MGT 238: Management Synthesis

Online Ordering Portal Implementation for Citrus Grove Catering

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CITRUS GROVE
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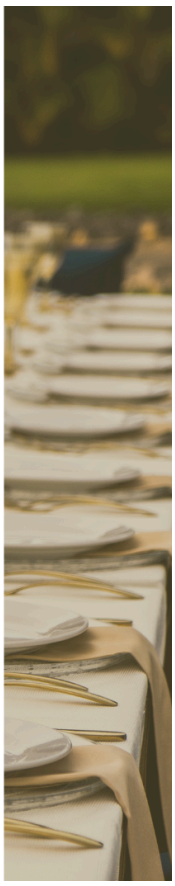

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Executive Summary

Citrus Grove Catering (CGC) currently operates with a manual ordering system that limits efficiency and growth. This report proposes the implementation of an online ordering portal to streamline operations, improve customer experience, and increase revenue.

The new system will automate order processing, reduce staff workload, and enable 24/7 self-service ordering. It will also provide data-driven insights to enhance menu optimization and financial tracking. A phased implementation plan ensures a smooth transition, addressing potential challenges such as customer adaptation through gradual onboarding and training.

With minimal costs and significant benefits, this digital transformation will position CGC for long-term success, enhancing efficiency, customer engagement, and profitability.

1. Value Addition

Implementing an online ordering portal will enhance Citrus Grove Catering's efficiency, profitability, and customer experience. By eliminating manual order processing, the system will reduce operational bottlenecks and free up staff for higher-value tasks. Additionally, the portal will create new revenue opportunities by enabling 24/7 self-service ordering, personalized recommendations, and a seamless checkout experience. These improvements will translate into cost savings, increased sales, and higher customer satisfaction.

1.1 Impact on Revenue and Profit Growth

- Reduction in Labor Costs and Time:
    - Eliminates manual order-taking, reducing staff workload.
    - Automates payments, minimizing invoicing and billing tasks.

    - Reduces order errors, lowering customer service interventions.
    - Frees up staff for higher-value tasks like customer engagement.
- Increased Sales Potential:
    - Enables 24/7 ordering, removing time constraints.
    - Encourages larger orders with upsell opportunities.
    - Provides personalized recommendations based on user behavior.
    - Streamlines checkout, reducing friction in the purchasing process.
- Higher Profit Margins:
    - Minimizes errors, reducing refunds and complaints.
    - Improves financial tracking, enhancing efficiency.
    - Speeds up fulfillment, increasing customer satisfaction.
    - Lowers reliance on manual processing, cutting costs.

1.2 Growth Strategy – Quadrant 4

The online ordering portal is a new asset designed for the same customer base, aligning with Quadrant 4 of the Growth Strategy Matrix.

- Modernizes service delivery while maintaining core offerings.
- Enhances customer experience with faster and easier ordering.
- Keeps pace with industry trends toward digital transformation.
- Provides data insights for better business decisions

2. Feasibility Analysis

The success of the online ordering portal depends on its cost-effectiveness, ease of implementation, and ability to address operational inefficiencies. By leveraging Caterease integration, CGC can introduce the system with minimal investment while significantly reducing administrative workload. However, a smooth transition will require customer adaptation and internal process adjustments.

This section evaluates the cost-benefit trade-offs and identifies potential challenges to ensure a well-planned and successful implementation.

2.1 Potential Costs vs. Benefits

- Minimal cost with Caterease integration (no website development fees).
- Small transaction fee per order, ensuring affordability.
- Reduced administrative workload, improving efficiency.
- Higher order accuracy, minimizing complaints and refunds.

2.2 Challenges to Implementation

- Customer adaptation to the new system may take time.
- Some may prefer current systems over digital ordering.
- Gradual onboarding and support needed for a smooth transition.
- User testing before launch to ensure ease of use.

2.3 Organizational Readiness & Alignment

The McKinsey 7S framework provides a structured approach to assessing Citrus Grove Catering's internal alignment, highlighting areas that need improvement. While CGC is a well-established operation at UCR, inefficiencies in its current system limit its ability to maximize operational effectiveness and customer satisfaction.

- **System Misalignment:** CGC currently relies on manual ordering processes, which create inefficiencies, require customers to reach out for additional information, and limit menu visibility. The lack of a streamlined platform hinders customer engagement and operational efficiency.
- **Style & Shared Values Conflict:** Internal communication gaps between CGC and the campus departments they serve result in logistical issues. Additionally, CGC's internal culture does not fully align with evolving workforce expectations, leading to operational inefficiencies.
- **Staff & Training Limitations:** With a mix of part-time student workers and a few full-time employees, CGC experiences high turnover. A structured training program and retention strategies are essential to maintaining service quality.
- **Strategy vs. Systems Gap:** While CGC aims to modernize and improve service delivery, the lack of a technology-driven ordering system prevents seamless client and event management.

Introducing an online ordering portal will directly address these challenges by streamlining operations, improving internal communication, and aligning CGC's strategy with its operational

capabilities. The platform will also create branding consistency and data-driven decision-making, helping CGC optimize its offerings and enhance customer satisfaction.

3. Justifying Implementation

Implementing an online ordering portal is a strategic move that aligns with both customer needs and business objectives. By leveraging market analysis, financial data, and customer insights, this system will enhance operational efficiency while increasing sales and customer satisfaction. A data-driven approach ensures that the portal is designed to meet demand, optimize product offerings, and improve the ordering experience.

This section outlines the key justifications for the portal's implementation, including its impact on revenue, user engagement, and long-term business growth.

3.1 Market, Financial & Customer Analysis

We leveraged a combination of market, financial, and customer analysis to ensure the proposed online ordering portal aligns with both customer preferences and business objectives. By analyzing the client's order and sales data, we identified the most frequently purchased items, allowing us to understand customer demand patterns. Simultaneously, we worked closely with Citrus Grove Catering (CGC) to determine which products they wanted to promote—particularly those with higher profit margins. This approach enabled us to create a balanced menu layout that not only highlights the most popular selections but also strategically encourages the purchase of higher-margin items. By integrating these insights into the portal's design, we aim to enhance profitability while maintaining a seamless and user-friendly ordering experience for customers.

3.2 Data Collection Plan

While we do not currently have the necessary data to conduct a comprehensive analysis, we have a clear plan to obtain the required insights. After launching the new online ordering portal in the spring, we will collect and analyze data on customer behavior, order patterns, and sales trends. Additionally, we plan to gather qualitative feedback through a focus group, allowing us to assess user experience, identify any friction points, and refine the system accordingly. Conducting our own market analysis alongside customer feedback will provide a well-rounded understanding of the portal's effectiveness, enabling us to make data-driven improvements that enhance both customer satisfaction and business performance.

4 Implementation Plan

4.1 Translating Strategy into Action

Looking into how Citrus Grove Catering will strategize we look into different concepts we learned throughout our program. Our strategy integrates insights from our PESTLE analysis, the McKinsey 7S Model, and business strategies such as rebranding, time shifting, and catching the new wave.

Looking first at the PESTLE analysis we dive deeper into the lifecycle phase CGC is currently in. Given the current political climate and the uncertainty of the coming year after coming out of a positive year in sales it is hard to tell if they are in the Growth stage or Maturity stage. Taking both into account if down the road they realize they are more in Growth Phase they should work more on their online portal while trying to focus on larger events for more profits. If they are less lucky and in a maturity stage they will need to reinvent themselves with more external

business while trying to connect with outside venues. This would allow CGC to diversify revenue streams in case the education budget is cut and events are the first thing to go. Regardless of the phase however, the website will be a huge help to reach both internal and external clients in the coming years.

Using the McKinsey 7S Model we can see some key misalignments in the system, staff, and client connections. Starting with the system, the current system relies on one person in the sales team taking all orders from clients and then passing it onto the operations team to set it up. Given the transfer of projects there are often communication gaps between the teams that could be fixed with some more cross training. In terms of the staff misalignment this stems from the fact that this is a college job. At most their student staff work force will work for four years if that, leading to high turnover rate. By establishing a structured training initiative for newer student staff they would be able to continue working at a high level of competence. They could also implement retention incentive programs that improve student skills to keep good employees while improving the weaker staff. Lastly, their partnerships with campus departments around UCR. They have a monopoly over the campus, but by developing stronger connections highlighting their values they could increase sales further. Fostering goodwill so their clients want to work with them not just because they have to.

Looking into different business strategies over the quarter we narrowed it down to time shift, rebranding, and catching the new wave. Through the time shift we can see a bottleneck from the one person who is the point of contact for all clients. By implementing an order processing system (the new website) CGC will be able to reduce delays and shift their focus to bigger/newer clients to help with their orders. When looking over rebranding we found that a

lot of clients just order the same items then complain about the lack of variety on the menu. If they were to change visuals and descriptions to be more appealing for the consumer they would be able to rebrand in a big way. Diving into “Catching a New Wave” we see that the the current PDF menu is difficult to navigate and stops most clients from branching out or looking any further if they don’t want to take too much time planning a manu. By creating a visually engaging shopping portal, CGC will be able to convince clients to look around at different options. These options will hopefully incorporate better descriptions of the food along with pictures that may help the client decide. Down the road they could even implement an AI ton walk through the menu process with them, but we do not want to get too ahead of ourselves. This strategy brought us full circle for all the insights because creating a website helps check the boxes for all issues that are being faced. Which we will talk about more in depth in the next section.

4.2 Actionable Steps

Step One: Build a Strong Platform Foundation

A robust and user-centric platform is essential to address core challenges—improving user experience, enhancing product clarity, and maintaining customization options that reflect CGC’s commitment to personalized customer service. The portal is set to include the following recommendations:

- Enhanced Menu Presentation:
    - Top Visibility for Key Items: Prioritize the most frequently ordered and high-value categories in Row 1 for maximum exposure.

    - Balanced Distribution: Organize rows with a mix of main dishes, sides, and beverages to encourage diverse ordering.
    - Customer Flow: Structure the layout to guide users from core meal selections to complementary and customizable options.
- Clear and Intuitive Categories: Introduce distinct sections like "Build-Your-Own" and highlight popular selections with visual cues (e.g., "Crowd Favorite"). Dedicate a special category for high-margin items (e.g., "Season Specials") to boost profitability.
- Descriptive Labels: Incorporate dietary tags (e.g., vegan, gluten-free) and vivid product descriptions to enhance clarity and appeal.
- Strategic Upselling: Prompt customers with high-value add-ons (e.g., premium beverages, extra toppings) during the ordering process.
- Sustainability Messaging: Encourage bulk orders (e.g., sandwich trays) to reduce packaging waste and highlight CGC’s environmental commitments.Thoughtfully creating the platform to address the issues they are trying to resolve - which we have already done for them
- Curated Menu Designs: Offer pre-set menus tailored for different event types, budgets, and themes. Ensure seasonal specials are included to align with customer needs.

Step 2: Soft Launch with Select Clients

- Identify a test group of star clients (frequent, high-value customers) and laggards (infrequent, hesitant users).

- Provide onboarding materials (video walkthroughs, guides) and assign staff for personalized support.
- Collect customer feedback via surveys and direct communication.

Step 3: Analyze Data & Resolve Issues

- Measure portal performance against defined Key Performance Indicators (KPIs) such as order volume, revenue growth, and user engagement.
- Identify friction points (e.g., cart abandonment, confusion in menu descriptions) and implement quick fixes.
- Use qualitative feedback to refine customization prompts and menu displays.

Step 4: Portal Enhancements & Feature Expansion

- Improve visuals with high-quality product photos and more detailed descriptions.
- Add features like advanced filters (e.g., dietary preferences), seasonal offerings, and personalized recommendations.
- Optimize the customer journey with "frequently bought together" suggestions and dynamic search filters.

Step 5: Hard Launch with Full Rollout

- Use the Summer to execute a communications push to announce the portal
- Train the Sales and Operations teams to guide customers and troubleshoot issues.
- Offer special promotions or discounts for early adopters to drive engagement.

Step 6: Continuous Improvement & Long-Term Innovation

- Monitor customer usage and feedback continuously.

- Gradually integrate advanced AI features such as product recommendations and predictive ordering.
- Keep refining the portal based on evolving customer needs and operational data.

4.3 Timeline for Execution

Since the business is tied to the academic calendar, the plan aligns with the quarter system to ensure no disruption to operations.

- Development and Soft Launch Phase: Short-Term (Winter-Summer)
    - Finalize portal layout and features | 2 months (January – March)
    - Conduct internal testing | 1 month (March)
    - Soft launch with selected clients | 2 months (April – June)
    - Analyze initial feedback and resolve issues | 1 month (May -June)
- Enhancements & Full Rollout Phase: Medium-Term (Summer-Fall)
    - Implement advanced features (filters, bundling) | 2 months (June – July)
    - Enhance visuals and refine UX | 1 month (July)
    - Hard launch with public access | 1 month (August)
    - Provide ongoing customer support and monitoring | 2 months (August – December)
- Ongoing Development and Advanced technology Integration Phase: Long-Term
    - Roll out AI-driven recommendations and evaluate long-term KPIs and operational efficiency.

- The long term goal is to have various add ons features like product recommendation engines, filters and AI to make the platform more user and usage driven while enhancing the quality of personalization and CRM received through it.

5. Evaluating Success & Risk Mitigation

To ensure the effectiveness and long-term success of the online ordering portal, it is essential to track key performance indicators (KPIs) and proactively address potential challenges. Measuring order volume, revenue growth, customer engagement, and operational efficiency will provide insights into the system's impact and areas for improvement.

At the same time, a risk mitigation strategy will help CGC anticipate and resolve obstacles, such as low adoption rates, operational inefficiencies, and data inaccuracies. This section outlines the metrics for evaluating success and the strategies to minimize risks, ensuring a smooth and sustainable transition to the new system.

5.1 Key performance indicators (KPIs):

1. Order Volume & Revenue Growth

- Total orders placed through the portal (monthly comparison pre- and post-launch)
- Revenue generated from online orders (track trends over time)
- Average order value (AOV) (track whether customers are spending more per transaction)

2. Customer Engagement & Experience

- Time spent on portal per session (indicates ease of use and engagement)

- Cart abandonment rate (percentage of users who add items but do not complete the order)
- Conversion rate (percentage of visitors who complete a purchase)

3. Popular Items & Upsell Effectiveness

- Most frequently ordered categories/items (helps refine menu layout)
- Upsell success rate (how often suggested add-ons are purchased)
- Customization adoption rate (track the popularity of build-your-own meal options)

4. Operational Efficiency

- Order fulfillment time (time from order placement to fulfillment)
- Error rate in orders (percentage of orders requiring corrections or refunds)
- Customer support inquiries related to portal usability (fewer issues indicate better UX)

5. Customer Satisfaction & Retention

- Customer feedback & ratings (surveys or direct feedback on ease of ordering)
- Repeat order rate (how often customers return to place another order)
- Net Promoter Score (NPS) (gauge customer likelihood to recommend the service)

5.2 Risk Mitigation Strategies

1. Low Adoption Rate
    a. Implement targeted onboarding for hesitant users.
    b. Provide promotional incentives (e.g., discounts for first portal orders).
2. Operational Inefficiencies

    a. Create a rapid-response team for real-time issue resolution.
    b. Conduct bi-weekly check-ins with staff and customers to identify bottlenecks.
3. Feature Overload
    a. Phase advanced features gradually, prioritizing customer-requested improvements.
    b. Offer tutorials and support materials for new functionality.
4. Data Inaccuracy
    a. Regularly audit KPI reports to ensure data integrity.
    b. Cross-reference customer feedback with analytics to identify blind spots.

5.3 Evaluation Cadence

1. Monthly Reviews: Assess KPIs, customer feedback, and operational efficiency.
2. Quarterly Audits: Conduct a comprehensive evaluation of adoption, feature effectiveness, and financial impact.
3. Annual Innovation Review: Assess the need for advanced AI and further platform enhancements.

Conclusion

The implementation of an online ordering portal represents a significant step forward for Citrus Grove Catering, addressing inefficiencies in its current manual system while unlocking new growth opportunities. By streamlining operations, improving customer experience, and

leveraging data-driven insights, the portal will enhance efficiency, profitability, and service quality.

A phased rollout ensures a smooth transition, with measurable success metrics and risk mitigation strategies in place to track progress and address challenges. Through continuous refinement and potential future enhancements, such as AI-driven recommendations and personalization features, CGC can position itself as a modern, customer-centric catering service that meets evolving needs.

By embracing this digital transformation, CGC is not only improving day-to-day operations but also creating a scalable and future-ready system that will drive sustained success.