>			<b>6</b>		<b>\$54,861.00</b>	

**COMMENT #4**

*Because the pizza oven has a unit price of over \$20k, two cost estimates/quotes are required to be uploaded with Fabi's Pizzeria's application.*

**How will this asset contribute to help reach your near- or long-term business goals, solve a problem your business faces or make the most of an opportunity for your business?**

Fabi's Pizzeria opened its doors in May 2009. Our kitchen equipment has not been updated since then, and the main appliances and equipment are constantly in need of repairs. Doing an upgrade on these will eliminate the maintenance expenses and will allow our kitchen team to work in a more efficient and safe way, increasing productivity and thus allowing for a sales increase.

The fryer and mixer are industrial size and faster than our current equipment. Our current pizza oven only has capacity for four pizzas at a time. The Bakers Pride Y-602 Double Deck will allow us to bake eight pizzas at a time to support the new take out and delivery business as well as the catering events.

Our refrigerator breaks down every three months, causing food to go bad quicker than anticipated and increasing our inventory costs. A new refrigerator will guarantee ingredients are always stored at the right temperature helping us with our goal to improve inventory management.

The three-compartment sink will allow us to hire a second dishwasher and have a more efficient kitchen.

These upgrades are necessary to support our plan to increase sales by 40% in the next three years; and the added business/revenue will allow us to hire two drivers, another cook and assistant cook and a dishwasher.

**FINAL COMMENTS:** Fabi's Pizzeria application clearly defines their business goals and ties them to the assets requested. While multiple assets are included in the request, Fabi's Pizzeria describes how these are part of the same project (kitchen update) and provides specific details for each asset including: asset, model, description, unit cost, quantity and total cost. Two estimates were included in the request to support the purchase of the pizza oven, and the owner explains how each asset is going to help them achieve their business goals.

## Example 2: Lazaro's Landscaping

*This is not a real businesses, but is meant to serve as an example on how to respond to questions within the application.*

### COMMENT #1

*This response does well in explaining:*

- 1. what the business does*
- 2. who the target customer is*
- 3. how the business helps customers solve their problems*
- 4. and which goods and services are at the core of their business*

### COMMENT #2

*This response:*

- 1. describes the existing challenge in the business*
- 2. describes the solution to overcome the challenge in order to reach the goal*
- 3. the goal as it relates to number of employees and revenue growth*

**Describe your business in 400 words or less. What does your business do or offer? What problems do you solve for your customers? What services, goods or activities are at the core of your small business.**

With over 20 years of experience, Lazaro's Landscaping enhances the value and aesthetic appeal of commercial and residential lawns with top-notch landscaping services from our qualified team. We provide services in Charlotte, NC, and the surrounding neighborhoods north of the city.

Our staff members have the skills and expertise needed to take care of all landscaping needs:

- Landscape Installation
- Sod installation
- Tree planting and removal
- Edging and trenching
- Spring and fall cleanup
- Mulching

The owner, Javier Lazaro, is present on every job site to ensure that all work is completed promptly and reliably, guaranteeing the quality of the services provided.

**In no more than 400 words, what goals do you wish for your business to achieve in the next 3-5 years, especially those related to revenue and/or number of employees? Include any information you think would create a clear picture of success in your mind (for example: number of employees, revenue growth, etc.)**

1. Expand our service area to South Charlotte leading to a 30% revenue increase by 2025 and 50% by 2027. We currently serve the North and East side of the city of Charlotte. After COVID, people started spending more time at home and taking pride in their yards. We receive two calls per week of prospective new clients looking for landscape services and or regular yard maintenance, that we cannot fulfill due to team / equipment constrains.
2. Hire three high-caliber employees to create a third team to cover the demand increase. Train, motivate and develop them, so they will perform their duties in a safe, satisfied, and efficient manner.
3. Incorporate the following services in our portfolio over the next three years,avoiding the need to outsource these to a third party:
  - Fire Ant Control
  - Nuisance Pest Control
  - Tick Control
4. Upgrade our internal invoicing process (currently manual) guaranteeing invoices are issued promptly after a service is completed and payment is easily tracked.

**Please describe the asset(s) you wish to acquire. Please include information about the specific brands and models, a reasonable unit cost for each individual asset under \$20k in cost, and two (2) cost estimates/quotes for each asset over \$20k in cost.**

#### COMMENT #3

*The assets are clearly described, including:*

- 1. Make and model of the pickup truck and trailer*
- 2. Describes how the assets will be helpful in the business*
- 3. Provides two cost estimates/quotes for the pickup truck because it is over \$20k*

**2023 Ford F-150 XL:** this pickup truck combines power, function, and unequaled features. With cutting-edge safety features and a cutting-edge powertrain, the Ford F-150 XL is the ideal vehicle to safely haul all the equipment we need to carry for our landscaping jobs such as cutting and pruning tools, lawnmowers, leaf blowers, wheelbarrows, shovels, and digging tools.

Quotes from two vendors (copies uploaded to application):

Keith Hawthorne Ford of Belmont: \$35,750

Capital Ford of Charlotte: \$35,900

**2023 Diamond K LT014 6.5' X 10' 7K CLT Tandem Landscape Trailer - (7000 G.V.W.R.):** 2 - 3500 lb easy lube (1 Brake) axles - 205/75/R 15 Radial tires on Silver mod wheels - 24" 16 gage metal sides - 4' gate ramp - 3 X 2 angle frame - 2 x 2 tube top rail - 3" channel wrap tongue - 2000 lb tongue jack - LED lights.

Price: \$4,650 <https://www.diamondksales.com/2023-diamond-k-65x10-clt-7k-landscape-new-landscape-trailer-halsey-or-97348-i3419234>

**How will this asset contribute to help reach your near- or long-term business goals, solve a problem your business faces or make the most of an opportunity for your business?**

Currently Lazaro's landscaping has two landscaping crews (one serving the North of Charlotte and the other one the East). Adding a new truck and trailer for hauling landscape equipment will allow Lazaro's landscaping to put together a third crew (three new hires) and start serving customers located in South Charlotte that we can't serve now due to lack of personnel.

An additional truck and crew will also support the expansion of the business to provide yard pest and weed control. Adding these valuable services will help with customer satisfaction and retention, guaranteeing yards look attractive, healthy and weed and disease free while simplifying our customers life by eliminating one extra service provider to deal with.

All this will help our business achieve the 50% revenue growth targeted by 2027.

**FINAL COMMENTS:** In this application small business owner, Javier Lazaro, defines in a simple way the services provided by his company and his goals for the next five years. While he requests two assets (truck and trailer), these two go hand in hand. Since the truck is over \$20k he includes two quotes from two different Ford dealerships. The trailer is less than \$5k so no quotes are needed, however he stills add an internet link to the one he plans on buying for clarity. There is a clear, strong, and direct connections between the truck and trailer and the business goals, as these assets will help him achieve his objectives:

1. Expand our service area to South Charlotte.
2. Hire three high-caliber employees to create a third team to cover the demand increase.
3. Incorporate new services in his portfolio.

#### COMMENT #4

*This response clearly explains the connection between his two asset requests (pickup truck and trailer) and how the assets will help him reach his business goals.*



*Beyond Open Small Business Grant Program (Beyond Open) is administered by FFTC Partners For Empowering Communities, a supporting organization of Foundation For The Carolinas, to help build economic mobility among diverse (minority, woman, veteran, LGBTQ+, persons with disabilities) small business owners in Charlotte-Mecklenburg. The program is made possible by support from the Wells Fargo Open for Business Fund.*