

CODEx GROWTH

FIELD GUIDE NO. 01

THE PRIVATE-EVENT PIPELINE CHECKLIST

Interest is not revenue.

For fine-dining operators who get private-event and catering inquiries and want them booked, not buried. Everything here is built to be used mid-service: scan it, check it, fix the first leak you find.

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01 · START HERE

THE CORE PRINCIPLE

Interest is not revenue. Five inquiries can look like a full pipeline and actually be five loose threads. Private-event and catering inquiries are not admin work. **They are sales.** A reply answers a question. A sales process moves the buyer toward a decision. Without stages, ownership, and next actions, a restaurant has a collection of conversations, not a pipeline.

02 · VISIBILITY

THE 7 STAGES EVERY INQUIRY MOVES THROUGH

- 1 New Inquiry.** The lead has contacted you; no real conversation yet. **Next: assign an owner and respond.**
- 2 Contacted.** You have replied and asked for what you need to evaluate. **Next: collect the missing details.**
- 3 Qualified.** You know event type, date, guest count, format, approximate spend, and timeline. **Next: recommend the best option.**
- 4 Options / Proposal Sent.** The buyer has relevant pricing, menus, availability, and a clear next step. **Next: set a follow-up date.**
- 5 Decision Pending.** The buyer is comparing or getting approval. **Next: follow up and resolve open questions.**
- 6 Deposit Pending.** Interest confirmed; event not yet secured. **Next: collect the deposit and agreement.**
- 7 Booked or Lost.** Confirmed, or closed with a documented reason. **Next: hand off to operations, or record why.**

If you cannot name the stage, the lead is drifting.

03 · OWNERSHIP

Every live lead needs four things. An owner. A current stage. A next action. A next-action date. If one is missing, the opportunity can disappear quietly. The first leak to fix is always the count of active leads with no next action.

04 · QUALIFICATION

QUALIFY BEFORE YOU QUOTE: THE 8 QUESTIONS

Qualification is not an interrogation. It is how you earn the right to recommend.

- ☐ What type of event are you planning?
- ☐ What date or date range, and how flexible is it?
- ☐ Approximately how many guests?
- ☐ Private dining, group dining, off-site catering, or full buyout?
- ☐ Target budget, minimum spend, or per-person range?
- ☐ Important food, beverage, space, service, or setup requirements?
- ☐ Who is involved in the final decision?
- ☐ When do you expect to choose a venue or caterer?

Do not make the buyer dig through a menu packet and guess what applies.

05 · RESPONSE SPEED

THE FIRST-REPLY STANDARD

Reply the same business day whenever possible, and always within a standard your team can actually meet. A strong first reply does four jobs: **confirm you can host the date, give capacity and the minimum, ask one good question, and point to the next step.** The template:

Hi [Name],

Thank you for reaching out about your [event type]. We'd be happy to see whether we're a good fit. To recommend the most relevant option, could you share a few details?

- Preferred date or date range
- Estimated guest count
- Private dining, group dining, catering, or buyout
- Any approximate budget or target spend
- When you're hoping to make a decision

Once I have that, I can confirm the best next step and send the most relevant options.

Best, [Name]

06 · FOLLOW-UP

THE 5-TOUCH FOLLOW-UP CADENCE

Silence is not a no.

- ☐ **Touch 1: initial response.** Same business day whenever possible.
- ☐ **Touch 2: next business day.** If qualification details are missing, send a short reminder and restate the easiest next step.
- ☐ **Touch 3: day 3.** Offer help, answer likely questions, or clarify the most relevant option.
- ☐ **Touch 4: day 5 to 7.** Ask whether the event is still active and whether the buyer needs anything before deciding.
- ☐ **Touch 5: final follow-up.** Politely close the loop with a reason instead of leaving the opportunity open forever.

Every touch has a purpose: collect missing info, confirm availability, answer a decision-blocking question, schedule a conversation, request the deposit, or close accurately. No empty "just checking in" nudges. They teach the buyer to ignore you.

07 · PROPOSALS

WHAT A PROPOSAL NEEDS BESIDES A PRICE

CONFIRMED AVAILABILITY

For their specific date or range. A price without a date is a brochure.

ONLY THE RELEVANT OPTIONS

The packages that fit their event. Not the full packet.

ONE CLEAR NEXT STEP

Tour, hold, or call. Name it, and make it easy to say yes to.

A FOLLOW-UP DATE

Set before you hit send. This is what keeps the deal from stalling.

A price with none of these is where deals stall.

08 · BEFORE YOU SPEND

THE 5 FIXES BEFORE MORE MARKETING

If intake and follow-up leak, more marketing pours water into a bucket full of holes. Fix these first. None of it is glamorous. All of it is cheap.

- ☐ **A real private-events CTA, visible on mobile.** "Book a Private Event (15+ Guests)", not a buried menu link.
- ☐ **A guided inquiry form.** Date window, guest count, event type, contact info. It filters tire-kickers before they reach your team.
- ☐ **An autoresponder that sets expectations.** Confirms receipt and points to the next step: tour, hold, or call.
- ☐ **Call tracking and routing.** So phone inquiries do not die at the host stand mid-service.
- ☐ **The 5-touch follow-up cadence.** The one on the previous page, so serious buyers do not slip away in the silence.

09 · VISIBILITY

THE NUMBERS TO TRACK

Per inquiry: contact name · email and phone · event type · date or range · guest count · service format · approximate value · lead source · assigned owner · current stage · last interaction · next action and date · proposal sent · deposit status · final outcome and lost reason.

LEADERSHIP SHOULD BE ABLE TO ANSWER

Inquiries received and how many qualified · proposals sent and deposits paid · booked revenue and strongest lead sources · response speed · and how many active leads currently have **no next action**. It is the first leak to fix.

10 · SEE IT YOURSELF

THE MYSTERY-SHOP TEST

Become a guest in your own restaurant.

Send a real private-event inquiry through your own website, as if you were a buyer planning a dinner. Then time everything:

- ☐ How fast does someone reply?
- ☐ Does the reply confirm the date and give a minimum?
- ☐ Does anyone ask a single qualifying question?
- ☐ Is there a clear next step?
- ☐ Does anyone follow up when you go quiet, and when?

You are watching your own team handle a live inquiry, in their own words. This is where the leak stops being theoretical.

11 · SCORE YOUR ROOM

THE TWO-MINUTE SELF-AUDIT

One point for each statement that is true today:

- | | |
|---|---|
| ☐ Every inquiry is captured in one visible place | ☐ Every active lead has a next action and date |
| ☐ Every active opportunity has an assigned owner | ☐ Proposals, follow-ups, and deposits are tracked |
| ☐ The team qualifies before sending generic info | ☐ Leadership can see volume, revenue, and conversion |
| ☐ Every active lead has a current stage | ☐ Lost opportunities are closed with a reason |

7-8

Strong foundation. The next gain is speed, conversion, and consistency.

4-6

Revenue is likely leaking between the inbox and the deposit.

0-3

An inquiry-response process, not a pipeline. More leads will not fix it.

12 · THE NEXT STEP

WANT THE LEAKS MAPPED FOR YOUR ROOM?

Book a **Revenue Leak Review**. It is a paid diagnostic that shows you the leak before you buy anything.

- 1** We mystery-shop your own team with a real inquiry, and time everything.
- 2** We map every route an inquiry takes through your restaurant.
- 3** We put a monthly dollar figure on the leak, and walk you through the fix.

\$800, credited in full toward setup if we move forward together. You keep the findings either way.

[CODEXGROWTH.COM/APPLY](https://codexgrowth.com/apply)

Codex Growth · Private-event and catering pipelines for fine-dining restaurants · Field Guide No. 01, 2026 Edition