

POS System Vendor Selection for a National Restaurant Brand

This client is a leading national restaurant brand with 300+ locations across the United States. The client operates through several service models but was looking to enhance their standard models with additional customer-friendly concepts, like drive-thrus and kiosks.

The client's legacy POS (point of sale) system offers limited extensibility at the restaurant and above-restaurant level, creating inefficiencies in data management and communication across franchisees, operators, and employees. The client saw an opportunity to modernize their POS solution to be more customer- and employee-friendly as they seek to scale their business into the future.

The client sought Clarkston's retail experts to provide advisory and vendor selection management support to identify an all-in-one POS solution vendor. Clarkston supported the client through a full request for information (RFI), request for proposal (RFP), and vendor selection for their POS solution. As part of this effort, Clarkston also identified and documented technical and functional requirements across manager and owner controls, sales and customer experience, labor, inventory, menu management, and reporting.

Retail Case Study

PROJECT OVERVIEW

INDUSTRY:



Retail

PRODUCT AND SERVICES:



Quick Service Restaurant

PRIMARY OBJECTIVES:

- Organize the client through a structured vendor selection process to choose a modern and best-in-class POS solution
- Facilitate communications throughout the RFI, RFP, and product and on-site demonstrations between the vendor and client teams
- Document organizational, business, and functional requirements related to the POS system
- Create scorecards and evaluation matrices for the client to use during vendor selection processes
- Build a best-practice POS solution pre-implementation toolkit to prepare the client for upcoming implementation

RESOLUTION:

- Developed RFI and RFP documents to evaluate POS solution vendors across key criteria for the client
- Supported vendor demos by creating an agenda and scripts focused on the client's customized functional requirements for the new POS system
- Conducted analysis of RFPs and demonstrations based on client input and best practices for POS solution implementations
- Guided the client to review vendor submissions using scorecards to evaluate client-specific scoring criteria
- Aided in the transition between final selection and vendor negotiation processes

KEY BENEFITS:

- Provided the client with a clear, organized, and efficient process to evaluate top-tier POS solutions that met their unique requirements
- Empowered the client stakeholders across operations, IT, marketing, and finance to thoughtfully down-select a POS solution partner that would grow along with the client's goals in the future



KPIs

- **Identified 10 potential POS solution vendors and managed five proposal responses**
- **Created a comprehensive list of 400+ functional requirements after holding requirements gathering sessions across business units**
- **Analyzed five proposals across five key criteria areas and facilitated down-selection discussions to ensure franchisees were involved in the final selection decision**

"It was evident from the beginning that Clarkston brought to the project a highly skilled team that worked with us to establish requirement criteria, goals, and ownership in the selection process and to build and maintain the necessary momentum to achieve a successful outcome."

- CLIENT CIO

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