


Here's your **Ultimate Catering Business Launch & Growth Checklist**, crafted as if it were built by a small business counselor who's been in the trenches — from global catering kitchens to top-tier operations at Amazon and Tesla. This checklist is intentionally structured so that each item represents a **clear milestone**, helping the user feel a sense of accomplishment as they go. (Checkbox-style ready )

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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.)



## 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



## Tech Stack Suggestions (Optional Add-On)

- **CRM:** HoneyBook, Dubsado, or 17hats
- **Accounting:** QuickBooks or Wave
- **Scheduling:** When I Work or Homebase
- **Proposals & Forms:** Cost eVentsEZ™, Jotform, CognitoForms
- **Social Media:** Meta Planner + Canva Pro