

MINI MARGIN + FIT WORKSHEET

A lightweight way to compare growth ideas before spending money or staff time.

Important: this worksheet is a planning tool created by The Happy Thesis; not a validated academic scale. It deliberately combines financial and operating questions because a profitable-looking idea can still be wrong for the concept, clientele, or owners.

▲ WORKSHEET

SCORE ONE IDEA FROM 1–5

CRITERION	QUESTION	1–5	NOTES
Margin Potential	Could this create meaningful direct or indirect contribution?		
Traffic Potential	Could it bring incremental guests?		
Repeat Potential	Could it create a reason to return?		
Concept Fit	Does it make the bar more itself?		
Clientele Fit	Would current or desired guests reasonably want it?		
Owner Enthusiasm	Would ownership enjoy building and sustaining it?		

CRITERION	QUESTION	1-5	NOTES
Ease of Execution	Can the team execute it consistently without creating disproportionate complexity?		

▲ SEC. 01

TWO KINDS OF MARGIN

- **Direct margin:** sponsorship fee, private-event charge, merch contribution, art commission.
- **Catalytic margin:** an activity brings people who then purchase beverages, return later, or become regulars.
- An idea can be strategically valuable even when its direct revenue is small; but only if the indirect effect is real enough to measure.

The service-profit-chain framework supports looking beyond a single transaction toward service value, loyalty, and profitability, while hospitality-servicescape research supports treating concept/environment fit as part of the customer experience. [M1][R3][R4]

▲ SEC. 02

DECISION

Choose one: PRIORITY; strong fit and plausible economics. TEST; promising but uncertain, run a small experiment. HOLD; not now. REJECT; poor fit or unnecessary complexity.

▲ SOURCES

EVIDENCE & SOURCES

- **RESEARCH EVIDENCE** peer-reviewed study

○ **MANAGEMENT FRAMEWORK** established management literature

■ **LEADING-BAR CASE** documented operator practice, not a controlled experiment

M1 ○ **FRAMEWORK** Heskett, Jones, Loveman, Sasser & Schlesinger (1994). "Putting the Service-Profit Chain to Work." *Harvard Business Review*, March–April 1994. **Source**

R3 ● **RESEARCH** "The restaurant social servicescape: Establishing a nomological framework." *International Journal of Hospitality Management*, 74 (2018), 13–21. **Source**

R4 ● **RESEARCH** Kaminakis et al. "Hospitality servicescape effects on customer-employee interactions: A multilevel study." *Tourism Management*, 72 (2019), 130–144. **Source**

M2 ○ **FRAMEWORK** Blank, S. (2013). "Why the Lean Start-Up Changes Everything." *Harvard Business Review*, May 2013. **Source**

Interpretation note: hospitality and restaurant studies are used as evidence for general service and environment principles. They should not be read as guarantees of a specific sales lift in a particular bar.

Part of The Happy Thesis Co.'s free Bar Owner Resource Library. **Get in touch** if you'd like help putting any of this into practice.