

The Catering Operations Playbook

What to fix first

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What this is

A catering business has four sides: marketing, sales, operations, and the food itself. This playbook is about operations: how an order gets taken, made, delivered and paid for. It is the side you can fix without spending a dollar on reach. Most of it runs behind the scenes, and it directly shapes what your clients experience.

This is one of App8's playbooks. It assesses how mature a catering operation is, and it shows how to unlock the most value from it. It has three parts.

1. The four things a catering operation runs on. For each one, five stages, from run by hand to run by the system at every site.
2. How to pick the one thing to fix first.
3. For each of the four things, at every stage, the moves we advise to reach the next stage.

The grid shows where you are. The moves are what you do about it, and you can start on them tomorrow.

Most of the moves are simple: a rule written down, a named owner, a cutoff, a form. The rest are functions of a digital ordering system.

The four things catering runs on

This playbook covers four parts of catering operations: taking the order, getting it to the kitchen, turning it into money, and setting the rules. Each one is a row on the maturity grid.

1. How the order reaches you (*order intake*)

Every way a request can land: phone, inbox, web form, text, or a paper order sheet. What gets asked at the order matters as much: the headcount, the room, the time, the allergens, the setup. Every answer rides with the order to the kitchen. Many operations have four or five ways in and have never counted them.

The tell: catering orders arriving as a text on somebody's cell phone, and nobody thinking that is unusual.

2. How the order reaches the kitchen (*order fulfillment*)

What the kitchen and the delivery team work from: a production sheet, a packing list, labels. Then what happens when the order changes after it is placed.

The tell: the change that came in by phone on Friday and never reached the kitchen.

3. How the order becomes money (*order to cash*)

What happens between the food leaving your kitchen and the money being in your bank. Who builds the invoice, what they build it from, and where it lands.

The tell: somebody retyping an order into an invoice. Or the month you find one that went out and never got collected.

4. Who sets ordering rules (*rules and internal communication*)

The cutoffs, the minimums, who says yes to an exception, and how rules and order details reach every site, every client and the kitchen.

The tell: one person everybody calls to ask whether an order can still go in. When that person is away, the answer changes.

The three questions. Each of the four has its own people, its own process and its own tools. For each one, ask:

1. Is the right person responsible for it?
2. Is the process written down anywhere outside somebody's head?
3. Do the tools do the job, or do people do it by hand?

How to use the maturity grid

1. Review the maturity grid and circle your stage on each row.
2. Rank the rows on the priority check. Priority 1 is the one you tackle first.
3. Go to the maturity guide for your priority 1 row.
4. Write down what you need to do to move that row up a stage. At stage 3 with one site, or stage 5 with several, work on what the row still gets wrong instead.
5. Commit to the action, and to the result you expect in 90 days.
6. Compare the number with today's at day 14 and again at day 90. If it has not improved, check whether people are using the change, and whether the change itself works.

The maturity grid

This is the table App8 uses to evaluate how mature a catering operation is and where its opportunity is.

Name: _____ Date: _____

How to use this sheet

1. Pick one site to score: one kitchen, cafe or property. If you run several, pick the one closest to your average. **Site you are scoring:** _____
2. In each row of the table, find the one box that describes your site today. If you run one site, stage 3 is your maximum.
3. Go to the next page and circle your stage for each of the rows.

Rules for marking

1. Circle based on how things run today, not where the policy says or where you would like it to be.
2. If you are torn between two stages, mark the lower one.

	Stages 1 to 3: every operation			Stages 4 and 5: several site operation	
<i>Circle one box in each row</i>	Stage 1 Manual intake	Stage 2 Digital but siloed	Stage 3 Integrated workflow	Stage 4 Multi-site control	Stage 5 Enterprise operating layer
1. How the order reaches you <i>order intake</i>	Phone, email and walk-ups, written down by a person	An order form exists, but orders still arrive other ways	Every order arrives one way, with what the kitchen needs on it	Same channel, fields and questions at every site	Ordering accounts with approvers, budgets and cost centers
2. How the order reaches the kitchen <i>order fulfillment</i>	The kitchen works from notes, texts and memory	A production list exists, but it is typed from the orders	Every order flows to the production sheet and labels, changes included	Same production sheets, labels and packing at every site	Every site's fulfillment is measured against the order, in one view
3. How the order becomes money <i>order to cash</i>	Invoices built by hand from the order	Invoices built in a system, typed in from the order	Each order goes into your accounting system with no retyping	Same posting rules and cost centers at every site	Catering receivables reconcile into your finance system on their own
4. Who sets ordering rules <i>rules and internal communication</i>	Ordering rules live in people's heads	They are written down, but an order can still break them	The system refuses an order that breaks a rule	One place sets the rules and every site runs them	Every exception goes to one owner and is counted across sites

The priority check

What to fix, in order of priority

Print this page, or write on it in your PDF reader.

1. Circle your self-evaluated stage for each row.
2. Write what is broken today and the fix. The maturity guide later in this playbook shows what broken looks like at each stage and the moves that fix it.
3. Rank the rows 1 to 4. Priority 1 is your constraint, the row with the biggest upside. To find it, ask: if you had 10x the volume, what would be the first thing to break?

Row	Your stage	What's broken today	The fix	Priority					
1. How the order reaches you <i>order intake</i>	<table border="1"> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> </table>	1	2	3	4	5			
1	2	3	4	5					
2. How the order reaches the kitchen <i>order fulfillment</i>	<table border="1"> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> </table>	1	2	3	4	5			
1	2	3	4	5					
3. How the order becomes money <i>order to cash</i>	<table border="1"> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> </table>	1	2	3	4	5			
1	2	3	4	5					
4. Who sets ordering rules <i>rules and internal communication</i>	<table border="1"> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> </table>	1	2	3	4	5			
1	2	3	4	5					

Stages 4 and 5 are for operations with several sites.

Your first fix: the next two weeks

For your priority 1 row, pick one change. Name the owner: the person accountable for it, even if that is you. Name the deliverables: what you will have produced by day 14, two weeks from today. A count, a rule, a setting turned on, a note that went out. Then name the metric you will measure. Measure it now, on day 14, and on day 90, three months from today.

The one change	The owner	Deliverables and metric	Quantifiable result
		Deliverables: _____ Metric: _____	Now: _____ Day 14: _____ Day 90: _____

The impact of each row

This is what each row costs your business when it stays at a low stage.

Row	What it affects	What goes wrong
1. How the order reaches you <i>order intake</i>	Sales volume and the back-and-forth	• Every extra way in is one more thing for your team to manage, and one more choice for the client. • For standard orders, a quote request adds a step before the client can see prices and order. Some go where they can see prices first, and you never see the order you lost. • Every question the form did not ask becomes a phone call afterward. • Corporate clients buy through a named buyer, against a budget, with a PO or a cost center to bill to. Not knowing that buyer and their process means back-and-forth on every order.
2. How the order reaches the kitchen <i>order fulfillment</i>	Accuracy, and the kitchen's day	• Every retype between the order and the kitchen is a place the order goes wrong. • The allergen note reached one team in the kitchen and never reached the other. • The change that came in by phone never reached the kitchen. • Two big orders on the same morning, and nobody saw it coming.
3. How the order becomes money <i>order to cash</i>	How fast you get paid, and what it costs to get paid	• An invoice typed from the order waits for somebody's time before it goes out. • Chasing takes time every week. The invoice nobody chased is money you never collected. • Receivables fall behind, and nobody sees how far until somebody counts. • Missing billing details delay payment. Each client has a PO, a cost center or a route the invoice has to take.
4. Who sets ordering rules <i>rules and internal communication</i>	Friction and strain in the kitchen and on the phone	• The kitchen absorbs late orders and late changes. • One person everybody calls. When they are away, the answer changes. • An exception nobody priced comes out of margin. • Sites running different rules give the same client a different experience at each one.

Row 1. How the order reaches you

Order intake. Every way a request can land, and what gets asked at the order. Self-ordering is for standard and repeat orders; an assisted or custom order goes into the same record with the same details. Find your stage, then do what sits beside it. The note to your catering clients follows the stages.

How the order reaches you: where you are	What we advise, to reach the next stage
1 Phone, email and walk-ups, written down by a person	1. Count every order for two weeks, and how it arrived: phone, email, walk-up, text. 2. Put one order form in front of every channel, on paper or on a web page. 3. Give the form the same fields every time. Who is ordering and for which department. The date, the time and the headcount. Where it is delivered, down to the room. Dietary needs and allergens, and anything to set up. 4. Name the one person who writes every order onto that form, whoever took the call. 5. Confirm every order back to the client in writing the same day, from the form.
2 An order form exists, but orders still arrive other ways	1. Write the rule: an order exists once it is on the form. A call or a text is written onto the form, and nothing else counts as an order. 2. Show the menu and the prices first, and ask for the account and the details at checkout. Where a client has their own prices, identify the account first. 3. Move your standing orders to the new link first, so regulars never re-enter anything. 4. Tell your clients the date the link goes live, and put an auto-reply on the old channels pointing to it. 5. Require the details the kitchen needs to accept and make the order. Show the other questions only when they apply. 6. Add the questions your kitchen always has to ask, on the order and on each item: utensils, setup, allergens. The answers ride with the order, so nobody phones the client back. 7. Turn on the automatic confirmation, so the client hears when the order is accepted, and when anything about it changes, without a phone call. 8. Put every change on the order itself, never in an inbox, so the order stays the one record.

How the order reaches you: where you are

3

Every order arrives one way,
with what the kitchen needs
on it

What we advise, to reach the next stage

1. Write the intake standard on one page: the one channel, the required fields, the questions, and who at each site owns intake.
2. Set up one site in full, then replicate its menu and settings to the next site.
3. Keep the required fields and the questions the same at every site. Let the menu, the hours and the delivery locations differ by site.
4. Read intake by site each month, in whatever view your system gives you across sites. A site still taking orders outside the channel is the one to bring across next.

4

Same channel, fields and
questions at every site

1. Write the account register first. Each client department, the person who approves its orders, the budget it spends from, and the cost center it bills to.
2. Ask each client to name, in writing, its buyers and its approver per site, and the budget and cost center they spend from. Only the owner on your side changes the register.
3. Set up an ordering account per client department, with its approver and its cost center on it. Every order then carries both from the moment it is placed.
4. Turn on the approval gate, so an order from an account holds for its approver before it is confirmed.
5. Hold each budget on the register, and have the approver check spend against it.

5

Ordering accounts with
approvers, budgets and cost
centers

What keeps it there.

1. Check, each month, that every accepted order reached the one order record, including the orders your team entered for clients. Count the missing ones. Each one is the leak.
2. Count the orders where the kitchen had to phone the client for something the form should have asked. Each one is a question to add.
3. Count the orders placed by a name that is not on an account. Each one is a leak.
4. Bring a new site onto the same channel and the same account structure before its first order.
5. Once a quarter, ask the three questions of this row.

The note to your catering clients

When to send it. Only when you are working on this row and your stage is 2 or higher. At stage 1 there is no single link to point clients at yet. Send it after you have tested the link, the confirmations and the kitchen's sheet, and moved the standing orders. Send it about a week before the old channels start auto-replying. Cut any line that does not apply.

Send it as written, with the brackets filled.

Subject: Your catering orders, from [date]

Hi [Name],

From [date], catering orders for [their organization] come through one link: [link].

You get a confirmation on every order, and the kitchen works from your order as you placed it.

Everything else about working together stays the same. Same team, same menus, same terms.

Your standing orders are already moved across, so there is nothing for you to do on those.

Regards,

[Your name]

Three things to keep out of it. An apology. The internal reason. Any ask beyond ordering at the link. If the note asks your client for anything else, some of them will not do it, and you are running two channels again.

Row 2. How the order reaches the kitchen

Order fulfillment. What the kitchen and the delivery team work from, and what happens when the order changes. Find your stage, then do what sits beside it. The kitchen check follows the stages.

How the order reaches the kitchen: where you are	What we advise, to reach the next stage
1 The kitchen works from notes, texts and memory	1. Write one production list a day from the order forms: every item, every quantity, every note, every allergen. Give the kitchen nothing else. 2. Put the delivery time, the room and the headcount at the top of every entry, so the kitchen and the driver read the same line. 3. Label anything with an allergen or a dietary note by hand, before it leaves the kitchen. 4. Name the one person who owns the list. Every change goes to that person and onto the list, never straight to a cook. 5. Read the list back against the orders at the end of each day for one week, and count what was missed.
2 A production list exists, but it is typed from the orders	1. Turn on the production report. Every accepted order then prints to the day's production sheet, with nobody retyping it. 2. Turn on the packing list and the labels from the same orders, so what is packed and labeled is what was ordered. 3. Make every change go through the order, so the sheet, the packing list and the labels print from the changed order. 4. Set the cutoff for routine changes, so the day's sheet is final at a fixed time. For an approved late change, update the order, reprint what it touches, and confirm the kitchen has it. 5. Print the day's sheet from the system at the same time every day, and retire every hand-written version. 6. Read the week ahead in the production calendar every morning, so two big orders on one day are seen before they collide.

How the order reaches the kitchen: where you are

What we advise, to reach the next stage

3

Every order flows to the production sheet and labels, changes included

1. Write the production standard on one page: what prints, when it prints, who reads it, and how a change reaches the kitchen and the driver.
2. Set up one site's production report, packing list and labels in full, then replicate to the next site.
3. Keep the sheet's fields the same at every site, as they come from the order: item, quantity, notes, allergens. Let the menu differ by site.
4. Check the kitchen's sheet against the orders for one week at each site. Each gap shows where order information was missed.

4

Same production sheets, labels and packing at every site

1. Read production by site each month, in whatever view your system gives you across sites: orders, items, changes after the cutoff.
2. Count the changes that arrived after the cutoff, per site, and where each one came from.
3. Name one owner of the production standard for the whole group, and have every site inherit any change to it.
4. Use the same order status steps at every site, so a client and a site manager see the same thing.

5

Every site's fulfillment is measured against the order, in one view

What keeps it there.

1. Count, each month, the orders that went out wrong: a missing item, a wrong count, a missing label. Trace each one to the step that lost it.
2. Count the changes that reached the kitchen by phone instead of through the order. Each one is the leak.
3. Bring a new site onto the same production report, packing list and labels before its first order.
4. Once a quarter, ask the three questions of this row.

The kitchen check

For any stage. One week, one site. Each gap shows where order information was missed.

Site (same as your maturity grid): _____ Week of: _____

1. Orders this week: _____

2. Orders on the kitchen's sheet: _____

3. Notes on the order that were not on the sheet: _____

4. Allergens on the order that were not on the labels: _____

5. Changes after the order was placed: _____

6. Changes that reached the kitchen: _____

7. Orders that went out wrong (missing item, wrong count, wrong room): _____

Row 3. How the order becomes money

Order to cash. What happens between the food leaving your kitchen and the money being in your bank. Find your stage, then do what sits beside it. The brief for IT and finance follows the stages.

How the order becomes money: where you are	What we advise, to reach the next stage
1 Invoices built by hand from the order	1. Name the one person who owns invoicing. 2. Write the rule for when an invoice goes out: with the delivery, or on the billing cycle the client agreed to. Never later. 3. Use one invoice template whose lines match the order form, so an invoice is copied from the order, never composed. 4. Decide, per client, how they pay: card when the order is done, or an invoice on terms. Write it on their account card. 5. Ask for a deposit on any order above a size you set, before it is cooked. 6. Keep one list of open invoices with their age, and chase from that list on one fixed day a week.
2 Invoices built in a system, typed in from the order	1. Add the billing fields to the order form: who is billed, the cost center or PO number, and the payment terms. The invoice inherits them. 2. Turn on invoicing from the order, so the invoice is generated from the completed order and sent with nobody retyping it. 3. For clients who pay by card, take the payment when the order is completed, with the invoice as the fallback when a card declines. Offer invoice terms only to approved accounts. 4. Set invoice due dates and turn on the automatic reminders, so nobody spends the month chasing by email. 5. Connect the ordering system to the accounting system you already run, so each invoice posts there with no retyping.
3 Each order goes into your accounting system with no retyping	1. Write the posting map on one page: each order type to its category, its cost center and its PO rule. The same page at every site. 2. Name one finance owner who alone adds or changes categories, cost centers and posting rules. 3. Set the posting map once, centrally, and have every site post through the same accounting connection. 4. Read receivables by site each month. A site whose invoices are still typed by hand is the one to bring across next.

How the order becomes money: where you are

4

Same posting rules and cost centers at every site

What we advise, to reach the next stage

1. Write the rule that the accounting system is the only record of catering receivables, and retire every spreadsheet copy.
2. Take every payment through the one system, card or invoice. Carry the client's PO and cost center onto the invoice and into the accounting record.
3. Turn on the accounting connection, so invoices and payments post to your finance system without retyping. Anything unmatched goes to a named owner.
4. Mark invoices paid in one place, so the reminders stop and the ledger and the portal agree.

5

Catering receivables reconcile into your finance system on their own

What keeps it there.

1. Count, each month, anything typed by hand between an order and the ledger. Each one is the leak.
2. Count the unmatched receivables at month end, and trace each one to the break in the path.
3. Bring a new site onto the same accounting connection before its first invoice.
4. Once a quarter, ask the three questions of this row.

The brief for IT and finance

When to send it. On day 14, when you have the two-week count. For two weeks, count the invoices typed from orders and the ones that needed a correction; those are the brief's numbers. The count is what turns a request into a case. Keep the "what we are not asking for" list in. It answers the objection before it is raised.

Send it as written, with the brackets filled.

To: [IT lead], [Finance lead]

Subject: Catering invoices, from the order to the ledger, live [date]

What we are changing. Every catering invoice for [site] is generated from the order and posts to [accounting system], instead of being typed in from the order.

The number. Over the two weeks of [dates], _____ catering invoices were typed in by hand, and _____ of them needed a correction.

What we need from you, three things.

1. [IT] Approve the connection between the ordering system and [accounting system], or the export and import if there is no connection, by [date].
2. [Finance] The list of categories, cost centers and PO rules a catering invoice has to carry, by [date].
3. [Finance] Confirm who is billed for each client account and on what terms, so the invoice and the ledger agree, by [date].

What we are not asking for. No new finance system. No change to your chart of accounts. What we need is the connection, or the file export and import, and IT confirms the access and the data transfer it takes.

The date. [date]. If any of the three above slips, tell me and I will move the date rather than run it half live.

Row 4. Who sets ordering rules

Rules and internal communication. The cutoffs, the minimums, who says yes to an exception, and how rules and order details reach every site, every client and the kitchen. Find your stage, then do what sits beside it. The rules card follows the stages.

Who sets ordering rules: where you are	What we advise, to reach the next stage
1 Ordering rules live in people's heads	1. Write the three numbers on one page. The notice you need, the smallest order you will take, and when a change or a cancellation stops being free. 2. Put one person's name at the top of the page: the owner, the one who says no after the cutoff. 3. Add the last line: only that person approves an exception, and every exception is written on the order. 4. Send the page to every location and every client, in the same words. Pin it in the kitchen and at the phone. 5. Test it: ask two people to explain the rule, at two sites if you have them.
2 They are written down, but an order can still break them	1. Sort the rules into hard and soft. Hard is what the system refuses. Soft is what a person decides. 2. Set the advance notice and the daily cutoff in the system, so an order past the cutoff can't be placed. 3. Set the minimum order amount, so an order below it can't be placed. 4. Block the dates and the hours you can't serve, so they never appear as options. 5. Set the cutoff for changes and cancellations, so a late change is refused by the system rather than argued over. 6. Show the rules on the order page: the notice, the minimum and the change cutoff. A client sees them as they order, and nobody explains them by phone. 7. Send any exception past a cutoff to the owner, and write it on the order.

**Who sets ordering rules:
where you are**

What we advise, to reach the next stage

3

**The system refuses an order
that breaks a rule**

1. Name one owner of the rules for the whole group. The page carries that name and reaches every site and every client in the same words.
2. Set the rules once, centrally, and have every site inherit them: the notice, the cutoff, the minimum, the change window.
3. Name what a site may set for itself: its hours, its closed dates, its delivery locations and its delivery fees.
4. Set up one site in full, then replicate its menu and settings to the next site.
5. Move any rule a site still enforces by hand into the system, and bring that site onto the one standard.

4

**One place sets the rules and
every site runs them**

1. Write the exception rule: only the named owner approves an exception, and the reason is written on the order.
2. Where your system holds an order for approval, make the owner the approver for that gate too.
3. Keep a monthly tally, per site, of the exceptions written on orders and who approved each.
4. Read the view across your sites each month for the outliers: many exceptions, or none.

5

**Every exception goes to one
owner and is counted across
sites**

What keeps it there.

1. Count, each month, the exceptions that were not written on the order: a call to a person, an edit after the fact with nothing noted. Each one is the leak.
2. Phone two locations on a fixed cycle and ask them the rule.
3. Bring a new site onto the same rules and the same owner before its first order.
4. Once a quarter, ask the three questions of this row.

The rules card

For an operation at stage 1 or 2 on this row. Where a client contract sets a term, that contract wins for that client.

Site (same as your maturity grid): _____ Date: _____

1. Lead time, orders up to _____ guests: by _____ the day before.
2. Lead time, orders above _____ guests: _____ business days.
3. Minimum order: _____.
4. Changes accepted until _____. After that the order stands as placed and is billed as placed.
5. Cancellation free until _____. After that, _____.
6. Only _____ can approve an exception, and every exception is written on the order.

About App8

App8 is the enterprise foodservice operations platform that foodservice operators and multi-unit brands run their catering, K-12 and on-site ordering on, from order capture through fulfillment and invoicing that reconciles into their accounting system.

For a catering operation, that means the four rows in this playbook run as one path. Every order comes in through the system. The kitchen works from it, with nothing retyped. The rules are applied automatically. The invoice is generated from the order, sent, and followed up on automatically.

What we have seen at one workplace site, over 12 months on the platform: catering orders up 513%, revenue up 526%, a 70% repeat-order rate, and 67 hours of manual work cut.¹

If you want to do this with us, email me and we'll walk through your catering operation together.

Elias Hage, CEO

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¹ App8's own record for one enterprise workplace site, anonymized and single-site, over the 12 months to January 2026 against the year before. Repeat orders are orders placed by returning buyers. The manual work is an estimate of about five minutes an order across the orders in the period.