



Here's your **Catering Business Launch & Growth Checklist**. This checklist is intentionally structured so that each item represents a **clear milestone**.

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## Legal & Business Foundation

- ✓ Register business name (LLC, S-Corp, etc.)
  - ✓ Apply for EIN (Employer Identification Number)
  - ✓ Set up a business bank account
  - ✓ Get required business licenses & catering permits (local/state)
  - ✓ Apply for food handler and ServSafe certifications
  - ✓ Secure general liability & commercial kitchen insurance
  - ✓ Check local zoning laws (especially for home-based operations)
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## Kitchen Setup & Compliance

- ✓ Choose commercial kitchen location or shared commissary
  - ✓ Pass health department inspections
  - ✓ Establish food safety SOPs (Standard Operating Procedures)
  - ✓ Post sanitation checklists for daily/weekly routines
  - ✓ Set up waste disposal, grease trap service, pest control
  - ✓ Create HACCP or food safety plan (for bulk or prepared foods)
  - ✓ Ensure allergen compliance and proper labeling (if applicable)
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## Business Operations & Admin

- ✓ Create your operations manual
  - ✓ Build a scheduling system (Google Calendar, Shift tools, etc.)
  - ✓ Design event intake forms & menu templates
  - ✓ Set pricing formulas and cost control spreadsheets
  - ✓ Choose your tech stack (POS, accounting, CRM, proposal tools)
  - ✓ Set up vendor relationships (meats, produce, rentals, etc.)
  - ✓ Draft emergency plans (backup staff, power outage, etc.)
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## Hiring & Team Management

- ✓ Write job descriptions (cooks, servers, bartenders, dishwashers)
  - ✓ Post hiring ads (Indeed, Craigslist, culinary schools)
  - ✓ Onboard new hires with training checklists
  - ✓ Implement labor tracking & payroll system
  - ✓ Schedule team food safety training
  - ✓ Set expectations: dress code, punctuality, roles
  - ✓ Keep documentation: W-4, I-9, NDA (as needed)
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## Financial Systems

- ✓ Set startup budget and initial investment plan
  - ✓ Create monthly P&L template (Profit & Loss)
  - ✓ Track COGS (Cost of Goods Sold) percentages
  - ✓ Set pricing model based on margin targets
  - ✓ Build quoting system for events (manual or form-based)
  - ✓ Choose accountant or DIY software (QuickBooks, Wave, etc.)
  - ✓ Review cash flow weekly
  - ✓ Plan for taxes quarterly — don't wait until it's too late
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## Sales, Marketing & Branding

- ✓ Choose business name and purchase domain
- ✓ Set up Google Business Profile
- ✓ Build simple, fast-loading website (with menu examples)
- ✓ Set up online forms for inquiries or proposals

- ✓ Design logo, brand colors, and identity
  - ✓ Build lead magnets (free guides, proposal templates, etc.)
  - ✓ Implement sales process: inquiry > follow-up > contract > deposit
  - ✓ Track conversion rate of inquiries to booked events
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## **Social Media & Digital Presence**

- ✓ Set up business accounts on Instagram, Facebook, TikTok
  - ✓ Create a content plan: behind the scenes, plated dishes, reviews
  - ✓ Use scheduling tools (Later, Buffer, Meta Planner)
  - ✓ Add booking links to bio
  - ✓ Set up testimonials and client review capture (Google, Yelp)
  - ✓ Post 3–5x per week with intent (showcase, educate, sell)
  - ✓ Use local hashtags and tag vendors/venues
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## **Event Execution & Workflow**

- ✓ Create an event checklist (equipment, food, staff, backup)
  - ✓ Design delivery & setup protocols
  - ✓ Build timeline templates for plated, buffet, and station service
  - ✓ Print backup menus and guest count
  - ✓ Assign team leads for large events
  - ✓ Set up incident report system
  - ✓ Debrief after events: what went well / needs improvement
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## **Client Experience & Retention**

- ✓ Welcome email after booking
  - ✓ Pre-event meeting or tasting
  - ✓ Final confirmation checklist (menu, time, count)
  - ✓ Follow-up thank you + feedback request
  - ✓ Offer referral discount or loyalty perk
  - ✓ Add past clients to email list
  - ✓ Track repeat business and lifetime value
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## **Mindset & Growth Systems**

- ✓ Set monthly CEO day to review goals
  - ✓ Outsource low-value tasks when possible
  - ✓ Create annual strategic plan (financial, marketing, hiring)
  - ✓ Learn AI & automation tools (Zapier, ChatGPT, Canva AI)
  - ✓ Join networking groups & vendor communities
  - ✓ Seek feedback, stay humble, keep evolving
  - ✓ Celebrate every milestone — don't forget why you started
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