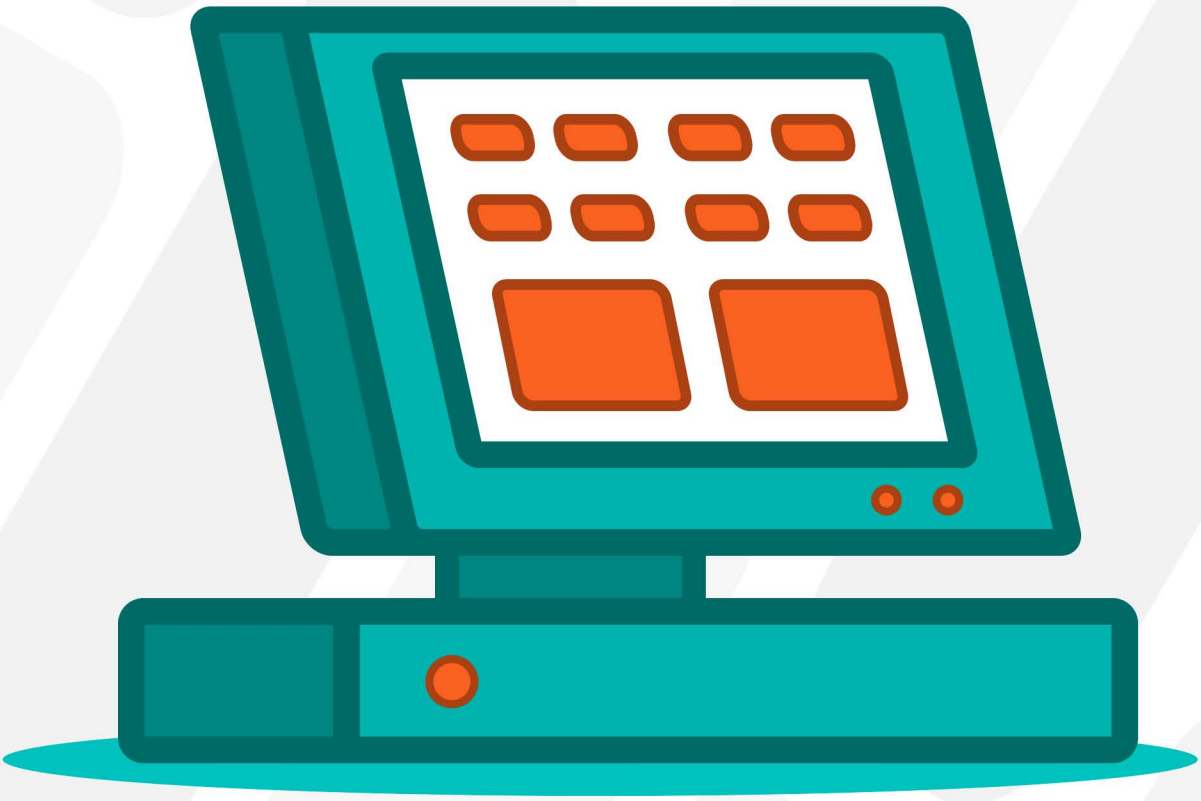
The Catering Institute™

Five Best Practices of POS Integration

A Catering Institute Original Essay by James Lux, *Vice President, IT, Boloco*



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Every new integration project restaurant operators undergo adds an additional layer of complexity to their IT and POS systems that requires cooperation and commitment from many levels and departments. Add the layer of communication between your POS and third-party software platforms and the task becomes even more complicated.

So, why do we do it?

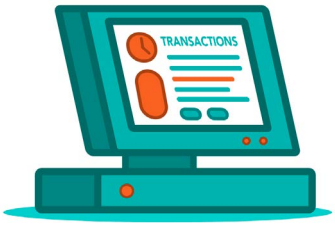
Ultimately, the catalyst behind adding anything to a restaurant's operating system is to help increase sales and/or improve the efficiency of running the restaurant. For us at Boloco, we needed to integrate a new catering software program into our existing POS platform. While our catering software provider, MonkeyMedia Software, developed and implemented the program to meet our needs, without a certain level of integration it was a challenge to ensure sales, order and reporting accuracy across each of our locations and systems.

When adding a third-party software package to your POS, consider these five simple best practices to help streamline the process.

> *"Ultimately, the catalyst behind adding anything to a restaurant's operating system is to help increase sales and/or improve the efficiency of running the restaurant."*

1. Get all parties talking. The level of complication in any project increases when you add another stakeholder. First, talk to the partners involved to see what their capabilities and technologies allow. Everyone needs to understand the perspective of the restaurant operator, including their ultimate goal for adding the additional layer of service onto their restaurant business. This is true if you're adding a catering management platform, online ordering, mobile payment, or any other type of third-party software. Make sure every stakeholder from every team understands the objectives for integration from an operations perspective and is willing to work together to co-create the desired result – it's not about the technology, it's about solving problems for the guest and the operation. Both vendors – your third-party and POS supplier – need to be aligned and work together as true partners. If this doesn't happen, it could take twice as long, if at all, to get your project up and running.

2. Determine what data you want to share and how you want to review it. Prior to launching our catering management system, we conducted a series of exercises that helped us determine the type of information we wanted to integrate into our restaurant POS. We wanted to simulate the order process to highlight the type of data we wanted our POS system to reconcile and report against at the end of each day. These elements need to be well defined so the necessary adjustments can be made to the impacted software programs, enabling sales reporting, inventory management, and other functions. The integration of our catering management system now allows us to view our catering sales and transaction history on a per-store basis with exceptional accuracy.



3. Implement a project plan. When we first made the decision to add catering as a service, we knew we needed a project plan. This plan acted as a project check and balance and also kept everything and everyone on the same page. The plan was not overly structured, but it did outline the technical responsibilities of both sides and clearly mapped out project guidelines tied to the operational phases, timelines and problems being solved. Share your project plan

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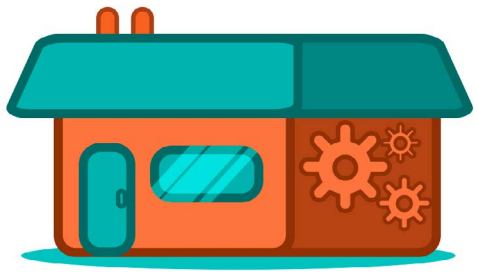
with your POS and third-party solution providers, and make adjustments based on their resource loads. Weekly project calls also will help keep the lines of communication open, bring visibility into how the project is tracking, and highlight any issues that may need immediate attention.

4. Test the solution, end to end. Once integration has occurred, it's crucial that you test the solution through a variety of use cases. Start testing and prove-out the functionality using your test lab environment first. Once everything checks out to your satisfaction, promote the solution and test it store-level in just a few locations (variety of store profiles/volumes). Make sure you give the solution enough time to work through a few days-ends and potentially a couple of periods. As your confidence increases, plan your roll out to other locations until it has been implemented system wide. Make the testing process a part of your project plan so you can prepare for any alterations. If payment transactions are part of your integration platform, testing becomes even more crucial. You don't want to lose a sale, or the end- of-day reporting on a sale, because of a technical problem. If a problem does arise, make sure you have an integration point person willing to take on the challenge of solving the issues. Often this includes working with both your vendors.

5. Consistently monitor. Once integration has taken place it's crucial that you continue to monitor the solution to ensure continual performance. Include a line item in your project plan that establishes monthly or quarterly meetings with your stakeholders and partners to review the solution and any potential upgrades in development. The overall goal of this review is to maintain open communication between your brand and your solution providers.

By following these steps, you can lower the major risks associated with any integration process. While integration can seem like herding cats at times, once completed it will add value to your offerings and make it easier for restaurant teams to track progress. Overall, if the true values and needs for integration are well understood, it will be worth the effort regardless of time and effort.



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About The Catering Institute

The Catering Institute is the world's leading educator in takeout, delivery and catering, providing training, certification and consulting to restaurant operators and their teams.

The Catering Institute is a private, independent academic institution. Led by founder and CEO Erle Dardick, the faculty at the Catering Institute is passionate about helping brands excel at feeding their customers where they Live, Work & Play™.

Learn more:
www.cateringinstitute.com

About Erle Dardick

Erle Dardick is a 17-year catering veteran, business turn-around expert and author, best known for helping multi-unit restaurant executives create successful catering revenue channels. Erle founded both MonkeyMedia Software and The Catering Institute. He also authored "Get Catering and Grow Sales! A Strategic Perspective for The Multi-Unit Restaurant Executive."

Get Catering and Grow Sales!™

A Strategic Perspective for the Multi-Unit Restaurant Executive

by **Erle Dardick**

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As Partners in Education, MonkeyMedia Software, PepsiCo Foodservice, and Catering Insights work with the Catering Institute, to help restaurant operators grow sales and increase profits by educating them to become experts at feeding their customers where They Live, Work and Play™.

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