



# 2026 AGENDA

## The Catering Roadshow

Sales-First Off-Premise Workshop

9:00am – 4:00pm

Workshop + Sponsored Happy Hour

### 8:30–9:00am | Arrival + Coffee + Check-In

- Workbook + name badge
- Headshot sign-ups open (rolling slots)

### 9:00–9:15am | Welcome + Outcomes

- What you'll leave with: outreach plays, scripts, KPI tracker, margin tools, tech workflow map, and a 30-day action plan
- Table intros: role + "biggest catering growth goal for 2026"

### 9:15–10:00am | Scaling Catering: Sales Lessons from Operators (Panel + Q&A)

### 10:00–10:10am | KPI Scoreboard: What to Track (and What to Stop Tracking) (Preet)

- Weekly scoreboard: outreach sent, replies, meetings, quotes, wins, repeat orders
- Conversion checkpoints + simple targets

### 10:10–10:25am | Break

### 10:25–11:10am | Messaging That Gets Replies + Books Meetings

- Outreach frameworks, follow-ups, intro asks, talk tracks

### 11:10–11:55am | Technology Education: The Catering Tech Stack That Drives Sales

- Order channels + where handoffs break
- Delivery/dispatch workflow basics
- Guest comms + issue resolution loops
- What to measure weekly

### 11:55am–12:10pm | Hands-On: Tech Workflow Map (Live Exercise)

- Everyone completes a one-page "map" of their current process.
- Activity: Order → Production → Handoff → Delivery → Follow-Up
- Map your steps across: online orders, phone/text orders, marketplace orders
- Circle your top 3 failure points (late confirmations, missing items, unclear driver notes, no follow-up, etc.)
- Identify 2 quick fixes: one process fix + one tech/automation fix
- Quick pair share: "my #1 breakpoint + how I'll fix it"

### 12:10–12:50pm | Catered Lunch + Networking

### 12:50–1:30pm | Financial Education: Profitably Scaling Catering

- True cost components + pricing guardrails
- Minimums/fees/promos that protect margin
- What to report up (profit language)

### 1:30–2:00pm | Leadership in the Catering Role: How to Grow (Program + Career)

- Leading ops alignment, coaching behaviors, visibility, and reporting wins

### 2:00–3:05pm | Hands-On Working Session: Build Your Sales Plays (4 Stations)

- Prospecting sprint
- Write your outreach
- Objection role-play
- Account growth plan

### 3:05–3:20pm | Break + Snacks

### 3:20–3:45pm | Charitable Component (Cards or Boxed Lunch Build)

### 3:45–4:00pm | Wrap + Commitments

- 3 actions + 2 KPI goals + 1 accountability buddy
- Headshots last call + happy hour details

### 4:00–5:30pm | Sponsored Happy Hour