

# Catering Startup Checklist

Use this checklist to organize every step of your catering launch, build a strong foundation, and make sure nothing essential slips through the cracks.

## Niche & Market Research

- ☐ Select your primary niche
- ☐ Select a complementary niche
- ☐ Identify 3–5 local competitors
- ☐ Compare competitor menus, pricing, and reviews
- ☐ Identify market gaps (e.g., dietary, corporate, cuisine, pricing)
- ☐ Review venue preferred vendor lists
- ☐ Check demand on ezCater, CaterCow, and Foodee
- ☐ Look up local search demand (Google Trends)
- ☐ Confirm niche fits your kitchen setup (home/shared/mobile)

## Kitchen & Location Setup

### Home-Based Catering (if allowed)

- ☐ Verify state cottage food or home catering rules
- ☐ Confirm zoning/home occupation permissions
- ☐ Set up separate ingredient and equipment storage
- ☐ Schedule home kitchen inspection (if required)
- ☐ Obtain food manager certification
- ☐ Confirm liability insurance coverage

### Shared/Commissary Kitchen

- ☐ Compare two or more shared kitchen options
- ☐ Confirm facility licensing + inspections
- ☐ Ensure dry/cold/frozen storage availability
- ☐ Verify scheduling availability and 24/7 access
- ☐ Check for load-in space and parking

## Kitchen & Location Setup

### Food Truck/Mobile Kitchen

- ☐ Confirm commissary parking requirements
- ☐ Verify equipment and permitting needs

### Commercial Kitchen (for later expansion)

- ☐ Estimate buildout costs and hood/utility needs
- ☐ Confirm inspection requirements

## Menu & Pricing Structure

### Menu Planning

- ☐ Create a starter menu using the “Rule of 12”
- ☐ Remove items that don’t travel well
- ☐ Build modular packages (base + add-ons)

### Portion Planning

- ☐ Define protein portions for lunches, buffets, and plated dinners
- ☐ Set appetizer quantities per hour
- ☐ Create a portion standard reference sheet

### Pricing Setup

- ☐ Choose your pricing model (per-person, tiered, or cost-plus)
- ☐ Calculate food cost percentage
- ☐ Add delivery, setup, labor, overhead, and admin time
- ☐ Set profit margin targets (10–25%)
- ☐ Add separate delivery/setup fees (recommended)

### Sustainability & Dietary Options

- ☐ Add at least one plant-based or dietary menu option
- ☐ Select compostable or eco-friendly serveware
- ☐ Create allergen labels or signage

## Business Planning & Structure

- ☐ Write a brief overview of your concept
- ☐ Describe your niche, service area, and kitchen setup
- ☐ Summarize market research findings
- ☐ Add your starter menu + pricing approach
- ☐ Outline your operations workflow
- ☐ Document staffing needs (now and future)
- ☐ Estimate startup and monthly operating costs
- ☐ Project 3–6 months of revenue

## Licensing, Permits & Insurance

- ☐ Choose your business structure (LLC, sole prop, etc.)
- ☐ Register your business name and entity
- ☐ Get an EIN
- ☐ Register for sales tax (if required)
- ☐ Secure an approved kitchen (home/shared/commercial)
- ☐ Apply for food service permit
- ☐ Schedule/confirm health inspection
- ☐ Complete Food Protection Manager certification
- ☐ Get Food Handler cards for staff
- ☐ Check zoning/home occupation rules
- ☐ Purchase liability and product liability insurance
- ☐ Apply for catering/mobile food license (if applicable)
- ☐ Obtain alcohol service license (if offering drinks)

## Startup Costs & Equipment

### Cost Planning

- ☐ Choose your kitchen model (home/shared/mobile/commercial)
- ☐ Estimate total startup budget
- ☐ List one-time costs (licenses, equipment, branding)
- ☐ List monthly recurring costs

## Startup Costs & Equipment

### Equipment Checklist

- ☐ Hotel pans, sheet pans, and containers
- ☐ Knives, cutting boards, and prep tools
- ☐ Induction burners or portable cooktops
- ☐ Chafing dishes + fuel
- ☐ Cambros (hot/cold)
- ☐ Carts, racks, and coolers
- ☐ Storage bins + labels
- ☐ Probe + infrared thermometers
- ☐ Disposable serviceware
- ☐ Cleaning and sanitation supplies
- ☐ Vehicle setup for secure transport

## Operations, Staffing & Logistics

- ☐ Map your workflow (Prep → Cook → Pack → Transport → Serve → Breakdown)
- ☐ Create pack-out checklist
- ☐ Create on-site setup checklist
- ☐ Build SOPs for food safety and temperature logs
- ☐ Identify staffing needs per event
- ☐ Build a roster of on-call servers and event staff
- ☐ Pack backup equipment (burners, utensils, gloves, sanitizer)
- ☐ Confirm venue rules (load-in, kitchen access, electricity)

## Marketing & Client Acquisition

- ☐ Build a simple website with menu + pricing ranges
- ☐ Set up and complete your Google Business Profile
- ☐ Upload professional food and event photos
- ☐ Create profiles on ezCater / CaterCow / Foodee (if available)
- ☐ Reach out to local venues to join preferred-vendor lists
- ☐ Create social content (prep, setups, testimonials)
- ☐ Identify 10 local businesses for outreach
- ☐ Prepare a tasting platter or sample-drop strategy

## Launch, Evaluation & Growth

- ☐ Complete a soft-launch event
- ☐ Collect testimonials and event photos
- ☐ Review food costs, labor, and profit margins
- ☐ Refine menu items based on performance
- ☐ Create at least one recurring revenue offer
- ☐ Add rental items or premium upgrades
- ☐ Document one or more pivot options (meal boxes, holiday menus, ghost-kitchen pickup)

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