

# EXAMPLE OF A CLIENT ADVISORY SERVICE TIMELINE

Our Client Advisory Services focus on determining specific objectives individualized to your restaurant, with measurable outcomes. Working directly with our Client Advisors, you will receive guidance and education regarding best practices, continued development of your management teams, understanding of the financial health of your business, strategic planning, industry standards and more. For Owners/Operators that require a deeper engagement and partnership in their business, much like a COO or CFO, our Client Advisors become an integral part of your organization through strategic management, focusing both on the financial and operational aspects of your restaurant. You will see an example below of a quarterly timeline with respective services you would receive.



## Quarter 1

### Ops Review

Goals, Tactics, Measurements  
Specific Training:  
Increasing Staff ROI

## Quarter 2

### Ops Review

Goal Review  
Cash Mgmt. Strategies  
Effective use of promos

## Quarter 3

### Ops Review

Goal Progress  
Purchasing Strategies  
Financial + Tax Review

## Quarter 4

### Ops Review

Budget Review  
Strategic Planning  
Year-End Financial Review

# CLIENT ADVISORY SERVICE

## VALUE & BENEFITS

- ✓ **UNIT GROWTH & ACQUISITION**  
Planning properly for unit expansion is a major differentiator for sustainable growth. When does it make sense to acquire a brand vs build it yourself?
- ✓ **CFO & COO ENGAGEMENTS**  
Our Financial and Operational Officer engagements enable you to grow the organization without incurring the unnecessary corporate overhead. Temporary and full-time engagements are available.
- ✓ **UNIT REBRANDING**  
Rebranding doesn't have to cost a fortune. Many operators miss the mark when it comes to knowing when to rebrand a failing business.
- ✓ **INVESTOR RELATIONS & FINANCIAL REPORTING**  
Clear communication and financial acumen demonstrate to your investors that their money is being managed effectively.
- ✓ **LEASE NEGOTIATIONS**  
This is the number one reason why restaurants fail to succeed as well as fail to sell for their top dollar. Owners and operators are too close to the deal to effectively negotiate what's achievable for their business both in the short and long term.
- ✓ **BANKING STRATEGIES & CAPITAL MANAGEMENT**  
As your business grows, so do your banking strategies. Proper planning saves thousands in bank fees and G&A fees.
- ✓ **ADVANCED MANAGEMENT MENTORING & DEVELOPMENT**  
We've been educating & training key mgmt. for 20 years. Allow us to prepare your key team members for success in their current role or preparation for their future promotion.



- ✓ **PURCHASING EVALUATION & NEGOTIATION**  
RSI's Purchasing services provide an unbiased view of selecting the best vendor partners for your business. Take advantage of Distributor and Manufacture rebates without having to participate in a Group Buying Service.
- ✓ **INCENTIVE & BONUS PLANNING**  
Are you rewarding your key personnel in a way that is meaningful, measurable and compliant?
- ✓ **BRAND EQUITY REVIEWS**  
Understanding your brand's financial, operational, social media presence and physical health need to be measured frequently.