



{SAMPLE} Back of House Consultation Report

MONTH 2024

BACK  HOUSE

Table of Contents:

Digital Marketing	#
Inventory	#
Hiring & Onboarding	#
Next Steps	#



Sounding board for operational challenges and other improvements

Back of House is a restaurateur's **operating advisor** and broker of **vett**

We connect reputable third-party partners to ensure restaurant operators have access to a reliable & quality network of service providers

We do this by providing restaurant operators access to:



Consultations with veteran restaurant experts

We'll get to know your business, and your challenges, and put a plan in place to help you achieve your goals.



A network of vetted 3rd party partners

Tap into a network of partnerships with vetted technology platforms for exclusive deals.



The latest operating insights and resources

Best practices to stay ahead of trends and keep up with the ever-changing restaurant industry.

BACKHOUSE

Consultation Menu

Marketing

Loyalty Programs
Website Builders
Social Media

Core Operations

Reservations
Payment Processing
Point of Sales

Emerging Technologies

AI Implementations
Robotics & Automation
Ghost Kitchen

Kitchen Operations

Recipe Management
Inventory Management
Online Ordering

HR & Staffing

Scheduling & Payroll
Recruiting & Hiring
Training

Delivery & Events

3rd Party Delivery
Catering Management
Event Managements



Considerations: Digital Marketing

Comprehensive Analytics:

- Ensure the platform provides in-depth analytics, including engagement rates, reach, impressions, and conversion metrics.
- Look for features that offer insights into follower demographics, behavior patterns, and content performance.

Customer Journey Mapping:

- Choose a platform that tracks the entire customer journey from initial engagement to final conversion.
- The ability to integrate with CRM systems to provide a holistic view of customer interactions across various touchpoints.

Integration Capabilities:

- Ensure the platform can integrate with other tools and systems you use, such as your POS system, email marketing software, and website analytics tools.
- Integration with advertising platforms to track the performance of paid campaigns.

Scheduling and Publishing:

- Robust scheduling features to plan and automate posts across multiple social media channels.
- Content calendar functionality to manage and organize your social media strategy.

Sentiment Analysis:

- Tools that analyze customer sentiment and feedback to gauge public perception and improve customer engagement strategies.

Competitor Analysis:

- Features that allow you to monitor competitors' social media activity and benchmark your performance against industry standards.

Digital Marketing	Company A	Company B	Company C	Company D
Comprehensive Analytics	Provides detailed analytics on engagement rates, reach, impressions, and conversion metrics. Offers insights into follower demographics and content performance.	Offers in-depth analytics, including engagement rates, reach, impressions, and conversion metrics. Detailed insights into follower demographics and behavior patterns.	Provides detailed analytics on engagement rates, reach, impressions, and content performance. Insights into follower demographics and behavior patterns.	Offers detailed analytics on customer engagement, visit patterns, and behavior through WiFi and other data sources. Limited social media metrics.
Customer Journey Mapping	Limited in-depth customer journey mapping. Basic CRM integration capabilities.	Provides customer journey tracking with integration capabilities. Integrates well with CRM systems for a holistic view.	Basic customer journey tracking. Limited CRM integration capabilities.	Tracks customer journey from initial engagement through WiFi interactions and CRM integration. Provides a holistic view of customer interactions.
Integrations	Integrates with various tools, email marketing software, and website analytics tools. Supports integration with advertising platforms.	Robust integration with various tools, email marketing, and website analytics. Supports advertising platform integration.	Integrates with various social media platforms and some tools. Limited integration with advertising platforms.	Integrates with CRM systems, POS systems, and email marketing tools. Limited integration with social media platforms.
Scheduling & Publishing	Robust scheduling features with a comprehensive content calendar. Allows for automation and planning across multiple channels.	Comprehensive scheduling features with a robust content calendar.	Robust scheduling features with a comprehensive content calendar.	Focuses on customer engagement through WiFi and email marketing rather than social media scheduling.
Sentiment Analysis	Offers basic sentiment analysis tools to gauge public perception.	Advanced sentiment analysis tools.	Basic sentiment analysis tools.	Provides sentiment analysis based on customer feedback collected through WiFi and surveys.
Competitor Analysis	Provides features for monitoring competitors' social media activity.	Features for monitoring competitors and benchmarking performance.	Limited competitor analysis features.	Limited competitor analysis features.
Pricing	-----	-----	-----	-----

Recommendations: Online Ordering & Marketing

Company A is a comprehensive platform designed specifically for independent restaurants to manage online ordering, marketing, and delivery operations.

KEY FEATURES

- Online Ordering and Delivery
- Custom Mobile App
- Automated Marketing: Email campaigns, promotions, and customer engagement strategies.
- Built-in Loyalty Program
- Integration with Toast
- Zero-Commission Delivery: The platform allows restaurants to offer delivery with flat, fair fees, which can significantly reduce costs compared to traditional third-party delivery services [OBJ].

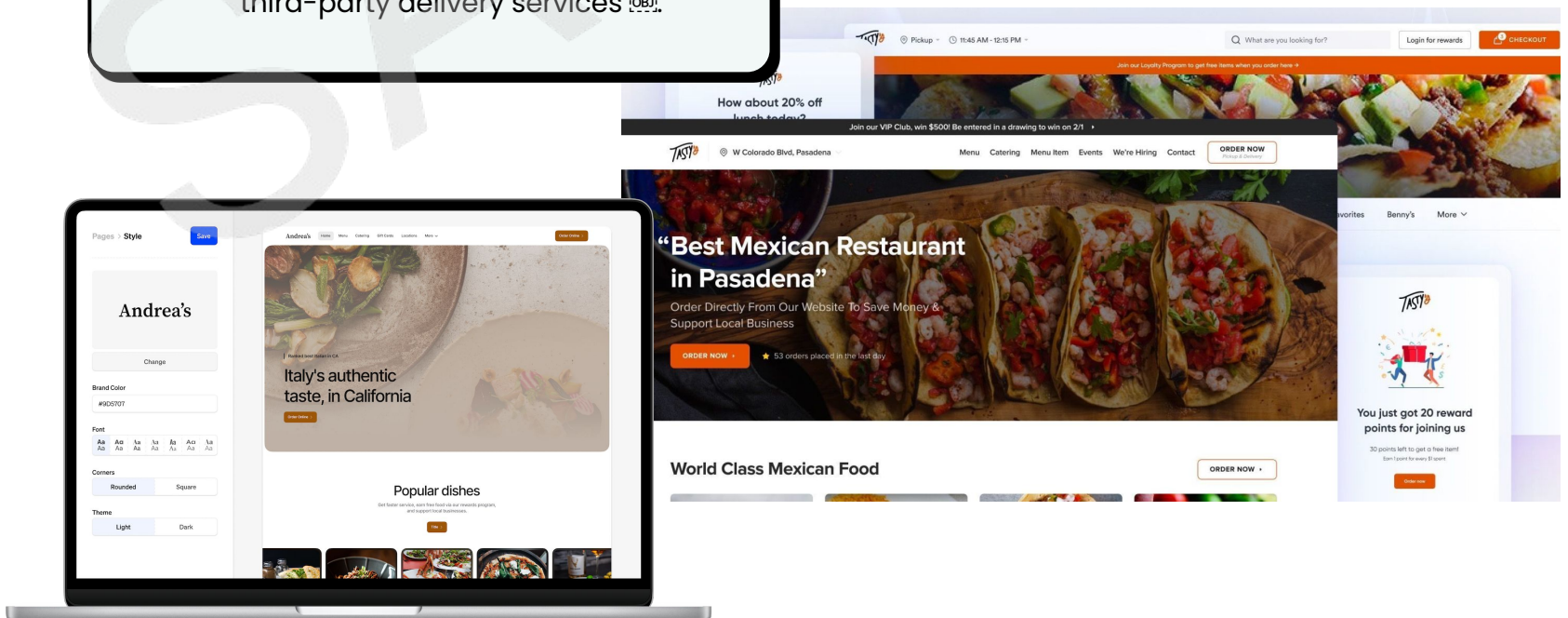
THINGS TO CONSIDER

Some users have found the user interface to be challenging and visually unappealing, which could affect the overall user experience. Additionally, issues with the notification system for failed posts and difficulties in scheduling posts accurately have been reported, which could impact the efficiency of social media management.

PRICING:

Starting at \$499/month

Setup Charges May Apply



Considerations: Inventory & Recipe Management

System & Vendor Integration

- Ensure compatibility with existing POS systems, accounting software, and supply chain management tools.
- Seamless integration will provide real-time data across all platforms for better decision-making.

Recipe Management Features

- Standardize recipes across all locations to maintain consistency in taste and quality.

Cost Control

- Track ingredient costs and usage to identify cost-saving opportunities.
- Monitor variances between actual and theoretical food costs to control expenses.

Regulatory Compliance

- Ensure the system helps you comply with food safety regulations, including tracking expiry dates and batch numbers.

User-Friendly Interface

- Minimize training time and ensure high adoption rates among employees with an intuitive and easy to use interface.

Reporting

- Generate detailed reports for audits, inventory reviews, and financial analysis.

INVENTORY	Company A	Company B	Company C
Core Functionality	Focuses heavily on streamlining financial operations and integrating seamlessly with existing POS and accounting systems, providing real-time insights into costs and profits.	Automating back-of-house operations, specifically for financial and operational insights.	Aimed more towards smaller operations looking for straightforward solutions without the need for extensive setup or maintenance.
Unique Features	<p>Bill pay, daily P&L reports, POS integration</p> <p>Advanced automation with a focus on overall operational efficiency</p>	<p>Strong financial tools, excellent data extraction and analytics, robust AP automation.</p>	<p>Customizable dashboards, real-time data updates</p> <p>For a fee, they do the setup for you.</p>
Target Users	Small to large restaurants, multi-unit operations	Medium to large operations, restaurant groups and chains	Small to mid-sized restaurants
Pricing	-----	-----	-----
Summary	Focuses on automating back-office operations, strong in invoice processing and sales integration.	Ideal if your focus is on financial management and automated invoicing	Focuses on inventory management and procurement, offering detailed data analytics for operational insights.

Solution: Inventory & Recipe Management

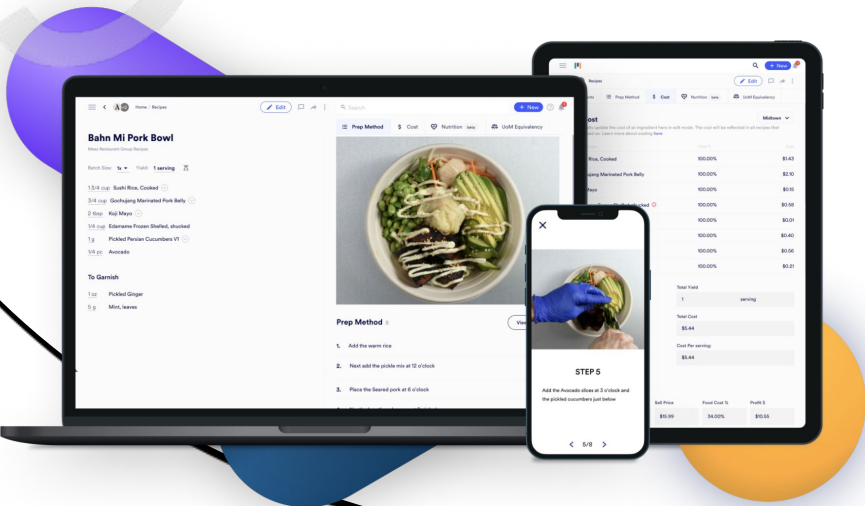
Company A: Experience enhanced kitchen efficiency with Company A. A culinary operating system is tailored to the mindset and operations of food and beverage professionals, offering precise food costing, real-time menu engineering, and seamless recipe organization.

WHERE IT EXCELS

- Provides step-by-step visual guides, including images and videos, which can be extremely useful for training and maintaining consistency.
- Accurate scaling of recipes for different batch sizes.
- Emphasizes collaboration, enabling chefs to comment, make suggestions, and iterate on recipes in real-time.

FEATURES

- Explore hypothetical food expenses
- Craft recipes utilizing an integrated database
- Maintain orderliness through recipe books, notes, videos, photos, etc.
- Access precise price charts with real-time updates on costs.
- Share images and videos of recipes for staff training purposes.



Solution: Inventory & Recipe Management

Company B - Improve your foodservice operation's efficiency and profitability with *company B*. This total restaurant management system was built from software designed by restaurant operators who know what it takes to lead a successful restaurant. Members can utilize Company B to automate several key managerial operations.

WHERE IT EXCELS

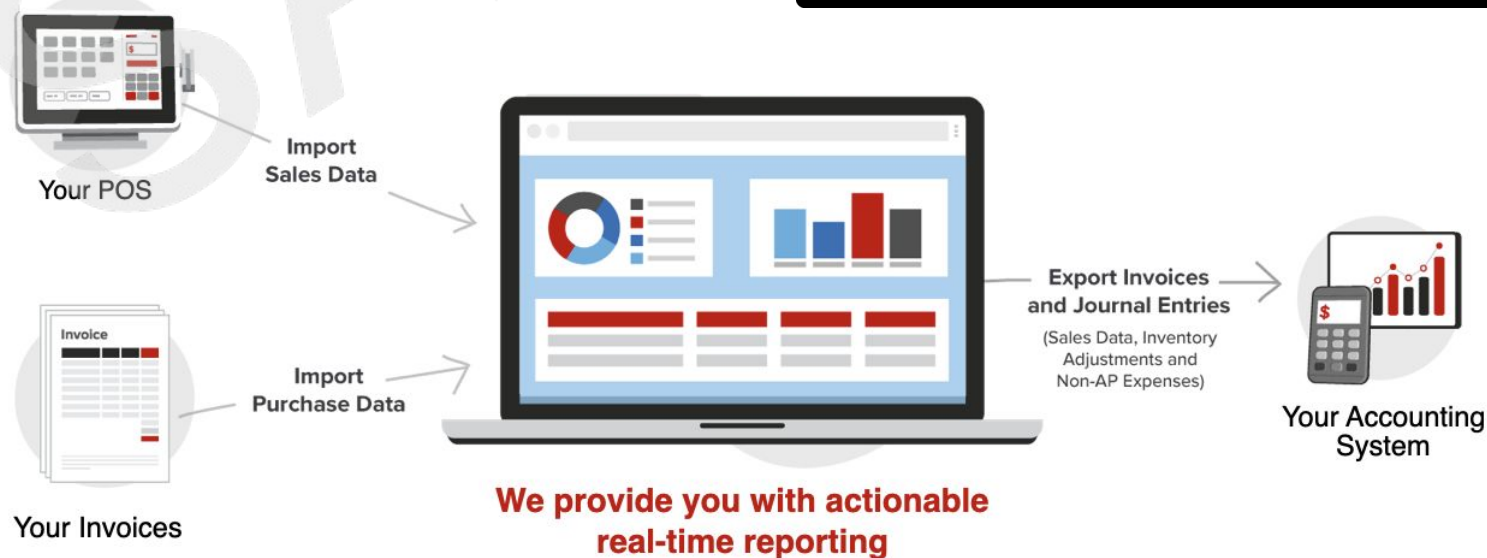
- Autonomous data updates to accurately monitor margins and gain insight into operating costs.
- One Central System - Manage inventory, recipes, ordering, and costs in one place.
- Optimize your back office processes to maximize time for revenue-generating activities.
- Recently acquired Freepour for bar inventory

FEATURES

- Connect POS and accounting for daily P&L
- Compare actual and theoretical food cost
- Automated invoice processing
- Instantly track food and labor costs

PRICING:

- Starting at \$xx/month
- Setup Charges May Apply



Inventory Implementation Proposal – Multi Unit

Phase 1: Preparation and Planning

- Needs Assessment and Goal Setting:
 - Assess the current state of inventory management, accounting, and reporting processes.
 - Identify key stakeholders and form a project team with representatives from each unit.
- Develop a Project Plan:
 - Outline key milestones, timelines, and responsibilities.
 - Pilot Testing:
 - Select one or two units to pilot **COMPANY** before a full rollout.
 - Monitor the pilot units closely to identify any issues and gather feedback.
 - Make necessary adjustments based on pilot feedback.

Phase 2: Configuration and Integration

- Data Collection and System Setup:
 - Gather necessary data for each unit, including menus, recipes, supplier information, and current inventory levels.
 - Configure **COMPANY** settings to match the specific requirements of each unit.
 - Ensure proper hardware setup, such as tablets or mobile devices for inventory management.
- Integration with Existing Systems:
 - Integrate **COMPANY** with existing POS, accounting software, and any other relevant systems.
 - Conduct data migration and ensure the accuracy of transferred information.

Phase 3: Training and Testing

- Staff Training:
 - Develop comprehensive training materials and schedules for all relevant staff members.
 - Conduct training sessions to ensure staff members are comfortable using **COMPANY**.

Phase 4: Full Implementation and Monitoring

- Rollout to All Units:
 - Implement **COMPANY** in all remaining units based on insights from the pilot phase.
 - Provide additional training and support as needed.

Considerations: Hiring/Onboarding

Employee Scheduling and Shift Management

- User-friendly interface for creating and managing schedules.
- Mobile access for employees to view schedules and request time off.

Time and Attendance Tracking

- Seamless integration with time clocks or POS systems.
- Payroll Management
- Integration with payroll systems to streamline payments.
- Automation of payroll processing to reduce manual work.

Employee Onboarding

- Simplified onboarding process with digital forms and checklists.
- Built-in training and certification tracking.

Compliance and Reporting

- Features to help maintain compliance with local, state, and federal labor laws.
- Comprehensive reporting capabilities for workforce analytics and compliance documentation.

Communication Tools

- Internal communication tools for managers and staff.
- Channels for employees to provide feedback and suggestions.

Performance Management

- Tools for performance reviews and feedback.
- Features for setting and tracking employee goals.
- Systems for recognizing and rewarding employee achievements.

Integration Capabilities

- Integration with existing POS.
- Compatibility with accounting software for financial tracking.
- Other HR Tools: Ability to integrate with other HR tools and platforms.

HR & STAFFING	Company A	Company B	Company C
Scheduling & Shift Management	Offers advanced scheduling tools that integrate with recruitment and onboarding, allowing seamless transition from hiring to scheduling.	Offers easy-to-use scheduling tools with shift swapping and availability tracking.	Scheduling tools tailored for the restaurant industry, allowing easy shift management.
Time & Attendance Tracking	Provides robust time tracking capabilities, including clock-in/out features and automated timesheets.	Features time clock integration and automated timesheet generation.	Integrated with the POS system for accurate time tracking.
Employee Onboarding	Comprehensive onboarding solutions with automated workflows and document management.	Provides digital onboarding solutions with e-signatures and document storage.	Offers digital onboarding with customizable workflows.
Compliance & Reporting	Strong focus on compliance with automated reporting features to help stay compliant with labor laws.	Includes compliance tracking and reporting tools to meet local labor regulations.	Provides comprehensive compliance tools and detailed reporting features.
Communication Tools	Strong focus on compliance with automated reporting features to help stay compliant with labor laws.	Features internal messaging and notifications for effective communication.	Includes messaging tools within the platform.
Performance Management	Basic performance tracking and management features are available.	Limited performance management features.	Basic performance tracking features are available.
Integration Capabilities	Integrates with current POS	Integrates with current POS	Integrates with current POS

Solution: Workforce Management

Company A serves as a team management platform designed specifically for restaurants. This platform simplifies employee scheduling, streamlines team communication, and facilitates time-off requests. Additionally, it standardizes shift tasks, lowers labor costs, ensures labor compliance, manages the payment of tips and wages to your team, and offers various other functionalities.

Features

Ease of Use: Intuitive interface and mobile accessibility.

Employee Scheduling: Intuitive drag-and-drop scheduling interface.

Labor Compliance: Tools to help ensure labor law compliance, including break and overtime tracking.

Tip Management Tip calculations and automate tip payouts.

Labor Cost Management: Tools for monitoring labor costs help businesses optimize staffing levels and control expenses.

Why This Solution Suits Your Specific Challenges

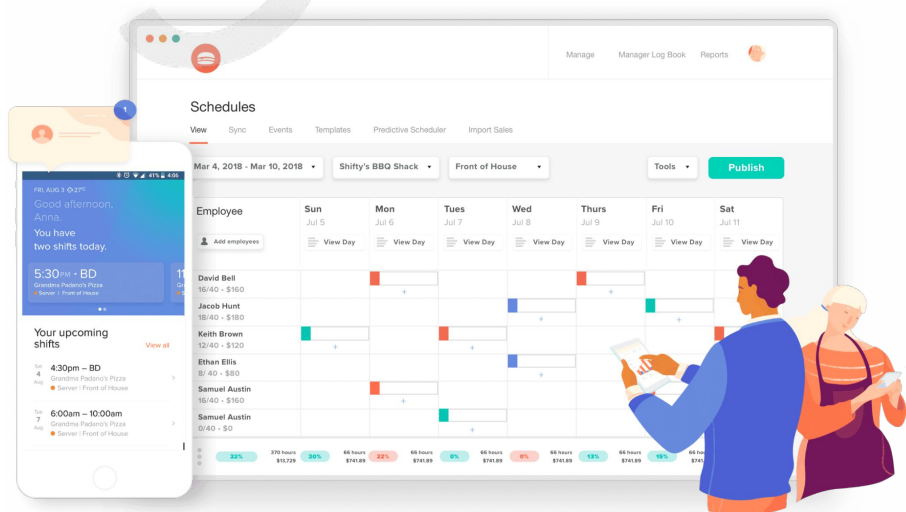
Communication: Built-in messaging features facilitate communication and collaboration.

Employee Engagement: Monitor engagement and automate shift feedback surveys to gather actionable insights, improve coaching, and identify operational issues early.

Hiring: Streamline the recruitment process by offering tools to post job openings, screen candidates, and manage interviews.

PRICING:

Starting at \$0/month for 30 or less employees



Next Steps

1. Evaluate Free Options

- a. Research and Trial: Explore and trial the recommended free tools to determine their suitability.
- b. Implementation: If a free option fits, plan its implementation and monitor its performance for 4-6 weeks to ensure it meets your goals.

2. Consider Paid Solutions

- a. Budget Allocation: Review your budget to determine how much you can allocate toward a paid technology solution. Consider both the upfront costs and any recurring fees.
- b. Vendor Consultation: Contact the vendors of the recommended technology options to discuss pricing, features, and support services. Schedule demonstrations to see how each solution operates in a live environment.

3. Implement and Monitor

- a. Decision and Rollout: Choose the solution that aligns with your goals and create a rollout plan, including training and onboarding.
- b. *Most important step* Training and Onboarding: Ensure that all relevant staff members are properly trained on the new system. Provide resources and support to help them transition smoothly.
- c. Review and Adjust: Monitor the system's performance, gather feedback, and make necessary adjustments.

4. Review and Optimize

- a. Performance Review: Set a timeline to review the performance of the implemented solution (e.g., after 3 months). Measure its impact on key metrics such as efficiency, customer satisfaction, and cost savings.
- b. Continuous Improvement: Based on the performance review, identify areas for improvement. Consider further enhancements or additional features that could be integrated into the system to maximize its effectiveness.



Thank you!

Tech Expert

chat@backofhouse.io

Schedule your next call here: [30 Minute Sync](#)



BACK OF HOUSE

Want to learn more?

www.backofhouse.io

Have questions?

chat@backofhouse.io