**Project Kick-Off - Cactus Club**

**Attendees:**

[Anna Grolle](https://www.linkedin.com/in/anna-grolle-cpa-cga-89912557/) - Chief Corporate Officer

[Rebecca Robertson](https://www.linkedin.com/in/rcrobertson/) - Senior Manager, Corporate Operations

[Rob Larmour](https://www.linkedin.com/in/robertlarmour/) - EVP, Information Technology

[Andrew Latchford](https://www.linkedin.com/in/andrew-latchford-b22b75/) - President

**Meeting Notes**:

* Identify lighthouse project
* What’s the ideal group size for workshops?
  + Rob and Andy know what areas to focus on first and point us in that direction
  + Review as a group then prioritize
  + Loss Prevention
    - Crunching manual numbers. A store a week.
    - 34 stores, by the time they get to the first store again, it takes a long time
    - Rob is executive champion. Support from Rebecca to coordinate meetings
  + Christy Murphy, interview person
  + Maybe give them some pre-work before interviews to save time: a brutal list of ‘what is a waste of time, why are we still doing this’
  + Pain points for customers could lead to solutions for better customer experience (customer data access)
  + We can also explore other areas
* Simple, better, faster
  + Grow sales faster than costs
  + Strategic mandate with technology
  + Internally can handle customer service and training
* Find 3-5 opportunity areas from Anna and Rob
  + 20 opps from interviews with Anna and Rob
  + Want us to prioritize
* Andrew is fine with low hanging fruits + quick wins as well as seeing all of the opportunities
  + Hoping that the process is more scalable
  + People can do more with less instead of just hiring people
  + Dont want to double labour as the company doubles
  + Head office services is a key area
  + Operations is the biggest cost - could be a good place for low hanging fruit and quick wins
* Schedule
  + Goal to finish up before holidays
  + Oct-November: good timing
  + Jan-April: window for innovation
  + May-September: customers come first
  + Aligns with business plan for the year
* What can Cactus do to improve the output compared to WorkSafeBC?
  + WorkSafe looking for wins but it’s much slower than anticipated
  + The more documentation that is available is helpful
  + There are going to be some departments that require guidance from heads in order to speed up the process
* Anna concerned with 8 week timeline
  + Operations blackout for next 3 weeks
  + Other projects going on, concerned with taking time from other departments
  + Prepopulate some of the interview questions to have smaller groups contributing to get faster results for Cactus to do some of the leg work – turn over to Farpoint to have another interview if there is interest
  + Pain points for head office vs pain points for operations will be different; how will we make both of those work together?
* Rob’s approach: take small wins to move the needle right now, use that to prove the ROI, keep the ball rolling from there
* Patterns of successful implementation
  + Infrastructure is something that Cactus hasn’t focused on
  + Better since Rob’s been around
  + Lots of legacy items that Cactus does because that’s the way it’s always been done
  + Areas
    - Payroll
    - Performance management - painful but part of the culture of feedback
    - Recruitment - typically a long process
    - Data + infrastructure is the biggest area of opportunity. How we’re using data, how its collected, how it assists decision making
    - Sales
    - Food costs
    - Staffing levels not a red zone - best they’ve been since covid
      * Keeping staffing levels at Head Office even
      * Add 6 more restaurants before we add more people to Head Office
        + Finance, payroll, HR, customer guest experience team, (these teams have regions that you have to add people to)
        + 60 calls to 70 calls from stores on finance requests, customer requests -> burden on payroll when new head count comes in
        + Onboarding (forms, compliance, signing up for orientation - manual by several people behind the scenes). Doesn’t really have potential for 100k’s in savings, so adding more people is an easier solution
        + Offboarding
  + Every problem has been solved by getting more sales, add more people
  + A successful project has all to do with who’s on the project
    - If we don’t have the right team in place, we shouldn’t touch those projects
  + Cactus Philosophy - “Build sales, and everything else will fall into line”
  + Warren on Rob’s team - keys to the data castle

**Action Items:**

* List of project teams from Cactus
* Org chart from Cactus
* Create interview questions to send to departments
* Work with Rebecca to set up interviews
* Ryan - set up time(s) to set up data tech stack (within next week or so)
* Can we get a copy of your annual financial reports?
* We need to talk about WorkSafe’s feedback

**Quick Win Areas:**

1. Pricing - scraping websites of competitors - fill out the spreadsheets - each location of joeys. Alert you anytime there is a price change
   1. Internal - Should we change our pricing for our menu items based on internal data?.
   2. External - scraping competitor websites
      1. MRO up to 6 times a year (MRO?) its the loss of sales (that’s the real value)
      2. Price change of $0.5 could result in x lower orders \* 35 locations \* margin per item. Rob threw out $10k per store over 2 months potentially 350k or ~2M over a year
2. Loss prevention - data is available -
   1. **What data? (eigen?)**
   2. POS data
   3. Voids, doubles
   4. New payment systems