

RESTAURANT MANAGEMENT SOFTWARE

A Buyer's Guide for Back of House



INTRODUCTION

Restaurants have been existing in a world where customers and employees are living in different realities. Customers have a wide array of technology to fit their desired restaurant experience—multiple delivery options, table-side or touchless payment, easier drive thrus, and more.

But when it comes to the back of house, many employees are still cobbling things together with a hodgepodge of different solutions—clipboards for daily tasks, a calendar app for schedules, emails for purchasing, and yet another app for inventory.



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As restaurants continue to operate on low margins, and labor grows in competitiveness, this kind of fragmented approach to restaurant management won't provide the data or tools needed to run an efficient restaurant.

Forward-thinking companies are investing in restaurant management software (RMS) to meet the challenges of modern enterprise restaurants.

INTRODUCTION

While there are many tools available to help you address some or all of your back-of-house tasks, many of them will not be the right fit for you. You need a platform that has evolved to understand what restaurants need in a modern world, and one that continues to create the tools that will carry you into the future.

We created this buyer's guide to help you:

- Define restaurant management software
- Understand the benefits of a good restaurant management platform
- Decide when it's time to invest in an RMS
- Know who should be involved in the procurement process
- Narrow the field of vendors, and make a final selection



"YOU NEED A PLATFORM THAT HAS EVOLVED TO UNDERSTAND WHAT RESTAURANTS NEED IN A MODERN WORLD, AND ONE THAT CONTINUES TO CREATE THE TOOLS THAT WILL CARRY YOU INTO THE FUTURE."

A black and white photograph of a man with a beard, wearing a dark apron over a light-colored shirt, looking down at a tablet device he is holding. The background is a blurred restaurant interior with shelves of bottles. An orange vertical bar is on the left side of the image.

RESTAURANT MANAGEMENT SOFTWARE DEFINED

If you're reading this guide, you likely have an idea of what restaurant management software is. However, the field has evolved significantly in the last decade, expanding to include new features you may want to consider as you evaluate vendors. We want to help you explore why people are buying restaurant management software and what it may encompass.

1. Define the Need

The overarching reasons to implement restaurant management software are to help your company streamline back of house and increase profitability. Some common goals that fall under that umbrella include:

- Reduce food waste and theft
- Improve overall efficiency
- Ensure supplier deliveries match orders and are within contract pricing
- Create better match between scheduled and actual labor needs
- Reduce risk through better food safety procedures
- Gain more visibility into your data, including daily P&L reports
- Integrate back-of-house tech with your POS to have a more holistic understanding of your business
- Document processes and procedures

2. Consider Available Features

Features will vary somewhat across vendors depending on what type of restaurants they serve or the depth of the product. Your decision will hinge on whether you're looking for just the



RESTAURANT MANAGEMENT SOFTWARE DEFINED

KNOWING YOU NEED AN RMS

baseline features, or whether you need an enterprise system. These are the key features in a more comprehensive RMS.

- Offline operating abilities
- App-based access for in-store employees
- Integrations with your POS, key suppliers, and accounting or payroll
- Inventory and purchasing suite
- Predictive scheduling abilities
- Food safety tools
- Checklists to cover all day-to-day employee responsibilities
- Customizable reporting dashboard
- Role-based features and reporting to ensure each employee has the access they need
- Easy-to-use team communication features

The best way to know if it's time to start evaluating restaurant management software is when it's become too painful not to have an effective system. Outgrowing more manual methods of restaurant management creates issues that hinder your growth, either by taking too long for routine tasks or not having the information you need to make data-based decisions. Here are a few of the issues that may be the catalyst for beginning the search for restaurant management software.

1. Antiquated Back-of-House Systems Aren't Fast Enough

Pen and paper or old-school software aren't enough anymore. They may

KNOWING YOU NEED AN RMS

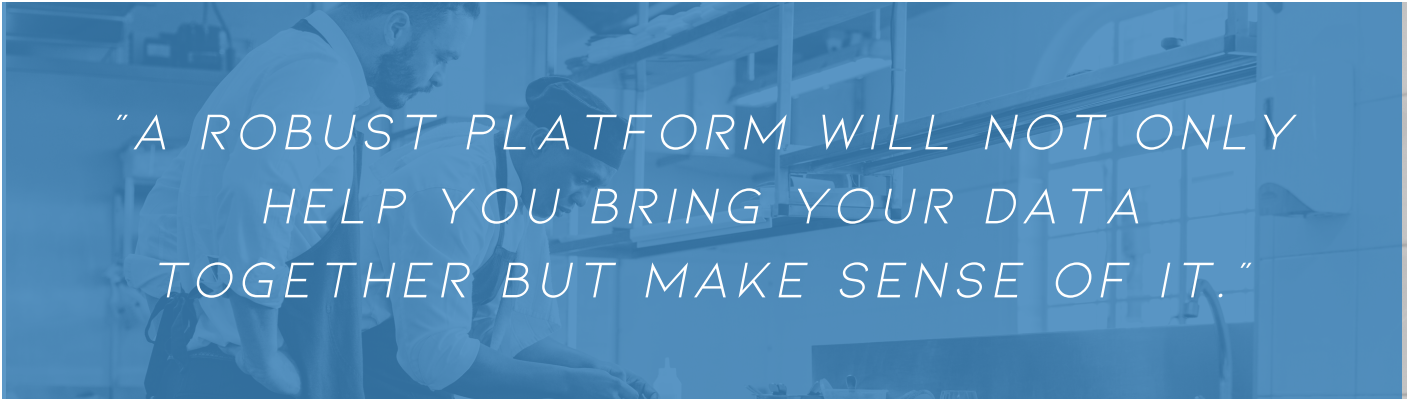
have been feasible when your brand had fewer locations, but you no longer have a good way to track what's happening across the brand and you're losing time to inefficient processes.

2. You Feel Overwhelmed by Data

Do you know the information you need is available, but don't know how to collect it in a way that makes sense?

This is common for restaurants as they grow. You have a nearly limitless number of data points to collect, but with antiquated processes by the time you have pulled the information together it's already out of date.

Without effective software, you won't see trends, risk factors, or areas of opportunity.



*"A ROBUST PLATFORM WILL NOT ONLY
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3. Reporting is a Nightmare

You don't need to spend hours copying information between spreadsheets and fiddling with charts and graphs. A robust platform will not only help you bring your data together but make sense of it with relevant pre-built reports and easy-to-use custom reporting tools. Then instantly share those reports with anyone who needs to see them.

KNOWING YOU NEED AN RMS

4. Managers Are Too Focused on Admin

The administrative side of every job is a necessary one, but it's easy for it to eat up more of your manager's time than it should. An RMS will free up hours each week with automated reports, predictive scheduling, order reconciliation, and more. This will free up more time for your general managers to spend with employees and guests.

5. Supplier Deliveries Are Inconsistent or Out of Pricing

Missteps by a supplier will kill your margins just as quickly as a mistake made by your team. Food temperature problems, out of contract pricing, or under delivering can all come from your suppliers but still damage your profitability. A good RMS should be able to help you monitor pricing in advance of any delivery and reconcile/monitor the deliveries you receive to ensure they're accurate and at a safe temperature.



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A black and white photograph of a man and a woman looking at a tablet together. The man is wearing an apron, suggesting a kitchen or food-related setting. The woman is smiling and looking at the tablet. The background shows shelves with various items, possibly in a kitchen or a store. The image is partially covered by an orange overlay on the left side.

ASSEMBLING THE TEAM

Software procurement is an important process. It's an investment in your business and requires sign off from stakeholders around the company. But with so many potential people involved, how do you keep the team as streamlined as possible while still considering everyone who needs a say? It helps to think of the decision in terms of who needs to be involved and who simply needs to be considered.

First look to who must approve, manage, or use the software. If they are in any of those groups, they need to have representation at some point in the procurement process. If they will be indirectly affected by but not directly using the system, take their input into consideration, but they do not need to be involved in key steps of the process.

Involved

1. Company Leadership

Whoever must ultimately approve your choice needs to be looped in a few times along the way. This could be the CEO, CFO, CIO, or some combination of those areas of influence.

2. Direct Manager

The person managing the relationship between your back-office vendor and other people in the company must have a say in whether the chosen platform has the functionality and usability needed. This could be a VP of Operations, Director of Strategic Initiatives, Director of Retail Technology or similar.



ASSEMBLING THE TEAM

3. Resource Manager

This person will be working hand in hand with your chosen RMS to implement properly and ensure ongoing seamless operation. Likely an IT Director or VP.

4. Franchisee Council or Franchisee Thought Leader

If you want to get franchisees on board with a new technology, you need to ensure they have a voice. Tap into influential franchisees or franchisee council leadership to make sure you think of everything they may need.

Considered

1. Project Team

The team implementing this project and ensuring it goes according to deadline is important, but do not need a say in which platform is chosen. However, you should consider their bandwidth and capabilities when discussing implementation and rollout.

2. Suppliers and Other Software Vendors

Think about your current suppliers and other vendors in your tech stack. Are there any that your new software vendor must integrate or play well with? If so, you should talk about what the dealbreakers are with the companies you're considering. However, the suppliers and other vendors do not need to be directly involved in the selection process.

MAKING A SHORTLIST

Vendor selection can start the same way many of our purchases do these days—Google. You can do an initial web search, ask trusted colleagues, and then browse software review sites to help you narrow the field when looking for the RMS best suited to your needs. A few of the most popular are Capterra, Software Advice, and G2.

Initially, you should look for a more expansive list that you can whittle down to your top picks. Make sure the first list includes everyone who meets your basic feature requirements. Next, consider what sets great RMS vendors apart from the pack in order to narrow it down to 5 or fewer vendors.



"YOUR RESTAURANT MANAGEMENT SOFTWARE MUST BE ACCESSIBLE TO THOSE WHO WILL BE WORKING IN THE PRODUCT EVERY DAY."

1. Usability

Frontline employees will be the ones using this product day in and day out. Your restaurant management software must be accessible to those who will be working in the product every day. Look for a vendor with an easy-to-use phone app for better employee adoption. No matter how powerful the software, if it's incomprehensible to all but a few admins, you won't get the widespread user adoption needed to achieve your goals.

MAKING A SHORTLIST

2. Visibility and Reporting

One of the key goals of restaurant management software is getting better visibility so you can optimize your operations. If your new solution is still disconnected from the rest of your operations, all you've gotten is disparate data in a fancier wrapper. Being able to distribute those reports to the relevant stakeholders is also critical so look for permission-based reports that you can view at local, regional, and corporate levels.

3. Corporate and Franchisee Structure

Enterprise brands must be able to have their software meet the needs of complex franchisee hierarchies. From royalties to reporting permissions to regional menu differences, your system must be able to work with the many variances that franchisees bring.



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MAKING THE PICK

Now you need to narrow those choices down to your final selection. Let's walk through what questions you need to answer and what questions your vendors need to answer before you sign the contract.

1. Define Your Needs

If you don't have a good idea of why you're looking for an RMS, you will never be happy with the vendor you choose. Begin vendor selection with an honest assessment of your needs. These practical questions will help you better understand what you are looking for in restaurant management software.

- What gaps do we need to fill? What are our goals? Think back to when the idea of an RMS was raised. Who began that conversation and why? Some of the most common issues include lack of scalability, poor visibility, company growth making manual processes impractical, and difficulty making sense of the data. Whatever the answer, this is the foundation of every other decision.
- What's the budget? This often feels like the most important question to restaurants, but it may be a lower priority than you think. While it helps to know what you can pay, you should also keep in mind that enterprise software pricing is almost always negotiable, with discounts for volume, payment options, and product usage.
- What does getting approval look like? Identify who in the company must sign off on the deal. What do they need to feel comfortable with the final decision?



MAKING THE PICK

2. Understand the Vendors

Once you have a good understanding of your needs and selection process, it's time to get into the nitty gritty with your shortlist of vendors. Do as much research as you can online, get demos, use a free trial if offered, and ask every question you can think of and then some.

Here are a few places for you to start as you dig into how well each vendor fits your needs.

Product

- Why is your software better than what I'm doing now? If they can't answer that question, it probably isn't. You want a partner with a clear understanding of the industry, what problems they're solving, and why they're better than the status quo and their competitors.
- How easy is it to use? User adoption will be low if the software is complex. Even admins, who should understand the product inside and out, benefit from having power users who are nearly as proficient as they are. The easier the software is to use, the better results you will see.
- What kind of training will we need? This depends on how user friendly the software is, and how robust its capabilities are. Find out what typical training looks like, what the time commitment is, and whether additional onsite training is available if needed.



MAKING THE PICK

- What does implementation look like? Will your team need to upload historical data and recipes themselves? Will your new vendor offer that, and, if so, how much does it cost? How will franchisees be added to the system? How long will it take?
- How do I access reports? It's great if your new RMS allows employees to gather data more easily, but you're only getting partial use if it's difficult to find the reports that matter most to you. Be sure to have the vendor show you in a live demo environment how reporting works.
- What capabilities are available? In more enterprise-level vendors, you will typically have more than just inventory and purchasing as part of back of house. Consider every piece of the platform and how useful it will be to meet your goals. If you can meet multiple goals using the same software, you will save time and money vs using separate systems.
- Does the software integrate with other software I need? If it doesn't, decide how important that is or ask whether you can add an integration. For example, your POS system will almost always need to integrate. If you love your POS, that could be a dealbreaker. However, if you're revamping back of house and POS at the same time, you can look for systems that already integrate.
- Are there different user permissions so I can protect sensitive information? Your restaurant management system

MAKING THE PICK

will be housing important data that needs different levels of accessibility. Make sure your vendor has user permissions that allow only certain people or roles to view specific reports or tools.

- Will the software support my goals and future growth plans? If you are looking for your first RMS, make sure you're looking for systems that have capabilities you can grow into. You don't want to be in the middle of a growth spurt and outgrow a system you implemented only two years ago.



*"MAKE SURE YOU'RE LOOKING FOR
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Security

- How is my data stored and backed up? Is your data available if requested and how long will it take you to receive it? What is the vendor's data protection plan? Do they have documented policies to handle catastrophic events?
- How is my data protected? What is the vendor's data security plan? How is information encrypted? Will they ever share your data, and, if so, why? How and when would you be notified in case of a data breach?

MAKING THE PICK

What does my IT team need for implementation? Do you have required or recommended devices to run this software? What does ongoing maintenance look like? What does your service level agreement look like for support?

Company

- How long have you been in business? There's no right answer. Older companies may be outdated; younger companies may be more in touch with current needs. But what you're really looking for here is that they have a good track record in your industry.
- Can I see a roadmap? Do they have a vision for the future and is it aligned with your goals? And if they don't have a roadmap, they're not putting as much thought into the product as they should.
- Can I see customer reviews, references, and case studies?
- Who will be my point of contact? Understand how each vendor handles customer relationships. Your employees may use standard support channels, but your admin needs a point of contact to discuss major issues or product upgrades.
- How often do you push software updates? While you want the product to evolve and grow with your company, you should check to see how often users will be expected to make updates and potentially have to learn new processes if the user interface changes.

A hand holding a pen, signing a document with a grid of numbers. The document has a grid of numbers, some of which are circled. The background is a blurred image of a laptop keyboard.

MAKE A LIST & CHECK IT TWICE

Now it's time to make a grid. Go through and list the answers each vendor gave and compare answers against the needs and wants you identified. This may seem tedious but will make the review process much simpler.

It can be tempting to make a decision based on gut, but stick to your defined metrics as much as possible. You never know when an amazing customer success manager may take another job, or whether a connection to a great salesperson is coloring your perception.

Don't forget to include the positive reviews or referrals as their own category, and weight them more heavily if their concept is similar to yours.

GET SIGNATURES

It's time to make this official! Have your legal team review the contract, and once you have their go-ahead for your top pick, it's time to close the deal. Let the vendors you didn't choose know that you are moving forward with another company. Then get all the right signatures and celebrate a job well done.

CONCLUSION

With the right restaurant management software company for your team, you can begin to implement changes you need to thrive and grow. It's not easy to take the field of back-of-house solutions and whittle it down to the right choice for your company, but we hope this guide has helped you identify the vendor that will help drive your success.

Ready to look for a new back-of-house system?
See a demo or get in touch.

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