The Buyer's Guide to Operations Execution Software

A comprehensive resource for restaurant, convenience, and grocery chains to identify the right solution for rolling out system-wide initiatives and ensuring quality execution

Zenput.

Table of Contents

Who should read this buyer's guide?

The aim of this guide is to help you understand what is (and isn't) an operations execution (OpsX) platform, why multi-unit operators are investing in them, and how to evaluate solutions and make the case for prioritizing an OpsX initiative in your organization.

You know this guide is for you if...

YOUR INDUSTRY

• You work for a multi-unit restaurant, convenience store, grocery, or other retail operator that needs to drive consistent procedures and experiences across locations and geographies to increase store performance, meet customer expectations, and protect your brand.

YOUR ORGANIZATION

• You're an emerging brand looking to rapidly expand and carve out a space in the market, *or*

• An established brand trying to compete with many new entrants in the market amidst changing customer expectations, *or*

• A global brand aiming to drive next level consistency and controls, and innovate faster, *or*

• A franchisee trying to scale best practices across all of your stores and be a good steward of the brand(s) you manage as you grow.

YOUR ROLE

- You're a business owner or on the exec team, *or*

- An operations leader or member of the ops team, *or*

- A food safety or QA leader, *or*

- A marketing leader or other department head looking to roll out strategies and initiatives more quickly, and ensure every location is in lockstep with them.

YOUR SITUATION

- You're looking to improve the quality of work execution across an emerging, fast-growing, or scaled organization—and ensure consistently great customer experiences, *and/or*

- You realize the status quo related to the speed at which your organization is able to adapt and change, and the current level of operational visibility and controls is no longer sufficient, *and/or*

- Your organization continues to struggle with the same issues and risks falling behind as competitors and the broader industry moving forward.

Why are operators prioritizing initiatives to improve operations execution (OpsX)?

In recent years, with customer expectations rising and technology creating opportunity and disruption, operators were already feeling pressure mounting to take their operations execution rigor to the next level. But the pandemic has proven to be a tipping point for most operators—maintaining the status quo is now putting the business at potentially catastrophic risk.

Pressures mount against a "status quo" strategy

The struggle for visibility has been a longstanding challenge for operators looking to understand and control the processes happening in each store or restaurant. This has traditionally been addressed by deploying field teams that visit stores at some frequency but the approach still leaves much to chance that all the right tasks are getting done correctly across all the initiatives and standard operating procedures being rolled out. The feedback loop to the home office is slow, often "leaky", and tends to be a lagging indicator of larger issues.

High turnover of store employees makes training and organizational learning and improvement difficult.

Productivity constraints. Employees in stores, the field and HQ are fighting through a lot of manual tasks and processes which leave managers and leaders feeling they barely have enough time and staff to do the things they're already doing. This lack of resource has created inertia and resistance to taking on ambitious new initiatives to drive change.

Technology resistance. For many operators that have made past investments in technology, first impressions may not have been very good. They discount the impact technology can have going forward based on a perception that the up front investment and time required to get to value is too great. There's also anxiety around the IT support they imagine might be needed to make a new software application work for them.

Technology disruption creates new opportunities

In the last half dozen years, a growing pool of innovative operators have been breaking through the status quo, blazing trails and demonstrating that there's a better way.

Technology has been a major enabler for a new set of emerging best practices in the area of operations execution (OpsX), with advances in cloud computing, mobile, and vertical-specific solutions creating new possibilities. The barriers to entry to deploy new technologies have plummeted, putting this new path in reach of all operators, not just the largest or best resourced.
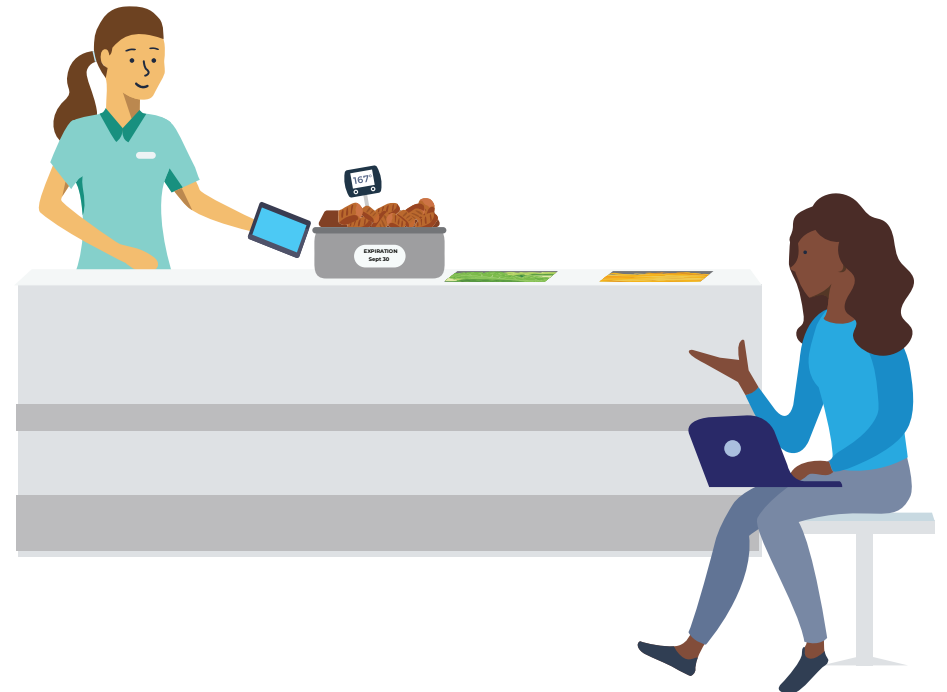
With Millennials and Gen-Z making up an increasing portion of the workforce, there's also pressure to enhance the employee experience by removing barriers to internal processes with next generation tools and apps that are as easy to use and engaging as the ones employees use when not at work. This has more forward-thinking leaders asking themselves, "What can I do to make the lives of my district managers or store managers easier? How do we avoid losing them to another brand just because our process stinks or we're not enabling them with the right tools?"

A growing pool of visionary operations leaders—spanning the domains of restaurant chains, convenience stores, groceries, and other distributed retailers—have embraced technology to break through perceived limits, driving a step function increase in productivity, organizational agility, and controls across the operation.

A key to the success for these operators is how they think about making the budget case for technology, framing these investments as strategic in context of tangible outcomes and measurable ROI. Advances in cloud computing and subscription-based software pricing models have meant much quicker payback (months, not years). And, these leaders are measured on their ability to succeed in these projects, with success leading to promotion and career opportunities.

The tipping point

Setting aside the group of trailblazing operators described above, every restaurant chain, c-store and grocery operator intuitively understands that there is a tight correlation between improved execution and better customer experiences and business performance. As their peers have started demonstrating that technology can be applied to make big gains—essentially reducing the perceived risk of taking on such projects—other operators have started asking themselves, "why wouldn't I do the same?"

And then in the first quarter of 2020 the pandemic hit making it clear that the industry can no longer wait with a range of issues rising to the top.

Safety. The disruptions brought on by COVID-19 put a white high spotlight on employee and customer safety, with most realizing they do not have the processes and infrastructure needed to quickly roll out new safety procedures and strategic initiatives, or have the confidence that every one of their locations is complying. Whereas consumer decisions were previously based largely on product and brand loyalty, safety and cleanliness would be critical to getting customers to return and attracting new guests.

Agility. In addition to safety concerns, many businesses found themselves needing to shift their mode of operation, on the fly, to create new revenue streams. You now had to adapt quickly or potentially risk going out of business. Never before had we had to roll out processes and initiatives as quickly. This exposed massive gaps within the operation that weren't previously as visible or thought to have been a big deal.

Quality of execution. In this new environment, inconsistent or poor execution of new procedures intended to drive safety or support new modes of operation has become mission critical. Visibility into the quality of work happening on the ground has always been difficult but was now compounded with field team mobility being limited or completely grounded.

What is (and isn't) an operations execution platform?

With a proliferation of available solutions addressing a range of issues, it's helpful to draw some lines around the operations execution (OpsX) platform "box".

For starters, an OpsX platform is not...

❌ **Overlapping with more traditional tools** geared to help with scheduling, inventory, labor management, and training.

❌ **Intended for a limited set of employees.** E.g., It should not be just an audit tool for field teams, or just a digital checklist for store employees, or just a task assignment tool for the ops team.

❌ **Geared to a specific department.** It's not intended to solve a singular problem (e.g., not just for food safety).

❌ **Just a replication of what you're doing today.** E.g., These systems need to help you aim higher than just digitizing your paper checklists, although they should do that too.

An OpsX platform is...

Purpose-built for multi-unit operators

These systems are designed specifically to manage the complexities and overall execution of work in one central place, supporting multiple teams and functions within your organizations from junior staff to senior leadership, and from headquarters to field teams to store employees. The assignment of work through these systems needs to be flexible so that a range of work can be assigned to the appropriate regions, stores, and individuals - at scale.

Designed to improve productivity

An OpsX solution should enable work to get done both more consistently and faster, saving everyone time at every level across the business. These time savings allow your team to put weight behind the big initiatives you didn't have time for before when your team was caught up just keeping up with cumbersome processes and communications.

A key way these systems create efficiencies is through automation of processes and speeding the flow of information, with the right people alerted at the right time to get in front of potential issues or opportunities. This shifts everyone's focus from reacting to issues to proactively steering the business.

Provides visibility needed to make better decisions, at HQ and in the field

An OpsX solution captures real time data representing work happening now (vs. 3 months ago) and trending so you can identify issues and opportunities to enable the team to perform better and help the business grow. To accomplish this, these systems need to provide:

· Targeted but scalable reporting which means easy access to role-relevant reports to prevent everyone from being inundated with irrelevant information;

· Real time tracking of work so field teams and the home office can see, at any moment, progress against a given initiative or process, and if you're trending in the right (or wrong) direction (e.g., Helps you instantly answer questions like "across all my locations, who has and hasn't completed the marketing LTO roll-out?");

· Both quantitative and qualitative metrics. A number of simple tools can show you how many times a process or form was completed but what moves the needle is being able to quickly hone in on areas of opportunity where you are struggling and succeeding. For example, one of your store managers may complete a manager walk through every day—that's good. But, 90% of the time, that manager flags an issue with bathroom cleanliness. That's the insight that needs attention and rectification. Or, your field team has completed all of last month's audits but you're getting worse month over month in certain categories which is the key insight leadership needs asap to refocus support and resources.

Create shared accountability, and improved morale

In chaotic work environments, these systems help teams better structure the work they need to get done, predictably reminding every employee when a task needs to be performed. This holds managers and the leadership team accountable for making sure everyone knows what they need to do, and when they need to do it—while making employees accountable by tracking if what needs to get done is actually getting done well.

Beyond accountability, OpsX solutions should create pride in an employee's work. As photos are captured and shared, the work happening in every store gets more visibility which gives leadership the opportunity to put a spotlight on staff and stores that are models for others.

Meets you where you are now—and where you're aiming to be in the future

An OpsX solution is not a niche solution that you'll quickly outgrow as the complexity of your business grows. It needs to have sufficient range of functionality and flexibility to be able to scale with your business. This may come in the form of configurability (e.g., will the process flows I have in place for 50 locations today break down as I approach 100 stores?) or hierarchy management, designed with inherent access controls so that different levels and roles throughout the organization can access only the data that he or she needs.

What functional and platform requirements are important?

The specific set of capabilities your organization will want to prioritize for evaluation will depend on your objectives and the make-up of your operation, but here is a summary of the range of capabilities you should expect an operations execution platform to support.

Store productivity capabilities

Task management	• Recurring/scheduled tasks (from hourly blocks to annually, e.g., daily HACCP logs) • One-off tasks (e.g., LTO, product recall) • Follow up/corrective action tasks
Incident management	• Automated alerts to above store leaders • Automated corrective action instructions • Historic incident tracking across the organization
Bluetooth temperature probe thermometer integration	• Quick/easy connection • Reliable temperature input directly to forms • Support probe and infrared thermometers

Remote temperature monitoring	• Ambient temperature tracking viewable from mobile and web • Robust alert/tasking capabilities to drive action • Historic temperature reporting to track trends and equipment performance • Support hot and cold holding • Support FDA recommended two-stage cooling process
Food preparation labeling	• Automated date calculation • Bulk printing capabilities • Trend reporting around food labeling activities (e.g,. How often products are being labeled, what part of the day/week) • Easy and instant updating of categories, ingredients, or expiration details

Field management capabilities

Audit management	• Assign, track, and analyze audit results across your organization
Audit scoring	• Flexible scoring option for audit to measure key KPIs across the organization
Corrective action tracking	• Track corrective actions to drive accountability and ensure resolution • Easy, automatic one-off task assignment for follow ups
Communication	• Commenting capabilities to allow stores and field teams to collaborate on work in real time to ask clarifying questions, provide praise, and loop-in leadership • Announcements allow field leaders to communicate important news and updates to stores
District reporting	• Individual location tracking (e.g.,visibility into each location within districts to track previous audit results, task completion, areas of opportunity for growth) • District-wide trend reporting. Zoomed-out visibility of the health of your district overall (e.g., task completion, performance trends, common issues, opportunities for improvements and coaching)

Operations orchestration capabilities

Standard operating procedure roll out (work assignment)	• Basic procedure support. Ability to assign work/tasks related to a set of core procedures • Dynamic work assignment (e.g., assign tasks or projects by market, store attributes, region) • Automated recurring task assignment (e.g., from hourly checklists to annual audits) • Assign tasks with time constraints • Single view of field and store tasks • Private forms. The ability to lock down visibility into certain data • Form building. Easily update forms and instantly make them available to teams • Centralized view of all tasks that need to be completed
Announcements	• Relating to important news, updates or centralized communications around work that is being assigned out • To the entire organization, or by role, team, region or other segments • Read receipts to confirm everyone has received a specific communication
Compliance tracking	• Completion rates across every level of operation • Completion time tracking
Performance insights	• Dashboards • Real-time mobile access for stores and above store leaders without the need for internal analytical resources

Platform capabilities

Mobile compatibility	• OS, Android, and Windows • Designed for the way your teams work (mobile first)
Offline support	• Ability to complete work while offline
Administration flexibility	• Hierarchy management • Role-based access controls • User (de)provisioning • Location management • Bulk actions
APIs	• Push APIs to centralize work from exceptions triggered by other systems • Pull APIs to layer other data streams from your business with operations execution data
Security	• Identity authentication and single sign on (SSO) support • Encryption at rest and in-transit • Backup & recovery
Localization	• Localized in multiple languages • Supports local temperature readings (celsius and fahrenheit)

Building the business case for your initiative

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This chapter provides a framework for how to look at and measure key outcomes you may be looking to drive (both short and longer-term) from an investment in an operations execution (OpsX) initiative.

There are a range of metrics you might track but most support enablement of four key areas:

1. Making employees across the organization more productive

2. Increasing the consistency and quality of work happening across locations

3. Improving the visibility you have into execution and performance across the operation

4. Creating more consistent customer experiences and growing revenue

1 | Increasing Productivity

To scope the potential impact of an OpsX platform on your organization, explore productivity improvements in two key areas:

- **Individual roles on your team.** From each vantage point in the organization, identify role-specific opportunities to use time more efficiently.

- **Key tasks and processes.** How does the shift away from manual processes yield time savings that can be applied to higher value activities? For example, map out process efficiency gains in your audit management or incident response processes.

EXAMPLE PRODUCTIVITY GAINS BY ROLE

ROLE	TIME SAVINGS
Store Employees	**Saving time, automating tasks.** By improving efficiency in day-to-day store operations, your managers may be able to eliminate shifts and/or maximize the productivity of workers who are on duty by monitoring their performance more clearly and offering swift corrections when work is not being done correctly.
Store Managers	**Organizing, prioritizing, and tracking daily work.** Store managers will be able to re-focus their time, moving away from putting out fires, getting caught up with paperwork and other menial tasks, to spend time on best-in-class training and staff management procedures.
District Managers	**Visibility into store conditions, expanded coverage capacity.** District managers will have a clear picture of the work happening at every location before even stepping foot into a store. This substantially reduces time spent on conducting audits and following up on corrective actions, and more time coaching and training. The implication of creating more efficiencies for district managers is they'll be able to expand their store coverage area.

2 | Improved Quality of Execution

While brands aim to build quality into their operations by setting brand standards that all managers and employees are expected to follow, individual stores often fall short of those expectations and it's difficult to hold them accountable. There are a range of quality-focused KPIs you can look to monitor and track improvements against when you deploy an OpsX platform.

Audit scores and brand standards. Internal and third-party audits help operations leaders understand where a store stacks up in terms of brand standards and quality. Consider what even a 5% or 10% increase in average audit scores would mean for your operation.

Health inspection scores. A health inspection violation can negatively impact business and brand reputation. How would scores improve if you gave store managers the tools to ensure proper compliance with all health and safety codes prior to inspection?

Foodborne illness outbreak costs and brand image. A technology-enabled operations execution strategy with a strong focus on proper food safety procedures should greatly alleviate the risk of such an incident occurring. If you can prevent one incident per store each year, what kind of cost savings (or mitigated risk of lost revenue) could this generate?

Training and coaching improvement. Use newly accessible operations execution data to identify problematic areas for stores in a certain region, as well as share positive examples from a particular store to provide best practices that other stores will be able to utilize. Improving training on a day-to-day operational level can result in better quality across the board and a happier, better-trained staff.

Online reputation scores. Negative reviews due to quality or customer service complaints can send sales plummeting. By improving your operations execution to ensure higher, more consistent quality at your stores or restaurants,], you should see the average star rating go up. In turn, that will likely result in an increase in sales.

Customer satisfaction survey scores. Have you begun using survey tools to measure customer experiences? If so, you'll have a good benchmark to measure whether changes in your operations execution has improved the customer experience at your stores.
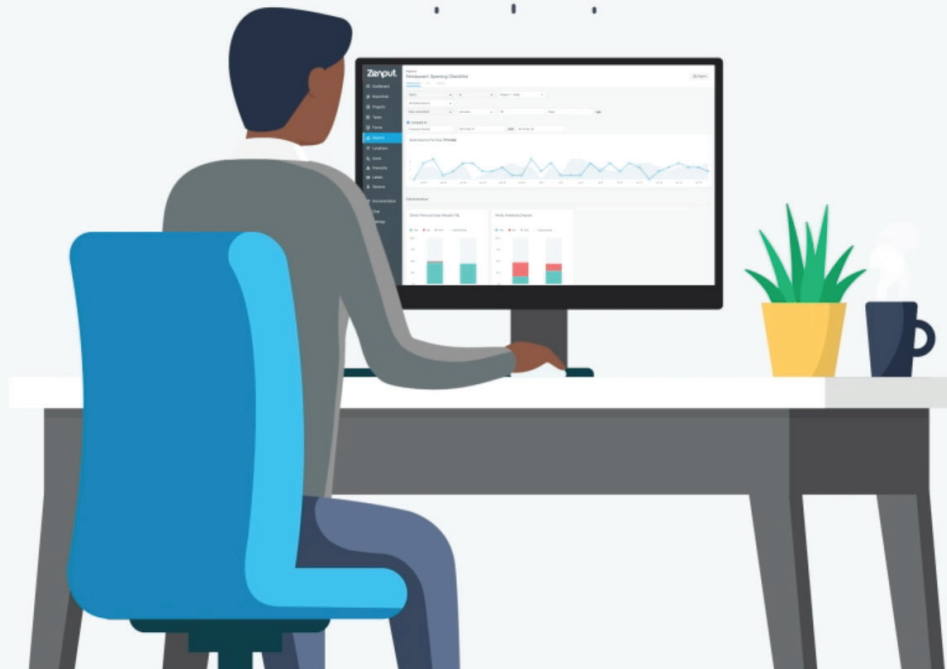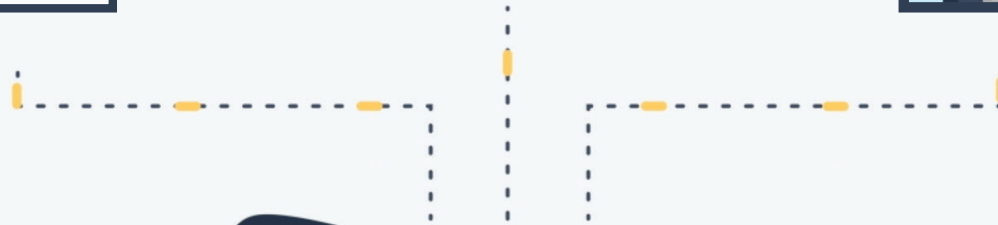
3 | Gaining Visibility

Building a best-in-class operations execution strategy can provide far greater visibility into all of your metrics across stores, relating to both the efficiency and qualitative benchmarks that we've just reviewed. But how do we weigh the value of this enhanced visibility itself? Here are a few ways to look at it:

Identifying trends and common issues across locations. With a solution that helps you gather and make sense of data, you can immediately identify trends and address wide-spread problems earlier. For instance, if analysis of your audits shows that cashiers aren't greeting or offering upsells correctly to customers, you can make sure to focus on this as a training opportunity.

Realtime HACCP temperature log visibility. Your operations execution platform should provide integrations with smart technology, providing instant readings and temp logs in real time, and enabling staff to receive alerts and take action immediately if temperatures go out of range, heading off potentially major issues.

Employee and store recognition. If you have better visibility into which team members are going above and beyond, you can incentivize and reward them. Store managers will have the insights to help them recognize staff for "Employee of the Month" programs and other perks, and corporate leaders can spot which store managers and field managers are performing at the top of their game, and involve them in leadership training.

4 | Increasing Revenue

As your team begins drilling into the specific "ways" an OpsX initiative will make an impact, you'll quickly find that making people more productive (in your stores, in the field, and at the home office), enabling them to do their jobs well, and getting better visibility into the actual work that's happening across the operation directly impacts your ability to create great customer experiences and grow revenue.
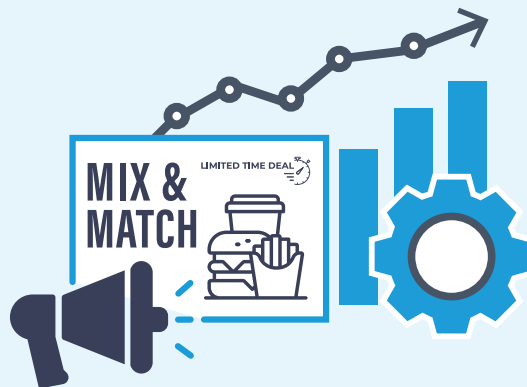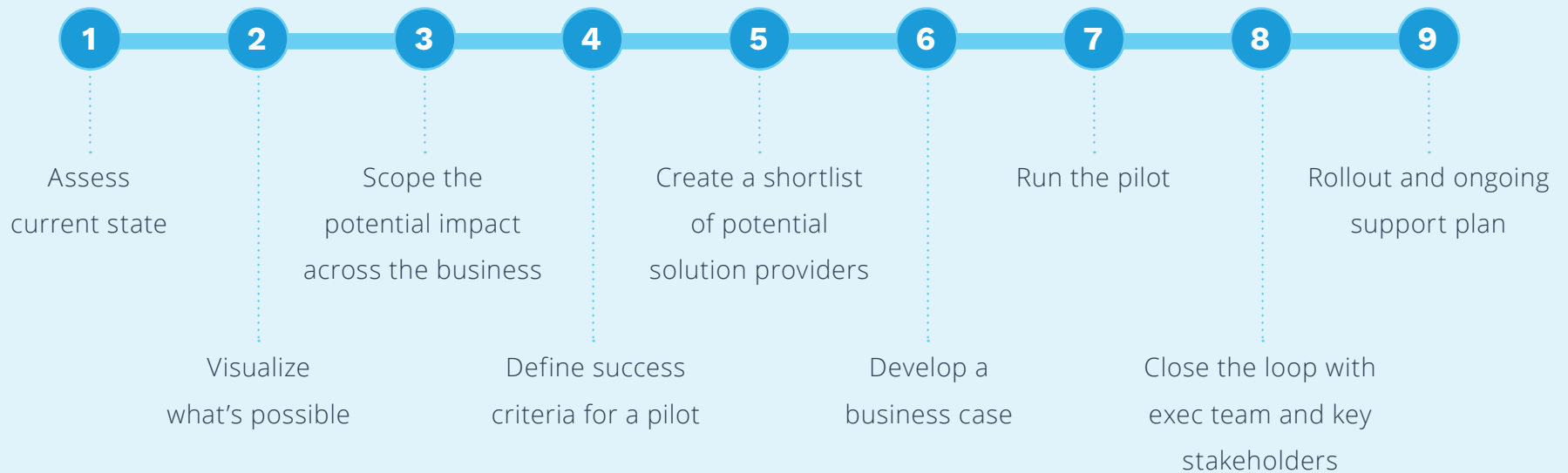
How OpsX drives revenue: Promotions and LTO example

A common challenge for multi-unit operators is to see inconsistencies in their stores' participation in brand-wide promotions and limited-time offers (LTOs), causing the stores to lose out on valuable sales. By deploying new strategies or solutions that enable you to track compliance and confirm each store's on-time participation, you're likely to see a spike in LTO sales from restaurants that have previously not performed well. What if all signage was up on day one? Imagine what even a two percent increase in LTO sales per store could mean by executing on promotions more consistently.

Putting together your evaluation plan

You now have clarity on where you're looking to take your team's operations execution, the impact you're looking to make, and the kinds of capabilities you should expect from an OpsX platform. **It's go time!**

Here are some suggested best practices around evaluating and identifying a solution that is right for your organization.

1 Assess current state

2 Visualize what's possible

3 Scope the potential impact across the business

4 Define success criteria for a pilot

5 Create a shortlist of potential solution providers

6 Develop a business case

7 Run the pilot

8 Close the loop with exec team and key stakeholders

9 Rollout and ongoing support plan

Evaluation Steps

STEP 1

Assess current state

At the outset, you want to get clarity and alignment on the state of operations execution today across the organization which may mean answering questions like:

· Can you easily identify operational trends across stores or regions so that you can use data insights to remedy problems?

· What are the biggest and most common issues across your operation? How do you prioritize resolving them?

· Do you know when store managers have completed daily or weekly checklists, or if they've even done them at all?

· To what degree are your stores in compliance with brand standards?

· How sure are you that proper food handling procedures are used?

· Where are there opportunities to reduce the amount of time field and store teams are spending completing certain tasks?

STEP 2

Visualize what's possible

Examining the various challenges that make up your "current state", how might you solve this problem if you had no limitations on technology or budget? What might an ideal solution look like to you?

STEP 3

Scope the potential impact across the business

Assess which teams and how many people could be positively affected by making a change across the operation - from headquarters to field teams to the stores, and across departments. By exploring from each vantage point, identify target outcomes that could be achievable.

STEP 4

Define success criteria for a pilot

Given the context of a short pilot, what are the leading indicators to the longer-term outcomes you're looking to drive that you can peg as pilot goals? Ensure the pilot goals are SMART (specific, measurable, attainable, relevant, and time-bound).

OPSX SOFTWARE PILOT GOALS

S ─── M ─── A ─── R ─── T

Specific   Attainable   Time-bound

Measurable   Relevant
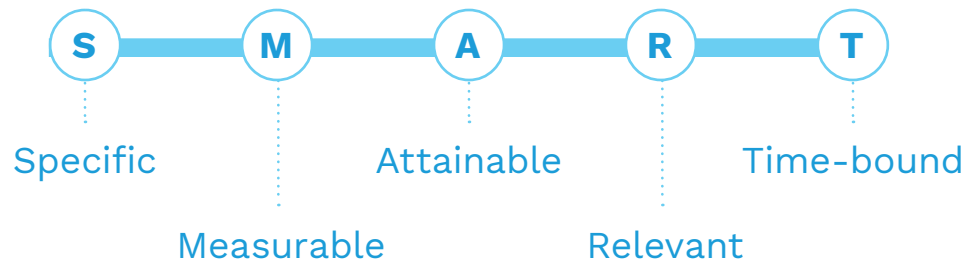
STEP 5

Create a shortlist of potential solution providers

Based on key functional and platform requirements (see *Chapter 4*), identify a vendor that can support you today, and grow with your needs over time.

As you look to build a case for investment in an OpsX platform, chart out the target outcomes, from both a qualitative and quantitative perspective, using some of the metrics suggested in *Chapter 5* as a guide.

Quantitatively, you might look to isolate the time savings expected at headquarters, in the field, and across each of the processes occurring in your stores, and calculate what that time back could mean to the organization (e.g., labor hours and labor $s investments that can be redirected to higher value add activity). Or call out where you expect to see increased levels of execution on critical work, fewer failure or faster times to issue resolution.

STEP 6

Develop a business case

Qualitatively, is the expectation that your field leaders and general managers will be more knowledgeable around key issues affecting their locations so they are better equipped to coach and train? Will increased visibility create more accountability across teams and drive the right behaviors? In your future state, will managers and leaders across the organization be able to spend less time reacting to issues as they arise so there is more time to push forward new strategic initiatives that have an outsize impact on the business?
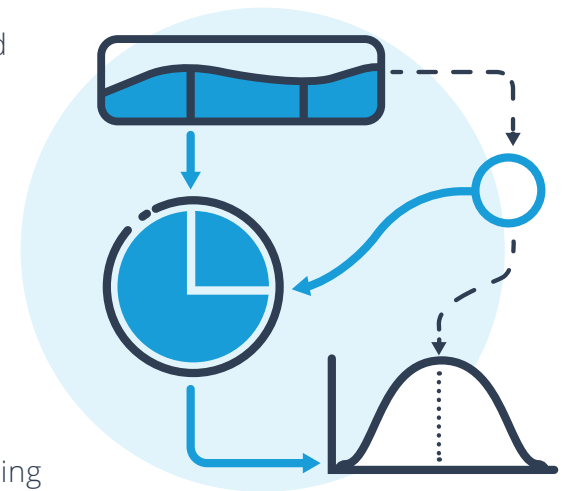
STEP 7

Running the pilot

Some keys to success in running a successful pilot include:

· Test the solution and not any one particular process. Your processes may be ever changing so choose a solution that can be flexible to market conditions and operational changes now and in the future.

· Be involved. Actively engaging in the pilot allows you access to invaluable feedback not just on the platform, but the current state of your operations execution and where improvements can be made. Your engagement will also help drive participation across your pilot team.

· Solicit feedback from users piloting the system early and often.

STEP 8

Close the loop with exec team and key stakeholders

Having secured alignment at the outset of the project on the current state and the objectives of an operations execution initiative, based on the pilot results and the business case you've developed, review the expected ROI and overall benefits of the solution to the organization to secure alignment and sign-off.

STEP 9

Run the pilot

Work with your new partner to create a plan that works for you and the teams that will be involved in the deployment. You should expect your chosen vendor to be subject matter experts in industry and implementation best practices but also have a deep understanding of the complexities and differences between organizations so they can tailor a plan that will make your team successful.

Conduct semi-annual or annual business reviews with your vendor to track progress, identify new areas or use cases that can benefit from the solution, and review new and emerging strategies and best practices within the industry.
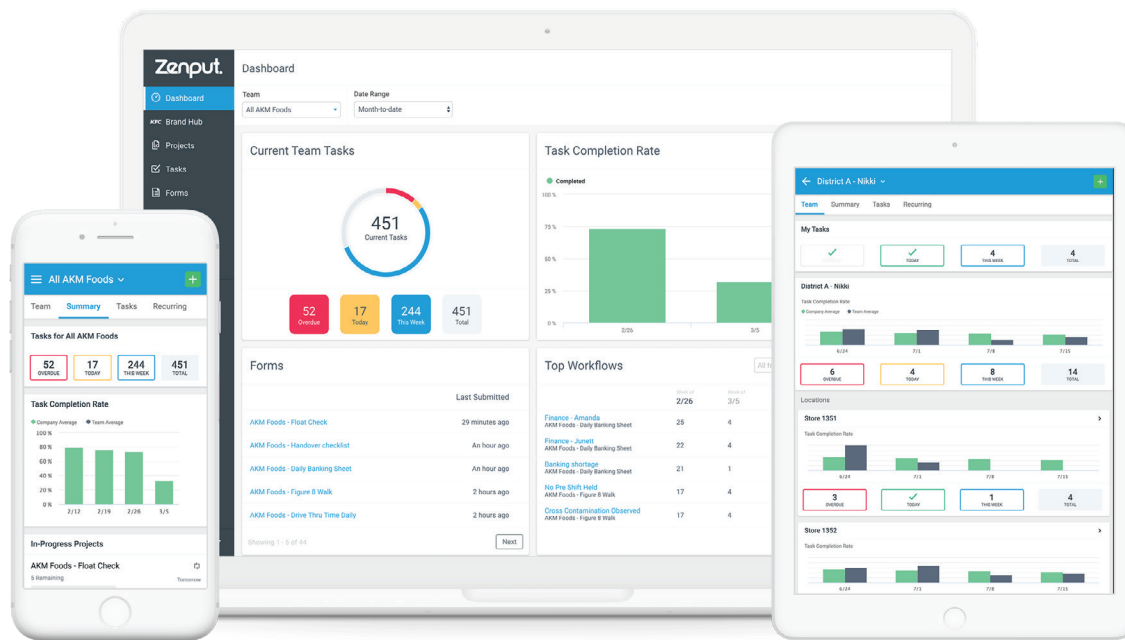
Ready to take OpsX to the next level?

Evolving industry and competitive dynamics, new technology, and changing consumer behavior are factors that operators have always had to address. But, the pace of change has accelerated, requiring restaurants, convenience stores, grocers and other multi-unit operators to adapt much faster, and adopt new ways to ensure quality system-wide execution of all the work that needs to get done.

Fortunately, [many operations leaders and brands](#) have been charting a clear path to a step function increase in productivity, organizational agility, and controls across the operation. And, this Buyer's Guide can serve as a key resource and reference as you and your organization set your own sights on next level OpsX to protect your brand, increase store performance and exceed customer expectations.

About Zenput

Zenput is how top operators elevate team execution in every store. Restaurant, retail, and other multi-unit operators use the platform to automate how operating procedures and key initiatives are rolled-out and enforced. Supporting 50,000 locations in over 40 countries, Zenput makes every field and store employee more productive and better equipped to do their jobs well. Visit **www.zenput.com** to learn more.

Operations Execution Software

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