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BRIEFING BOOK



Earl of Sandwich expects to grow to 300 mostly franchised units in the next two or three years.



FIRST LOOK

Earl of Sandwich Inks its First Franchise Deal

he Earl of Sandwich, a fast-casual restaurant in Orlando, Fla., signed its first franchise agreement in October with an unlikely franchisee: a wealthy investment bank.

"They invest billions of dollars and their analysts understand how [restaurants] are put together," says Gary Davis, the concept's CEO, referring to Sanders Morris Harris, one of Texas' largest private-equity firms. "There are a lot people who look at us as a great investment opportunity."

Davis believes the chain could grow to 300 mostly franchised units within the next two or three years.

Sanders Morris Harris will open the first of five units in January in Sugar Land, a fast-growing, middle-class suburb 20 miles southwest of Houston. Davis says the investment bankers hired an assistant manager from the Orlando restaurant to

operate the new 3,200-square-foot sandwich shop.

A smaller company store, about 1,300 square feet, is scheduled to open in Tampa this year.

The original restaurant—and, so far, the only one—opened in March 2004 at Disney's Marketplace. Business has been good. In its first 12 months, the 220-seat operation rang up \$5.3 million on a check of just \$8 including beverage.

Order times are three minutes, and Davis says the assembly-line system he created can produce 320 sandwiches an hour. Priced at \$4.95 each, they include turkey, roast beef and pork in 14 permutations, though customers can order them to their liking. Sandwiches are toasted in a conveyer oven that reaches 575 degrees.

"We're not trendy," Davis says. "Our concept is going back to a more traditional time. We have gone with a traditional line of sandwiches with traditional ingredients." He cites a French-style sandwich called Le Frenchy that's made with ham, Brie and Dijon mustard.

Davis and Earl of Sandwich Chairman Robert Earl, both British-born entrepreneurs, created the concept, taking inspiration from the descendents of the 4th Earl of Sandwich, John Montagu (1718-1792), for whom the sandwich is named. Earl is an investor in the descendents' London sandwich business, a commissary-based delivery operation.

Davis, in charge of daily operations, estimates investment costs for the Sugar Land unit are running \$115 per square foot, including furniture, fixture and equipment, while the downtown Tampa unit is running \$150 with FF&E.

Downtowns and suburbs are target markets, with smaller units (16 seats) destined for downtowns.

RESEARCH

It Was 20 Years Ago Today

The NPD Group finds few major changes year-over-year in dining trends. But a longterm look shows great differences. In its 20th annual "Eating Patterns in America" report, NPD notes that the number of meals eaten in restaurants has gone down, from 93 per person in 1985 to 80 today. But the number of meals people purchased

from a restaurant and eaten in the car has grown from 19 to 32 per person.

Interestingly, NPD reported 20 years ago that 25 percent of Americans were on a diet, the same figure found in this year's research. However, today 61 percent of survey respondents say they would like to lose at least 20 pounds, while only

54 percent said the same in 1985.

At the same time, Americans are more accepting of other people's weight. Twenty years ago, 55 percent said they completely agree with the statement, "People who are not overweight look a lot more attractive." According to this year's report, 24 percent said they completely agree.

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20 Nobody's Fool

Jimmy John's Gourmet Sandwich Shops launched a comprehensive advertising strategy to build awareness and expand beyond its core market of college students and recent graduates. A new series of TV ads has founder and CEO Jimmy John Liautaud struggling with activities like paddleball to show the chain is focused on sandwiches, not other pursuits.

By Margaret Littman



RESTAURATOUR

24 Split Personality

Eat'n Park has fine-tuned its "homestead" prototype by separating its hip coffee bar from its family dining room. The warm, comfortable dining room features a palette of gold and sage, warm wood tones and lots of natural light. The coffee bar is moodier, with a dark wood floor, a fireplace and exposed ductwork. The prototype in Streetsboro, Ohio, is the system leader in latte sales and dinner salad-bar sales.

By Lisa Bertagnoli



31 Taste and See

To increase trial and repeat traffic at Papa Murphy's, Vice President of Research and Development Doug Collins has stepped up sampling and developed new pizzas and add-ons such as cinnamon rolls and pasta dishes that are appropriate for the take-and-bake pizza concept. His strategy includes tweaking doughs, introducing more sophisticated toppings and training staff to educate customers about how to prepare heat-and-eat products.

By Monica Rogers





THOUGHT LEADER

43 Personal Effects

Selected by *Chain Leader's* Cover Society, Rare Hospitality Chairman and CEO Phil Hickey has won this year's Chain Leadership award. Hickey has turned Rare and its three brands—Longhorn Steakhouse, Bugaboo Creek Steak House and The Capital Grille—into a \$1 billion business by personalizing the dining experience and maintaining management stability. *Chain Leader* grilled him about where his leadership abilities work best in growing the company.

By David Farkas



LIQUID MEASURE

37 Star Power

Hard Rock Cafe has leveraged its music heritage with a three-tiered beverage program. It consists of a new rock 'n' roll-themed beverage menu, promotional events featuring rock stars with beverage tie-ins, and seasonal promotions. By combining signature beverages with music icons and major beverage brands, Hard Rock is driving media attention and beverage sales.

By Donna Hood Crecca

HUMAN ASSETS

52 Better Coaches, Better Players

Fatz Cafe has improved guest satisfaction and sales with a dual-focused training initiative. The company launched a comprehensive server training program that includes pre-hire testing and classroom training. At the



same time, it rolled out a leadership training initiative that covers topics like goal setting and time management. The simultaneous focus is yielding results: same-store sales are up, and management and hourly turnover is down.

By Donna Hood Crecca

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Why Must Big Mean Bad?

esidents of the ocean town of Ogunquit, Maine, will vote this month on a plan that would bar "formula" restaurants from opening. Afraid of homogenization and loss of the city's unique character, the town would be the second in the state to ban chains. It's a pre-emptive measure, as no chains have tried to open in Ogunquit recently, according to local officials.



The notion that chains are inherently evil continues.

Not in Our Backyard

This is nothing new, of course. Many communities have forbidden chain restaurants from opening within their historical district, downtown or whole city. Such snobbery exists because these towns think they are unique and that only their own residents are capable of maintaining charm and character. To them, a chain is a generic product borne out of

some cubicle in a cold office building, controlled by a big, greedy corporation whose only concern is making money by stamping out duplicate copies of a garish box producing pedestrian food.

The obvious questions first: Is it fair to ban one kind of business? Would a community ban other sorts of chains such as banks, fitness centers, dry cleaners, oil-change stores, florists, supermarkets, specialty retailers, hardware stores, cleaning services, hotels, realtors, gas stations and hair salons? Must residents avoid wearing Dockers pants, New Balance shoes and Old Navy hoodies to avoid sameness?

How do they define "chain restaurant"? Three units? Twenty? Headquartered outside of town? Is the pizza concept with five units in the tri-county area a chain? Does it employ more local residents than five units of Papa John's? Is the pizza better?

Are large restaurant chains incapable of following local architecture, parking and signage regulations? Do tourists avoid them? Are they afraid that local restaurants would be unable to compete? Isn't our country

proud of capitalism, letting customer demand control business?

With that off my chest, let's look at the benefits that chains bring to a community.

Formula for Success

The anti-chain argument says that local businesses support other local business and keep the money in the community. The local franchisee or operator of a chain outlet also lives in the community, makes purchases there, pays property and business taxes, and hires residents as employees who also pay taxes and buy things.

Those big corporations behind the chains have the resources to help within the community, from sponsoring Little League teams to helping rebuild after a hurricane. In many cases, chain operators demand that franchisees and unit-level management support their neighborhoods, getting involved with the schools, for example. *Chain Leader's* Driving Traffic research featured in our special Oct. 15 issue revealed that 90.2 percent of operators are involved in their communities.

Chains advertise to draw customers, including those who might not have come to the area otherwise. While they wait an hour for a table at The Cheesecake Factory, guests can mill about the shopping district.

They have sophisticated quality-assurance systems, enabling a safe product and environment for their customers. Their size gives them the power to demand adherence to safety standards from their suppliers as well.

So what can we do about it? The best way we can fight the bias against chains is to offer the food and service that consumers in every community demand. Customers who want consistent quality will come, even if they have to leave town.

MARY BOLTZ CHAPMAN, EDITOR-IN-CHIEF

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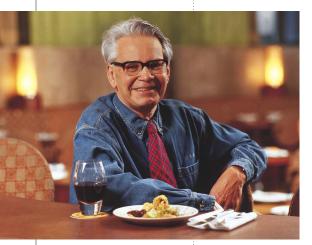


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Diverse Perspectives

erald Fernandez, longtime president of the MultiCultural Foodservice & Hospitality Alliance, wondered aloud why so many restaurant executives stand on the sidelines when they "could be taking a straight-talk approach and broaden their outlook." He admitted he was "preaching to the choir," as he asked the question at MFHA's Straight Talk Symposium in Atlanta last month.



Executives eager to embrace inclusion can find help in executing it.

CHARLES BERNSTEIN, EDITOR-AT-LARGE

(732) 263-0581 Charles Bernstein@msn.com Some 250 people did come to the every-other-year event. But Fernandez felt more should have attended. As a result, he has decided to hold just one major annual MFHA conference each year and no symposium to avoid confusion.

Ready and Willing

The event's participants demonstrated willingness to support and attempt

inclusion by their presence, so Fernandez was indeed "preaching to the choir." But the symposium did give industry leaders the opportunity to tap the best practices of others and get ideas for executing diversity in their organizations.

"We must capture the talents that reflect our diversity and have more of a nucleus of concern for and support for our people," asserted Joan Ray, Elliot Associates executive vice president. She urged executives to open their minds to new ideas and to strategize more. "Are we paying enough attention to our people?" she asked. Ray also suggested having an executive coach available whenever possible to help and encourage diverse leaders into top positions.

Aptitude and personality tests that are used to advance people, or not, were the subject of debate. Lori Wolner, senior director of corporate diversity for Sysco Corp., strongly believes in systematizing the culture. But she warns that these tests can be very complicated and that some of them are

"culturally biased." Clearly, certain groups do not feel comfortable taking tests, she affirmed. "I always look for someone passionate," Wolner said. "How do you test for a culture fit?"

Questions and Answers

Much of the symposium focused on trying to answer the tough questions that people are afraid to ask about diversity, not wanting to be hurtful or politically incorrect. Fernandez maintained that unless we discuss the difficult issues, we won't be able to truly embrace diversity. The industry needs to move beyond assumptions.

For example, Helen Zia, a keynote speaker at the symposium and an award-winning journalist, discussed the many wrong assumptions some make about the 13 million Asian-Americans in the United States. "There is too much hate mail and too many feelings that the Asian-American waiters, cooks and service staffs might be spies," she said. Zia, a second-generation Chinese-American and proud of it, argued that Asian perspectives in the work place are rarely addressed, but they should be. "We make the road by walking it," she said. "Let us be real and share together."

Issuing a Challenge

It is time to move further ahead in diversity and give minorities even more of a chance to move up the ladder in the restaurant industry. The first step is to open our minds and question our assumptions. And if we are sincere in our efforts, those hard questions will be easier to ask and easier for our diverse co-workers to answer.

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Breakfast Sandwich Boom

On-the-go consumers clamor for breakfast sandwiches with cheese

he old adage about the importance of breakfast still rings true. Ninety percent of Americans eat breakfast, and more than half say breakfast is the most important meal of the day, according to a 2001 Mintel/Simmons NCS study. Although the appeal of breakfast remains, the meal has changed to suit today's lifestyle.

Breakfast Rush Hour

Tougher commutes and longer working hours leave consumers more time-crunched than ever. Given this new reality, it's not surprising that consumers are looking for easy breakfast solutions that can be eaten on the go. According to a 2004 NPD National Eating Trends study, on-the-go breakfast occasions have doubled in the last five years.

Breakfast sandwiches account for one-quarter of breakfast restaurant orders.

Enter the breakfast sandwich. This convenient breakfast option is tasty, satisfying, available in minutes—and portable. The NPD Group's CREST service found that 41% of breakfast sandwiches are eaten in the car, and 24% are taken to work. Breakfast sandwiches' broad appeal makes them strong sellers, accounting for one-quarter of breakfast restaurant orders, the NPD study reported.

More Cheese, Please

Cheese is a big part of breakfast sandwiches' allure. It makes them more of a complete meal, adding flavor, richness and texture, not to mention a healthy hit of calcium to start the day.

According to the Foodservice Research Institute, in the last five years, the number of breakfast sandwiches with cheese at the top

burger QSRs increased almost 50%, nearly double the increase for all breakfast sandwiches.

Adding cheese means higher perceived menu quality, too. According to a 2003 Market Facts/Favorite Cheese study, almost 50% of consumers are willing to pay extra for cheese to be added to foods. In fact, consumers think the cheesier the better. When it comes to breakfast foods, most consumers would like them to include two or more types of cheese, the study found.

Flavor Proliferation

QSRs are on top of the trend, offering breakfast sandwiches with cheese in a plethora of innovative shapes, flavors and varieties to tempt hungry commuters. And some establishments are revving up the flavor meter by menuing breakfast sandwiches made with specific varieties of cheese or cheese combinations.

Upsizing and elongating its standard breakfast-sandwich offerings, Burger King has introduced the Enormous Omelet Sandwich. This hearty new breakfast option consists of a long, toasted bun enclosing two eggs, three strips of bacon, a sausage patty and two melted slices of American cheese to top it all off.

Carl's Jr. recently took the burger into the realm of breakfast by launching a Breakfast Burger. This breakfast-sandwich variation tops a hamburger with a fried egg, bacon, cheese and tater tots for good measure. Cheese-loving customers can also chose a Sourdough Breakfast Sandwich, a menu stand-by since 1999 featuring the complementary flavors of both Swiss and American cheeses.

Sonic is capitalizing on the homey appeal of Texas toast for its new breakfast sandwich line, dubbed Toaster Sandwiches. Each Toaster Sandwich includes bacon, sausage or ham with egg and cheese, layered on two thick slices of Texas toast. The sandwiches can be enhanced with optional add-ons of spicy jalapeños, crispy bacon or more cheese.

And in a south-of-the-border twist on the breakfast sandwich, Jack in the Box's new Meaty Breakfast Burrito goes beyond the boundaries of most hand-held variations of breakfast quesadillas, burritos and tacos. Its new triple-meat burrito takes flavor one step further, combining cheeses to liven up ham, sausage, bacon and scrambled eggs with a zesty blend of Cheddar and Pepper Jack.

Breakfast and Beyond

Another way to differentiate your menu is to offer breakfast sandwiches all day long. Star newspapers reported that Dunkin' Donuts recently conducted a study in Chicago and found that 54% of respondents enjoy breakfast foods for dinner. In response, it created a Steak, Egg & Cheese bagel sandwich, which is available 24 hours a day, according to the company.

For QSRs, the great news is the increasing numbers of consumers enjoying the convenience and taste of today's breakfast-sandwich innovations—and the cheese that makes them a true treat.

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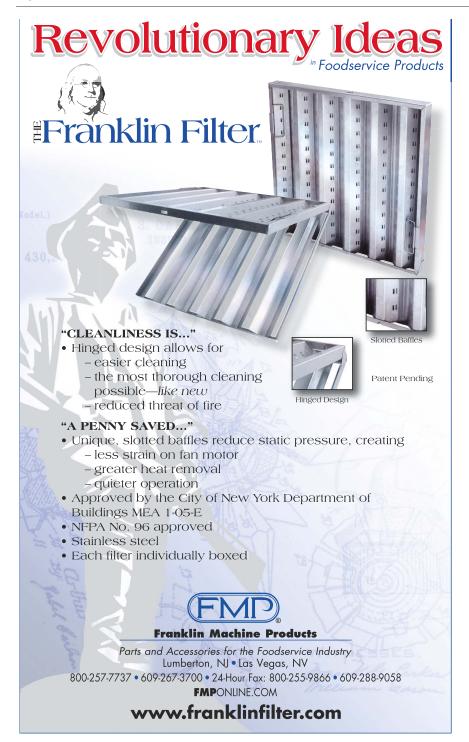
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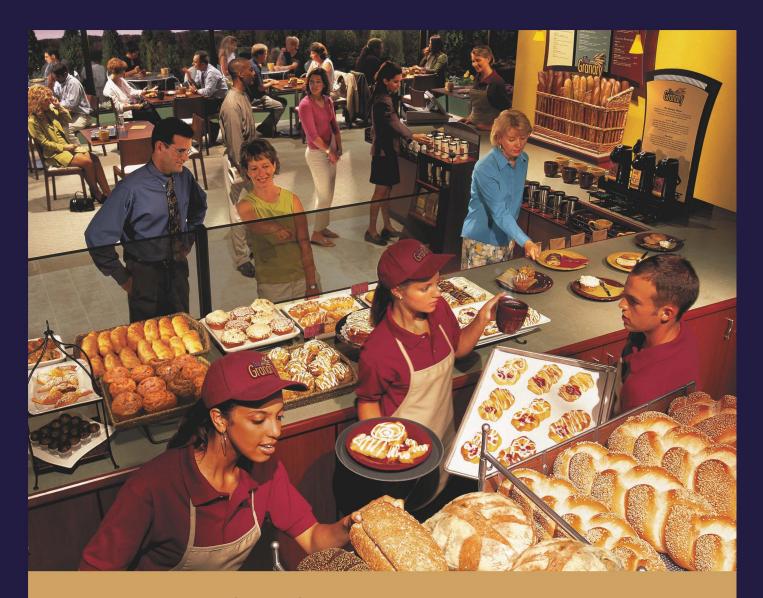
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avid Mansbach, managing director and a corporategovernance expert with HVS Executive Search, says the best board members are savvy about the restaurant industry yet smart enough to offer a global perspective. But you'll have to dig to find them in, say, gaming hotels and retail. "There's enough of a transferable skill set from these other segments," he insists. We asked Mansbach about board member assets and compensation issues.

What do you look for on a board of directors?

We are very big really when it comes down to a director's performance. If a board director is performing, I don't have a

The Right Stuff

Choosing board members can be a tricky business.

BY DAVID FARKAS

problem paying that person half a million dollars. I would question a company if the majority of its board directors pay is coming in cash.

What will performance be tied to?

Most companies are going away from stock options. Long-term incentives still remain. But many companies are shifting from stock options to restricted stock because of having to expense the options. Restricted stock will become more popular.

What type of board members will be more effective?

These will be individuals with knowledge of auditing, nominating, governance and compensation. What companies are doing to realign and manage corporate governance. It just wasn't happening.

Which board members are not particularly effective?

Well, when we evaluate boards, we look for interlocks [or conflicts of interests]. For example, having your largest franchisee sit on the compensation committee isn't a good thing. When that committee does its due diligence and ends up deciding the CEO doesn't deserve a raise, perhaps the CEO says we are not going to expand your franchise rights. Also, having a board director from your law firm sit in on key decisions isn't good, either. You want a true objective overview of the industry.

What about the CEO on the compensation committee?

A CEO not should be on the committee. Most corporate governance experts would advise against that. That committee should be led by outside parties.

What does that guard against?

A CEO could suggest that

the chief executive officer should get a 20 percent increase, setting a trend. The CEO should be involved in the [compensation] process, but as a consultant only. If you look at the companies with the best practices—Outback, Darden, Wendy's, for example—they make clear that there is no assistance from anyone except the compensation committee itself.

What other things do best-practice companies do?

They're hiring consultants to do competency analyses of board members. They want to know, does our nominating committee have someone who understands succession planning?

Also, when it comes to compensation decisions, best-practice companies are giving general managers more skin in the game, which aligns them with more senior-level executives.





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UPSTARTS





221B Baker St. Pub & Grill showcases live music and British fare as it prepares to expand outside Texas. By Maya Norris

Aiming for endcap locations in suburban lifestyle centers, 221B Baker St. Pub & Grill serves pub fare like fish and chips in a traditional English pub setting with lots of dark wood, old prints of British royalty and sportsmen, and wingback chairs.

SNAPSHOT

CONCEPT

221B Baker St. Pub & Grill

PARENT COMPANY

Hospitality USA Management Group, Houston

UNITS

3

2004 Systemwide Sales

\$8.5 million

2005 Systemwide Sales

\$12 million (company estimate)

AVERAGE Unit Volume

\$3.5 million

AVERAGE CHECK

\$14

EXPANSION PLANS

4 to 6 a year

21B Baker St. Pub & Grill is poised to share a bit of its British pub culture. After cultivating its concept in Houston for the last five years, the three-unit chain is venturing into outlying states this year.

"We truly believe that we are the neighborhood pub," says Edgar Carlson, coowner of Hospitality USA Management Group, parent company of the chain. "We have customers that gravitate toward us because we serve a social purpose not only as a place to serve food and good beer and entertainment but because they feel welcome there. It's their second house."

The concept seems to be thriving. With an average check of \$14, the chain posted \$8.5 million in systemwide sales in 2004 and expects to ring up approximately \$12 million in 2005.

Problem Solved

Hospitality USA created Baker St. in 2000 as a spinoff of its other pub concept, Sherlock's Baker St. Pub & Grill, when it found a 4,000-square-foot space with a kitchen in a shopping mall near Rice University in Houston. Although Sherlock's was not a full-service restaurant and required 9,500 square feet, the company deemed the real estate and demographics too good to pass up. So it opened a smaller, full-service pub concept in the space instead. "We really liked the opportunity to do food because we were open much earlier [in the day]," Carlson says.

Named after Sherlock Holmes' address, 221B Baker St. Pub & Grill offers authentic British fare along with some American items like burgers in a traditional pub setting. Created by consulting chef Neil Doherty, who was born in Ireland and studied culi-

nary arts in London, the menu features made-from-scratch items like British Sausage Roll, \$4.50, British sausage encased in puff pastry and served with spicy mustard and Branston pickle sauce; and Shepard's Pie, \$7.99, ground sirloin with veggies, topped with cheddar cheese and finished with a mashed potato crust, and served with green beans and red potatoes.

The restaurants also offer 20 to 24 draft beers and ales, microcrafted beers, wines and signature cocktails. Alcohol makes up about 60 percent of sales.

However, unlike most traditional pubs, Baker St. has live acoustic rock and folk music five or six days a week.

And at 6,500 square feet with seating for 300, Baker St. is large compared to most traditional pubs. To create a cozy, conversational environment, the bar splits the space into two dining rooms and the booths have glass partitions.

Hire Aspirations

As Baker St. gears up for growth, Hospitality USA has gone on a hiring spree. Carlson and co-owner Larry Martin hired Vice President of Operations Bob Allison in 2002, who developed an opening crew, training team and network of area directors. They recently hired Director of Construction Leo Parker and Dallas-based The Retail Connection, which specializes in finding real estate for restaurants.

Hospitality USA plans to open three units in Oklahoma, Colorado and Texas by year-end and two more in Texas and Louisiana in 2006. The company expects to open an additional 25 to 27 units in Oklahoma, Colorado, Texas, Louisiana, Florida, the Carolinas, Georgia and Arizona in about five years.



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ComServ

The founder of a popular sandwich-only chain flaunts his weaknesses to show his strengths.

By Margaret Littman

Nobodys

f you haven't heard of Jimmy John Liautaud, don't worry, you will. At least if Liautaud has his way.

The robust entrepreneur is CEO of the eponymous sub chain he founded in 1983 when he was just 19. Since then Jimmy John's Gourmet Sandwich Shops has expanded steadily to 354 locations. And now the company has ramped up expansion to the current pace of 100 restaurants annually and has sold 700 franchises—all under Liautaud's very watchful eye. For example, he requires franchisees to stick to his sandwiches-only formula and, in his words, "arrogantly" prohibits couponing and other discounting.

Like his better-known competitors including Quiznos Sub and Potbelly Sandwich Works, Liautaud is looking to build brand awareness and loyalty among diners ages 18 to 34, and he wants to do it on as small a budget as possible. After two decades of spot TV, radio and other scattershot marketing efforts, Jimmy John's has developed an integrated campaign to expand beyond its original core markets of college students and recent graduates.

The Face of Jimmy John

Jeremy Irwin, CEO of Denver-based Xylem Interactive, developed the Champaign, Ill-based chain's advertising strategy.

When Xylem took on the account last year, Irwin wasn't familiar with the Jimmy John's brand or sandwiches, so his questions turned out to be a genuine education. "I asked them what the brand was about, and they all said, 'Jimmy is the brand,'" Irwin remembers. "I decided we had to show the world Jimmy."

The new ad campaign, the most comprehensive in the company's history, does just that. Liautaud's face pops up on the home page of the company Web site and says, "Just roll over me. I'll take you where you want to go." Then, clad in a chef's jacket, his image jumps up and down on each of the Web site's pages.

Liautaud also stars in the TV spots, which began airing in August in Chicago; Denver; Columbus, Ohio; and other cities with a significant concentration of Jimmy John's restaurants. The new commercials sport the same red background as the Web site, with reversed-out type identifying Liautaud as "Jimmy."

"Yo-Yo" Length: 30 seconds



1. [Music]



2. [Music]



3. [Music] Jimmy John: Ow!



4. [Music]

FOL.

The wordless 30-second ads, save for a voice-over tagline at the end, show Liautaud struggling with numchucks, a paddleball or a yo-yo. Future ads will feature him attempting to play tennis and golf, without success. By watching Liautaud get tangled in yo-yo string and making other blunders, viewers understand that both Liautaud and the chain are focused on sandwiches, not other pursuits, according to Irwin.

"At first, Jimmy was really worried," Irwin says. "He did not understand the idea of making fun of himself."

But once Liautaud caught on, he was a good sport. Irwin says the spots capture his personality, the chain's irreverent attitude and its narrow menu of 16 sandwiches.

"We take a different approach that a new customer does not want to be pitched. We let that soft sell draw them in. We think that is stronger because we are not telling anyone what they like," he says. "No one likes to be told what they like."

Scott Snyder, a partner at Xylem, feels the speed of service Jimmy John's stores provide is conveyed through the rapid pacing of the ads. "It is quality and attitude that drives you into the store," he says. In addition to the TV commercials and the Web animation, print ads do their part, with taglines such as, "so fresh, you'll want to slap somebody."

More Than Fresh

The new creative direction has allowed Jimmy John's to move away from promoting its fresh ingredients and gourmet bread. Those elements are still crucial to the chain's positioning, but its competitors use those concepts in their ads.

"Everyone else claims fresh gourmet, so we have got to try to get people's attention and let people know who we are another way," Liautaud says.

Privately held Jimmy John's will not reveal its investment in the new ad campaign, but the company spent \$2.4 million on media buys—mostly on radio—in the 12 months ending June 2005, according to New York-based TNS Media Intelligence. That figure is certain to rise in the next year with more TV buys during all dayparts, and with Liautaud's lofty goals.

"I want to be Dave Thomas when I grow up," he says. Well, it worked when he dreamt big 22 years ago.

SNAPSHOT

CONCEPT

Jimmy John's Gourmet Sandwich Shops

HEADQUARTERS

Champaign, Ill.

UNITS

338 franchised, 16 company

2004

SYSTEMWIDE SALES

\$210 million*

AVERAGE CHECK

\$5.25*

AD BUDGET

\$3.2 million*

AD AGENCY

Xylem Interactive, Denver

EXPANSION PLANS

100 new units annually

*Chain Leader estimate



5. Jimmy John: Whoa!



6. [Music]



7. Voice-Over: Well, you can't be great at everything.



8. Voice-Over: Jimmy John's. World's Greatest Gourmet Sandwiches.





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ustomers visiting the Eat'n Park in Streetsboro, Ohio, know just where they're going. The women dressed in afternoon-shopping clothes, stopping in for a snack or late lunch, turn left from the lobby and head to the spacious dining room. The youngish man with jetblack hair, punky T-shirt and a tired look on his face turns right, plopping onto an Ultrasuede couch in the trendy coffee bar.

It seems like a minor change, but Eat'n

Park says moving the coffee bar to the opposite side of the restaurant has made all the difference in the world. "If the coffee bar is on the restaurant side of the lobby, it gets confusing," says Basil Cox, president of Pittsburgh-based Eat'n Park, which operates 78 family-dining restaurants.

"But if it's on the other side of the lobby," Cox continues, "people can see it's a distinct feature."

The coffee bar and the restaurant are as distinct as espresso and cappuccino. The restaurant features a warm, comfortable

BY LISA

BERTAGNOLI



dining room with a palette of gold and sage, warm wood tones and a dark patterned carpet, all basking in plenty of natural light. The coffee bar is moodier, with a dark wood floor, sage-green walls, a fireplace, comfortable chairs and exposed ductwork overhead.

An expansive tiled entryway separates the two sections of the restaurant, as does a salad bar festooned with banners, a hot food bar and, closer to the coffee bar, a display case filled with sweets.

Room for Improvement

The new look is a fine-tuning of Eat'n Park's "homestead" prototype introduced five years ago, according to Andy Dunmire, vice president of design and construction for the chain. "It's an evolutionary process," he says.

For instance, while Eat'n Park has always used red and gold, the new versions are saturated and "more sophisticated," says Michelle Isroff, senior environmental designer at WD Partners, the Columbus, Ohio-based design firm that has worked with Eat'n Park since 1996.

The newly relocated coffee bar sports higher-end accents such as hardwood, that Ultrasuede sofa and a dramatic blown-glass light fixture reminiscent of a Russian onion dome. The custom piece creates interest around the espresso bar, says Mike Corbett, studio director at WD Partners.

The prototype also features strong design elements, such as banners and a trellis suspended over the salad bar, as well

SNAPSHOT

CONCEPT

Eat'n Park

LOCATION

Streetsboro, Ohio

OPENING DATE

Jan. 19, 2005

DESIGN FIRM

WD Partners, Columbus, Ohio

AREA

6,500 square feet

SEATS

173 indoor, 20 on patio

AVERAGE CHECK

\$6.50

UNIT VOLUME

\$1.7 million

EXPANSION PLANS

1 in 2005; 2 in 2006



Dark-brown tile leads customers to Eat'n Park's coffee bar; goldenrod tile leads to the self-serve counters and dining area.

The exterior sage-green "fin" was meant to hold signage; local zoning ordinances forbid it, however.





(Clockwise from top I.) With hardwood floors and living room furniture, the cafe sports a residential look.

Windows and natural light create warmth in Eat'n Park's dining area.

Eat'n Park's entryway clearly divides the coffee bar from the restaurant.

Goldenrod — on the walls in the dining area and on the tabletops in the cafe — ties the two areas together.

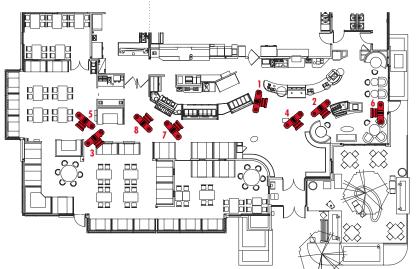




Coordinating colors and textures create synergy between Eat'n Park's dining room and coffee bar.

KEY Direction of shot –Shot No. Position of camera

This floor plan is designed to show the location of each key photograph. Shot numbers correspond with numbers in select photos.



as a patio that is an extension of the coffee bar. While fully updated, the design still recalls Eat'n Park's carhop history. The dining area's windows are slanted; in the carhop era, the slant of glass kept cars' headlights from creating a glare. Today, the slanted windows make the interior glow at night, Corbett says.

Interior porthole-style windows also hark back to the 1950s. The portholes, which are surrounded by a rhombus of silver material, provide customers with views from the main dining room into the smoking area and a

party room as well.

The Wal-Mart Factor

Cox is happy with the prototype as is; minor adjustments will include reinstating the chain's signature soup kettles to the salad bar. Moving the kettles to the back of the house "was not a strategic thing to do," he says.

If he could, Cox might also shift the location of the restaurant, which is in front of a large, but not terribly busy, Wal-Mart.

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Exterior overhangs add a little Frank Lloyd Wright style to Eat'n Park's prototype.

(Clockwise from top)
While Eat'n Park's dining
room features a warm,
comfortable look, the
coffee bar conveys a
moodier tone with sagegreen walls, an Ultrasuede
couch, a fireplace and
exposed ductwork.

Banners over the salad bar can be changed to advertise monthly pies and other specials.

A hot-food station lacks soup tureens; the tureens will make a comeback at future locations.

The prototype is succeeding in some areas: It's the system leader in latte sales (2 percent of total) and dinner salad-bar sales (18 percent of customers order the salad bar, compared to 12 percent at other locations). Yet it's lagging in overall sales. The average Eat'n Park outlet averages \$2.4 million a year, but the Streetsboro unit is on track to gross \$1.7 million. Cox believes the Wal-Mart is partly responsible.

"It seemed like a terrific site," Cox says. "But in hindsight, the Wal-Mart is doing a lot less business than you'd expect a Wal-Mart to do."

Other factors contribute to the lagging performance: A study of the neighborhood revealed a less dense population, and a more upscale one, than in other Eat'n Park locations. Plus, "there's a heck of a lot of competition," Cox says.

Still, he's confident that the design update is the right move. "Family restaurants are being attacked from above and below," Cox says. "To succeed going forward, we need to continue to evolve."



APPETIZER

Breaded Zucchini: hand-breaded, served with ranch dressing or Old World marinara sauce, \$3.99

SALAD

Buffalo Chicken Salad: fresh greens, cucumbers, tomatoes, hard-boiled egg, fries and chicken breast in Buffalo sauce, topped with cheddar cheese, \$7.79

SEAFOOD

Baked Scrod (pictured): two North Atlantic cod fillets, ovenroasted with bread-crumb topping, with two sides and rolls, \$8.29

BLACK ANGUS BURGER

American Grill Burger: char-grilled and topped with grilled onions, green peppers, mushrooms and melted American cheese with a hint of yellow mustard, served on Texas toast with one side dish, \$6.79

ESPRESSO BAR

Caffe Mocha: espresso, chocolate syrup and steamed milk, \$1.99 small, \$2.69 medium, \$3.39 grande

Vanilla Latte: espresso, vanilla syrup and steamed milk, \$1.99 small, \$2.69 medium, \$3.39 grande

Mocha Java Milkshake: double shot of espresso, three scoops of vanilla ice cream and chocolate syrup topped with whipped cream and a chocolatecovered espresso bean, \$3.19







Greek Island club featuring Mediterranean vegetables and kalamata cheese spread.

Santorini slaw with butter-toasted almonds.

Recipes at www.thedairyspecialist.com

Chain Leader



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Papa Murphy's Take 'N' Bake Pizza builds sales with new pies, add-ons and free samples. By Monica Rogers

Taste an

t happens daily: A Papa Murphy's employee rolls a cheery little cart to a strategic spot outside Wal-Mart. He flips on the lights, and throngs line up for free samples of hot pizza.

"It's the quickest way to correct any misconceptions people may have about take-and-bake pizza's quality," says Doug Collins, vice president of research and development.

Half those samplers will stop by Papa Murphy's counter inside to buy a pizza, the company says. Even better, 80 percent will buy again.

"My job right now? It's both about developing products that will satisfy and impress those first-time guests and about giving repeat customers lots of good reasons to come back," Collins says.

Growing in leaps and bounds—100 new units in 2005; 150 planned for 2006—850-unit Papa Murphy's has stepped up sampling strategies, meal-bundle tests and new pizzas to snag trials in new markets. It is also working hard to build repeat traffic and average checks by adding more salads, pastas and desserts.

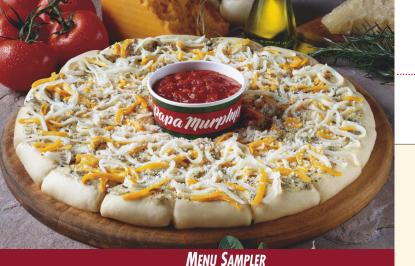
"Instead of just sending guests home with a pizza, we're hoping to send them home with a full meal," Collins says.

It makes sense to William Bender, restaurant consultant and principal of San Jose, Calif.-based W.H. Bender and Associates. "Sampling's a great way to get guests to the store for that first trial, and the moves they're making to give guests lots of options when they get there are right on point," he says. "It's critical that Papa Murphy's become a 'one stop shop' able to sell everything needed for a full meal, not just pizza. It gets rid of the veto vote, and mom doesn't want to have to drive all over to build a meal."

New Pies Please

Add-ons are important, but pizza is still the priority. Papa Murphy's Sicilian Pan Pizza, which launched in October,





TOQUE OF THE TOWN

PAPA'S PIZZAS

Cowboy Pizza, topped with herbed tomato sauce, pepperoni, Italian sausage, mushrooms, black olives, and smoked provolone, whole-milk mozzarella, aged cheddar and herbed Parmesan cheeses, \$9.99 medium

GOURMET PIZZAS

Chicken Garlic Pizza, topped with creamy garlic

sauce, grilled chicken, roma tomatoes, green onions, and smoked provolone, whole-milk mozzarella, aged cheddar and herbed Parmesan cheeses, \$10.99 medium

STUFFED PIZZAS

Chicago-Style Stuffed Pizza: two layers of fresh dough stuffed with wholemilk mozzarella, aged cheddar and smoked provolone cheeses, with herbed tomato sauce, salami, pepperoni, Italian sausage, ground beef, mixed onions, roma tomatoes and green onions, \$11.99 large

PAPA'S SPECIALTIES

Club Salad: romaine lettuce, Canadian bacon, crisp bacon, roma tomatoes, mozzarella, cheddar and black olives, \$4.99 family size Cheesy Bread (pictured): bread sticks with dipping sauce, \$2.79

Papa Murphy's gives free samples from in-store ovens to tempt customers and from mobile carts to gain new ones.

SNAPSHOT

CONCEPT

Papa Murphy's Take 'N' Bake Pizza

HEADQUARTERS

Vancouver, Wash.

UNITS

850

2004 Systemwide Sales

\$384 million

2005 Systemwide Sales

\$407 million (company estimate)

AVERAGE TRANSACTION

\$11 to 18*

EXPANSION PLANS

75 by year-end; 150 in 2006

*Chain Leader estimate

tested higher for taste and purchase intent (90 percent) during limited-store testing than any product. Olive-oil-brushed dough topped with Sicilian-style pizza sauce, whole-milk mozzarella, pepperoni, Italian sausage, fire-roasted onions, Parmesan and dollops of herbed tomato sauce, Sicilian Pan Pizza took a year to develop and will be a new pizza category "if it earns its way on to the core menu," Collins says.

Dough for the rectangular pan pizzas is marinated in olive oil before being sheeted 25 percent thicker than original round pizzas. They're baked in aluminum pans, black-coated so they absorb, rather than reflect, heat. "The objective is a rich, almost fried crust," Collins says. Sicilian Pan Pizzas come in two sizes: original, a half-sheet pan for \$8.99, and family, a full sheet pan for \$13.99.

Mediterranean Pizza, sans tomato sauce but brushed with olive oil and topped with garlic, mozzarella and feta cheeses, fresh spinach, herb-tossed chicken breast and sun-dried tomatoes, is also expected to set records. Collins reports limited-store test scores of 7 percent to 9 percent of sales without advertising support.

Collins and his two development assistants face unique challenges. "It's tougher in some ways to do R&D for a take-and-

bake concept. You've got to send the food home in packaging that's going to double as the cooking vessel," he says. "It's got to get the food home in one piece, be affordable and be easy for the guest to work with through the cooking process."

Papa Murphy's deLITE pizzas are an interesting example. With a St. Louis-style cracker crust, deLITEs start with a different dough recipe and proofing method. DeLITEs come five ways (cheese, pepperoni, meat, veggie or the now-in-test Mediterranean) but are only available in the 14-inch size. Going any bigger would result in a soggy middle. Collins explains that Papa Murphy's ovenable paperboard tray acts as a slight insulator.

Adding On Extras

To encourage guests to take home more than pizza, Papa Murphy's new stores include grab-and-go cases stocked with salads, pasta dishes and chocolate-chip-cookie dough. Cheesy Bread, Papa Murphy's pizza-shaped breadsticks, and Cinnamon Rolls also tempt customers.

The launch last April of Chicken Caesar Salad in tandem with the refrigerated graband-go cases has boosted salad sales by 25 percent. Cheesy Bread, \$2.79, fresh dough topped with herbs, garlic olive oil and four





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The new Mediterranean deLITE pizza tops cracker crusts with fresh chopped garlic, olive oil, mozzarella and feta cheeses, fresh spinach leaves, herb-tossed chicken and sun-dried tomatoes.

Grab-and-go cases stocked with ready-made salads have upped salad sales by 25 percent.
Tossed-to-order salads may be in the offing.

Papa Murphy's menu is working to build its pasta category

cheeses, and served with dipping sauce, is Papa Murphy's highest selling add-on.

Chocolate-chip-cookie-dough sales (1 pound bucket for \$2.50) are close behind. "We had to reformulate the recipe so that it would have good mouthfeel in its raw state because so many people were eating the dough right out of the tubs before baking it," Collins laughs.

Collins also expects the November launch of Cinnamon Rolls, \$3.99 for eight, to do well based on tests begun in September 2004. "Our hope is to send guests home with pizza for tonight and cinnamon rolls for breakfast tomorrow," he says.

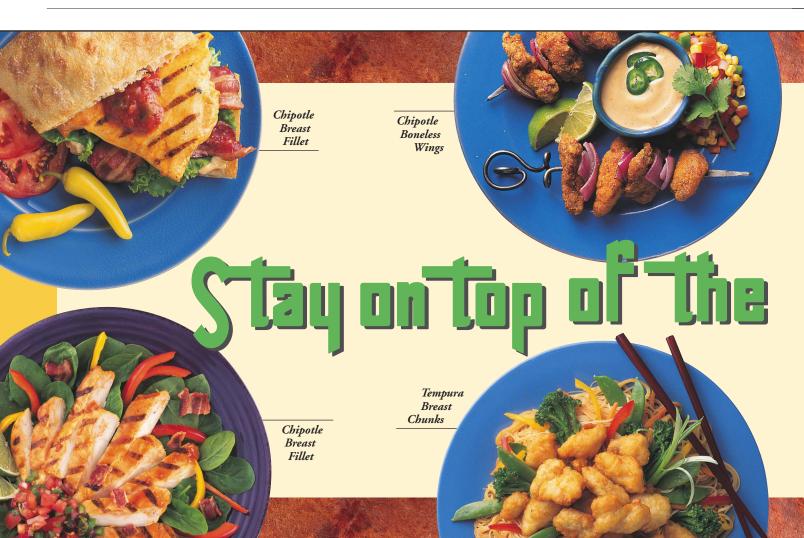
The first systemwide test of bundled meal deals is also intended to increase

checks. "We've tried bundling meals in various ways at various franchises, but this is the first time we're gearing up for a systemwide test," says Collins.

He is also optimistic about pasta, "a category we've never jumped on with both feet," says Collins. "It's been a nice add-on sale, but we see it as having potential for something much more." He envisions a tossed-to-order format, where customers could select from a variety of fresh noodles, toppings and sauces.

Mature Development

Now 25 years old, Papa Murphy's is moving to a more formalized, 24-month marketing calendar and testing ways to





with possible toss-and-take items and packed-to-go entrees.

glean customer feedback. "The plan is to use quantitative methods like online surveys to ensure ideas are on strategy and that purchase intent is strong," Collins says.

It's a pleasant juncture for analytically minded Collins. His fascination with numbers and the way people think led to a quantitative-psychology degree from UCLA. He first applied the degree teaching math to high school students, but moved into restaurants, where he felt he could impact more people, managing Baker's Square restaurants then Papa Murphy's. Collins has been with the company since 1989, first as a franchisee and then corporately in operations, business services, marketing and finally R&D.

He says new product ideas come from the field, franchisees, vendor partners and employees. Cheesy Bread, for example, was born out of employee eating habits. "We used to sell the bread simply brushed with olive oil and herbs," Collins says. "But the employees liked putting cheese on top." Adding four-cheese topping in 2003 raised sales of the product by 25 percent to 30 percent.

Looking ahead, Collins hints that "health issues continue to be a big area of focus for our guests," which may lead to a multigrain crust. But whatever gets developed next, pizza, side dish or dessert, "Our process will always start with a lot of research in the field," Collins concludes.

Creative use for pizza dough? Cinnamon rolls for breakfast. Papa Murphy's makes them with butter, cinnamon and sugar.

Sicilian Pan Pizzas are Papa Murphy's current national promotion. Dough is marinated in olive oil and baked in blackcoated enamel pans for a rich, crispy crust.

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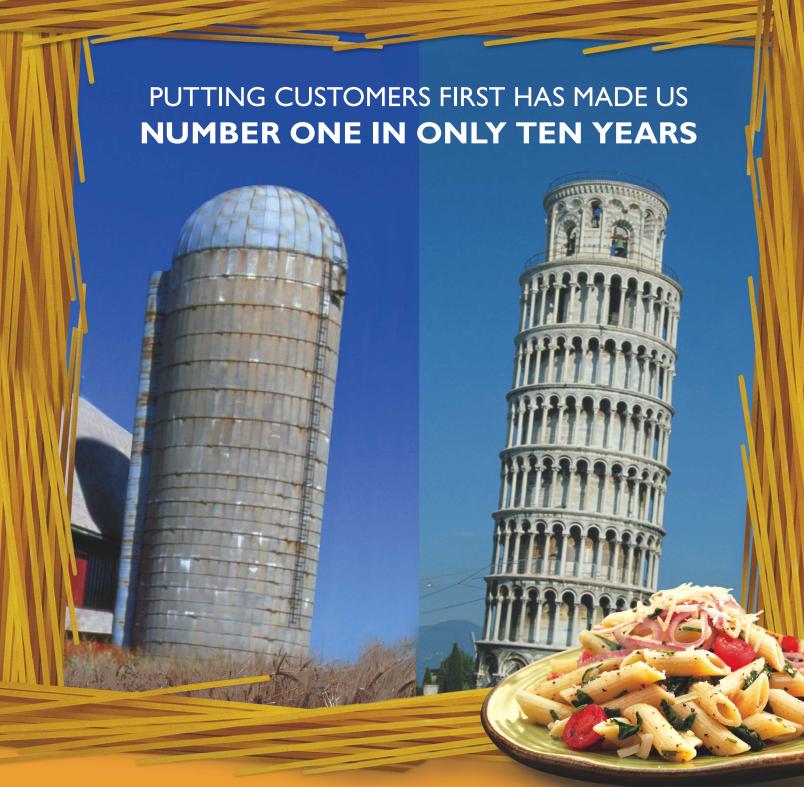
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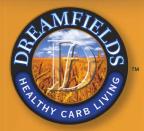
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By Donna Hood Crecca

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Hard Rock Cafe Los
Angeles enjoyed a
concert by country
music star Brad Paisley
in early October.
The event included

opportunities to win autographed sampler CDs of Paisley's latest release, "Time Well Wasted," and an autographed guitar. Local radio stations heralded the event, as did in-restaurant materials such as posters, coasters and tabletop pieces.

Hard Rock Cafe developed the Time Well Wasted South Beach Cooler, featuring premium rum, lemon-flavored rum and amaretto combined with sweet-and-sour mix, cranberry-juice cocktail and lime juice, priced at \$7. The cocktail was promoted in the 46 domestic Hard Rock Cafe locations through the end of October.

This type of event is one element of a three-tiered beverage program at Hard Rock Cafe that involves a new rock 'n' rollthemed menu, events featuring rock stars with beverage tie-ins, and seasonal drink promotions. By combining signature beverages with music icons, Hard Rock is driving media attention and beverage sales.

"We're all about delivering experiences that rock through our food, beverages and memorabilia," says Cindy Busi, who, as worldwide beverage manager for Orlando, Fla.-based Hard Rock International, overseas beverages at 120 Hard Rock Cafes and 13 Hard Rock Hotel and Casino locations in 40 countries.

Musical Menu

The experience began with a new drink menu that launched in all U.S. and European Hard Rock Cafes in late April. Coinciding with a new food menu launch, the drink menu includes eight new cocktails and highlights Hard Rock's heritage.

The Heavy Metal portion of the menu includes drinks such as Purple Haze: vodka, rum, gin and sweet-and-sour mix topped with lemon-lime soda and raspberry liqueur. Hip Hop cocktails include

SNAPSHOT

CONCEPT

Hard Rock Cafe

COMPANY

Hard Rock International, Orlando, Fla.

UNITS

46 domestic, 104 international

2004 Systemwide Sales

\$410 million (cafes only)*

2005 Systemwide Sales

\$425 million (cafes)*

AVERAGE CHECK

\$24*

EXPANSION PLANS

N/A

*Chain Leader estimate

Served in a souvenir glass, the Appletini on the Classic Rock menu blends vodka, sour-apple liqueur, and sweet and sour.





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The Hurricane layers orange, mango and pineapple juices, rum, amaretto and grenadine.

Piña Colada and other tropical libations. Most cocktail prices average \$7.

The Classic Rock section features cocktails such as the Cosmopolitan, \$9.99, made with citrus-flavored vodka, orange liqueur, lime juice and cranberry juice, served in a souvenir martini glass.

Name Dropping

Seasonal promotions, while always part of Hard Rock's beverage program, also include a stronger music element. This summer, the Shake It Up program promoted five top-shelf tropical cocktails shaken table-

side in guitar-shaped souvenir shakers.

The drink program also leverages the beverage projects and culinary inclinations of famous rockers. "There is a lot of history with beverages and rock stars, and several of them are involved in the industry," says Busi.

The names of famous musicians appear throughout the drink menu, and their products are ingredients. The Red Rocker and Waborita cocktails feature the handmade tequila produced specifically for Sammy Hagar's nightclub in Cabo San Lucas. The Mighty Mango Mary version of a Bloody Mary includes a hot sauce marketed by Aerosmith guitarist Joe Perry.

"It makes sense for Hard Rock to utilize a music theme in their beverage program and promotions," explains Dave Commer, president of Carollton, Texasbased Commer Beverage Consulting. "This technique can help to create some interest around the beverage offerings and increase guest trial, but it is critical that the drinks deliver on quality and flavor. Cabo Wabo tequila works well because it is owned by Sammy Hagar and it is superb tequila."

Server training for the new menu and promotions involves CD-ROM programs and an intranet-based curriculum on drink preparation and presentation. Incentives such as a chance to win a trip to Sammy Hagar's annual birthday bash in Cabo San Lucas, which coincided with Hard Rock's Cinco de Cabo promotion in May that featured the tequila, keep wait staff focused on promoting the featured cocktails.

Hard Rock is leveraging its partnerships with rock stars and beverage brands in a variety of ways. Restaurants in seven cities are hosting a tour of former Grateful Dead front man Jerry Garcia's paintings for one week each from August through November, drawing media



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By combining signature beverages with music icons, Hard Rock Cafe is driving media attention and beverage sales.



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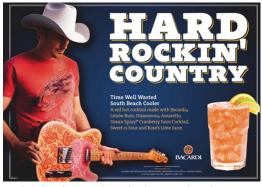
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Hard Rock Cafe created a cocktail to coincide with a Brad Paisley concert.

attention and driving traffic into the restaurants, says Busi. Wine-tasting events raised awareness of the four varietals of J. Garcia wines on the new beverage menu. Available by the glass and bottle, the wines are priced at an average of \$7 and \$25, respectively.

The Buzz Factor

"We're finding anything rock-star inspired is hot; the iconic angle is a big pull. People are willing to try a drink with a famous rocker's name tied to it," Busi says.

To pull the program together, Hard Rock Cafe International engaged Patrick Henry Creative Promotions, a food and beverage trade promotion agency based in Stafford, Texas. "Hard Rock is really thinking outside the box. They didn't just want your traditional program where you put together a promotion and sell a few cocktails. This is a concerted effort to work with national brands and hot celebrities to get marketing buzz going and drink sales going at the same time," says Mephele Zimmerman, director of the firm's casual-dining division.

The effort appears to be paying off. While Busi won't give specifics, she says beverage sales are trending positively and all programs will continue. After a few years of declines, cafe sales rose 9 percent in 2004, with overall food and beverage sales up 3.4 percent. Comp-store sales were essentially flat at 0.4 percent.

Busi anticipates the new food and beverage menu and coinciding events and promotions will spark further sales growth. "The new drink menu and recent promotion programs are very successful; if anything, we plan to pick up the pace," she says. "Beverages have always been a focus for us, and we plan to continue mining the rock-star-partnership aspect because it sets Hard Rock apart."

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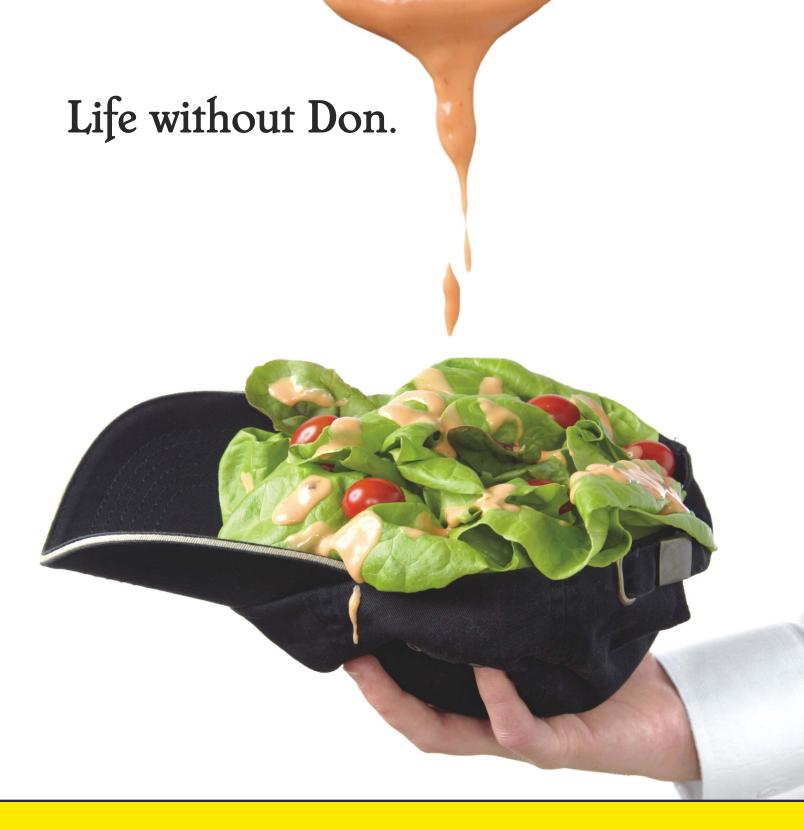
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Phil Hickey is all about high touch when it comes to running restaurants. By David Farkas

hilip J. Hickey Jr., winner of this year's Chain Leadership award, has been managing restaurants since the early 1970s, when he ran a cafeteria at Michigan State University. Since then, the Detroit native has climbed the foodservice ladder, co-founding Cooker Bar & Grille and running the Rio Bravo division for Applebee's along the way.

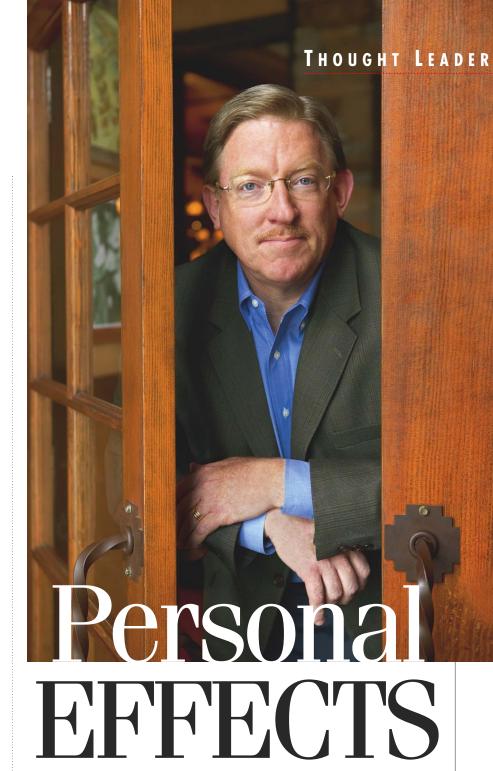
Today, he is chairman and CEO of Rare Hospitality, an Atlanta-based multiconcept company that operates 293 restaurants. Analysts expect revenues from Rare's three brands—Longhorn Steakhouse, Bugaboo Creek Steak House and The Capital Grille—to reach \$1 billion in 2006.

We caught up with 51-year-old Hickey in Jacksonville, Fla., where he was attending an annual gathering of restaurant company executives, and grilled him in a Longhorn Steakhouse restaurant about where his leadership abilities worked best in growing the business.

Have consumer fears about rising gas prices and the economy affected your business?

Perhaps there is less disposable income going around right now because of gas prices and going into winter because of higher natural gas prices. Both affect the discretionary income bucket.

If the consumer is eating out slightly less frequently, the challenge is who's going to get the occasions when they do go out to eat. Our charge is, we want to be one of those winners. And in this situation, the guest has to feel that you want their business, both from what you offer and the attitude with which you offer it.

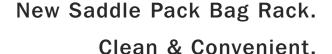


Is pricing part of the "offer" strategy?

We consider pricing as part of an overall value strategy. We believe the guests assess value on their own. The advantage in the steakhouse segment is that people understand the value of steak. They know what it costs at the grocery store. They know what they pay for it in the restaurant. We try to add value to that equation by making sure we serve an extraordinary product. We also believe from a service side, the value equation can be enhanced greatly by personalizing the experience as much as possible.

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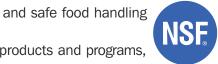
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THOUGHT LEADER



Has that been accomplished at Longhorn?

The lessons that we've learned came from Capital Grille, the high end of dining. We'd gotten pretty close to an extraordinary level of service in Capital Grille. And then we broke the dining experience into components and realized there was a lot of opportunity for improvement.

Remember that Dave George, our president at Longhorn, came from Capital Grille. Dave and Wilson Craft have taken the Longhorn service experience and broken it down into its components, asking, how can we make the experience even more compelling? We will also continue to upgrade our facilities; we're spending a lot of money on capital improvements.

Panera Bread recently won a customer

pany for its free Wi-Fi. What are your brands offering that guests feel is a real value? What we try to do is personalize the experience. If you were to come in more than once, we try to learn your name and your preferences. If we can anticipate that and recognize you and know that you've got 25 to 30 minutes for lunch, we can bring your iced tea and your burger out

service award from Fast Com-

quickly. We might also know that when you come in for dinner, you like a slower pace, that you will want high touch, like having the manager stop by.

You've often referred to the table as the "9-square-foot battlefield" on which customers are won or lost. What exactly do you mean by that?

Focusing on the basics of the dining experience. Is there a friendly person on the front door who's good with names and resilient to pressure and able to handle a large crowd. Then having that same person say, "Please come see us again." And if there is any hint of dissatisfaction, the person jumps all over it and fixes it right away.

There's also the servers' ability to read a table. This isn't new stuff. A lot of what we've been doing at Capital Grille over the last three years has been improving the details of a great dining experience.

Capital Grille certainly gets its share of praise, but you've managed to grow all three concepts effectively. What kind of leadership does it take?

I was talking to a CEO of a private company. He was articulating an accelerated

SNAPSHOT

COMPANY

Rare Hospitality

HEADQUARTERS

Atlanta

2006 Systemwide Sales

\$1.1 billion*

UNITS

237 Longhorn Steakhouses, 31 Bugaboo Creek Steak Houses, 23 Capital Grilles

AVERAGE Unit Volume

\$2.8 million, Longhorn; \$3.5 million, Bugaboo Creek; \$7.7 million, Capital Grille

AVERAGE CHECK

\$17, Longhorn; \$16.50, Bugaboo Creek; \$70, Capital Grille

EXPANSION PLANS

34 in 2006*

*SG Cowen & Company estimates



To better execute the Bugaboo Creek concept, Phil Hickey moved the chain's headquarters to Atlanta, where Rare Hospitality is based, and promoted Rare veteran Kristi Nyhof to president.

THOUGHT LEADER

WINNING WAYS

Chain Leader will be honoring the industry's legends, leaders and future leaders with its second annual Chain Leader Execution Awards, which will be presented at Chain Leader LIVE Nov. 16-18 in Dallas. Following are the award winners.

Protégé: Chain Leader readers nominated several young up-and-comers, and the editorial staff chose Billy Downs, owner and founder of bd's Mongolian Barbeque.

Chain Leadership: The executives who have appeared on *Chain Leader's* covers voted for the person who currently has great influence on his company and the industry. They selected Phil Hickey, chairman and CEO of Rare Hospitality.

Legend: The cover subjects named Joe Lee, who will retire as chairman of Darden Restaurants at the end of the year, as the industry leader who has inspired them the most in their careers.

Phil Hickey attributes the success of The Capital Grille to the stability of its leadership: President John Martin has been with the chain since it first opened in 1990.





Rare Hospitality's high-end concept, The Capital Grille, is known for its fresh seafood and dry aged steaks.

"Any successful company has to have a balance between good operations and marketing." —Phil Hickey

growth plan for next year. And I questioned that. I showed him ours from last year. We said we'd open as many restaurants as we can *effectively*. That means the restaurant opens well, in a good location and with a great management team and establishes itself for a successful 20-year run.

We do not become overly enamored of target growth numbers. We let it bubble up and say, "How many can we do well?" My first year [1997], we opened up 17 Longhorns. In 1998, we opened nine.

The reason being...

The question was, how many can we open that will have a 20-year success pattern? The answer was a lot less than 17. So we got down to a number we could manage.

How do you forecast out 20 years?

We do the best job picking out a growth site that has economic viability, both from a macro and micro standpoint. We try to



build a quality building that will stand the test of time. And then we hire a great crew and establish habits and expectations.

That's worked for Capital Grille and Longhorn, but Bugaboo Creek has been a challenge, hasn't it?

It has been more challenging than the other two, that's for sure. Let's look at Capital Grille first. It has done very well for a couple of reasons. One of them is the president, John Martin, who has been with the concept since the first one opened in 1990. His No. 2 has been in place for about eight years. There are a number of very long-term general managers and regional managers. We've done extraordinarily well in promoting stability and competency.

Longhorn has had good stability. Dave George has been around almost 10 years.

For the first seven-and-a-half years that we owned the Bugaboo brand, we kept the headquarters up in New England. We came to believe that was not the best course and brought the headquarters staff to Atlanta to enjoy the synergies.

Why did you change Bugaboo Creek's leadership a year ago?

We changed leaders with the goal of consistency of execution. We did not have a concept problem. It was more of an execution problem. We feel good about Bugaboo's long-term prospects.

Execution is your bailiwick. What kind of marketing leadership can an operations-oriented CEO be expected to provide? CEOs have to know their strengths and shortcomings. And in that case, Gene Lee, our president, is very strong in marketing.

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—Chris Lowe, President Foodservice & Hospitality Coca-Cola North America



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THOUGHT LEADER



Rare Hospitality's revenues are expected to reach \$1 billion in 2006.

And we have a number of very bright marketing people in the company.

An organization moves to hire to its strength. I believe any successful company has to have a balance between good operations and marketing. One without the other doesn't work.

You changed advertising agencies last year and cited problems, at least initially, with the new agency. What happened?

In the first quarter of this year, we were trying to establish a rhythm with the new agency. Anytime you begin a new relationship, there's a lot of mutual discovery, assessment and research. We started a little out of rhythm, but we feel great about where they have evolved to.







It is. Their learning curve was significant. Now we really like the Longhorn ads.

Can you talk about the new slogan, the "New West in town"?

The intent was to signal to the consumer that we are continuing to evolve. We were the pioneer of the Texas-style steakhouse. When it came to peanut-shell carpet and country music and longneck beer, we were the first out there.

What does "New West" mean?

It means we're a little more contemporary as opposed to [servers in] T-shirts and 100 percent country music. We have evolved the interior package away from barnyard country to more ranch house. Menu offerings used to be just a piece of protein on the plate with a little bit of starch. Now we've added a little more class and style and flavor. We see that as a permission to keep expanding the menu in a couple different categories.

Rare is also evolving financially. What are the implications of being a cash flowpositive company by the end of next year? Will shareholders receive dividends?

Our cash flow will be more than enough to build new restaurants. That means we won't need to take on any more debt or

equity to grow effectively. Dividends? No, not anytime soon. We are still early in our growth to provide a dividend. Because we are cashflow positive a little bit doesn't mean we are flush with cash.

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SNAPSHOT

CONCEPT

Fatz Cafe

COMPANY

Cafe Enterprises, Taylors, S.C.

UNITS

25

2004 Systemwide Sales

\$54.9 million

2005 Systemwide Sales

\$60 million (company estimate)

AVERAGE CHECK

\$11.50

AVERAGE Unit Volume

\$2.5 million

EXPANSION PLANS

3 by year-end; 4 in 2006; 4 to 6 annually

Better Players

Fatz Cafe drives guest satisfaction and sales with a dual-focused training initiative. By Donna Hood Crecca

hree years ago, 70 percent of guest e-mails to Fatz Cafe contained complaints or concerns. Today, 70 percent are praise, says Steve Bruce, COO of parent company Cafe Enterprises. What's more, all employees are empowered to handle the complaints that do come in.

"We're not afraid to open those e-mails or deal with a guest in the dining room that has an issue," says Sara Nickel, training coordinator for the Taylors, S.C.-based operator of 25 casual-dining restaurants. "Everyone, especially servers, knows how to make it right for the guest."

Last fall, Cafe Enterprises launched a comprehensive server training program involving pre-hire testing and, for the first time, classroom training. On the heels of that launch, the company rolled out a lead-

ership training initiative, the National Restaurant Association Educational Foundation's Leadership & Management Program featuring Harvard's ManageMentor PLUS program.

"We realized that we were talking a lot about associate satisfaction driving guest satisfaction but weren't actually driving results with our existing programs," Bruce says. "And we didn't feel that we could wait to get one aspect done before we started the other; the server training and leadership program had to go hand in hand."

This simultaneous focus is beginning to yield results. Same-store sales are up 2.5 percent this year, continuing three years of comp-store gains. As of September, hourly turnover stood at 118 percent, down from 135 percent in 2002; management turnover was 25 percent, a decline from 30 percent in 2002.



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Fatz Cafe's comprehensive server training program includes pre-hire testing and classroom training.

With its new training focus, Cafe Enterprises hopes to reduce hourly turnover to 80 percent and management turn to 10 percent. The number of managers culled from hourly ranks is also on the rise: 59 percent of new managers are internal promotions, compared to 40 percent last year, and 70 percent of managers for the next four store openings are former hourlies. Building that bench will help the company as it grows from three locations a year to as many as six, with a goal of reaching 38 units and \$100 million in sales by 2008.

Getting it Right

Cafe Enterprises embarked on this training drive in 2003, when it identified improving order accuracy as a way of "improving guest satisfaction by preventing dissatisfaction," Bruce says. "Delving deeper, we realized communication and server menu knowledge were the main issues."

The company moved Nickel from an operating-partner spot to the newly created training-coordinator position. Working with Vice President of Human Resources Steve Corson, Nickel rewrote all materials, introducing the pre-hire test, classroom training and new content.

Fatz Cafe gives promising server candidates a copy of the menu and study guide and asks them to return for a test; a score of 90 percent or higher makes them eligible for hire. Once on board, they train for five days including an hour each day of classroom topics like service and menu knowledge prior to on-the-job training shifts. Trainees are quizzed daily, and the training week concludes with an oral exam.

The company also introduced several new elements. Servers are now trained to write down orders using a system that correlates to the POS system. "A lot of servers want to wow the guest by memorizing the order, but when something doesn't come to the table correctly, the guest perception is that the server made a mistake," Nickel says. "If the food comes out right, that's a big wow and allows the server to focus on wowing them in other ways."

Another new element is guest recovery. Servers are trained to listen, apologize, solve and thank. "The training takes away the fear of making a mistake, and enables them to make the guest a guest for life by correcting the situation," Corson says.

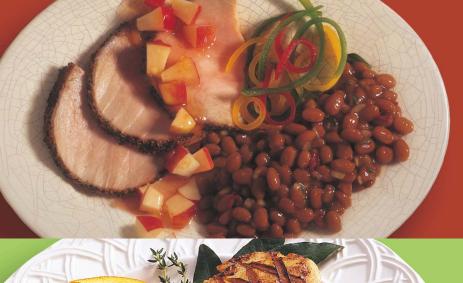
The new training program has also improved quality of hire. "The pre-test on the menu eliminates anyone who talks a good game in the interview but doesn't really want to put in the effort," says Bruce Dressler, general manager of the Fatz Cafe in Irmo, S.C.

Turnover at Dressler's restaurant is down 50 percent since implementing the new training last fall. He attributes the improvement as much to better hires resulting from the pre-hire test as to the training.

The creation of a certified trainer position has put the career track at Fatz Cafe front and center for many hourlies. "They can go from hourly to certified trainer then be a management candidate," Corson says.

Promoting from within improves retention, according to data from People Report. The Dallas-based human-resources tracking firm reports that companies with the highest level of internal promotions enjoy turnover rates of about 45 points lower for hourly employees and 15 points lower for management staff.





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E. Free distribution outside the mail (carriers or other mea	ans) 308	1,250
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G. Total distribution (sum of 15c and 15f)	19,292	20,305
H. Copies not distributed	1,170	1,291
I. Total (sum of 15g and 15h)	20,462	21,596
J. Percent paid and/or requested circulation (5c/5g x 100) 85.1%	81.1%

16. Publication of Statement of Ownership: Publication required. Will be printed in the November 2005 issue of this publication. **17.** I certify that all information furnished on this form is true and complete. I understand that anyone who furnishes false or misleading information on this form or who omits material or information requested on the form may be subject to criminal sanctions (including fines and imprisonment) and/or civil sanctions (including civil penalties). Dennis Lee Roy (signed), Distribution Director





Fatz Cafe has promoted 59 percent of its new managers from the hourly ranks this year.

Parallel Priorities

To help unit managers administer the training and serve as coaches, Cafe Enterprises kicked off leadership-development training in April. Fifty area partners, operating partners and general managers underwent 40 hours of training, consisting of reading assignments, online modules and group sessions focusing on topics like goal setting, time management and managing difficult interactions.

"If we improve people skills, retention improves and the guest satisfaction improves," says Nickel.

Tackling hourly employee training and management development simultaneously is ambitious, according to Harry Bond, president of Bradley, Ill.-based Monical Pizza Corp. For the past several years, 58-unit Monical has recorded zero management turnover, hourly turnover in the low 70 percent range and same-store-sales gains.

"Having worked with Cafe Enterprises on implementing the Harvard program, I can say that they understand that the time and monetary investment will lead to retention improvements, first and foremost, followed by better performance on all fronts," Bond says.

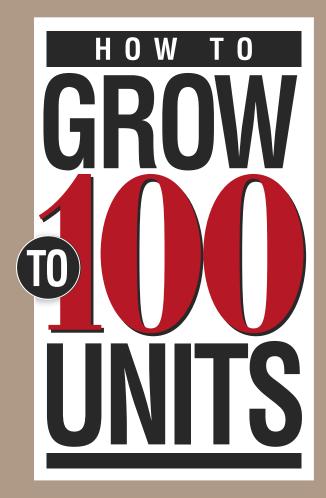
"Both programs absolutely go hand in hand," says Ralph McMurray, operating partner at the Hendersonville, N.C., Fatz Cafe. "We were studying how to take care of our employees, and the servers are studying how to take care of the guest. I'm doing a lot more coaching and mentoring than I had been, and the servers are looking for that guidance. Everyone is moving in the same direction."

Cafe Enterprises will train another group of unit managers in early 2006. In addition, strength assessment interviews are under way, which will lead to more tailored management training, says Nickel.

"This training is now in demand on all levels," she declares. "We're beginning to see the results, so it's worthwhile to keep it going."

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Accident to Advocate







Brinker's Doug Brooks helps other amputees triumph as he has.

BY CHARLES BERNSTEIN

n July 22, 1998, when a 45year-old Doug Brooks was training for the New York marathon near his suburban home in Plano, Texas, everything suddenly changed. Two vehicles collided on the street where he was jogging, and one of them pushed him through a brick wall. "I somehow jumped up at the last minute," he recalls. "That saved me."

A helicopter rushed him to Parkland Hospital in Dallas. "I was very fortunate to have some great trauma doctors, and after four surgeries, they managed to save my right leg." But his left leg had to be amputated above the knee.

Back in the Saddle

With the support and encouragement of his family, the employees of Brinker International and his mentor, Norman Brinker, Brooks was able to go back to work in just two months. And in just six months, Brooks, who rose through the ranks of Chili's from 1978 as a manager in Dallas and eventually to Chili's president in 1994, was promoted to president and COO of Brinker International.

Thanks to the latest in prosthetic technology, Brooks, who is now president, CEO

and chairman, is able to lead a normal life. Indeed, his life is more active than most. Although he is no longer a runner, he still enjoys snow skiing, white-water rafting, snorkeling, scuba diving and bicycling. But his favorite hobby is playing golf with his two sons, family and friends.

"I was never a great golfer, even with two legs," he laughs. "Losing a leg does cause some balance challenges, especially hitting out of the sands or on a hill."

Brooks' prosthesis has a computer chip in it that has different settings so that he can personalize the artificial leg swing to his height, weight and speed of gait. He notes that the artificial leg can usually get him "a couple of extra shots when negotiating a wager on the first tee."

Spreading the Word

For the last six years, Brooks and his wife, Holly, have both been involved with the Limbs for Life Foundation and are active board members. Limbs for Life is a national nonprofit organization that is dedicated to providing comfortable and fully functional prosthetic care for individuals who can't afford it. "Some 3,000 Americans lose a limb a week," Brooks says. "There is a tremendous demand for prosthetic care and limbs."

The Brooks participate in many Limbs for Life fund-raising events such as golf tournaments. The biggest fund-raiser is an annual dinner and auction each year in Dallas. The fifth annual event is set for Feb. 25, 2006. The 2005 event raised almost \$250,000, which provided 125 limbs for amputees. "It can change their life overnight," Brooks declares.

"We're not asking for much, just an arm and a leg," he says.

Beyond fund raising, Brooks supports the cause on a more personal level as well. "I spend a lot of time talking to amputees," he says, "to let them know that their life can be very normal."

Despite losing a leg in a car accident, Brinker International President, CEO and Chairman Doug Brooks is active in various sports including golf, snow skiing and bicycling.

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