



One platform for quality, risk & compliance

# 8 Essential Drivers for Operational Excellence in Retail, Hospitality, and Restaurant sectors

***“Companies with superior customer experience grow revenue five times faster on average than their competitors with inferior customer experience.”***

**Forrester Research - September 2019**

**"Improving CX Through Business Discipline Drives Growth:  
The Vision Report In The CX Transformation Playbook"**

This e-book is designed specifically for leaders within the Retail, Hospitality, and Restaurant sectors. It offers insight into how top brands are modernizing their OpEx strategies for greater success in the new era of compliance, while continuing to drive and maintain growth.



## CHAPTER 01

# OpEx Challenges

# Today's OpEx leaders face complex challenges

**Operational Excellence (OpEx) is at a crossroads.**

While continuing a steady focus on quality, compliance, and risk management, operational leaders in the retail, hospitality and restaurant sectors must now also contend with a market in which customers have a dizzying array of choices and continually changing preferences. In addition, these businesses face ever-shrinking margins.



**As a result, the message from Forrester Research is simple:**

Customer experience has become the most important differentiator in driving and maintaining revenue growth.

In fact, it has become just as important as quality and price. The onus is now on operational teams to lead the way in terms of how customer experience is integrated into the product and service and permeates operations for the entire business.





## OpEx Challenges

**Quality, compliance and operational programs must evolve to address this new reality.**

**Retail, hospitality, and restaurant businesses have historically struggled to sustain OpEx improvements over time.** Delivering a remarkable customer experience time and time again across tens, hundreds or even thousands of locations is nearly impossible using traditional methods where transparency and control are lacking.

**While third-party audits provide value from an outside view** – they only offer a single “snapshot in time”, are time intensive, and take valuable attention away from running the business in a workplace where unexpected urgencies take priority.

**“Train, audit, fix, and repeat”** still has its place, but due to infrequency, this approach is a lagging indicator. Above all, it simply isn’t effective when an operation has a **high degree of employee turnover**.

As customer expectations have grown, the impact of these challenges on delivering a consistent customer experience with excellence has never been greater.



Today, addressing rising customer demands along with executing on the brand promise means new approaches to OpEx need to be adopted – approaches that leverage digitalization and real-time information to enable higher levels of agility.

Clearly **digitalization is the solution** for allowing OpEx teams to create and execute repeatable operational routines. With real-time information gathering, analysis, and insights, businesses gain the agility to tailor ongoing programs to address these challenges.

But, **a plethora of technology solutions have hit the market**, creating confusion for the OpEx buyer. Many of these solutions are merely point solutions that don’t deliver far-reaching, actionable OpEx impact all the way to the retail/franchise level as expected.





## CHAPTER 02

# The Solution

# How Top Brands Are Turning Their OpEx **Vision** Into Executable Reality

Industry experts and leading brands alike are coming to the realization that what is needed to address these challenges is an enterprise class, easy-to-use, agile platform. Point solutions that can't scale or be integrated into the brand's operating environment simply aren't cutting it.

What is needed is a platform that provides the flexibility to develop and execute a wide variety of audit, self-assessment, checklist, evaluation, inspection, and survey programs - **a new breed of platform that enables:**

- Company policies, procedures, training content, and media to all be stored and leveraged across different programs and initiatives
- The collection and analysis of data in real-time
- Actionable insights, with the agility to make program adjustments and distribute them enterprise wide on-the-fly





## Six essential components of these new platforms:

- 01 — **They embrace digital** by replacing inefficient paper-based quality, compliance, or risk management-based operational programs with agile digitized mobile applications. Which allow for information to be collected and insights in real-time.
- 02 — **They empower employees** to deliver the most optimal customer experience possible by digitizing critical operating procedures, protocols and best practices; embedding them into existing business workflows; and making them easily accessible via mobile devices.
- 03 — **They create a company-wide culture of excellence.** No matter the size of the organization, effective quality, risk and brand compliance programs require a company-wide approach. This approach must be anchored by centralized data and content management along with far-reaching scalability that extends to the retail and franchise level for data collection and consistency.



## The Solution

- 04 — **They are designed for self-service**, which minimizes the time, cost and complexity of implementation, ongoing use and allows for adjustments to programs on-the-fly.
- 05 — **They drive sustainable improvements**, eliminate manual tasks and reduce administrative burden. Intelligent automation and embedded policies, procedures, training content, media, and recommended actions are integrated into everyday workflows. Veteran and new employees alike have the information and tools needed to do their jobs and continually improve.
- 06 — **They measure for success and continuous improvement:** Knowing that every employee is following Standard Operating Procedures (SOPs) and executing on the brand promise is the holy grail of quality and compliance today. Automatic real-time reporting makes this possible, taking measurement to the next level by providing insights for managers to continuously analyze performance and easily identify where coaching and corrective and preventative actions (CAPAs) are needed.

***“Since the technology went live, we’ve been impressed with how easy it is for our team to evaluate our results and make adjustments to our programs. ActivityStudio™ gives us the ability to make updates and implement them to our system immediately. That flexibility and agility is critical when it comes to food safety and quality, which are paramount to Firehouse Subs and our brand mission of excellence.”***

**- TIM FOSTER,  
SR MANAGER OF TRAINING FOR FIREHOUSE SUBS**





## CHAPTER 03

# Technology Requirements

# 8 Essential Technology Requirements for Success

Taking it a level deeper, to truly drive new levels of Operational Excellence using a single-platform approach, elite Quality and OpEx leaders are prioritizing these 8 essential feature sets:

## 01 — Integrated Policy Management

In an age where agility is essential, organizations need to be able to quickly and easily create and update policies, SOPs and training documentation. This can now be accomplished using rich text editors with document/media storage. In addition, processes must offer built-in flexibility, with the ability to publish content to specific user groups or even company-wide in real-time.

## 02 — Intuitive, Visual Form Building

Agility is further enhanced when an intuitive drag-and-drop policy and form building designer is adopted. This makes it possible to easily incorporate any business activity into the platform, from complex audit forms with automated repeat detection to simple checklists and surveys. With the capability to link questions and instructions to policies, SOPs, media, and training content in order to reinforce brand standards and promote best practices, the result is lower design costs and less scrambling to ensure all bases are covered.

## 03 — Automated Scheduling

The ability to set and monitor recurring schedules for programs and activities eliminates key pain points associated with ongoing OpEx initiatives. With automatic scheduling, managers can also ensure their teams understand – and are working toward – important organizational goals. Nothing falls through the cracks.

## 04 — Closed-loop Corrective Actions

Technology administrators must be able to define the protocols for addressing and reviewing CAPAs and recommended actions, and at the same time have the ability to enforce timeframes to respond based on criticality. With these capabilities, the path to Quality and Operational Excellence becomes infinitely more manageable and attainable.



# Technology Requirements



## 05 Flexible Workflows

Flexible and automated workflows are OpEx game changers, providing the ability to configure repeatable business processes and make use of settings for role-based user assignments, notifications, reminders, escalations, and report distribution to ensure effective program execution.

## 06 Powerful & Actionable Insights

With features such as data visualization, KPIs and reports, every level of the organization can gain access to program status and actionable insights as well as the ability to measure performance against defined program goals. Without this knowledge, businesses don't have a clear understanding of where to make adjustments and how to manage for success.

## 07 Mobile Optimized

To create a stronger focus on the customer, today's retail and franchise employees must have the ability to work untethered – to perform activities online or offline as they go about their work. A mobile-optimized design can enable their success using native apps for Windows, iOS, and Android.

## 08 Integrated IoT

Connectivity is key for OpEx initiatives to reach their full potential in an enterprise or retail environment. This allows data insights to be brought together and communication to flourish. The platform you select should enable you to seamlessly connect with Bluetooth Low Energy devices including barcode scanners, temperature probes, digital scales, and other IoT devices which improves the speed, consistency, and accuracy of data collection.

## CUSTOMER EXPERIENCE IS EVERYTHING

*We are living in a digital era in which customer experience is **everything**. In this new era, OpEx is being tasked with playing a central role in fulfilling a brand's promise all the way to the organization's most important customer touch points.*



Get in Touch

# It's Time to Elevate Your OpEx Game

If you've read this far then you're clearly interested in raising your OpEx game. We've modernized OpEx across many industries for brands like Burger King, Buffalo Wild Wings, Hasbro, and Two Men and a Truck to name a few - so get in touch to discuss how we can do the same for you.

We invite you to visit our **website** at [CMX1.com](http://CMX1.com) to find out more about our revolutionary OpEx solution **ActivityStudio™**, join one of our regular **webinars**, or **contact us** for a complimentary demo and consultation.

Get In Touch

TODAY'S TOP BRANDS TRUST CMX.

