



SAUCE & SPOON PROJECT



Rashmi Krishna

Document: Project Proposal

Sauce & Spoon Project Proposal: Menu Tablets

Author: Deanna Coleman, Director of Operations

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Executive Summary

Sauce & Spoon is a local restaurant chain specializing in scratch-to-table cuisine and committed to partnering with local farmers and suppliers.

Company Mission and Objectives

Sauce & Spoon exists to enrich our community:

- Make fresh, quick food for the working families of our community
- Prioritize our customer needs and wants
- Run an efficient, profitable business model so we can continue to grow in our community
- Support local businesses through our sourcing and partnerships

The restaurant group is growing in annual sales (+28%) each year and wants to meet demand by improving current restaurant operations. These are the greatest areas of opportunity to reduce costs: staffing, order size and amount, improving customer satisfaction and retention, and providing timely and quality service.

To address this, we propose implementing a digital menu and point-of-sale (POS) system that will be **guest-facing**. This initiative will take the form of a fully integrated tablet system located at each table to offer guests a seamless ordering experience—and at the same time provide the restaurant with a more effective ticketing system.

Opportunity Statement

In our first three years of business, Sauce & Spoon was able to exceed revenue goals and keep up with the customer demand without letting quality suffer. However, we faced “burnout” among our staff which led to high employee turnover (50% front-of-house reduction). We also risked profitability due to human error in ticketing and little-to-no focus on new employee onboarding.

Today, we have increased the number of restaurant locations and customer sales continue to grow. But, we have failed to create more efficient procedures or address issues of quality. Internal data shows that the time it takes for customers to receive their orders has increased (+20%) and we have seen a connection to negative customer satisfaction reviews due to “delay in service.” Our research also shows that, despite an increase in sales, we have maintained a flat profit margin year-over-year.

We’re confident this initiative will be well-received by customers and help reduce errors and sunken costs.

Project Overview

What?

Rolling out tabletop menu tablets to assist customers with quick, easy ordering options.

Why?

Implementing menu tablets at tables and digitizing the ordering process will speed up service and other processes. It will allow us to turn tables more quickly and serve more guests. Additionally, it will give us clear data points to track metrics so that we can help ensure the restaurant’s success. It will also help us keep up with the growing digital presence in the restaurant industry, allowing us to provide customers with a familiar digital experience.

Proposed Next Steps and Timeline

- Further scope project and create charter outlining scope, metrics, etc.
- Establish pilot plan for tablet rollout

Sauce & Spoon OKRs

Through this project, we hope to support and further our progress toward Sauce & Spoon's [company-wide OKRs](#).

Meeting: Clarifying Project Goals

Below is the transcript of the first Sauce & Spoon project meeting with the following people:

- Peta (Project Manager)
- Deanna (Director of Operations)
- Gilly (General Manager, North)
- Alex (General Manager, Downtown)
- Seydou (Restaurant Consultant)

Peta (Project Manager): Hi, everyone. Thanks for meeting today. I’m so excited to get started, and to find out more about what we’re hoping to achieve with this project. I’ve reviewed the existing project documents and I’m in the process of drafting the project charter. Once it’s finalized and approved by all the stakeholders, we can move into the planning stage! So, I’d like to take this time to review the information I have so far and make sure we’re off to a successful start.

Deanna (Director of Operations): Welcome to the Sauce & Spoon team, Peta! We’re happy to have you. How can we help?

Peta: Thanks, Deanna! Since you worked on the business proposal for this project, do you want to start by just giving a general overview of the project idea for everyone?

Deanna: Sure! Sauce & Spoon would like to launch a pilot rollout of tabletop menu tablets at two of our restaurant locations, Sauce & Spoon North and Sauce & Spoon Downtown. That way, guests can place their orders on the tablets as soon as they arrive at the restaurant, rather than waiting for a server to attend to them, which has been an issue in the past. I think these two locations will work well for the pilot, because each has the right sized staff and volume of guests to test this new concept. Gilly and Alex are the general managers of these locations—do either of you have anything to add?

Gilly (General Manager, North): Yes! I'm excited our location has been selected for this pilot. I was wondering which section of the restaurant we want to use for the tablet rollout. Or will we be piloting the entire restaurant? Personally, I think the bar area is an ideal location. It's the section where we're always hoping to drive faster turnover. Plus, I think guests in the bar area would appreciate a faster dining experience.

Alex (General Manager, Downtown): I agree, Gilly. The bar area is my pick for testing out the tablets, too.

Deanna: Great points—yes, we'd intended to pilot the tablets in just one section of the restaurant, and setting them up in the bar area makes sense.

Peta: Okay, great. We'll roll the tablets in the bar section of each restaurant. Deanna, can you discuss some of the major outcomes you're hoping to achieve with this project?

Deanna: Well, one of our biggest company-wide goals is to increase our product mix. We're thinking one way this project can help us do that is upselling appetizers or promoting certain entrees. Seydou, I've seen on some of the different tablet vendor websites that there's a feature to promote specific items. Does this seem fairly standard and like something we could incorporate?

Seydou (Restaurant Consultant): Yes! Several models out there allow you to suggest any menu item as an add-on, and you can display a coupon for that item as well.

Deanna: Excellent. Peta, we definitely want to try out the menu item add-on feature and the coupons, so we'll need to figure out which tablet package has those features. I think we also want to decrease our average table turn time by about 30 minutes, since delays in service have been a source of customer frustration. I know this is an ambitious goal, but I'm hopeful we can achieve it, since guests can use the tablets to order immediately and pay their own checks without having to wait for a server.

Peta: Got it! As someone who's new to the restaurant industry, I may need a little help with definitions. Can you please clarify what you mean by *table turn time*?

Deanna: Oh, sure! Table turn time is the amount of time a party occupies a table, including the time it takes to get the table ready for the next party. Right now, our average turn time at these locations is about 95 minutes for most sections, and 80 minutes at the bar.

Peta: Thanks—so you think reducing average table turn times by 30 minutes is a reasonable goal?

Gilly: Yes! Our dinner hours are 5-10 p.m., and we believe each table should be able to serve at least four parties in that time. We want our guests to have a great experience, so we don't want them to feel rushed. But we do think the tablets can help us cut down on wait time on the time

they spend waiting for tables and servers. Reducing table turn time should also help with some of our other goals, like increasing our average daily guest counts by 10%.

Peta: I see. Thanks for sharing more of the context. Are there any other goals you'd like to discuss?

Alex: At my location, we've noticed a growing amount of food waste. I think part of the reason for this is that we comp meals when customers send food back.

Peta: Comp?

Alex: *Comping* means not charging. Our current policy is to prepare new meals for any guests who report that their orders are prepared incorrectly. The problem is this can get cumbersome and expensive if it happens too frequently.

Gilly: That's been a problem for us as well. I'm wondering if the tablets will help us communicate specific guest requests to the kitchen more directly? That way, if a guest modifies a menu item in any way, we'll have a record of it.

Peta: Got it. Do you have a specific goal around cutting food waste?

Alex: Not really. It would be great if we could get some estimates of how much we can expect to cut with this project, and formulate a reasonable goal from there.

Peta: Okay, I'll see what I can do. So, I'm adding to the charter that we're going to roll out the pilot in the bar, check on tablet packages that include menu add-ons and coupons, and get some estimates on a goal of reducing food waste. Now, is there anything you're worried about with the tablet rollout?

Gilly: Change can sometimes be challenging for the staff. There's always a learning curve when you're adopting new technology, and people can sometimes be resistant.

Peta: Yes, of course. We'll definitely include a plan for how we train the staff on the new system. What else?

Deanna: It's not totally clear how the tablets will integrate with our existing POS system and host software.

Peta: Sorry, can you tell me a bit more about what these two pieces of software do?

Deanna: The host software tracks table usage and wait lists, while the point-of-sale or POS software manages prices, tracks orders, and generates the check at the end of a meal. The tablet software should be compatible with our existing systems, but we'll need to configure them properly to make the integration as seamless as possible. **Seydou:** The account services teams I've worked with have a lot of experience with this. Peta, let me know when you are ready to research tablet packages and I can work with you on that.

Peta: Thanks, Seydou! That will be really helpful.

Deanna: Excellent! Peta, what other questions do you have?

Peta: Let's see, I wanted to review the timeline for this rollout.

Deanna: We'd like to start the pilot at the beginning of quarter two, which gives us next quarter to get everything ready. If we can do it sooner, that's even better since we tend to be less busy in January and February.

Peta: This is great! Thanks, everyone, for answering all my questions. I may have more later, but I think I have what I need for now. I'll start drafting a project charter, which will summarize the project and explain the goals, the scope, and any future deliverables that might be necessary.

Email: Project Goals

Below is an email thread between the following people:

- Deanna (Director of Operations)
- Peta (Project Manager)

From: Deanna

To: Peta

Subject: Additional project goals

Hi Peta,

Thanks for all of your work on the project charter so far—I think the rollout will really help us hit on all of our objectives!

On that topic, I wanted to discuss a few additional goals that I think are really important. In terms of our company-wide goal of increasing our product mix, we should be trying to raise the average check total. As we discussed, we could do this by encouraging customers to order more appetizers, or in some other way. If you have any ideas on how the tablet rollout might help us achieve this goal, I'd love to hear them.

Second, Alex has emphasized that if we're going to reach our goal of decreasing table turn time, their kitchen staff might need more help to meet the increased demand. Alex thinks we'll be able to reallocate some of the payroll from our FOH (that stands for front of house": all the servers and hosts) budget to hire more cooks. Can we incorporate that into the charter?

Let me know if you have any questions!

Thanks,

Deanna

Hi Deanna,

Thanks for reaching out about these objectives! The added context is really helpful, as I'm currently trying to clarify some of these goals.

I've made note of the average check total goal. I agree that selling more appetizers could help, and Gilly also suggested the idea of selling more specialty drinks. I'm unclear how we'll know that we've reached this goal, though. Is there a percentage increase for certain menu items sold you'd like to measure? A dollar increase in average check price? I'd recommend a straightforward metric—for example, how many customers use the coupons we provide. And since some locations already sell more appetizers than others, I'm wondering if we should differentiate this goal by location?

About payroll reallocation, I'm a little hesitant to add that to the charter. How do we know we won't need to hire more servers or hosts? Also, we don't have a guarantee on tablet performance and whether or not profit increases will be stable. Until we have some data that can accurately project revenue increases, we won't know how much we'll have available to hire more kitchen staff. Do you still think it's reasonable to include this as a deliverable? If so, what should the timeline be? We're on track to measure other goals at the end of quarter two.

Finally, I wanted to flag the goal to decrease guest wait time. As Gilly pointed out at the meeting, the goal of decreasing table turn time should naturally reduce guest wait time, as well as increase daily guest counts. Do you think we really need it to be a separate goal? If so, by how much do we want to reduce guest wait time?

Thanks again for your patience as I get all of the details dialed in.

Best,

Peta

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Hey Peta,

Thanks for sharing your thoughts. I feel pretty strongly that we should target increased average check value as a goal, even if the main way to reach it will be selling more appetizers and specialty beverages. If you think it's best to adjust this goal by location, I'm fine with that. Our average check value is currently \$65 across all locations and we'd like to raise that to at least \$75. If you'd like to get more specific on this goal, you'll need to collect more data from our GMs.

I hear your concern about reallocating payroll, but I still think we should include a plan to ensure the kitchen has the appropriate resources. Maybe we can monitor the payroll and bandwidth of the BOH (that's "back of house: all the kitchen staff, bussers, and behind-the-scenes staff) and open up two part time line cook roles in the meantime?

If you believe that the table turn goal will decrease wait times naturally, that's great. Please just be sure to articulate how decreased table turn time relates to a decrease in guest wait time.

Best,

Deanna



Hi Deanna,

Thanks again for the clarifications here. I can talk to the rest of the team about the payroll issue and whether reducing wait times should be a separate goal. Then I'll summarize the insights around decreased table turn time, average check goal, and appetizer/drink sales in the project charter, and then distribute it to the project team for review.

Best,

Peta

[mail: Sales Goal Details](#)

Below is the email thread between the following:

- Peta (Project Manager)
- Alex (General Manager, Downtown)
- Gilly (General Manager, North)

From: Peta

To: Alex, Gilly

Subject: Sales goal details

Hi Alex and Gilly,

I'm revising some of the goals for the tablet project. I still need to determine how much we want to increase appetizer sales. I would propose 10% as a starting point, but I wanted to know your thoughts for a reasonable increase based on your current sales.

Thanks,

Peta

PS: I've included the current goal list for reference.

Confirmed goals:

- Cut food waste by 25%
- Reduce table turn time by 30 minutes
- Increase daily guest counts by 10%

To be determined:

- Increase appetizer sales by X%
- Reduce guest wait time by X%



From: Gilly

To: Peta

Hi Peta,

The confirmed goals look good to me! As for increasing appetizer sales, this one's a little tricky. My restaurant is in the business district, so we get lots of groups joining us for happy hour after work, and they tend to just order apps and drinks. Currently, about 2/3 of the parties that join us after 4pm order appetizers and many of them order multiple apps. But, I actually don't think the tablets are likely to have a measurable impact on my appetizer sales at all. Servers will suggest appetizers and provide coupons, but most guests are already planning on ordering them, so I don't think it'll matter much. Maybe we should cut this as an overall goal?

- Gilly

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From: Alex

To: Peta

Hi Peta,

Confirmed goals look good to me, too. For appetizer sales, the location I manage is in an area that attracts more dinner guests. They don't order appetizers as consistently—I'd say at dinner time, maybe 20% of tables order appetizers before their entrees. I'd like to propose a larger increase, something like 20%, but I'm not sure it's reasonable to expect to do that just with the tablets.

- Alex

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From: Peta

To: Deanna, Gilly, Alex

Hi All,

Based on feedback, we're going to keep the goal to increase appetizer sales at both restaurants, as this will support the company-wide goal of increasing product mix. Alex wanted a more aggressive increase, however Gilly pointed out that the tablets may not have that big an impact on app sales at her location. So, I'm proposing a 15% average increase overall, with the North location targeted for a 10% increase and the Downtown location targeted for a 20% increase. That way, the goals stay relevant to the unique trends of each location while still supporting the larger company goal.

Thanks,

Peta

Video Chat: Decrease Guest Wait Time

Below is a transcript with the following people:

- Peta (Project Manager)
- Gilly (General Manager, North)
- Alex (General Manager, Downtown)

Purpose: Discuss the goal: Decrease guest wait time by X%

Peta (Project Manager): Hi team! I'm trying to clarify the goal of decreasing guest wait time. To me, this seems redundant with the table turn time goal. If tables turn more quickly, wait times will decrease naturally.

Gilly (General Manager, North): They should, but wait time also depends on how busy the restaurant is.

Peta: But the tablets aren't likely to influence that, are they?

Gilly: Well if guest experience improves dramatically in light of the pilot, there may be more demand to eat at our restaurants.

Peta: Hmm, this feels like a lot of "if's"... I'm not so sure we should include this goal.

Alex (General Manager, Downtown): I'm comfortable removing it in favor of the table turn time goal, which I agree is more specific.

Gilly: OK, if you can convince Deanna, then it's fine by me.

Peta: Great. Since I have you here, are there any other goals we need to address?

Alex: I was thinking I'd really like to reallocate some of our payroll. I think the tablets will allow our servers to cover more tables at once. We can spend some of our savings on hiring more kitchen staff to meet higher demand.

Peta: Yes, Deanna mentioned that—I've made note of it here. But, until we have some data around how the tablets impact table turn time and changes in revenue, we won't know how much we'll have available to hire more kitchen staff.

Gilly: Yeah, and I don't want to give up front-of-house payroll in case we need to hire more hosts or bartenders.

Alex: Well, the kitchen is going to need more staff at some point. In addition to line cooks, we'll definitely need more bussers and runners. How are we going to account for that?

Peta: Hmm... okay I'll keep thinking about this. Before you go, I want to tie these goals to a specific timeline so we know when to evaluate whether or not we've achieved them. Since we're aiming to pilot these in April, I think measuring them through the end of June makes sense. What do you think?

Gilly: That works for me.

Alex: For me as well!

Peta: Great, thanks so much! I'll get to work on these and share them with Deanna.

Meeting: Scope Details

Below is a meeting transcript with the following people:

- Deanna (Director of Operations)
 - Carter (Executive Chef)
 - Gilly (General Manager, North)
 - Alex (General Manager, Downtown)
 - Peta (Project Manager)
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Deanna (Director of Operations): Thanks for being here, everyone. Let's get right to business. Peta has drafted the project charter for the tablet rollout—has everyone had a chance to take a look at it?

Carter (Executive Chef): Yes, it looks great, Peta! This project will really help us dial in our operations over the next few months, especially with the new policy change.

Gilly (General Manager, North location): Policy change? Sorry, what policy change are we talking about?

Carter: With food waste reduction as one of our goals, I assumed we'd be adjusting our policy on order returns due to error as part of the tablet rollout. Now we won't have to replace meals when a guest claims we got their order wrong because the tablet will show that we didn't.

Alex (General Manager, Downtown): I think that's a good idea. And it's another way we can help make things smoother for the kitchen, so I'm all for that.

Gilly: Hmm, I understand the idea, but I don't remember agreeing to changing the policy.

Deanna: You're right, Gilly, we haven't officially added this change. Thanks for bringing it up, Carter. I think it makes sense, but I'm curious about everyone else's thoughts.

Gilly: I'm not sure I agree. The service staff's goal is to ensure that guests have a good experience, not fact-check them. Our servers won't be happy about this. Plus, aren't policy interventions something that should be addressed separately, not as part of this project?

Carter: I hear you, Gilly, but I don't think we can hit our food waste goal without adjusting this policy.

Alex: Carter's right. If hiring more kitchen staff is still in question, we also need to consider this policy.

Peta (Project Manager): Carter, do you think it's important that this policy change be tied to the tablet rollout? I understand that you don't agree with the return policy, but it seems like we could adjust it separately. What do you think?

Carter: If we're committing to adjusting that policy separately, it doesn't matter to me whether or not it's tied to the tablet project.

Peta: Alex, Gilly—are you okay with moving this topic to an operations discussion and keeping it separate from the project, at least for now?

Alex: Sure, as long as we talk about it at some point I'm fine with that.

Gilly: Well, I don't feel comfortable committing to any changes right now, but I am willing to discuss it separately.

Peta: Carter, it sounds like you're definitely in favor of changing the policy; is it just about food waste, or is it something else?

Carter: Well, my kitchen staff has metrics around how long customers wait for their food. When the kitchen is slammed because orders are sent back, our kitchen doesn't perform as well against those metrics.

Peta: I see. I'd be happy to revise the food waste goal to include metrics that better capture your staff's performance, but I'm not convinced a policy change should be tied to this project, or that I should be responsible for revising company policies. If you and Deanna want to work separately on making policy adjustments then I could make sure those changes are reflected in the project goals.

Deanna: I'd be happy to do that.

Carter: That works for me.

Gilly: So we're in agreement that the policy change isn't in scope for this project?

Carter: Yes, that's fine by me.

Deanna: Okay, great. Is there anything else we should address?

Carter: I was hoping we could also include a goal around improving the satisfaction of the kitchen staff. Employee turnover has been high. Do you think that's an objective we can work into our plan?

Peta: Hmm, I think employee satisfaction is important, but is something we should be measuring independent of the tablet launch. I'm not sure I'm comfortable defining a specific goal for it.

Carter: I hear you, but I still believe this launch has the possibility to improve things for my staff.

Peta: OK, but I don't have a strong sense of how to measure that. If you can help me find a way to work it into the plan and provide specific metrics, I'll agree to include it in the project's scope.

Deanna: That sounds good to me—Carter?

Carter: Yes, that works for me as well.

Peta: Great! I'll get to work on amending the charter.

Document: Tablet Cost

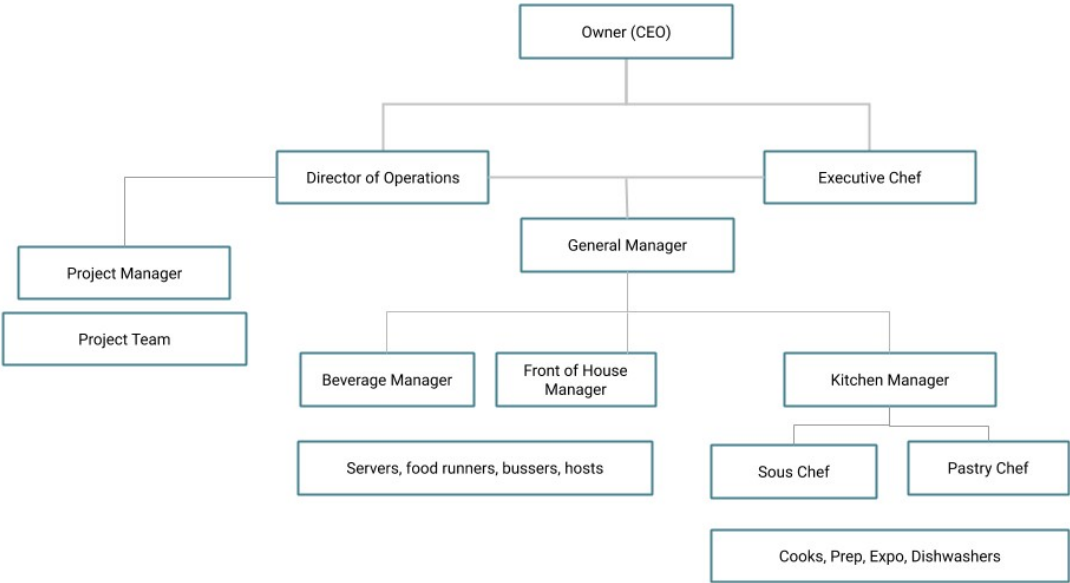
Terrific Tablets Quote:

Terrific Tablets	
Project Investments (Costs)	Estimated Cost
Training materials and fees	\$10,000
Hardware and Software Implementation across locations	\$30,000
Maintenance (IT fees through EOY)	\$5,000
Updated website and menu design fee	\$5,000
Other customization fees	\$550

Terrific Tablets Project Investments (Costs) Estimated Cost Training materials and fees \$10,000 Hardware and Software Implementation across locations \$30,000 Maintenance (IT fees through EOY) \$5,000 Updated website and menu design fee \$5,000 Other customization fees \$550

Org Chart & Team

Sauce & Spoon Organizational Chart



Email: Checking In

Below is an email thread between the following people:

- Deanna (Director of Operations)
- Peta (Project Manager)

From: Deanna

To: Peta

Subject: Checking in

Hi Peta,

I wanted to check in quickly, since you've already been with us for a month—I can't believe how quickly the time has flown! I'm really pleased with all the progress you're making!

On that note, I wanted to see if you'd had an opportunity to meet with Omar yet? As the owner and CEO, he's not typically involved with day-to-day operations, but I think it's worth sharing the project charter with him now that it's mostly finalized. This will also be a good opportunity for you to build some rapport with him, since his buy-in will be important across a lot of the projects you work on. I can introduce you if you want!

Thanks again for all your work—both Gilly and Alex have raved about working with you! I'm so glad you've been able to develop a strong working relationship with them. They'll also be able to help you work with some of the other General Managers as we try to scale the tablet program to them in the future.

Please let me know if you have any questions, or if there's anything else I can help you with!

Thanks,

Deanna

From: Peta

To: Deanna

Hi Deanna,

Thanks so much for checking in and for the kind words. It's been a pleasure working with Gilly and Alex, as well. And yes, I'd love an intro to Omar if you don't mind. It would be great to share the project charter with him.

I did have one question. Carter is understandably very protective of his kitchen staff—is there any additional context you can share that might make it easier to build rapport with him?

I appreciate your help!

Best,

Peta

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From: Deanna

To: Peta

Hi Peta,

Yes, Carter really tries to ensure that the kitchen can focus on preparing food, but he also tends to get involved in the details and doesn't easily back down when he feels the kitchen's best interests are at stake. Have you met Zane and Larissa, the kitchen managers for the pilot sites? They might be able to help you with some of the details that will impact the kitchen. That way, you won't have to involve Carter in every decision and you'll have their input or buy-in when discussing issues that concern the kitchen staff.

Thanks,

Deanna

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From: Peta

To: Deanna

Thanks Deanna! That helps put things in perspective. I'll be sure to reach out to Zane and Larissa.

Best,

Peta

Email: Stakeholder Intro

Below is an email thread among the following people:

- Omar (Owner)
- Peta (Project Manager)
- Deanna (Director of Operations)

To: Omar

CC: Peta

From: Deanna

Subject: Introductions and Project Progress

Hi Omar,

I wanted to formally introduce you to Peta Tsosie, our new project manager. She's been doing an amazing job getting up to speed with all things Sauce & Spoon and has already drafted the project charter for the tablet rollout, which I shared with you the other day. We'd both appreciate it if you could take a look at the charter and let us know if you have any questions or concerns. We're on track to start moving into the planning phase and get this project up and running!

Best,

Deanna

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From: Omar

To: Peta

CC: Deanna

Thanks for the introduction, Deanna.

Hello, Peta! Nice to officially meet you. I've heard great things about your work so far. Welcome to the Sauce & Spoon family!

I reviewed the project charter and in general everything seems in line with our vision. There is one change I'd like to make before you finalize plans. I want to expand the rollout to include all the dining areas—not just the bar area. We have ambitious revenue goals and I really want to make the most of this opportunity. Please revise the charter to reflect this update and then I'll sign off on it.

Thanks again,

Omar

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To: Omar

CC: Deanna

From: Peta

Hi Omar,

Thank you for the kind words—so nice to meet you as well! I've really been enjoying this project so far and meeting everyone on the team.

I understand why you want to expand the rollout and I'll definitely explore that possibility. Unfortunately, I can't guarantee that we'll be able to support an expansion that big within our current budget or schedule. I'm also concerned about our ability to maintain a high level of

customer satisfaction if we scale up too quickly. I'll conduct a comparison and see what's feasible.

Great to meet you, and please do let me know if you have any other questions or requests.

Best,

Peta

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From: Omar

To: Peta

CC: Deanna

Thanks, Peta. Please see what you can do.

- Omar

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From: Deanna

To: Peta

Subject: Rollout expansion

Hi Peta,

I understand the need to consider the impact of the expansion, but let's do everything we can to make this change. Omar doesn't often get directly involved in projects, so when he does it's usually important!

Let me know how I can help.

Deanna

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From: Peta

To: Deanna

Hi Deanna,

I'll do what I can, but a change this big would require a major shift in our budget and timeline projections. It's way out of scope for the time and resources we've allocated for the project. I'm also not 100% confident that we can support such a large rollout without significantly

more training or hiring more staff. I will do a thorough review, though, and get input from the rest of the team before we make a final decision.

Peta

Meeting: Identify Mutual Benefits

Below is a meeting transcript with the following people:

- Peta (Project Manager)
- Gilly (General Manager, North)
- Zane (Kitchen Manager, North)
- Alex (General Manager, Downtown)
- Larissa (Kitchen Manager, Downtown)
- Seydou (Restaurant Consultant)
- Carter (Executive Chef)

Peta (Project Manager): Hi everyone, thanks for meeting with me. Hi, Zane and Larissa—nice to meet you both! Deanna was just telling me about you the other day. I'm looking forward to hearing your thoughts on the project.

Larissa (Kitchen Manager, Downtown): Hello! Nice to meet you too!

Zane (Kitchen Manager, North): Hi Peta, thanks for including us. Happy to be here!

Peta: It looks like everyone is here except Carter, who will be joining us a little later. Let's go ahead and get started and we'll fill him in when he gets here. I've had a request from Omar to expand the tablet rollout to include all of the restaurant dining sections, not just the bar area. As Omar is the owner of Sauce & Spoon, I want to make every effort to consider the feasibility of this change. I have a number of reasons for pushing back on this request and keeping the rollout to just the bar, but I'd like your input as well. Perhaps there is a way to make this work, and if not I want to be able to provide a thoughtful rationale for the push back. I thought we could go around and do a brainstorm session to get everyone's input. Would anyone like to start?

Larissa: I think expanding sounds like a good idea, especially if we're trying to meet larger revenue goals. But since I'm new to the project team, can you provide some background for why just the bar area was selected in the first place?

Peta: Sure thing, thanks for asking. We selected the bar for a couple of reasons. First, we felt that bar patrons are more likely to want a speedier dining experience. Second, since the rollout only focuses on one section of the restaurant, we can make any necessary changes to the training process and address any issues without majorly impacting the entire restaurant before scaling further.

Seydou (Restaurant Consultant): Also, Larissa, in my experience with other clients, piloting at the bar is usually lower risk than other areas. Bar diners tend to be less particular about their experience than, say, a family celebrating a special occasion in the main dining area.

Larissa: Thanks for explaining. Well, I have lots of experience with high-demand kitchens, so I'm up for it! But, I'll defer to Alex since you're newer to the restaurant industry. Would you feel comfortable with an expanded rollout at our location?

Gilly (General Manager, North): I think my restaurant can handle it! I've helped with large-scale initiatives before and can guide Zane with the kitchen. Alex, what do you think? Larissa's a great teammate to help you through this.

Alex (General Manager, Downtown): Hmm...honestly, I'm not sure I agree. I have full confidence in your abilities, Larissa, but I'm definitely hesitant about leading the downtown location through an expanded rollout. There are so many variables to account for—I'm just not comfortable with the risks if anything goes wrong. I've worked really hard to restore and maintain staff morale and the quality of customer service. Something like this, even with a small issue, could be hard to recover from.

Larissa: That's a good point, Alex. In that case, I think it does make sense to start with a smaller rollout, then we can expand from there once we have a sense of the effort involved and the data reports.

Peta: Zane, what's your initial response? Do you think you'd be prepared to lead your staff with a full restaurant rollout?

Zane: Well, I trust Gilly, so with her guidance I'd be open to an expansion. As long as it makes sense once everything else is taken into consideration.

Peta: Thanks for that input. I've made a note of it. I see Carter just joined—hi, Carter!

Carter (Executive Chef): Hi everyone. Sorry to miss out on the first part of the discussion. Any chance I can get a quick recap?

Peta: Sure! Omar has requested we expand the rollout to include all dining sections, not just the bar area. I think it's outside the scope of the project at this point, but I wanted to get more input before making a decision. Gilly and Zane feel they could handle an expansion at their location, but Alex and Larissa are concerned about the potential risks. And Seydou, can you say a little more about your experience with these types of initiatives?

Seydou: Well, there are pros and cons to both options. Expanding the rollout would provide you with more accurate metrics and, if successful, could lead to a greater revenue increase. However, as much as I'd like to sell you more tablets, I really don't think piloting across the entire restaurant is a good idea. Like I said, a bar-focused rollout is less risky. Also, we've observed that diners in sections with tablets really do tend to order more, and it might make sense to let the kitchen scale up their operations more gradually to meet the increased demand.

Peta: Thanks, Seydou. Carter, what are your thoughts on expanding the rollout to the entire restaurant?

Carter: I know Omar wants to meet these sales goals, but I don't think expanding the rollout is a good idea. I've already expressed concerns about needing to hire more kitchen personnel and maintaining employee and customer satisfaction just with the bar rollout! I think Seydou

makes a good point: from an operational standpoint, this rollout needs to happen incrementally.

Peta: Okay, thanks everyone. I really appreciate your input. What I'm hearing is that even though expanding the rollout will yield more accurate metrics and generate much larger profits if successful, the benefits may not outweigh the risks. And as far as the project plan is concerned, an expanded rollout would require pushing back the timeline, paying for more tablets and wiring, and definitely more back of house hires. Limiting the rollout to the bar area will make it easier to ensure high levels of customer satisfaction and keep the project within the original scope. A more limited rollout will also give the kitchen time to scale up its operations and allow us to deal with any problems that arise more discreetly.

Gilly: Yeah, when you consider all those factors it does seem to make the most sense to pilot the tablets in just one area first.

Carter: But Omar and Deanna really want this change. They've both been pushing to meet these growth and expansion goals. They're also really into having a digital presence—and they expect the rest of us to be on board. I've already tried making my case with them; I'm not sure they'll back down so easily.

Peta: I hear you, Carter. I'll definitely need to be strategic about how I present our case to stick to the original plan. Well, thanks everyone. It looks like we're out of time, so I'll share the notes in a bit and keep you posted on the final decision.

=====

Peta, the new in-house project manager for Sauce & Spoon restaurants, has finished drafting the project charter for their tabletop menu tablets project. Her next step is to identify tasks to include in a project plan that will help her team reach the project's goals.

To identify project tasks, Peta spends some time reviewing project documentation for the current tablet project. She also examines the project plan from a completed Sauce & Spoon project for information that could help the team complete the tablet rollout.

Below is the email thread between the following people:

- Peta (Project Manager)
- Seydou (Restaurant Consultant)

From: Peta

To: Seydou

Subject: A few questions about tablet logistics

Hi Seydou,

I hope you're doing well! I have a question for you from Gilly: What's involved with the installation? We know that the tablets will be sending orders to the kitchen via WiFi. But how

do restaurants typically handle keeping them charged in during service? Or will they be plugged in the whole time? Do we need to contact an electrician to wire up the tables? Should I add "schedule an electrician" to the project plan?

Thanks!

Peta


Hi Peta,

Actually, yes—wiring the tables is exactly what happens. Once I know the extent of the installation at each location, I'll work with the tablet vendor to get an electrician in.

Let me know if there's anything else!

Seydou


Hi Seydou,

Another question, coming from Carter this time. How will the kitchen be able to update the menus? Can they do it in real time? Like, for instance, if they run out of a certain dish, can they remove it from the tablets immediately so customers don't order it?

Thank you!

Peta


Hi Peta,

Yes, this is a standard feature on all current tablet models. If an item is no longer available you'll be able to update the menu in real time from the admin back-end of the software, which you can access on the office computer. We just have to run the staff through some training so they know how to do it.

Keep the questions coming!

Seydou


Hi Seydou,

One more question! Will you be involved with setting up our customization and branding? Deanna asked again about making sure the tablet menu interface looks and feels like our printed hardcopy menus. Do we provide you with a printed version and you design the tablet version? Or do we get blank software and program the tablet menus ourselves?

Thanks again!

Peta



Hi Peta,

Custom branding, design, and upload are separate vendor offerings. Terrific Tablets offers these services with some of their packages. If you choose one of those packages, then I'll connect with your marketing department and update the menu interface to match the branding and layout of your menus.

Happy to help!

Seydou

Peta wants to identify more project tasks for the tablet rollout—but first, she needs to expand her domain knowledge of the restaurant industry. Peta decides to conduct online research on similar projects, which should help her identify additional tasks. This research also allows Peta to draw inspiration from other projects, and to learn from their successes and mistakes.

After conducting some online research about restaurant tablets, Peta calls Seydou and Gilly to get a better understanding of project tasks. She also discusses a past Sauce & Spoon initiative with Nia, the general manager of the Waterfront location. This conversation helps Peta understand the potential impact of the tablet project on the waitstaff.



Peta
Project Manager

Hi Seydou, it's Peta.

Hey Peta. More questions for me?



Seydou
Restaurant
Consultant



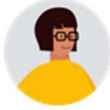
Peta
Project Manager

Always! We just had a project meeting and discussed needing to train waitstaff on how to use the tablets. How does this typically get handled?

Good question. We've found that the best strategy is to train some key staff members at the location, and have them run the training.



Seydou
Restaurant
Consultant



Peta
Project Manager

Okay, so you wouldn't run the training? I was under the impression that you would.

Actually, we've found that having a third party vendor come in to do the training hasn't made for the best implementation.



Seydou
Restaurant
Consultant



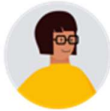
Peta
Project Manager

Why?

Waitstaff tends to resist changing the way they interact with customers, and the tablet benefits aren't always obvious. If someone in-house does the training they're more likely to get on board.



Seydou
Restaurant
Consultant



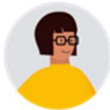
Peta
Project Manager

Good to know. I'll make sure we keep that in mind. So it sounds like we'll have you train a small group of us, then we'll schedule a second training with all the staff at each location.

That's generally how we do it.



Seydou
Restaurant
Consultant



Peta
Project Manager

Thanks so much! I'm sure I'll have more questions for you, but that's all for now.

No problem, Peta.



Seydou
Restaurant
Consultant



Peta
Project Manager

Hi! This is Peta, the new project manager. I don't think we've met yet.

Oh yes, Peta. I've heard your name. How's the tablet project going?



Nia
GM, Waterfront location



Peta
Project Manager

It's going pretty well! I do have a few questions, do you have a few minutes to chat? I'm curious about an initiative your location tried last year.

Sure, I have a few minutes to chat.



Nia
GM, Waterfront location



Peta
Project Manager

Thanks! I heard you tried something new with your waitstaff that didn't quite work, and I wanted to get your feedback. You tried piloting no tips at your location, right? Can you tell me how that worked out?

I think the idea floating around the restaurant industry is that no tipping is the future. The idea is to include the tip in the price of the food, and restructure pay and incentives for the entire staff based on that.



Nia
GM, Waterfront location



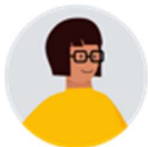
Peta
Project Manager

Yeah, I've seen that at some places.

Well, we certainly gave it a shot! Except we didn't anticipate how staff would react.



Nia
GM, Waterfront location



Peta
Project Manager

What happened?

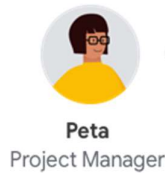
Half our waitstaff quit. Part of the issue was that they felt they could make more elsewhere because of the restructured pay. But part of it was our fault too.



Nia
GM, Waterfront

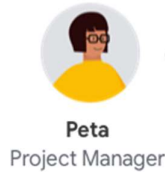


How so?



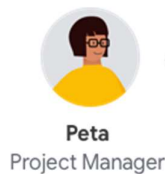
Hi Gilly, it's Peta.

Hey! How are you doing?
What's new with the project?



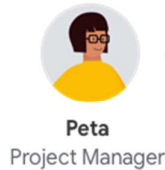
It's going really well! But there's actually something I could use your help with since I know you've been the GM for a while, and the staff really respect you.

Thanks! Happy to help.



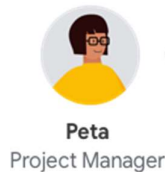
You may have already been thinking about this, but we need to make sure to get the waitstaff on board with the tablets before they start using them.

I have thought about that, yes. Especially after the disaster last year after the Waterfront location tried rolling out no tipping. I was already planning on having a meeting to update the staff. Want to be there?

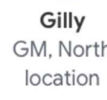


Yes indeed. You think you'll be able to convince them?

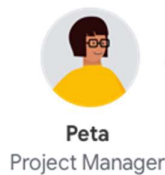
I'm excited about the tablets, so hopefully I'll be able to convince everyone! If not, I know their concerns and fears, and can help mitigate them. I was a waitress once.



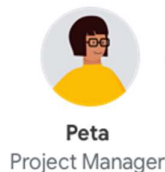
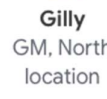
Seydou also mentioned that some of us would get trained, and then we could train the staff.



That sounds like a good plan. Be sure to coordinate with Alex about scheduling a training for the Downtown location.



Great! I'll be sure to do that.



That sounds great.
Thanks so much, Gilly!

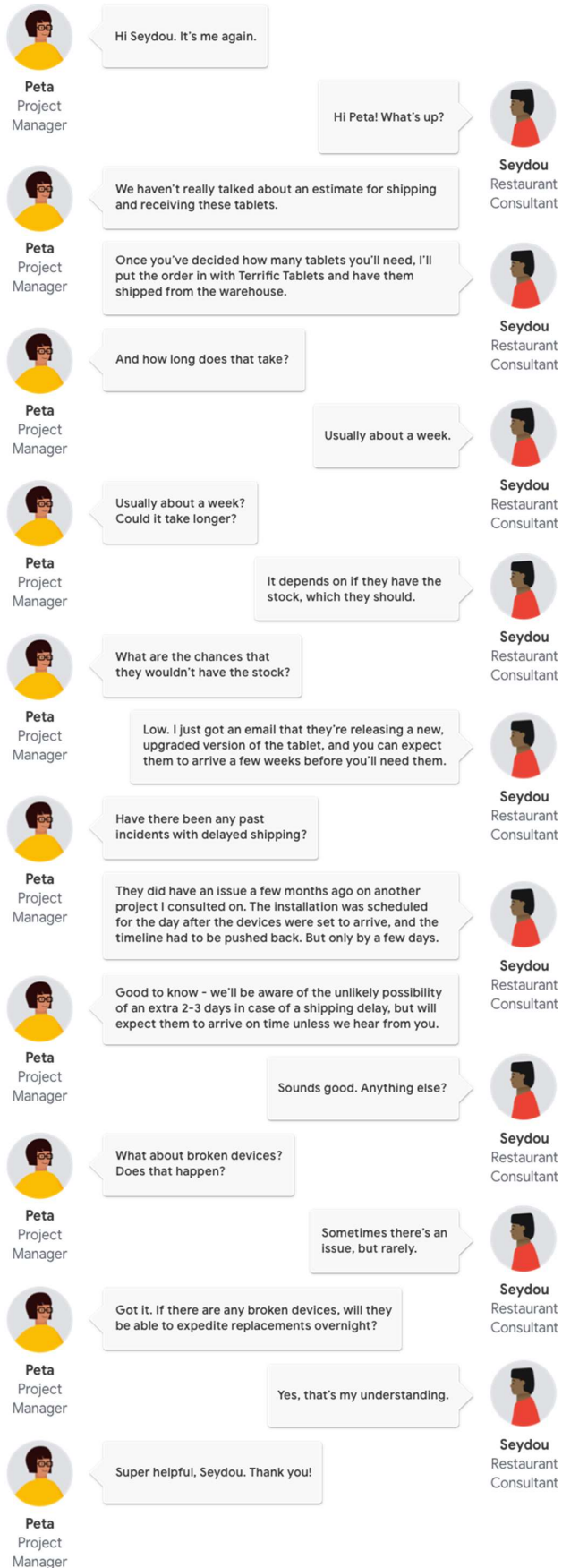


Once Peta ordered project tasks and identified milestones, she called Seydou to determine how long certain project tasks should take. The next step is to check in with Deanna and follow up with Seydou to clarify some of her estimates. She also reviews some project documentation, like emails and the historical project plan, to gather more task time estimates.

Below is the transcript of a phone conversation with the following people:

- Peta (Project Manager)
- Seydou (Restaurant Consultant)

To open an accessible document with the conversation, you can reference [this doc](#).



Below is the transcript of a phone conversation with the following people:

- Peta (Project Manager)
- Deanna (Director of Operations)

Peta: Hi Deanna. How are things?

Deanna: Good! How's the project coming along?

Peta: Pretty well! I wanted to touch base on when you'll have the menu items and coupon values you want featured on the tablets. I need to send that content over to the designer so they can get started with the mock-ups

Deanna: Yes! Do you know how long it'll take to upload the content once we have it?

Peta: I was told that once the mock-ups are ready, it's just a few hours to load everything in, maybe less. But we need to know which items will have coupons and the values of those coupons so the designer can start.

Deanna: I'm waiting on Carter to get that information for us. I sent him an email this morning.

Peta: Oh great, what did he say?

Deanna: He wants to revamp the menu first and then he'll send over the tablet content. He'll be able to get started on it later next week. Is that okay?

Peta: Well, we need the menu and coupon values soon. I'd like to get the mock-ups uploaded by the end of next week. Can he hold off on the revamp and make this decision a priority?

Deanna: Probably, but you'll need to check with him. I know he was planning on his new menu being featured with the rollout.

Peta: Does he change the menu often? How long does it usually take him?

Deanna: It all depends—sometimes he's inspired and submits something new within a few days. Other times he likes to research what's trending and test things out for a few weeks. Why don't you follow up with him about what you need. If he knows your timeline he's usually pretty agreeable. But you never know with Carter! Let me know if you need me to step in.

Peta: Will do. Thank you!

Below is the transcript of a phone conversation with the following people:

- Peta (Project Manager)
- Seydou (Restaurant Consultant)

Peta (Project Manager): Hi Seydou.

Seydou (Restaurant Consultant): Hi Peta! Got some more questions for me?

Peta: Yup! About software integration this time. We need to make sure that the tablet software syncs up with our POS system. How long does that typically take?

Seydou: Not long at all. We add some code to the POS, reboot, and there you go. We can get it done in a few hours.

Peta: Great! It sounds very straightforward. Are there any issues you've seen in the past with this process?

Seydou: Well, it depends on what POS software you're using, and which version. I think you're on FlatPlate version 3.0. We require 3.0 or higher, and there are a few other POS systems we work with as well.

Peta: Oh, I'm not sure if we're on 3.0. I remember thinking when I saw the screen at one of the locations that it looked a little old. What if we're not on 3.0?

Seydou: Then that means you'd need to update your POS system. That can be done by contacting FlatPlate directly.

Peta: And how long does that take?

Seydou: It depends. Maybe a few days?

Peta: Ok, thanks for the info. I'm going to give Gilly a call and check on that immediately. Thank you!

By now, Peta has added a number of tasks to the project plan and assigned them time estimates. Now Peta wants to get a sense of how confident the team is that those time estimates are accurate. This information will allow her to update the timeline for completion and be fully prepared to launch the project.

Below are the meeting notes from a video call with the team:

Project Team Meeting Notes

Purpose: Project Tasks Update

5 min: Review new tasks in project plan

5 min: Discuss shipping and installation time estimates:

- Seydou projected 7-10 days shipping timeline, 3-4 hours to integrate the POS systems
- Possible need to upgrade the POS system if S&S is running an older version (3-4 days)

- Electrician is confident they can wire both locations in two business days (16 hours), but since we can't close the restaurants for a full day we need to schedule two half-days at each location

5 min: Discuss menu and coupon upload time estimates:

- Still waiting on Carter for the finalized menu and coupon value mock-ups for upload (aiming for one week but could extend to two)
- Once mock-ups are received, 3-4 hours to upload

5 min: Discuss training time estimates:

- Pre-training meeting to introduce tablets and changes to staff before training them on the tablets (1 hour at each location)
- Seydou will train managers first (2 hours), then managers will train all the staff at each location (2 hours for each training plus one hour before and after each training for facilitator prep/debrief)
- Gilly and Alex will coordinate with Peta to schedule staff trainings at each of their locations. Each part of the training (pre-training, manager training, staff training) will take place on different days.
- The preparations and planning for the trainings should take about one week.

15 min: Assess which tasks (or similar tasks) the team has completed before (notes copied from whiteboard):

- Team has high level of confidence in the estimates on the Project Plan

Never attempted	Attempted at least once	Attempted regularly
Integrating tablet software with POS (need to upgrade current system)?	Wiring through tables (for light fixtures in booths, but not for tablets)	Staff training (in general, but not on a new directive like this)
Training waitstaff on new software system		
Regularly updating menu via software		

A table with three columns. The first column, which is titled "never attempted," says: Integrating tablet software with POS (need to upgrade current system)? Training waitstaff on new software system. And, regularly updating menu via software. The second column, which is titled "attempted at least once," says: wiring through tables (for light fixtures in booths, but not for tables). The third column, which is titled "attempted regularly," says: staff training (in general, but now on a new directive like this).

10min: Next steps:

- Follow-up with Carter on menu
- Follow-up with Gilly and Alex about staff meeting scheduling
- Check on POS status
- Determine how many tablets we need to order for each location
- Book electrician for specific dates
- Set a date for staff training at each location and update staff calendars
- Start drafting a training plan

As the team thinks ahead to the tablet test launch at Sauce & Spoon, Peta needs to identify quality standards. During their weekly check-in meeting, Peta and Deanna review some of these standards.

Below is a transcript of a conversation between the following people during their weekly check in:

- Peta (Project Manager)
- Deanna (Director of Operations)

Deanna: Hey, Peta! How are things going with the project?

Peta: They're going pretty well! We're working through the project plan, and looking forward to launch.

Deanna: That's great! For our check-in today, I thought we could go over some of the quality standards for this project.

Peta: Sure. Any you had in mind specifically?

Deanna: I'd like to update Omar on how the project will meet our commitment to customer satisfaction. Think we can put a list of criteria together? To start, since delays in service have led to negative reviews, I think we can safely assume that customers would be satisfied by a faster, more efficient experience—and by having their orders made correctly.

Peta: Yes! But, we need to make sure these can be measured so we can know we've met the standard. Can we dig into the details and get a little more specific? For example, when we mention a "faster, more efficient experience," how can we measure that?

Deanna: Hm. What about average ticket time—the amount of time between placing an order and delivering it to the table. Based on my experience, a good average is eight minutes for appetizers and 12-15 minutes for entrees. Since the tablets are supposed to help improve the flow of ticket orders, we could use these metrics. That would help with our goal of bringing down the average table turn time by 30 minutes, which should certainly increase customer satisfaction.

Peta: Great. What else would fall under a "faster, more efficient experience"? Since guests can run their cards at the table, maybe quicker check-out could be one?

Deanna: I like that. We've heard that customers are satisfied with our delivery checkout system online so a quicker dining experience would be great to mirror that. How would we measure that?

Peta: We could look at having a one-minute checkout time and ensure the checkout process is seamless and easy to navigate from a user perspective.

Deanna: I think that's great to add to our list of quality criteria to help us meet customer satisfaction—a checkout time of one minute or less. Great! What else do you think could help with an efficient experience?

Peta: Well, one thing that *wouldn't* help customers have a positive and efficient experience is if the tablets don't work the way they're supposed to! One of our charter goals is for less than 5% of customers who use the tablets to report technical issues each week.

Deanna: Definitely. So, let's add that to the list of criteria. And what about cutting down on incorrect orders?

Peta: Yes! How about we aim for 98% order accuracy? Since guests will be placing their own orders, they'll be able to confirm what they order before sending the ticket to the kitchen. Assuming the tablets function properly, there shouldn't be many problems with guests receiving incorrect orders anymore.

Deanna: These are great! Are there any other aspects we want to consider that could increase customer satisfaction before I present this to Omar? What do you think about decreased customer wait time in the lobby? We could aim for an average wait time of ten minutes or less before customers are seated.

Peta: Absolutely—that makes sense since we're expecting wait times to go down as table turn time decreases. So, measuring the specific impact will be useful. I think Omar will be happy with this list. We have some solid criteria to ensure we're meeting the standard when it comes to customer satisfaction. This list will also probably come in handy as we set up customer satisfaction surveys later on.

Deanna: Great! Thanks for working on this with me. Can you get the rest of the quality standards outlined in time for next week's check-in?

Peta: Sure thing!

The project team has completed two important milestones: installing the tablets and training the staff. Part of the training milestone included a test launch to make sure the tablets worked properly and to let the staff practice their training. Now that the test launch is over, Peta reviews the customer survey data and holds a retrospective review with the project team. They discuss what has gone well so far and identify areas for improvement going forward.

Now that the tablet test launch is complete, Peta wants to ensure that it leads to a successful rollout at both pilot locations. She does this by creating evaluation questions and indicators to measure the results of the test launch, and assess the project's progress at this stage.

there are two main types of evaluation questions. There are questions that ask how you can make improvements, such as:

- How can we improve?
- What is working and what's not working?
- Which goals are being met?
- Who is benefiting?
- What are the most common participant reactions?

There are also questions that help you measure and compare, such as:

- Were there unintended outcomes?
- What were the costs and benefits?
- Are there any lessons to be learned?
- Should we continue?

A well-crafted evaluation question should provide you with valuable data. As you create your evaluation questions, consider the following:

- Does the question address stakeholder or user values, interests, and concerns?
- Does the question relate to the purposes of the project and of evaluation?
- Is the question worth answering and important for the project and beyond?
- Is the question practical and feasible to answer with available resources?

Evaluation indicators state the specific type of data you need to collect to answer your evaluation questions. As you create your evaluation indicators, ask yourself the following questions:

- What do you want to measure or evaluate? The number of something? The level of satisfaction? Preferences? Demographic information like age, gender, or experience?
- Will the indicator demonstrate that you have reached the desired outcome?
- Will the indicator provide measurable evidence of meeting a goal? Examples of measurable evidence could include things like test scores, attendance rates, or observed behavior

Review the supporting materials

The survey results include the questions and responses to a 15-question survey that 50 of Sauce & Spoon's friends and family members completed on their tablets at the end of the test launch event.

As you review the survey results, take notes on the following:

- Identify responses that meet the goals and quality standards you set during the planning phase.
- Identify responses that show that there's still room for improvement.
- Pick one data point that helps illustrate and support the point you want to make in your presentation. For example, if you'd like to demonstrate that a majority of customers were satisfied with the test launch experience, you might use survey data that shows a majority of customers had a positive response to their dining experience.

Step 4: Create your presentation slides

Create your presentation following the guidelines below. Remember that this presentation is for high level stakeholders and potential investors, so be sure to tailor your presentation for the right audience.

- **Slide 1:** Title your presentation
- **Slide 2:** Summarize the milestone you reached—the tablet test launch—and how you achieved it
- **Slide 3:** Give an overview of what the project team wanted to measure. This should be based on the evaluation questions and indicators.
- **Slide 4:** Include one data point from the survey. This should be in the form of a chart or graph, or by comparing numbers. **Note:** *If you'd like some help on building charts in Google Docs or Sheets, review [this support article](#).*
- **Slide 5:** Describe one recommendation for improvements or next steps in the tablet rollout.
- **Slide 6:** Describe a second recommendation for improvements or next steps in the tablet rollout.

Meeting: Retrospective

Below is the transcript of a retrospective meeting with the following people:

- Peta (Project Manager)
- Carter (Executive Chef)
- Gilly (General Manager, North)
- Zane (Kitchen Manager, North)
- Alex (General Manager, Downtown)
- Larissa (Kitchen Manager, Downtown)
- Seydou (Restaurant Consultant)

Peta (Project Manager): Hi everyone! Thanks for taking the time to meet so we can debrief about the tablet test launch and our progress on the project so far. We're one step closer to the official launch! Before we begin our discussion, I'd just like to say that I want everyone to feel like they're in a safe space here. Please feel free to share whatever you can in order to help us improve this process. Does anyone want to start with something they think went well or something we could improve?

Alex (General Manager, Downtown): I think it went pretty well! We got all the tablets installed and working at my location.

Peta: Great! Gilly, what about your location?

Gilly (General Manager, North): Same here. It seemed like all the guests got the hang of the tablets and that payments worked for the most part. One area we could still improve is table turn time. We didn't see as much of a decrease as we wanted to in that area.

Alex: Yeah, same with us. The food came out on time, but table turn time stayed about the same.

Peta: Hmm, thanks for that. Maybe hearing about the kitchen's experience can provide some insight. Larissa or Zane, what are your thoughts?

Zane (Kitchen Manager, North): Tickets came through at a good pace and were easy to keep track of. But even though the ticket flow was smooth, there were still orders that got sent back. So, that's still an issue that needs to be addressed.

Larissa (Kitchen Manager, Downtown): Yes, we noticed that as well. Not as many as before, but there were still some food orders that got sent back. On the plus side, we've already started implementing some updates to kitchen operations as a result of the new ticket flow, and we're really happy with them.

Peta: This is great feedback. And that's interesting about the food orders. I'll be sure to prioritize this issue for further analysis. Also happy to hear that there have been some helpful updates to the kitchen operations! Maybe we can set up some time later to discuss them further. Seydou, what's your take on things? Anything on the technical front?

Seydou (Restaurant Consultant): I know this doesn't seem like good news, but we discovered a few technical issues during the POS integration process. The good part is that we were able to address them quickly and get them fixed.! There will always be routine maintenance issues that pop up—it just comes with the territory. But they're usually easy to manage once you identify what type of issue you're dealing with, and that's what we were able to do!

Peta: That's great news! We can also update the process manual so that the solution is easy to find next time that issue comes up. In fact, maybe there's a technical issue that's affecting ticket accuracy. Seydou, can you check on that?

Seydou: Sure thing.

Peta: For my part, the weekly calls with vendors helped us stay on track and clarify task dependencies. I'll make a recommendation that they keep this cadence for the next series of rollouts. Also, the survey was able to capture meaningful data, which shows that we listen to our customers. Fortunately, the results indicate that we met most of our customer satisfaction standards.

Seydou: We didn't get many participants for the birthday club though. This data will be helpful for future research, so I'm proactively working to grow the participant list. I'm also working with the designer to update the content on the website and the tablets so it's clearer what the program is, what we're asking, and how people can participate.

Peta: That's good to know, thanks. Anything else about the training process, or how the project is working in general? I noticed that as we started implementing the tablets and training, we discovered a few internal operational issues that we hadn't planned for. That impacted the team's ability to carry out tasks smoothly. So for the next rollout, we want to do a better job of understanding each location's history before planning gets underway. That way we can account for things we might need to address ahead of time.

Seydou: I'd also like to add that tablet implementation took just a little bit longer than we hoped. There was some vacation time that was unaccounted for, so this is a good reminder to make sure we plan things properly based on everyone's availability.

Zane: That makes sense! Kind of related to that, we'd like to do a bit more to help the back of house staff scale up their operations before the main launch. We want everyone to be prepared to handle a larger volume of orders.

Larissa: Good point, Zane. We also noticed there's a lack of understanding between what the front of house staff does and the back of house staff does. I think if we take time to share those experiences it will help everyone work together more effectively. It would also reduce the tendency to blame one another if issues come up.

Alex: Thanks for bringing that up. We might want to take a look at the waitstaff training process, too. Maybe we should develop a more comprehensive training session, or even break the training up into two parts. We could take the opportunity to address other aspects of daily service operations in addition to how to use the tablets.

Peta: Great—this was so helpful, everyone. I know our time's up, so we'll leave things here. Thank you so much for all the thoughtful feedback!

ou reviewed a retrospective meeting transcript in which Peta led the team through a retrospective.

Part of a project manager's job is to ensure that retrospectives run smoothly, with all attendees participating. In this quiz, you will identify how Peta addresses a lack of participation in a different version of the retrospective.

Peta: Hi everyone! Thanks so much for taking the time to debrief about the tablet test launch. We're one step closer to the official launch! Before we begin our discussion, I just want to say that I want everyone to feel like they're in a safe space here. Please feel free to share whatever you need to in order to help us improve this process. Ok! Does anyone want to start with what they observed as a success and what they observed as an opportunity for improvement?

[long pause]

Alex: I think it went well.

Peta: Can you tell us a little bit about what you think went well?

Alex: Well, maybe someone else could go?

[long pause]

Peta: I could certainly go first. I think some of our successes were that we got all the tablets installed, working, and had a chance to test them out! And that, in general, everything went pretty well. The customers got the hang of the tablets, the tickets went

through, and the payments worked for the most part. I know personally, though, that our table turn rate didn't see much improvement, which was one of our goals. But we can certainly focus on that going forward and brainstorm ways to improve efficiency. Who wants to add anything?

[long pause]

Peta: Ok, if no one will jump in, why don't we do this. Let's go around and jot down some ideas on the whiteboard about what went well and what can be improved. Gilly, do you want to start?

Now that you've reviewed a different variation of the retrospective, you can identify ways that Peta can address a lack of participation.

Peta encourages accountability in the retrospective.

Peta: In looking at the customer survey, it shows that we didn't hit our goal of decreasing table turn time. I'm sure we'll be able to speed that up as we go, but I'm curious if anyone has any thoughts as to why we're seeing guests spend the same amount of time at the table with the tablets as before we installed them.

Deanna: We might want to look at waitstaff training. The waitstaff might need to adjust how they go about their interactions, which could cut down on turnover.

Gilly: We might also want to look at kitchen speed.

Peta: Let's look at everything that might contribute, including the kitchen turnaround. I think we all have to do our part to contribute to the goals. I did want to note that Alex, your location actually had a quicker turn time than Gilly's location by about fifteen minutes. Do you have any insights?

Alex: We just encouraged the waitstaff to speed up the visits. That was one of our objectives, and since the tablets sped up checkout, it was easy.

Peta: Gilly, what were you doing differently?

Gilly: I know my customers. I know they want to come to dinner and hang out and have a good time, so I instructed my staff to let them.

Peta: Gilly, I know that the team—including you and me—had discussed that one of the objectives we wanted to hit was speeding up table turn. We know that the tablets create efficiencies to do that, so we need your location to start focusing on that objective.

Gilly: I don't want to rush my customers through dinner.

Peta: I can understand that. But is that all customers? Maybe some customers do want a quick dining experience, while others want to hang out.

Gilly: Possibly. But I don't want the tablets to change the experience, which is why they come to Sauce & Spoon.

Peta: We do want to speed up the dining experience at your location, but we can talk more about ways to identify guests who might want to hang out a little longer and those who would like a more efficient dining experience. Maybe the majority would like a faster dinner, and we could help them get that experience. Would you take the initiative to have your waitstaff speed up dining time but also be sensitive to guests who might want to stay longer?

Gilly: Sure, we can chat more.

identify the ways Peta addresses negativity in the retrospective.

Alex: Are we going to talk about the fact that orders are still being made incorrectly in the kitchen? The customer survey shows that even with the tablets, the kitchen was still making the orders wrong.

Carter: I didn't see that in the survey.

Peta: I think that's a good point, Alex. Actually, Carter, the survey results show that 28% of the orders were incorrect. We had talked before about reducing food waste by reducing the number of dishes returned to the kitchen. Since the tablets eliminate any waitstaff error in ordering, I think we need to address this issue.

Carter: Like I've said before, it's not the kitchen, it's the generous send-back policy we have. We shouldn't let people just sample dishes and send back whatever they don't like.

Alex: If we don't get this fixed, we won't have any customers to fix the tablets for.

Carter: We should change the policy. What they order, they get.

Alex: Obviously, you're not going to realize that it's really the kitchen staff getting things wrong.

Carter: I don't think it is.

Alex: There just doesn't seem to be any reasoning with you, even when we have the facts. I don't know what else to do.

Peta: Hang on. I think we can agree that the goal for all of us is to have satisfied customers who have an enjoyable experience, right?

Alex: Right.

Carter: Yes.

Peta: Alex, I can understand your frustrations. Carter, would you commit to helping us find out exactly where the problem is?

Carter: It's not just me and the kitchen. Others should help out too.

Peta: We all will. Why don't we talk more about this later, and why don't we take a quick break.

Peta will summarize the problem to Deanna, the Director of Operations (a stakeholder). To begin, please read the email below:

To: Peta (Project Manager)

From: Gilly (North Location General Manager)

Subject: Customer Survey Results

Hi Peta,

I reviewed the customer survey results from the tablet pilot test launch. From my perspective, one piece of negative feedback stood out from the rest. Several of the customers mentioned they had a negative experience when paying with cash.

I believe this is an important issue to resolve because about 10% of our customers pay in cash. I think it may negatively impact the restaurant if 10% of the customers are having a negative experience with the checkout process. This could lead to less repeat customers. It could also lead to unenthusiastic word-of-mouth and less than stellar online reviews.

We should come up with a new process to more quickly handle cash payments. I really like the new tablets, but we need a checkout process that works well with both the credit cards, and cash. Regarding the new process, it would help to make cash more accessible to our wait staff. Currently, they have to go to the bar to access the cash register. We should consider adding a second register by the kitchen. Also, to get ahead of the issue, I think wait staff should ask customers if they're paying with cash or a credit card.

Please let me know how we should proceed with an improved cash checkout process. I think we can figure out something that will work well alongside the new tablets. I'm excited to use the new menu tablets full-time!

Sincerely,

Gilly

General Manager - Sauce & Spoon North Location

will consider how the email scenario from the previous activity (Peta and Gilly's checkout challenge) could impact Sauce & Spoon's objectives and key results (OKRs). Start by reviewing the email:

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From: Gilly (North Location General Manager)

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Sincerely,

Gilly

General Manager - Sauce & Spoon North Location

The Sauce & Spoon tablet rollout is now complete! Peta is finalizing the project by creating a closeout report that details the project's goals, the approach for carrying out the project, and its key accomplishments. Completing the project closeout report is especially important because Sauce & Spoon has just hired a second project manager, Molly Edwards, to help Peta oversee the tablet rollout at the remaining restaurant locations. Molly will reference Peta's closeout report as she onboards and begins planning her own projects.

Email: Post Project Launch Check-in

Below is an email thread between the following people:

- Peta Tsosie (Project Manager)
- Molly Edwards (Project Manager)

To: Peta Tsosie **From:** Molly Edwards **Subject:** Congrats on the project launch!

Hi Peta,

Congratulations on the tablet launch! I'm excited to work with you on the next round of rollouts and really appreciate your help as I get familiar with Sauce & Spoon and all the project details.

I know you've been busy for the past few months. Once you have the closeout report wrapped up, I was hoping we could grab lunch and talk more about the project. In the meantime, are there any highlights you're able to share with me now?

Congrats again!

Molly

Hey Molly,

Thanks so much—and welcome to the Sauce & Spoon family!

Things have been busy, but the tablets are out and guests are using them. We managed to get everything off the ground—after a lot of work!—and the project has been pretty successful. Of course, we only got there after tweaking some things following the test launch. Guests and waitstaff are both adjusting to the tablets, and we've had some good feedback from guests. They like the novelty of the tablets, but also how they're speeding things up. It's kind of a different look for Sauce & Spoon, but it still fits with the brand.

I'd love to grab lunch soon. It would give us a chance to debrief before I do my personal closing report.

Peta

Peta,

That's fantastic! I heard that the responses after the pilot were a little shaky. How did you fix it?

P.S. Yes to lunch! I'll set something up :)

Molly

Hi Molly,

Thanks, I did the best I could!

Yes, we made several adjustments in response to the pilot and our survey results. First, our guests seemed to have some trouble with the navigation, so we switched to a layout that they've found much simpler.

We also found out we weren't hitting our objective of reducing table turn time, so we worked with the general managers on ways to speed things up. We finally did manage to reduce turn time by 30 minutes. That was mostly through training and getting waitstaff to be more aware of guest pacing. Quicker turns means shorter wait times for tables, so we accomplished that, too. We also confirmed that the average tablet checkout time has stayed at one minute or less, so that's another win.

One more change we made was creating clearer messaging around payment options. We wanted to make it clear that the tablets only take cards, while also streamlining the process for customers who need to pay cash. And I'm pretty sure we've weeded out the glitchy tablets through our new pre-service testing checklist! We wanted less than 5% of customers reporting tech issues each week, and we got there.

Peta



Hi Peta,

Oh wow, that's awesome! So did you accomplish everything you wanted to? How are Gilly and Alex feeling about things? Have Carter and the kitchen staff made any improvements?

Molly



Hey Molly,

Well, as far as getting everything accomplished, I'd say we did! We eventually met (and exceeded) our goals, but again, it was after we made improvements based on the test launch.

Alex got the waitstaff at the Downtown location to reduce table turn time, and has already increased daily guest count by 20% (our goal was 10%). Gilly is getting used to the new ways of doing things, but she's always positive and focused on what's going to create a great experience for the customer.

As for Carter, well... The survey results showed that customers were still receiving incorrect orders, so we had a conversation and I think we're on the same page in looking at all possibilities for errors, which includes the kitchen staff. I reminded him that we're all working towards the common goal of providing a great customer experience. We wanted to reduce food waste by 25%, and we've just hit that number.

I got the invite for lunch next week. Looking forward to it!

Peta



Great! I'm excited to chat more in person. Although, I guess we covered more than just the highlights here! Hopefully it's helpful for your closeout report, haha.

Thanks so much,

Molly

Write the executive summary

On the **Executive Summary** slide (slide 2), write a few sentences to a paragraph summarizing the purpose and outcome of the tablet project. Remember that your audience consists of senior stakeholders and potential investors for Sauce & Spoon's next tablet rollout project, so the summary should provide a high-level overview. A "high-level" overview means providing a basic and general explanation without going into all the details.

As you compose your executive summary, be sure to describe the following elements:

- **The project vision:** What need did the project fulfill?
- **Two key accomplishments:** What value did the project add? What activities, tasks, and milestones helped the project succeed?
- **Two lessons learned:** What could have been done differently?
- **Two next steps:** What work remains now that the launch is complete?