

Getting the Most from Your Catering Software

The Secrets of Making your EMS Work for You



“Why you are here?”



- Are we using the system we have to its potential?
- Why do I need an Event Management System (EMS) and what it can do for us?
- We want to make the move but don't have the time as there is so much data entry to do?

Objectives



- Understand the fundamental design of event management software
- Learn a few definitions
- Discover what type of user you are
- Provide some strategies to get the most out your system
- Answer burning questions
- Light the fire at the end of the tunnel

Why Me?



- 30 plus years in the culinary and catering world
- Executive chef of \$14M off-premise catering & food service company
- Consulting Chef for Multiple catering clients across the country
- Advanced working knowledge and Experience on EMS and Recipe Management Systems
- I really like this stuff

Associations



Experience and Knowledge



How Does This All Work?



- Event Management Systems (EMS)

- A computer based information storage system with processing and reporting capabilities to help manage the daily repetitive tasks required for the business of **catering and special events.**

What EMS Does



- Automatic/repetitive printing and processing of pre-formatted documents (internal and external)
 - Proposals, Contracts, Email Templates, Correspondence, Event Packs
- Storage and collection client information
 - Client List, Email Records, Client Contact, Past Events
- Calculating event related financial information from pricing to associated costs
 - Estimates, Costing Information
- Calculating production quantities needs for food, liquor, disposables, rentals and third party services

What an EMS Does



- Managing event staff
 - Staffing Requests, Estimated Costs, Scheduling
- Organizing operational details through project management mentality
 - Packing Lists, Production Lists, Liquor Sheets, Set-up Instructions
- One-stop event specific communication platform
 - Real Time Data, Change Requests, One-time Data Entry, Shared Information
- Interfacing tool for other industry related software solutions
 - QuickBooks, Social Tables, Constant Contact, ChefTec

What an EMS is Not

- A one stop shop for everything
 - POS system
 - Recipe management system
 - Food & Beverage inventory systems
 - EDI purchasing platform
 - The accounting system of record
 - A CRM (Client Relationship Management)
 - Graphic design platform
 - E-mail marketing platform
 - A human with intuitive and cognitive processing abilities

An EMS Talks to Other Systems

- Most systems have built in features that handle portions of these tasks
 - EMS Developers provide built-in interfaces with collaborative software packages
 - Generally handled as an export file in various forms through an import manager
 - .xls, .inp, .csv
 - Take advantages of other robust systems already on the market

The Guts of an EMS



- Modules – a function specific set of software processes and related data. They work independently on specific portions of the same set of data.

The Guts of an EMS



It is your System



- These are open systems that are designed specifically to replicate industry best practices.
- The communication of how information is presented is not written in stone and they should be customized to meet your specific operation.

Basic Terms



- Documents

- Guest facing: your brand and anything seen by a customer
- Internal: the information needed by your team to get the job done

- Financial

- Price: the \$\$ the client sees and pays you
- Cost: what it costs you to provide the service
 - Reality check: this is for the most part is randomized and not necessarily related to what you are paying at the back door

What You Sell



- Menu items (“the click”) What is selected from the menus
 - This is what is sold – It is a complete item or a collection of include/related items
 - Various sales units and formats
 - Can be food, beverage, rentals, staffing and services
 - Naming Convention
 - Organizational name (internal)
 - Kitchen name, item name, others
 - Customer descriptors (external)
 - Sales name, description, others

Food Items that you Pack for an event

- Ingredients – most confusing aspect
 - Multiple levels
 - Prep items/Sub Recipe: Items that are packed and sent
 - What you make
 - Can be fully completed, typical in drop off and corporate setting
 - Can be individual items to be finished on-site, full service
 - Ingredients: the items that are purchased and generally are not sent “as is” to an event
 - What you buy from the vendors
 - Note: Some Sub Recipes – Are recipes used to make other items
 - Generally not sent out of the kitchen
 - Rubs, stocks, marinades

Items that are always included

- Required items: generally disposables, pre-determined equipment, service ware, display pieces and general supplies
 - Also called common items
 - Those things that are always needed when you don't have them
 - Generally they have no price but have an associated cost
 - Can be internal equipment or rented items such as platters, serving pieces etc
 - Can be attached to Menu Items for the purpose of managing inventory

5 Levels & Approaches to EMS

Operational Approaches to EMS



- Level One - Sales Tool

- Primarily used for creating an event document to be presented to a client as a transaction tool
- A depository for guest/event Information

- Level Two - Departmental Reporting Tool

- Using a system's built-in reporting functions for operational documents
 - Sales quantities only, as-is reporting
 - Departmental delegation of as-needed information

Operational Approaches to EMS

- Level Three – Operational Needs Tool

- Detailed Reporting of production and inventory needs predicated by an associated ratio of menu item to prep items, ingredients and/or required items

- Department Specific Documents
 - Populating lists with unique details (DATA ENTRY)
 - Creation of data populated lists/ingredient and required items
 - Using built-in tools on a daily basis
 - Preformatted text, minimal document editing

Operational Approaches to EMS

- Level Four – Event Management and Analytical Tool
 - Associating true costs to populated menu items (mapped items)
 - Performance reporting from clean and managed Data
 - Sales associate margins
 - Customer queries
 - Sales mix and profitability
 - Elimination of out of system documents
 - Timelines
 - Ordering sheets
 - Event notes and set-up
 - Automatic Change Notifications
 - Utilizing Advanced Features
 - Staffing
 - Room Management
 - Prospect Managers
 - Transportation

Operational Approaches to EMS

- Level Five – A Branding Tool
 - Customized documents that represent who you are
 - Smart documents
 - Programmed operational rules (formulas)
 - CRM applications from your database using marketing tools and/or interfaced other software
 - Full integration with other systems
 - Accounting (MAS 90, QuickBooks)
 - Marketing (Constant Contact)
 - Purchasing/Costing (ChefTec, IMS, EDI's)
 - Room management (Social Tables)
 - Docusign
 - On-Line E-commerce Applications
 - Departmental specific reporting of all operational needs

What Type of User Are You?

-
1. “Open the box”
 2. The Weekend Warriors
 3. Power Users
 4. I’m Done
-

1. “Open the Box”



- Used as is – Level One

- Minimal customization of reports
- Reliance on other out of system documents to organize events
- No population of inventory/prep items/required items nor associations to menu items
- Same BEO/contract used by all departments
- Open access to add information at will (No Security)

2. The Weekend Warriors

- One or two individuals who have looked under the hood and started learning things on their own – Level Two - Three
 - Some custom reporting
 - Learned on the go and “found” the developer supplied learning tools
 - Used things as they came “as is thinking”
 - Understand that there are opportunities but don’t have the resources to do more
 - “That’s what I have always done” processes
 - Resistance to change within the organization even when improvements are available to them

3. Power User

- Fully integrated: Level Four to Five
 - Fully committed using the tools and the system as intended
 - Dedicated staff focused on managing data and reporting features with controls and oversight
 - Detailed use of queries and analytical tools
 - Fully functional interfaces
 - Customized reporting, operational processes
 - A “think tank” for system wide upgrades for other users of the system

4. I'm Done



- Totally frustrated and want to throw the whole idea out the back door with the rotary phone, betamax and the MP3 Player.

How Do You Become A Power User?

Understand who you are and
where you want to go.

1. Who are you?
 2. What are the priorities of your business?
 3. What type of catering are you really providing?
 4. How much customization do you provide your guests?
 5. Do you have the skillsets in your organization to get this done?
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8 Steps to Becoming a Power

1. Buy In



- This has to be a company wide approach from top down!
- Manage the Change
 - I am not a computer person and don't have the time
 - I have always done this this way
 - It's too slow, I can do it faster the old way
 - My customers won't like it
 - I am going to loose my job because of technology
 - It's the computers fault

2. Specialists



- Appoint or hire a specialist who understands the system and wants to make it work better.
- The responsibilities' include:
 - Data entry and managing rules
 - Formatting and printing daily documents
 - Editing and daily maintenance
 - *Specialties*
 - Kitchen: menu items, recipes, costing
 - Warehouse: equipment, transportation, liquor
 - Sales/Marketing: customer-facing documents, brand identity
 - Administrator: business rules, accounting needs, user access

Lock the Vault and Hide the Keys



- Security is a must
 - Activate the password and security features
 - Establish a User Protocol
 - Protect the Data

3. Be DATA Disciplined

- Establish rules on how the details of your information is entered into the system
 - Rules:
 - Logo, standardized fonts and format for all guest-facing documents
 - Data Lists structure and locations
 - Naming conventions for:
 - Sales names
 - Organizational names
 - Required fields for Event Creation
 - Internal document names with revision dates
 - Defining Data Attributes
 - Types of Clients
 - Types of Events
 - Event Status
 - Establishing Communication Channels

The Decision Makers

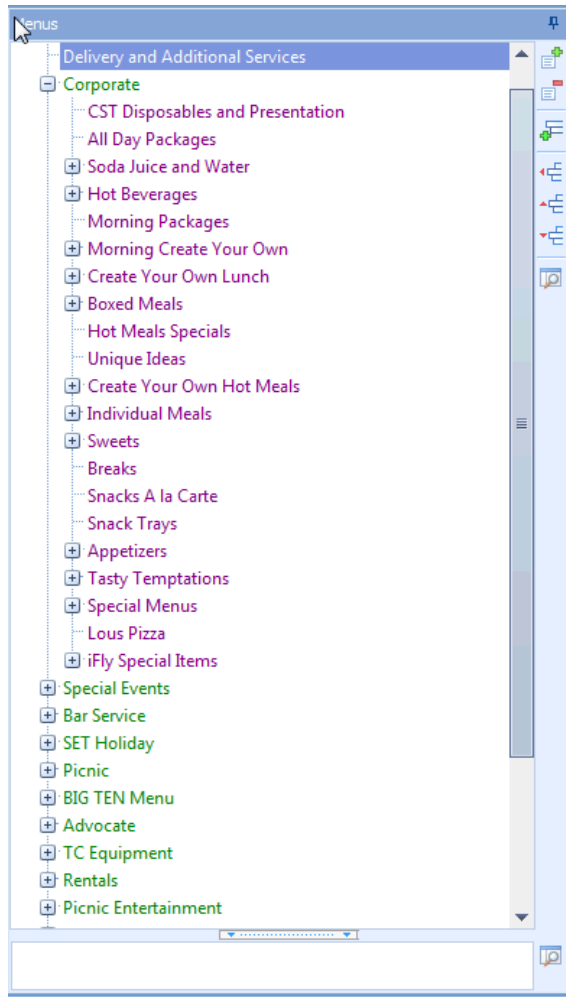
- When and by whom are the operational needs being decided.
 - Two approaches
 - Sales Associates decide how much or what is needed for the event
 - Quantities of items
 - Food Quantities, Display Pieces, Types of Equipment, Etc
 - More Clicks, More Training, Simple 1:1 Ratios for data associations
 - Less sophisticated set-up
 - The System/ Back of the House predetermines what goes with what and how much
 - All inclusive packages/bundles of information
 - Less “clicking” on the sales side, more standardized operating rules, Complex use of Multipliers/Formulas
 - Data management dependent
- Pro’s and Con’s to both
 - Data set-up needs to mimic the best operational processes of the organization and/or improve them.

Data Structure



- Menu structures: categories and subcategories
 - Represented by data trees or interactive search tools
 - Strategies
 - Replicate printed menu structure
 - Organized by type of item
 - Entrees, salads, desserts
 - China, Glassware, Linens
 - Beer, Wine Liquor
 - Combination of both
 - **Have enough categories** where you are comfortable with the speed at which you can find items
 - Especially true with multiple brands, locations and operations

Examples of Menu Trees and Structure



Category
Subcategory
Kitchen Name
Sales Name
Description
 All Active Inactive

Bulk Editing

1 to 20 of 62

	Kitchen Name	Sales Name
Plated		
1st Course - Salad		
	Apple, Baby Spinach With Granny Smith Apple Chutney	Baby Spinach
	Apple, Crispy Endive, Bleu Cheese Mousse, Candied-Spiced Walnuts, Crisp Apples	Crispy Endive and Bleu Cheese Mousse
	Apricots, Roasted Pine Nuts, Sauternes Vinaigrette	Organic Greens with Mache Salad
	Arugula and Radicchio Salad, Roasted Date Vinaigrette	Arugula and Radicchio Salad
	Arugula Salad with Endive, Toasted Almonds, Ancho Chile Vinaigrette and Manchego Cheese	Arugula Salad with Endive
	Arugula, Charred Lemon Vinaigrette	Arugula with Charred Lemon Vinaigrette
	Arugula, Salad with Roast Corn, Eggplant Puree, Charred Red Pepper and EVOO Vin	Arugula Salad with Roast Corn
	Asparagus, Grilled Michigan County Salad	Grilled Michigan County Asparagus Salad
	Baby Green, Baby Seasonal Green Salad with Apple, Orange, Sliced Almonds, Cranberries and Cajun Cheese	Baby Seasonal Green Salad
	Baby Romaine and Mesclun Salad, Bellwether Carmody Cheese, Fruit Compote	Baby Romaine and Mesclun Salad
	Baby Spinach and Hawaiian Hearts of Palm	Baby Spinach and Hawaiian Hearts of Palm
	Bacon, Baby Iceberg Salad, Pepper Cured Bacon	Baby Iceberg Salad, Pepper Cured Bacon
	Beet, Organic Field Greens with a Petite Roquefort Brulee	Organic Field Greens with a Petite Roquefort Brulee
	Beet, Red, Striped, and Golden Salad	Red, Striped, and Golden Beet Salad
	Beet, Roasted Beet, Apple and Goat Cheese Salad	Roasted Beet, Apple and Goat Cheese Salad
	Beet, Salad of Beet Greens and Mesclun	Salad of Beet Greens and Mesclun
	Berry, Berry Salad with Passionfruit Dressing	Berry Salad with Passionfruit Dressing
	Berry, Spinach, Baby and Basil Stewed Berries	Baby Spinach Salad and Basil Stewed Berries
	Berry, Spring Greens, Organic with Fresh Berries	Organic Spring Greens with Fresh Berries and Pecan Brittle
	Bibb Lettuce, Trio of Sweet Onions, Charred Radicchio, Citrus Vinaigrette	Bibb Lettuce Salad

Close

Naming Conventions

Menu items rules:

1. Decide how you want to look for information when writing proposals
 - Sales name or operational name
2. **Sales Names** should follow a style and format that matches your “brand” – this is what is going on your guest-facing documents
 - Font, size etc.
3. **Operational Name** is used to find and select items for inclusion into an event
 - It needs to be designed for convenience and organization

Recommendations



- Sales names and operational names do not have to be the same
- Take advantage of alpha numeric sorting or sort order features to group items by similar naming attributes (standard default) or frequency of use

Effective Searching

- The organizational names must be structured
 - Includes menu items, prep items, required items and ingredients
- Organize by type of item and/or prep item and use preparation/appearance attributes as organizational tools
 - Aioli – Roasted Garlic
 - Aioli – Peppercorn
 - Salmon – Herb Rubbed – Seared
 - Tenderloin – Herb Rubbed – Cooked MR
 - Tenderloin – Peppercorn Crusted – Seared
- The inventory method

Problems Occur When



- Menu items are organized by sales description or sales name
 - No rules
- The same items by default would be organized as such
 - Peppercorn Aioli
 - Peppercorn Crusted Tenderloin
 - Roasted Garlic Aioli
 - Roasted Herb Rubbed Tenderloin
 - Roasted Peppercorn Crusted Beef Tenderloin
 - Seared Herb Rubbed Salmon

Making Associations Between Menu Items and Ingredients / Required Items

One to One Associations

- Suitable for corporate, e-commerce, drop-off, limited
 - No customization
 - Used to make simple “Production Lists Extracted from BEO”
 - Basic organization and delegation of duties
- Duplication of Menu Item as Ingredient Mentality

Menu Item	“Ingredient/Prep Item”
Ham Sandwich Boxed Lunch	Ham Sandwich Boxed Lunch
Water Glass	Water Glass

- Preferred Method for associating Required Items to Menu Items

Menu Items with “Ingredients”

- The recipe approach of applying details to a specific menu items
 - Each company must decide how deep they want to go down the ladder of data entry
- Suitable for a small company without the right resources or limited services

2 Questions to ask on what is important

I need to know what to buy?

Or

I need to let my people know how much to prep?

Option # 1

Menu Items mapped to Raw Ingredients

1. Menu Items

Breast of Chicken Napoleon

Layers of puff pastry, medallions of chicken & spinach, wild mushrooms cream sauce, whole green beans, roasted acorn sauce and a trio of roasted potatoes.

2. Ingredients

- Puff Pastry
- Chicken
- Spinach
- Shallots
- Mushroom
- Cream
- Flour
- Butter
- Wine
- Green Beans
- Acorn Squash
- Red Potatoes
- Yukon Potatoes
- Idaho Potatoes
- Parsley

Option #2

Menu Items mapped to Prep Items/Sub Recipes

1. Menu Items



2. "Prep Items/Sub Recipes"

Breast of Chicken Napoleon

Layers of puff pastry, medallions of chicken & spinach, wild mushrooms cream sauce, whole green beans, roasted acorn sauce and a trio of roasted potatoes.

Breast of Chicken Napoleon

Wild Mushroom Cream Sauce

Whole Green Beans, Acorn Squash

Trio of Potatoes

Option # 3 Three Tiered



- Provides greatest level of detail for ingredient/purchasing needs
 - Purchasing Detail
- Creates Specific Packed Items that can be used dispersed to stations
 - Production Detail
- Can be used for forecasting as production items and raw ingredients are clearly defined
- Allows the true creation of a Recipe

The Three Tiered Method

1. Menu Items

Breast of Chicken Napoleon

Layers of puff pastry, medallions of chicken & spinach, wild mushrooms cream sauce, whole green beans, roasted acorn sauce and a trio of roasted potatoes.

2. Prep Items / Sub Recipes

Puff Pastry – 4x2 - Baked

Chicken – Breast – Medallions -

Spinach - Roasted

Wild Mushroom Cream Sauce

Whole Green Beans, Acorn Squash

Trio of Potatoes

3. Ingredients

Puff Pastry

Random Chicken Breast, Rosemary

Spinach, Shallots, Garlic, Oil

Mushrooms, Cream, Butter, Flour, Wine, Stock

Green Beans, Acorn Squash, Onions, Oil

Red Potatoes, Yukon Potatoes, Idaho Potatoes, Parsley

“Ah the Custom Menu”



3 Types of Customization

1. **Combinations and Packages**

Customizable by allowing the customer to choose from a list of predetermined choices of items where there are no other changes of price, portion or ingredients.

2. **Modifications/special requests**

Minor adjustments to a standard menu item such as allergens, removal of ingredients and service notes

3. **Customized**

A major change or creation of new item which requires creation or inclusion to the database and or editing by data specialist or authorized user

Decision Time



- Who and how are these needs handled in the system?
- What are you comfortable with?
- Have you created a process to communicate these changes?
 - The Change Request!!!
 - Menu Meetings
 - Automatic System Notifications for Event Changes
- Are you doing this within the system?

Ideal



- Ability to edit mapping associations at the event level for customized menu items
 - Treated as one time events
 - Most event level adjustments are handled by specialists and systematic production oversight

Challenges

- All systems allow the creation of non-standard items in the sales module especially for proposals.
 - The challenge for the level three and above users is how do you manage the associated mapped production information when confirmed?
 - Approach 1: Menu Request Approach where usable data such as ingredients/sub-recipes/prep must be first created prior to use in menu manager/ingredient lists.
 - Approach 2: Utilize notifications/ Special Instructions to the kitchen of the existence of a non-standard item and allows one-time event level mapping and possible inclusion into the data base if using standard prep items.

Strategies for Customization

- Define and communicate what customization means and how it is to be used
- Utilize packages and combinations
- Limit customization to specific scenarios (Modifiers)
 - For minor adjustments such as add extra side, no garlic etc
- Create process of making changes prior to production
- Create and a la carte menu
- Create an approval process for inclusion to the production process and data base

4. Start Simple

- If you want to move up the levels of usage
 - Pick manageable goals from your priority list
 - Set a date and do it
 - Work in smaller sections or processes (one task at a time)
 - Choose simple parts of the menu as a testing ground
 - Creating a packing list by adding required items for core items
 - Boxed lunches
 - Picnics
 - Drop-offs
 - Bar and coffee packages
 - Get comfortable with programming
 - Be detailed oriented
 - Delegate as necessary to collect the information needed

5. Let Everybody in on “The Plan”

- Let the team know what they are going to experience and possible problems in advance
- Get their input on how items are used and described within the organization
 - Every company has their own “language”
 - Bottom Up Approach
- Communication goals must include filtering out the clutter and presenting it in a user focused manner
 - Cooks, drivers, servers and sales team members have a different thought processes and content needs

6. Trust and Accountability

- Train and encourage the staff to trust the information they are reading or communicated.
 - If they spot mistakes, teach them to call you out on them so they get fixed
 - This is not finger pointing; it's improving their ability to do their job to the highest level

7. This Doesn't Happen Overnight

- This is a patient process
 - Very front-end load data entry
 - Can take several years of consistent data entry
 - Have to stay the course and follow the rules
 - Constant tweaking
 - Weeding out issues and changing traditional procedures
 - Learning is on-going and people learn differently so be open to different approaches to presenting the needs of the project

8. It's OK to ask for Help

- Talk to other users and build a support network to exchange best practices
- Utilize help desk and instructional content provided by the software developers
- Look for third-party service providers who can help manage and facilitate the process

8 Steps

- 1. Have Buy In**
- 2. Have Specialists**
- 3. Be Data Disciplined**
- 4. Start Small**
- 5. Communicate**
- 6. Trust the Data**
- 7. Be Patient**
- 8. Ask for Help**

What is on Your Mind?

Q & A



- Is this really worth it?

Thank You



How to get a hold of me?

Availability - Rest of the day

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This PowerPoint will be available at
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