

Your first catering booking

Learner exercise for individual practice or an educator-led session

Work through one fictional booking in about 60 minutes. Ask for missing information, cost the job, prepare a quote, record a customer decision and hand the current approved revision to the kitchen. No account or app entry is needed.

Use a pen and calculator. Keep the facilitator notes separate until you have attempted the tasks. All amounts are fictional CAD before sales tax and exclude gratuities.

Read the inquiry

Hello, can you cater lunch for 50 people on 2026-11-16 at the Cedar Room training venue? Two people would like vegetarian alternatives. We would like a simple drop-off lunch. Can you send a price? - Alex, Training Client; cedar-room@example.com (fictional training contact)

Ask before quoting

Work alone or in pairs. Record facts explicitly stated in the inquiry; write To confirm for missing details. A request for a price is an inquiry, not approval or payment.

- Ask at least six useful questions covering timing, exact location/access, count and dietary requirements, menu, service scope and the customer's price expectations.
- After reading the clarification card, note the remaining unknowns and who must confirm them.
- Choose what belongs in internal coordination notes and what belongs in an agreed customer scope. Keep contact details in the office record, not a kitchen handout.

Question 1 _____

Question 2 _____

Question 3 _____

Question 4 _____

Question 5 _____

Question 6 _____

Still unknown and who will confirm _____

Stop here before reading the clarification card on the next page.

Clarify and cost the booking

Clarification card

Read after drafting your questions. These fictional answers are supplied now; they were not implied by the inquiry.

- 50 guests total includes two requested vegetarian alternatives. The request is 48 standard lunches and two alternatives, subject to operator review.
- November 16, 2026; drop-off 12:00 and service 12:30 in America/Edmonton.
- Cedar Room training venue. Full address, access details, on-site contact and allergy information still need confirmation.
- Drop-off only. On-site service and collection are excluded in this training scope. No deposit or payment has been requested or received.
- Alex, Training Client, at cedar-room@example.com is a fictional office contact. Keep private contact fields out of the kitchen handoff.

Internal costing

For the 50-guest job, use food CAD230, labour CAD560, other job costs CAD200, overhead CAD50 and a manual payment-fee estimate of CAD10. The labour estimate includes the owner's time. All are whole-job estimates.

For practice, add a 10% contingency, divide the allowance by 0.80 for a 20% planning margin, then round up to the next CAD5. These choices are not market benchmarks. Whole-job inputs do not scale automatically when the guest count changes.

Calculate	Your answer
Entered costs	CAD _____
10% contingency	CAD _____
Cost allowance	CAD _____
Allowance / 0.80	CAD _____
Round up to next CAD5	CAD _____
Total / 50 guests	CAD _____
Total less allowance	CAD _____
Surplus / total x 100	_____ %

Why margin differs from markup _____

Keep this internal costing separate from customer and kitchen documents.

Prepare and approve the quote

Draft a customer-facing teaching outline for CLASS-Q1 revision 1. Use one fixed whole-booking package line for 50 guests. Show its scope and before-tax total. Keep internal costs, contingency arithmetic and margin out of the quote.

The exercise supplies no tax determination or commercial terms. A real quote needs applicable taxes, the final payable amount and reviewed terms before issue. This is an arithmetic and record-keeping exercise.

Customer quote outline

Quote reference / revision: _____

Customer and booking name: _____

Event date / drop-off / service time: _____

Venue and remaining access question: _____

Menu quantities and included service: _____

Fixed whole-booking total before sales tax: CAD _____

Remaining venue and dietary questions _____

What is excluded from the scope _____

Customer decision card

Read only after completing the quote. The facilitator supplies this fictional response:

Fictional response from Alex, Training Client: I approve CLASS-Q1, revision 1, for 50 guests at CAD1,445 before sales tax, with the stated training scope.

Decision date 2026-10-26 Fictional classroom date

Exact reference and revision approved _____

Evidence I would retain _____

What approval does not prove _____

Approval of this price does not establish payment, dietary suitability, completed work or approval of a future revision.

Handle the guest count change

Change request card

The guest count is now 60, including three vegetarian meal requests. The same date, times and drop-off scope apply. Please send the revised price for approval.

The change request is not approval of a new price. Retain the 50-guest decision unchanged while you prepare CLASS-Q2 revision 2.

Review fresh whole job estimates

The new manually reviewed whole-job estimates are food CAD276, labour CAD640, other job costs CAD210, overhead CAD50 and a manual fee estimate of CAD12. Keep the exercise's 10% contingency, 20% planning margin and CAD5 round-up increment.

Calculate	Your answer
Revised entered costs	CAD _____
10% contingency	CAD _____
Revised allowance	CAD _____
Allowance / 0.80	CAD _____
Round up to next CAD5	CAD _____
Total / 60 guests	CAD _____

Revision 1 retained history _____

Revision 2 pending state _____

New customer decision card

Read after calculating and recording the pending revision:

Fictional response from Alex, Training Client: I approve CLASS-Q2, revision 2, for 60 guests at CAD1,635 before sales tax, with the stated training scope.

Decision date 2026-10-29 Fictional classroom date

Current approved reference and revision _____

The new requested allocation is 57 standard lunches and three vegetarian alternatives, subject to operator review. No suitability guarantee is supplied by the exercise.

Hand the approved scope to the kitchen

Use the explicitly approved CLASS-Q2 revision 2 for this fictional handoff. Keep unresolved address, access and dietary questions visible for office follow-up before a real job. Do not treat this training handoff as ready for real production or delivery.

Packing practice uses 60 meal boxes, 60 cutlery sets and two labelled transport crates. These are exercise choices, not portion, recipe, food-safety or equipment recommendations.

Current approved reference / revision: _____

Date / drop-off / service: _____

Guest count / menu quantities: _____

Venue / approved delivery instructions: _____

Unresolved questions for office follow-up: _____

Packing plan: _____

Acknowledgment statement: _____

Meal boxes [] Cutlery sets [] Transport crates []

Do not include customer email/private phone, raw inquiry text, internal costs, margin, quote totals or payment history.

A newly approved revision needs a fresh acknowledgment and fresh revision-specific checks. Retain older history under its original revision. Leave work checks blank until the work is done.

Debrief

One improvement to my process: _____

The current approved revision matters because: _____

These manual resources do not import into CaterScale. Normal business, menu, customer and event setup and explicit review/save are required when using the app.

[Catering resources and companion downloads](#)

[Free pricing calculator and costing worksheet](#)

[Product walkthrough with a separate Northwood example](#)