

Flourish

ESTABLISHED 2017

# LAUNCHING & SCALING YOUR NEW YORK CANNABIS BUSINESS

A COMPLETE GUIDE  
FOR LICENSED OPERATORS



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# GUIDE SUMMARY

The New York cannabis market is rapidly expanding, and having a strong operational foundation is crucial for any business looking to scale successfully. Whether you've just received your license or you're in the process of applying, this guide provides actionable steps to help you set up and run a compliant, efficient, and profitable cannabis operation.

With insights from Flourish, a platform trusted by over 176 New York cannabis operators, we'll walk you through essential strategies—from compliance and technology to hiring and supply chain management—to ensure your business is positioned for long-term success.

# 1

## COMPLIANCE: NAVIGATING NEW YORK'S REGULATIONS

### TRACK-AND-TRACE (BIOTRACK)

Biotrack is New York's state tracking system, and you must report on every part of your supply chain, from cultivation to sale. In order to operate in New York compliantly, you must report to the Biotrack State Traceability System (Biotrack STS) for every step of your operation.

### LABELING REQUIREMENTS

Every cannabis product must be properly labeled with detailed information, including cannabinoid content, batch numbers, and lab test results. This step can be automated by using software that pulls lab data and product details, reducing errors and ensuring compliance.

### ONGOING AUDITS AND INSPECTIONS

New York regulators conduct regular audits, making it essential to maintain accurate records of all business activities, from inventory management to financial transactions. Implementing audit tools within your compliance software can save you countless hours during inspections.



**PRO-TIP**

*Build a culture of compliance from the start by training your team on state regulations and implementing regular internal audits to ensure all systems are up to date.*

# 1. COMPLIANCE: NAVIGATING NEW YORK'S REGULATIONS

Compliance is one of the most critical and complex aspects of running a cannabis operation, especially in a highly regulated market like New York. It's essential to understand and adhere to the state's cannabis regulations from day one to avoid costly fines, potential legal issues, or the loss of your license.

In this section, we will dive deep into some of the major compliance requirements in New York, including Biotrack integration, labeling requirements, and how to prepare for ongoing audits and inspections.

*Pro Tip: Build a culture of compliance from the start by training your team on state regulations and implementing regular internal audits to ensure all systems are up to date.*

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## Track-and-Trace System: Biotrack

New York uses Biotrack as its official track-and-trace system for the cannabis industry. This software is designed to ensure transparency and accountability by tracking every movement of cannabis products from seed to sale. If you're operating in cultivation, processing, or distribution, you must use Biotrack to report every step of your operation.

## Why Biotrack Matters

Biotrack allows the state to monitor cannabis supply chains and ensure that all cannabis products are legally cultivated, processed, and sold. It tracks vital data points such as:

- Seed planting
- Growth and nutrient application
- Harvesting and drying
- Packaging and labeling
- Wholesale distribution or retail sales

## How Biotrack Works

BioTrack's seed-to-sale platform enables New York's Office of Cannabis Management (OCM) to oversee the entire cannabis supply chain, from cultivation to final sale. This comprehensive tracking system ensures transparency, compliance, and accountability throughout the industry.

To standardize compliance reporting, all licensed cannabis operators in New York must utilize an Inventory Tracking System that seamlessly communicates with BioTrack's state traceability system. This integration allows for the automatic submission of required data, enabling businesses to remain compliant with state regulations.

## Who Needs an Inventory Tracking System?

The following cannabis businesses in New York are required to use an Inventory Tracking System that syncs with BioTrack:

- **Growers** – From planting to harvesting, track every stage of cultivation.
- **Sole Proprietors** – Ensure compliance at every step of the business.
- **Packagers** – Manage product packaging, labeling, and compliance data.
- **Retail Establishments** – Maintain accurate point-of-sale records and inventory counts.
- **Distributors & Transporters** – Track product movement through the supply chain.
- **Labs** – Record test results and quality assurance details.

## Choosing Software That Integrates with Biotrack

Choosing a [seed-to-sale platform like Flourish Software](#) that seamlessly integrates with Biotrack is critical to avoiding OCM violations and ensuring your data is always accurate. This third-party integration allows you to focus on your business without constantly worrying about staying compliant.

**Pro Tip:** Make sure your entire team is trained on how to use Biotrack, and consider using software that automatically syncs all compliance data to avoid mistakes.

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## Labeling Requirements: Ensuring Compliance

Cannabis product labeling in New York is a highly regulated process that ensures consumer safety and product transparency. The state mandates strict guidelines for the type and amount of information that must appear on every label, making it critical to get your labeling process right from the start.

### What Must Be Included on Your Labels

- **Product Information:** Product name, strain, and type (e.g., flower, extract)
- **Cannabinoid Content:** Total THC, CBD, and other cannabinoids by percentage or milligram per gram
- **Batch Number:** To trace back to the specific cultivation and production processes
- **Testing Results:** Lab results confirming product safety, free of contaminants, and cannabinoid content
- **Production Date:** To ensure product freshness
- **Compliance Warnings:** Any specific warnings required by law, such as “For Medical Use Only” or “Keep Out of Reach of Children”

Package ID	1A409990000A117000012962		
SKU Name	F-AC-3.5G		
Strain	Alien Cookies		
Size	3.5g		
Package Date	08/23/2023		
Lot Number	F-AC-301		
THC %	27.06	Myrcene %	1.13
CBD %	0.06	Terpeneol %	0.87
THCA %	31.46	Limonene %	0.86
Total THC mg Per Package	65.63 mg/package		



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### Automating Labeling

Many cannabis businesses spend hours manually entering labeling information into label designers, increasing the chance of mistakes. For example, manually typing out total THC or cannabinoid percentages for each batch leads to inevitable errors that can result in a product recall or rejection by retailers.

Using a software platform that automatically pulls lab results and product data directly into your labels can save hours of work and prevent costly errors. Flourish’s labeling feature integrates with lab results, ensuring that all compliance and batch information is automatically generated and printed on each label, with no room for manual errors.

**Pro Tip: Automating your labeling not only saves time but reduces the risk of compliance mistakes. If a product is mislabeled and does not meet state requirements, it can result in penalties, rejected orders, and reputational damage.**

## Ongoing Audits and Inspections

In New York, cannabis businesses are subject to regular audits and inspections from state regulators. Preparing for these audits ahead of time is essential to avoid penalties or delays in business operations.

## What to Expect in an Audit

Auditors will examine your entire operation, including:

- **Inventory Records:** Tracking inventory across all stages of production
- **Financial Transactions:** Ensuring all revenue and expenses are reported accurately
- **Compliance Data:** Verifying that you're logging every action (cultivation, processing, sales) in Biotrack
- **Employee Records:** Ensuring staff are properly trained and compliant with state laws



Daily Inventory Snapshot														
Snapshot Date	Area Name	Location	Inventory Type	Item Category	Brand Name	Strain Name	Item Name	SKU	Package Id	Lot Number	Original Qty	Qty	Is Sample	Is
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-041	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-023	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-022	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-021	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-020	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-019	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-018	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-017	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-016	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-015	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-014	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-013	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-012	null	12	12	False	
11/17/2024	Store Room	Shelf 1	Cannabis	Pre-Rolls	null	Blue Dream	Blue Dream P...	1.3.33.82.0	CADEMMN-20190131-011	null	12	12	False	
11/17/2024	Store Room	Shelf 2	Cannabis	Edibles (each)	Baked Bros	Lemon Haze	Kids These H...	1.6.22.73.0	CADEMMN-20190124-010	2021.07.14 L...	10	10	False	
11/17/2024	null	null	Cannabis	Bulk Concentrate	null	Blue Dream	CBD Dominat...	1.1.1.68.0	CADEMMN-20190124-004	null	4000	3995	False	
11/17/2024	Store Room	Shelf 2	Cannabis	Combined Cate...	null	Blue Dream	Infused Pre R...	1.7.25.143.0	CADEMMN-20190122-002	null	10	10	False	
11/17/2024	Store Room	Shelf 2	Cannabis	Combined Cate...	null	Blue Dream	Infused Pre R...	1.7.25.143.0	CADEMMN-20190122-001	null	10	9	False	
11/17/2024	Store Room	null	Cannabis	Bulk Extracts	Earth's Extracts	Do Si Dos	Crude Oil Ext...	1.1.3.81.0	CADEMMN-20190121-002	batch 123	300	300	False	

## Preparing for an Audit

Maintaining accurate, real-time records in your software system is key to passing an audit. Platforms like Flourish, which integrates inventory management, sales, and compliance data, allow you to run comprehensive reports that provide a full snapshot of your business operations. These reports can be generated on demand, making audits less stressful and more transparent.

## Inventory Snapshots

One valuable feature is the ability to capture inventory snapshots, which provide a record of your inventory at a specific point in time. If discrepancies arise, these snapshots allow you to track changes in real time and quickly identify where things went wrong.

**Pro Tip:** Regularly audit your own inventory and compliance processes before the state does. Internal audits not only prepare you for inspections but also help you catch any mistakes early and prevent compliance issues down the line.

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## Summary of Compliance Best Practices for New York Operators

By staying on top of New York's compliance requirements, you'll build a strong foundation for success. Compliance may seem like a burden, but choosing a third-party seed-to-sale inventory management software that integrates with the BioTrack New York State Tracking System can streamline your operations, helping you avoid costly mistakes and protect your business from penalties.

In the next section, we'll dive into building your tech stack to make sure you have the right tools to support these compliance efforts, as well as the other critical areas of your business. Stay tuned!



# BUILDING YOUR TECH STACK: SOFTWARE AND HARDWARE

# 2



## SEED-TO-SALE SOFTWARE

Ensure that your software integrates your entire operation in one place, from cultivation and processing to inventory management, packaging, and sales. Flourish, for example, integrates seamlessly with Biotrack, QuickBooks, and other platforms, reducing manual data entry and minimizing errors.

## HARDWARE

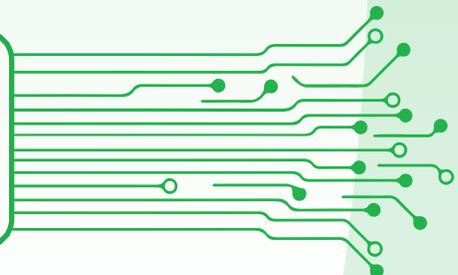
Don't forget the tools needed to support your software systems. Invest in reliable scanners, label printers, and scales that can integrate with your software for smooth operations.

## SECURITY SYSTEMS

New York regulations require cannabis operators to implement robust physical and digital security systems, including video surveillance and restricted access controls. Choose hardware that integrates seamlessly with your software to track and document security incidents in compliance with state law.

### PRO-TIP

Choose software with open APIs, so your tech stack can grow as your business scales, allowing you to integrate new platforms like accounting and CRM systems as needed.



## 2. TECH STACK: CHOOSING THE RIGHT TOOLS FOR YOUR CANNABIS OPERATION

Selecting the right technology stack is one of the most crucial steps in setting up a cannabis business in New York. Given the complexity of the cannabis industry—with stringent regulations, tracking requirements, and operational challenges—having the right software and hardware in place can streamline your processes, improve efficiency, and ensure compliance. Let's dive into the key elements of your tech stack and why each is important.

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### 1. Seed-to-Sale Software: Keeping Your Operation Compliant

[Seed-to-sale systems](#) are at the core of any cannabis operation. These systems track your plants from cultivation through harvesting, processing, packaging, and distribution. They also help you manage compliance with New York's state-mandated traceability requirements using the Biotrack system. A robust seed-to-sale platform like Flourish ensures your operation is fully integrated and compliant, with real-time updates to state systems.

#### Benefits

- Automated compliance reporting to Biotrace STS
  - Real-time inventory management and tracking
  - Integration with cultivation, processing, and sales
  - Elimination of manual data entry and reduction of errors
- 

### 2. Selecting the Right Financial Software

Accurate financial management is critical for the long-term success of any cannabis business. The cannabis industry's unique tax regulations (such as 280E) make it essential to have financial software that can handle complex accounting processes and compliance requirements. [QuickBooks Online \(QBO\)](#) is one of the more popular choices for cannabis operators, and integrating it with your seed-

to-sale system like Flourish can streamline your financial workflows. Having this integration will allow you to sync inventory, sales orders, and purchase orders seamlessly to your accounting system, ensuring accurate reporting and reducing the risk of discrepancies.

### Benefits

- Track cost of goods sold (COGS) for both cannabis and non-cannabis products
- Automate invoices, sales orders, and purchase orders
- Provide financial reports for tax planning and compliance
- Reduce manual bookkeeping and errors in financial reporting

**Pro Tip:** Consider choosing a financial software solution that can scale with your business and offers cannabis-specific features to help you stay compliant with federal and state regulations.

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## 3. Selecting a CRM for Larger Sales Teams

If you have a larger sales team or work with multiple retailers, having a dedicated Customer Relationship Management (CRM) system can greatly enhance the efficiency of your sales process. A CRM helps keep track of customer interactions, orders, and relationships all in one place. This is especially important for cannabis businesses dealing with multiple retailers, distributors, and wholesalers. Integrating a CRM with your seed-to-sale platform can help streamline order management and customer communication.

### Benefits

- Centralized customer management for larger sales teams
- Track sales pipelines, orders, and communications
- Automate follow-ups, orders, and renewals
- Improve visibility and accountability within the sales team

**Pro Tip:** Consider choosing a financial software solution that can scale with your business and offers cannabis-specific features to help you stay compliant with federal and state regulations.

#### 4. E-Commerce Menu and Marketplaces: Streamlining Your Sales Process

In today's market, an online presence is essential for any cannabis business. Offering an [e-commerce menu](#) or partnering with a [cannabis marketplace](#) can help streamline the sales process, increase your reach, and ensure a better customer experience. Whether you're selling wholesale to retailers or direct-to-consumer (if permitted), integrating an e-commerce solution with your seed-to-sale platform will make tracking orders, managing inventory, and fulfilling orders much more efficient.

##### Benefits

- Real-time synchronization of inventory and orders
- Allow customers to place orders directly through your e-commerce site
- Simplify order tracking and fulfillment for your team
- Integrate with popular marketplaces to expand reach

**Pro Tip:** Make sure your e-commerce platform integrates with your seed-to-sale and CRM systems. This way, your inventory, orders, and customer data are always up-to-date, reducing errors and saving time.

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#### 5. Security Systems: Keeping Your Business Safe and Compliant

New York has specific security requirements for cannabis businesses, including cameras, alarms, and access controls. A robust security system not only ensures compliance with state laws but also protects your business from theft and liability. Choose a security provider who understands the unique needs of the cannabis industry and can set up a system tailored to your facility's requirements.



## Benefits

- Ensure compliance with New York state security requirements
- Protect your inventory, employees, and customers
- Reduce liability and prevent theft or tampering
- Monitor your facility remotely with real-time alerts and reporting

**Pro Tip:** Partner with a security company that has experience working with cannabis businesses to ensure that all your bases are covered when it comes to compliance and safety.

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## 6. Hardware: Scanners, Printers, and Other Devices

Aside from software, the [hardware you choose](#) can significantly impact the efficiency of your operation. From scanners that track inventory to label printers for compliant packaging, investing in the right hardware is essential to ensuring your business runs smoothly.

### Hardware Essentials

- **Barcode Scanners:** Streamline inventory tracking and transfers with handheld or stationary barcode scanners.
- **Label Printers:** Ensure compliance by printing on-demand labels with strain, batch, and lab test information.
- **Security Cameras:** Keep your facility secure and compliant with real-time monitoring.

**Pro Tip:** Ensure that your hardware integrates seamlessly with your seed-to-sale software for a fully connected and automated workflow.

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By choosing the right tech stack, you'll create a foundation for success that allows your cannabis business to grow, remain compliant, and streamline operations across the board. In the next section, we'll look at Developing Standard Operating Procedures (SOPs) to ensure consistency and efficiency in your business operations.

# ESTABLISHING OPERATIONS: KEY CONSIDERATIONS

## INVENTORY MANAGEMENT

Inventory tracking in cannabis is highly regulated. Use software that can track real-time inventory, manage batch numbers, and forecast supply needs to prevent shortages or overstock. compliance with state law.

## FACILITY LAYOUT AND WORKFLOW

From cultivation to distribution, every area of your operation should be designed with efficiency and compliance in mind. For cultivation, ensure your grow rooms are optimized for airflow, light distribution, and cleanliness. For production and packaging, streamline workflows to ensure that materials move efficiently through each stage of production.

## PRODUCTION MANAGEMENT

Utilize software to track production runs, log waste, and manage materials. An integrated system can also help you forecast demand and adjust your operations accordingly.



### PRO-TIP

*Build in scalability by anticipating future growth, such as adding more grow rooms or increasing production capacity, without overcomplicating your current setup.*



# 3. ESTABLISHING OPERATIONS: BEST PRACTICES FOR CANNABIS BUSINESSES IN NEW YORK

Once your tech stack is in place, the next crucial step for any cannabis operator is establishing efficient and compliant operations. A well-planned operational setup ensures smooth day-to-day functioning, minimizes waste, and helps you meet regulatory requirements. In this section, we'll cover how to design your facility layout, establish workflows, and manage production processes to create a strong operational foundation for your cannabis business.

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## 1. Facility Layout: Designing for Efficiency and Compliance

The layout of your cannabis facility directly impacts how efficiently your business operates. Whether you're involved in cultivation, manufacturing, or distribution, creating a smart facility design can save time, reduce costs, and ensure that you meet New York's compliance requirements.

### Key Considerations for Facility Design:

- **Flow of Operations:** Plan your facility layout to reflect the flow of your operation. For example, in a cultivation facility, the plants should move logically from room to room (e.g., from germination to vegetative to flowering), and the tools and resources for each phase should be nearby. This minimizes unnecessary movement and helps employees work efficiently. Real-time inventory management and tracking
- **Space for Compliance Requirements:** Allocate sufficient space for compliance-related tasks, such as secure storage for cannabis inventory, a designated quarantine area for non-compliant products, and a compliant waste disposal system. Make sure all critical areas are covered by security cameras as required by state law.
- **Environmental Controls:** In cultivation, controlling environmental factors like temperature, humidity, and air circulation is essential for ensuring healthy plant growth and consistent yields. Ensure that your layout supports proper ventilation and provides space for equipment like dehumidifiers, fans, and HVAC systems.

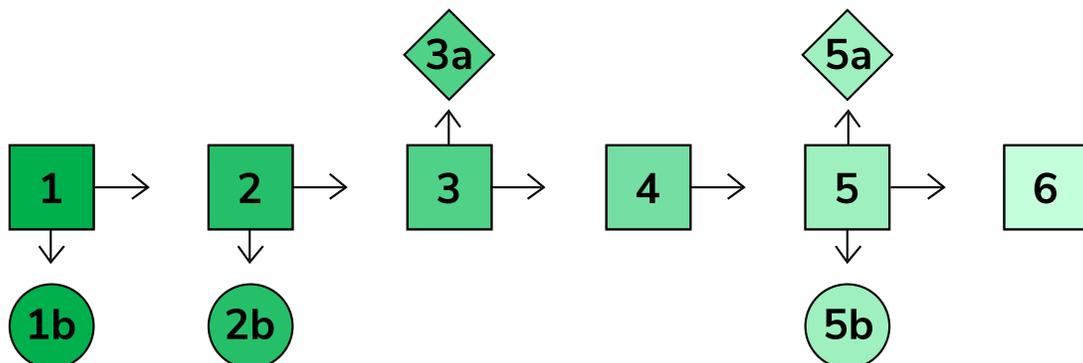
Pro Tip: Working with a professional cannabis facility designer can help you optimize your layout for efficiency, workflow, and regulatory compliance. Additionally, choose a seed-to-sale software platform like Flourish that can map out your facility's rooms and track the movement of inventory between them.

## 2. Workflow Management: Streamlining Daily Operations

Efficient workflows are essential for cannabis businesses that want to scale. Whether you're handling plants, processing products, or managing inventory, setting up clear workflows ensures that tasks are completed on time and according to regulatory requirements.

### Steps for Setting Up Efficient Workflows:

- **Document Standard Operating Procedures (SOPs):** SOPs are the foundation of a well-organized operation. They outline how each task should be performed, from plant care in cultivation to packaging and labeling in manufacturing. Make sure your SOPs are easy to follow, ensure compliance, and reflect your day-to-day business practices.
- **Automation and Integration:** Leverage your seed-to-sale software to automate key parts of your operation. For example, Flourish allows you to create and manage production runs, track the progress of each batch, and ensure compliance with real-time data updates to Biotrack. This minimizes the need for manual data entry, reduces errors, and helps you scale more efficiently.
- **Assign Roles and Responsibilities:** Ensure that each team member knows their role and has the tools they need to succeed. For example, cultivation teams should know when and how to harvest plants, while production teams should have clear guidelines for processing and packaging.



Pro-Tip: Set up daily, weekly, and monthly workflows that include recurring tasks such as inventory counts, equipment maintenance, and employee training. Build these into your software system so that reminders and alerts keep your team on track.

### 3. Production Processes: Ensuring Quality and Compliance

Cannabis manufacturing is a highly regulated process that involves transforming raw materials (cannabis plants) into consumable products (edibles, extracts, tinctures, etc.). In New York, it's essential that your production processes are standardized to ensure product consistency, meet regulatory requirements, and avoid compliance issues.



## Key Considerations for Cannabis Production:

- **Standardize Production Runs:** Every batch you produce should follow a standardized production run to ensure consistency across products. Use your seed-to-sale software to set up production runs with detailed instructions for processing raw materials, adding ingredients, and packaging products. This ensures that each product meets your quality standards and is compliant with state regulations.
- **Track Work-In Progress (WIP):** Monitor your production runs from start to finish by tracking work-in-progress items. Software like Flourish lets you track multiple inputs (cannabis and non-cannabis materials) and outputs, record compliance data (e.g., testing, lot numbers), and calculate your full cost of goods sold (COGS). This helps ensure that each product is traceable and compliant from seed to sale.
- **Lab Testing and Compliance:** New York regulations require all cannabis products to undergo testing for contaminants and cannabinoid levels. Build lab testing into your production process to ensure that every batch is tested before packaging. Automate the entry of lab results into your labels and compliance system to avoid manual entry errors.

**Pro-Tip:** Regularly audit your production processes to ensure that all team members follow SOPs and that every batch meets quality standards. This not only ensures compliance but also maintains product consistency and customer satisfaction.

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## 4. Inventory Management: Keeping Stock in Check

Managing inventory is one of the most important aspects of running a cannabis business. Whether you're dealing with raw materials, finished goods, or packaging supplies, keeping track of your stock ensures that you can meet demand and avoid costly overages or shortages.

### Best Practices for Inventory Management

- **Real-Time Inventory Tracking:** Use your seed-to-sale software to track your inventory in real time. This ensures that you always know exactly what you have on hand, whether it's plants in the cultivation phase, extracts in production, or finished products ready for sale. Integrated systems

like Flourish allow you to track cannabis and non-cannabis inventory, streamlining compliance and minimizing manual updates.

- **Reorder Points:** Set up reorder points for critical supplies, such as nutrients, packaging materials, and cannabis inputs. Your software can automatically alert you when stock is running low, ensuring that you never run out of essential items during a production run or sale.
- **Auditing Inventory:** Regular inventory audits help prevent shrinkage and ensure that your records match the physical inventory. Conduct weekly or monthly audits and use your software's reporting features to track inventory discrepancies and make adjustments.

**Pro Tip:** Build inventory counts and audits into your team's daily workflow to ensure accuracy. Flourish allows you to run real-time inventory reports that provide a snapshot of your current stock, helping you identify discrepancies before they become a problem.

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## Summary: The Key to Operational Success

Setting up efficient, compliant operations is the cornerstone of a successful cannabis business. By designing your facility layout for efficiency, establishing clear workflows, standardizing production processes, and maintaining accurate inventory records, you'll set your cannabis operation up for long-term success.

With the right tools—such as seed-to-sale software like Flourish—you can automate your workflows, integrate compliance, and ensure product consistency, giving you a competitive edge in New York's rapidly growing cannabis market.

In the next section, we'll cover how to hire the right people and build a team that supports your business goals and operational needs.

# HIRING AND BUILDING YOUR TEAM

## KEY ROLES

Identify the essential roles needed to support your operations, including cultivators, production managers, compliance officers, and sales staff. Make sure you're hiring individuals who understand the cannabis industry and its specific regulatory challenges.

## TRAINING

Ensure your team is fully trained on SOPs and compliance regulations. Flourish, for example, offers comprehensive training resources to help onboard employees quickly and effectively.

## ONBOARDING

Streamline the onboarding process by providing standardized training materials and access to tech platforms like your seed-to-sale software. This reduces the learning curve and ensures consistency across your team.

### PRO-TIP

*Create a strong company culture that promotes compliance, collaboration, and innovation. A positive work environment leads to higher employee retention and productivity.*



# 4. HIRING THE RIGHT PEOPLE: BUILDING A STRONG CANNABIS TEAM

As your cannabis business takes shape in New York, hiring the right people becomes a critical component of your success. The cannabis industry requires a unique blend of skills, from cultivation expertise to compliance management, production know-how, and customer service excellence. In this section, we'll explore how to build a team that aligns with your operational goals and meets the regulatory demands of the New York market.

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## 1. Identifying Key Roles for Your Operation

The specific roles you'll need depend on the type of cannabis license you hold and the scale of your operation. Whether you're cultivating, processing, distributing, or retailing, there are key roles every cannabis business needs to fill.

### Key Roles in a Cannabis Business:

- **Master Grower:** If you're in cultivation, the master grower is responsible for the health and yield of your plants. This role involves managing the entire grow operation, from germination to harvest, ensuring that each plant is nurtured under the correct conditions.
- **Production Manager:** In a manufacturing setting, the production manager oversees all aspects of product transformation, ensuring consistency across batches and compliance with New York's processing regulations.
- **Compliance Officer:** Compliance is critical in the cannabis industry. A dedicated compliance officer ensures that your business adheres to all state regulations, manages reporting to Biotrack, and implements best practices for record-keeping, security, and packaging.

- **Inventory Specialist:** In charge of managing your stock levels, the inventory specialist ensures that your product counts are accurate and that all inventory data is entered correctly into your seed-to-sale software. This role is vital for maintaining compliance with state regulations and optimizing operations.
- **Sales and Marketing:** If you're selling products either wholesale or retail, you need a strong sales and marketing team that understands both the regulatory landscape and the competitive cannabis market. This team will build relationships with retailers, create promotional campaigns, and ensure that your products reach the right audience.

**Pro Tip:** Even in a small operation, it's important to ensure that key roles—especially compliance and inventory—are filled by individuals who understand the regulatory complexities of New York's cannabis industry.

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## 2. What to Look for When Hiring in Cannabis

Hiring for the cannabis industry requires more than just finding people with the right skills—it requires finding team members who are adaptable, compliance-oriented, and passionate about the industry.

### Attributes to Look for in Potential Hires:

- **Experience in Regulated Industries:** While direct cannabis experience is valuable, people with experience in other highly regulated industries (like pharmaceuticals, food production, or alcohol) can also bring valuable insights into compliance and process management.
- **Tech-Savvy:** Given that cannabis operators rely heavily on software systems to track compliance, inventory, and sales, it's essential to hire employees who are comfortable using technology. They should be quick to learn new systems and able to navigate software with ease.
- **Problem-Solving Skills:** The cannabis industry is rapidly evolving, and businesses need to stay agile to respond to changes in regulations, market demand, and technology. Hire people who can think on their feet, troubleshoot operational issues, and suggest improvements to workflows.

- **Team Players:** The cannabis industry requires seamless collaboration between different departments—cultivation, production, sales, and compliance. Look for candidates who can work well in teams and are willing to contribute to multiple areas of the business

**Pro Tip:** Focus on candidates who are excited about the growth potential of the cannabis industry. Employees who are passionate about cannabis and its future will be more likely to stay engaged and motivated as your business scales.

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### 3. Training and Onboarding: Ensuring Success from Day One

Once you've hired the right people, setting up a strong training and onboarding program is essential for ensuring that they can hit the ground running. Effective onboarding not only helps new employees understand your business processes but also ensures that they're aligned with your compliance protocols and SOPs.

#### Best Practices for Onboarding Cannabis Employees:

- **Provide Comprehensive Compliance Training:** Every employee in your cannabis operation should understand New York's cannabis regulations, from cultivation guidelines to product labeling and packaging requirements. Training should cover how to use your seed-to-sale software to ensure compliance with Biotrack, along with specific responsibilities related to their role.



- **Hands-On Software Training:** Ensure that all employees are comfortable using your seed-to-sale software from day one. Provide them with hands-on training sessions, walk them through key workflows (like inventory management, cultivation tracking, or production runs), and offer resources like video tutorials or a training hub for ongoing learning.
- **Assign a Mentor or Buddy:** Pair new employees with a seasoned team member who can guide them through the first few weeks on the job. This mentor-ship approach helps them get acclimated faster and provides a go-to person for any questions or challenges that arise.

**Pro Tip:** Focus on candidates who are excited about the growth potential of the cannabis industry. Employees who are passionate about cannabis and its future will be more likely to stay engaged and motivated as your business scales.

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#### 4. Employee Retention: Building a Strong Company Culture

Hiring the right people is just the first step—keeping them is equally important. The cannabis industry is competitive, and employee turnover can be costly, especially when it involves retraining new hires. Building a strong company culture that fosters engagement, growth, and a sense of purpose is key to employee retention.

##### Tips for Improving Employee Retention:

- **Create a Positive Work Environment:** Foster a work environment where employees feel valued and supported. This can include offering competitive pay, benefits, and opportunities for advancement within the company.
- **Provide Opportunities for Professional Development:** The cannabis industry is constantly evolving, and employees need to keep up with the latest regulations, technologies, and best practices. Offer ongoing training opportunities, encourage attendance at industry events, and create pathways for career growth within your organization.
- **Recognize and Reward Contributions:** Recognize employees who go above and beyond, whether through performance bonuses, public acknowledgment, or career advancement. By recognizing and rewarding their efforts, you show that you value their contribution to the company's success.

Pro Tip: Establish regular check-ins with employees to gather feedback and understand their concerns. Creating an open line of communication helps identify potential issues before they escalate and provides opportunities to improve the workplace culture.

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## Summary: Building a Cannabis Dream Team

Hiring the right people is one of the most important factors in the success of your cannabis business. From identifying key roles to setting up effective onboarding and training programs, your team's performance will directly impact your company's ability to remain compliant, efficient, and competitive.

As New York's cannabis market continues to grow, building a strong, motivated team will position your business for long-term success. Remember, your people are your most valuable asset—invest in them, train them well, and create a work environment where they can thrive.



# DEVELOPING STANDARD OPERATING PROCEDURES (SOPS)

## WHY SOPs MATTER

Standardizing your processes ensures that you meet regulatory requirements, avoid costly errors, and create a replicable workflow across different teams or facilities

## CREATING SOPs

Establish SOPs for critical tasks such as cultivation, processing, inventory tracking, labeling, packaging, and sales. Flourish provides templates and examples of SOPs that can be customized for your specific operations.

**PRO-TIP**

Review and update your SOPs regularly to ensure they remain in line with evolving regulations and your growing business needs.



# 5. DEVELOPING STANDARD OPERATING PROCEDURES (SOPS)

Standard Operating Procedures (SOPs) are the backbone of a well-organized, compliant, and efficient cannabis operation. These step-by-step instructions provide your team with a clear framework for completing every task in your business. SOPs not only create consistency but also ensure compliance with New York's stringent regulations, prevent costly errors, and streamline workflows across different departments and facilities.

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## Why SOPs Matter

### 1. Compliance Assurance

[New York's cannabis regulations](#) require precise documentation of every process, from cultivation to labeling and sales. SOPs help your team adhere to these guidelines, ensuring that your business remains compliant with all legal requirements.

SOPs create a documented trail that is invaluable during audits and inspections, showing regulators that your business is organized and committed to following the law.

### 2. Consistency Across Teams

SOPs standardize workflows, ensuring that every team member performs tasks in the same manner. This reduces variability and improves the quality of your products and services.

They ensure that even new hires or temporary staff can quickly adapt to your processes without compromising productivity or compliance

### 3. Error Reduction

By following SOPs, your team minimizes the risk of errors that could lead to regulatory violations, wasted materials, or damaged products. For instance, detailed SOPs for inventory management can prevent discrepancies that might lead to compliance issues.

#### 4. Scalability and Growth

As your business grows, SOPs act as a scalable foundation that allows you to replicate successful processes across new facilities or teams. This is especially crucial in the fast-evolving New York cannabis market.

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### How to Create Effective SOPs

Developing SOPs may seem daunting, but breaking it down into manageable steps can make the process straightforward and effective.

#### 1. Identify Critical Processes

Start by identifying the processes that are most crucial to your operation, particularly those that directly impact compliance, product quality, or efficiency.

Key areas to focus on include:

- **Cultivation:** Document the steps for planting, watering, nutrient application, pest control, harvesting, and curing.
- **Processing:** Outline processes for extraction, infusions, and packaging, ensuring each stage complies with New York's regulations.
- **Inventory Tracking:** Detail how inventory is received, stored, moved, and reconciled to avoid discrepancies and meet Biotrack requirements.
- **Labeling:** Provide instructions for creating compliant labels, including cannabinoid content, batch numbers, and lab test results.
- **Sales:** Define workflows for order fulfillment, manifest creation, and delivery tracking to ensure accurate and timely transactions.

#### 2. Involve Your Team

Your team members are the ones who will use the SOPs daily, so their input is invaluable.

Involve employees from different departments to:

- Identify bottlenecks or inefficiencies in current workflows.
- Ensure the instructions are practical and align with day-to-day operations.
- Gain buy-in from staff, increasing the likelihood that they will follow the SOPs consistently.

### **3. Use Clear and Concise Language**

SOPs should be easy to understand, even for new hires or team members with limited experience. Avoid technical jargon unless necessary, and use simple, straightforward language to describe each step.

### **4. Create Visual Aids**

Where possible, include diagrams, flowcharts, or images to clarify instructions.

For example:

- A diagram showing the layout of your cultivation facility can guide employees on plant placement and movement.
- A flowchart of the labeling process can help staff understand the sequence of steps required for compliance.

### **5. Leverage Technology**

Platforms like Flourish provide templates and tools to simplify SOP creation. Using software ensures that your SOPs are well-organized, accessible, and easy to update.

With Flourish, you can:

- Customize templates for tasks such as inventory tracking or production runs.
- Digitally distribute SOPs to your team, ensuring everyone has access to the latest version.

### **6. Test and Refine**

Before rolling out new SOPs, test them with a small group of employees to identify any gaps or issues. Use their feedback to refine the instructions, ensuring they are accurate and practical.

### **7. Train Your Team**

Provide thorough training on new SOPs to ensure that all employees understand their roles and responsibilities. Consider creating a training schedule or hosting workshops to review the procedures in detail.



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## Maintaining and Updating SOPs

As your business grows and regulations evolve, your SOPs must adapt to stay relevant. Regular reviews and updates are essential to ensure they remain effective and compliant.

### 1. Schedule Regular Reviews

- Set a schedule to review your SOPs, such as quarterly or annually, depending on the complexity of your operations.
- During reviews, check for any regulatory changes or operational updates that may require adjustments.

### 2. Monitor Performance

- Use key performance indicators (KPIs) to assess how well your SOPs are working. For example, track error rates, compliance issues, or employee feedback to identify areas for improvement.

### 3. Incorporate Feedback

- Encourage your team to provide feedback on SOPs. They may identify steps that are unclear, redundant, or impractical, which can then be addressed in the next update.

#### **4. Communicate Changes**

- Whenever you update an SOP, communicate the changes clearly to your team. Provide training or refresher sessions to ensure everyone is aligned with the new procedures.
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### **Examples of SOPs for Cannabis Businesses**

Here are a few examples of SOPs that cannabis operators in New York should develop:

#### **1. Cultivation SOP**

- Step-by-step guide for germination, vegetative growth, flowering, and harvesting.
- Procedures for pest management, nutrient schedules, and environmental controls.

#### **2. Packaging and Labeling SOP**

- Instructions for creating labels that meet New York's compliance requirements.
- Steps for packaging products, including child-resistant and tamper-evident features.

#### **3. Inventory Reconciliation SOP**

- Procedures for conducting weekly or monthly inventory audits.
- Guidelines for resolving discrepancies and reporting to Biotrack.

#### **4. Sales and Order Fulfillment SOP**

- Workflow for processing sales orders, creating manifests, and coordinating deliveries.
- Steps for managing customer inquiries and returns.

#### **5. Compliance Audit SOP**

- Checklist for preparing for state inspections, including document reviews and facility walkthroughs.
- Steps for ensuring all records are up-to-date and readily accessible.

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## Pro Tips for Effective SOPs

Here are a few examples of SOPs that cannabis operators in New York should develop:

**Digitize Your SOPs:** Use software like Flourish to store and share SOPs digitally, making them accessible to all team members at any time.

**Focus on Compliance:** Prioritize SOPs that directly impact regulatory compliance to minimize risk.

**Promote Accountability:** Assign specific roles and responsibilities within each SOP to ensure clarity and accountability.

**Keep It Simple:** Avoid overcomplicating your SOPs. Focus on providing clear, actionable steps that employees can easily follow.

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Developing and maintaining comprehensive SOPs is not just a regulatory requirement—it's a strategic investment in your cannabis business's efficiency, consistency, and long-term success. By standardizing your processes and providing your team with clear instructions, you'll reduce errors, improve productivity, and ensure compliance with New York's cannabis regulations. By leveraging tools like Flourish to streamline SOP creation and updates, you'll build a solid operational foundation that supports your business's growth and scalability in the ever-evolving cannabis industry.

# FINDING AND WORKING WITH THE RIGHT SUPPLIERS

## SELECTING SUPPLIERS

Look for suppliers with proven track records in the cannabis industry. Ensure that they can meet your compliance and quality standards.

## NEGOTIATING TERMS

Establish SOPs for critical tasks such as cultivation, processing, inventory tracking, labeling, packaging, and sales. Flourish provides templates and examples of SOPs that can be customized for your specific operations.

## SUPPLIER MANAGEMENT

Use software to track supplier performance, delivery times, and quality to ensure that you're consistently receiving the best possible products.

**PRO-TIP**

*Establish backup suppliers in case your primary sources experience delays or shortages.*



# 6. FINDING AND WORKING WITH THE RIGHT SUPPLIERS: BUILDING STRONG PARTNERSHIPS IN THE CANNABIS INDUSTRY

One of the most critical aspects of operating a successful cannabis business is establishing strong relationships with reliable suppliers. Whether you are sourcing seeds, growing mediums, nutrients, packaging materials, or hardware for cultivation and processing, working with the right suppliers ensures that your operations run smoothly and consistently. In New York's highly regulated cannabis industry, choosing the right suppliers can also significantly impact compliance, quality control, and operational costs.

In this section, we'll explore the key factors to consider when finding and working with suppliers, how to establish beneficial partnerships, and the importance of negotiating favorable terms that benefit your cannabis business in the long run.

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## 1. Identifying Key Suppliers for Your Cannabis Operation

To build a successful cannabis operation, you need reliable suppliers that can provide the materials and services essential to your business. The type of suppliers you need will depend on your specific license and operation, whether you're a cultivator, processor, distributor, or retailer.

### Key Categories of Cannabis Suppliers:

- **Cultivation Supplies:** For cultivators, sourcing high-quality seeds, clones, grow mediums, nutrients, and pesticides is essential to ensuring healthy plants and maximizing yields. You'll also need lighting systems, HVAC equipment, and growing containers. A good relationship with a trusted cultivation supplier can make all the difference in the consistency of your harvests.
- **Processing and Manufacturing Equipment:** If your business involves extracting cannabinoids or producing infused products, you'll need

processing equipment such as extraction systems, commercial ovens, presses, and more. Additionally, packaging suppliers will be critical to ensuring that your products are safely and legally packaged.

- **Packaging and Labeling:** Packaging must meet New York’s strict compliance regulations, including child-resistant features, tamper-evident seals, and proper labeling. Sourcing the right packaging supplier will ensure that you remain compliant and maintain product integrity.
- **Security Systems:** Compliance with state laws requires strict security measures in cannabis facilities. This means investing in cameras, alarm systems, and monitoring equipment to meet New York’s requirements. Finding a supplier who specializes in cannabis security systems will ensure that your business is secure and compliant with local regulations.
- **Lab Testing Services:** In New York, all cannabis products must undergo rigorous testing for potency, contaminants, and pesticides. Establishing a relationship with a licensed third-party testing lab is crucial to ensure your products meet state requirements and can be safely sold in the market.

**Pro Tip:** Establish regular check-ins with employees to gather feedback and understand their concerns. Creating an open line of communication helps identify potential issues before they escalate and provides opportunities to improve the workplace culture.



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## 2. Vetting and Choosing Reliable Cannabis Suppliers

Finding a supplier isn't just about price; [it's about reliability, quality, and compliance](#). In the cannabis industry, where regulation and quality control are critical, it's essential to vet suppliers thoroughly before committing to long-term contracts.

### Steps for Vetting Cannabis Suppliers:

- **Evaluate Supplier Experience:** Work with suppliers who have proven experience in the cannabis industry. Suppliers with industry experience will have a better understanding of your business's unique needs, particularly when it comes to compliance and regulations.
- **Check for Regulatory Compliance:** Ensure that suppliers meet all New York state regulations, especially when sourcing materials like packaging or nutrients. Suppliers should understand New York's cannabis laws and provide materials that meet the required safety and compliance standards.
- **Assess Quality and Consistency:** Ask for product samples or conduct audits of potential suppliers to ensure their products are high quality and consistent. For cultivation and processing, this is particularly important to ensure your plants and products meet the same high standards across every batch.
- **Delivery Times and Reliability:** A delayed delivery can disrupt your production schedule and cost your business money. Make sure the supplier has a track record of timely deliveries and can meet your business's demand. Find out if they can scale up with you as your operation grows.
- **Request References:** Ask for references from other cannabis businesses they work with. Speak to these businesses to get a sense of the supplier's reliability, quality, and customer service.

**Pro Tip:** Create a set of criteria for evaluating potential suppliers, including factors like product quality, compliance, pricing, delivery times, and reputation. This will help you compare suppliers more effectively and make informed decisions.

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### 3. Negotiating Supplier Contracts: Getting the Best Terms

Once you've identified potential suppliers, the next step is negotiating a contract that works for both parties. A good contract outlines expectations, sets pricing, and protects your business from disruptions.

#### Key Considerations for Negotiating Supplier Contracts:

- **Price Breaks for Bulk Orders:** Many suppliers offer discounts for bulk orders or long-term contracts. If your business is growing, consider negotiating bulk purchase agreements that offer price breaks. This helps reduce your per-unit cost and ensures you have a steady supply of essential materials.
- **Flexible Payment Terms:** Negotiate favorable payment terms that match your cash flow cycle. Cannabis businesses often deal with cash-heavy operations, and having flexible payment terms—such as net-30 or net-60—can help manage cash flow more effectively.
- **Guarantees and Warranties:** Ensure the contract includes guarantees on product quality and delivery times. If the supplier's products don't meet your standards or arrive late, you should have recourse, such as refunds or replacements.
- **Termination and Exit Clauses:** Every contract should have clear terms for termination or renegotiation. This protects your business in case the supplier fails to meet expectations or if your business needs change.
- **Scalability:** As your cannabis operation grows, your needs will increase. Ensure that your supplier has the capacity to scale with your business and that your contract reflects this growth potential.

**Pro Tip:** While negotiating, consider building strong, long-term partnerships with your suppliers. A good relationship can result in better pricing, priority service, and more flexible terms down the line.



#### 4. Building Strong Supplier Relationships

Your relationship with suppliers should be more than transactional—it should be a partnership built on trust and mutual benefit. When both parties benefit from the relationship, suppliers are more likely to provide exceptional service, offer better pricing, and go above and beyond to meet your business’s needs.

##### Best Practices for Building Strong Supplier Relationships:

- **Communication is Key:** Keep an open line of communication with your suppliers. Share your production forecasts and communicate any changes in your operational needs. This allows suppliers to plan for your orders and ensures you always have what you need.
- **Provide Feedback:** If something isn’t working, give constructive feedback. Most suppliers want to improve and maintain strong relationships with their clients, and feedback helps them provide better service.

- **Pay On Time:** Timely payments help build trust and goodwill. When suppliers know they can rely on your business, they are more likely to offer favorable terms or prioritize your orders.
- **Plan for the Future Together:** Work with your suppliers to plan for future growth. As you expand your operations, they may be able to provide new services, products, or better pricing to help you scale.

**Pro Tip:** Schedule regular meetings with your key suppliers to review performance, discuss future needs, and explore opportunities for improvement. Building a relationship that goes beyond just placing orders can help secure your supply chain in the long run.

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## 5. Finding Backup Suppliers: Mitigating Supply Chain Risks

Even the best suppliers can face disruptions due to factors beyond their control, such as raw material shortages or regulatory changes. It's essential to have backup suppliers in place to mitigate supply chain risks and ensure that your operations aren't disrupted.

### Why Backup Suppliers Are Essential:

- **Risk Management:** By diversifying your supplier base, you reduce the risk of disruptions. If one supplier has an issue, a backup supplier ensures that you can continue operating without significant delays.
- **Competitive Pricing:** Having multiple suppliers allows you to compare prices and negotiate better terms. This competition ensures that you're getting the best possible deal.
- **Flexibility:** A backup supplier can step in during periods of high demand or if your primary supplier is unable to fulfill an order. This flexibility is essential for scaling your business.

**Pro Tip:** While negotiating, consider building strong, long-term partnerships with your suppliers. A good relationship can result in better pricing, priority service, and more flexible terms down the line.

- **Pay On Time:** Timely payments help build trust and goodwill. When suppliers know they can rely on your business, they are more likely to offer favorable terms or prioritize your orders.
- **Plan for the Future Together:** Work with your suppliers to plan for future growth. As you expand your operations, they may be able to provide new services, products, or better pricing to help you scale.

**Pro Tip:** Schedule regular meetings with your key suppliers to review performance, discuss future needs, and explore opportunities for improvement. Building a relationship that goes beyond just placing orders can help secure your supply chain in the long run.

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## Summary: Building Strong Supplier Relationships for Long-Term Success

Finding and working with reliable suppliers is crucial to the success of your cannabis business in New York. From sourcing quality materials to negotiating favorable terms and building long-term partnerships, the right suppliers help ensure that your operations run smoothly, remain compliant, and stay competitive in the market.

By vetting suppliers thoroughly, negotiating smart contracts, and maintaining strong relationships, you'll establish a solid foundation for your cannabis business's growth. Remember, your suppliers are more than just vendors—they're partners in your success



# CONCLUSION: SETTING YOUR NEW YORK CANNABIS BUSINESS UP FOR SUCCESS

Launching and scaling a cannabis business in New York is no small feat. The complex landscape of regulations, operational hurdles, and competitive pressures can make it challenging to get your footing, but with the right strategies and systems in place, success is within reach.

From building a robust tech stack and working with reliable suppliers to developing detailed Standard Operating Procedures (SOPs) and ensuring compliance with New York's stringent regulations, each piece of your operation is a vital part of the puzzle. By taking the time to establish a solid foundation—one that prioritizes operational efficiency, consistency, and compliance—you'll set your business on a course for long-term growth.

Remember, the cannabis industry is constantly evolving, and businesses that adapt quickly, streamline their operations, and build strong partnerships will be better positioned to thrive. Whether you're still finalizing your licensing or already ramping up operations, staying organized, compliant, and efficient will allow you to scale with confidence.

At Flourish, we understand the unique challenges cannabis operators face, and we're here to help you every step of the way. Our integrated platform brings together inventory management, compliance, cultivation, manufacturing, and sales into one seamless system, allowing you to focus on what matters most—growing your business.

## READY TO TAKE YOUR NEW YORK CANNABIS OPERATION TO THE NEXT LEVEL?

Contact us to schedule a demo and see how Flourish can empower your business for success.

[sales@flourishsoftware.com](mailto:sales@flourishsoftware.com)



# NEW YORK RESOURCES

Below is a list of Flourish's partner networks that can help you effectively set up or scale your operation.

## ICS CONSULTING (SETUP)

- Compliance Programs: ICS can develop, build and implement comprehensive compliance programs for your Cannabis or Hemp business to align with State and Federal requirements.
- Operational Audits: ICS compliance audits are comprehensive and educational. They provide operators with a detailed road map for making the necessary corrective actions, and outline the compliance gaps in order to facilitate at-ease inspections with State and Federal Regulators.
- Fractional Compliance: ICS can act as a part of your compliance department or train the staff in the required compliance functions.
- Culture of Compliance: ICS will show you how to build a Culture of Compliance within your organization that will help you meet your goals and be a leader in compliance.
- Integrated SOPs: ICS will provide the connection between your systems to create an integrated approach to your operating procedures.

### CONTACT

Jenny Germano - President/Founder  
Jenny@icsconsultingservice.com

Alex Hearing - Dir. of Quality & Safety  
Alex@icsconsultingservice.com

## B&B CONSULTATION (SETUP)

Cannabis operations and license company. We have been in the industry along all steps of the supply chain and are former operators, partners, and owners of Cannabis Businesses. Whether you are just starting out and need guidance on applying for a license, writing SOP's and being compliant, or you need another pair of eyes to analyze efficiency, we are here to help.

### CONTACT

Kelly Beaver  
Kelly@BandBConsultation.com

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## MJ STACK (SETUP)

MJstack makes recommendations for any cannabis-specific service that a cannabis operator may need. This includes things like a cannabis-friendly bank, insurance, security, website, SEO, licensing assistance, the entire technology stack, and more. We have partnered with every single cannabis solution in the space over the past 4 years, and can make unbiased recommendations for an operator based on their market's specific regulatory needs, their license type, their growth goals, etc.

### CONTACT

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Brian Mayfield - brian@mjstack.com

## **SAPPHIRE RISK (SECURITY)**

Sapphire Risk guides operators in creating solid security programs. Sapphire Risk writes high-scoring security plans for your license application. During the build-out, we then help you install the right equipment, train your employees, and evaluate your risks once you are operating. Sapphire Risk is the oldest and most successful security consultancy in the cannabis industry.

### **CONTACT**

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## **SIMPLY J (ACCOUNTING)**

A boutique, all-female, firm providing: Advisory, Bookkeeping, Accounting, Internal Controls, and reporting services. Based in Mass. servicing 12 States: MA, RI, VT, ME, NH, NY, NJ, FL, SC, OR, CA, WA. Best for smaller to mid-sized businesses, but can service larger ones too. They service all license types, stages, plant-touching & ancillary.

### **CONTACT**

Jillian Johnson, CEO & Founder  
jillian@simplyj.rocks

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## **FRONTIER RISK (INSURANCE)**

Frontier Risk is the first tech-enabled insurance solution for the cannabis sector and the first dedicated cannabis insurance brokerage staffed by former cannabis executives. Our data-driven, service-first brokerage model provides better risk management solutions than traditional brokers who are still “getting up to speed” on cannabis. The cannabis business is growing rapidly, but it lacks specific insurance and risk

consulting solutions built and implemented by experts who have lived risk throughout the cannabis value chain.

### **CONTACT**

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## **JEFFERY HOFFMAN & ASSOCIATES (LEGAL)**

Our practice focuses on clients in the cannabis industry, including licensees in the adult-use cannabis market, patients and practitioners in the medical cannabis space, and cannabis adjacent product and service providers. Think of us as your Cannabis Consigliere. We have a particular interest in justice involved individuals as well as social and economic equity cannabis license applicants. In this capacity, we aid cannabis prisoners in gaining their freedom and assist those convicted of cannabis offenses in getting such convictions expunged from their record.

### **CONTACT**

Jeffrey Hoffman, Founder  
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## **CANNABIZ COLLECTS (LEGAL)**

The first and leading US-based full-service Collection and Accounts Receivable Agency specializing in the legal cannabis industry. CBC was founded with more than 35 years of collection industry experience alongside former cannabis operators. CBC is uniquely equipped to handle every cannabis-related accounts receivable issue throughout the USA.

### **CONTACT**

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