

Point of Sale Project Overview

We are dedicated to ensuring a successful implementation experience that aligns with your goals. The following document provides an overview of what to expect as you begin your Point-of-Sale journey with MealSuite.

Summary

At MealSuite, we understand the unique challenges of implementing technology in senior living and healthcare environments. Our implementation approach is designed to support you every step of the way, using a consultative, partnership-based method to create a custom plan tailored to your needs.

Your project will be delivered in key phases, each designed to ensure your success. At kick-off, your Onboarding Specialist will review your timelines and requirements in detail, providing you with a customized project plan to guide the process.

- ✓ **Average Implementation Timeline – 12 Weeks**

Our Promise

At MealSuite, we've learned through experience that certain key elements are essential to the success of every implementation. These steps are straightforward but crucial to achieving positive outcomes. We are fully committed to your success, and in return, we ask for your support with the following. By proceeding, you acknowledge and agree to the following terms:

- Allocate the necessary resources to implement MealSuite applications and support organizational change.
- Partner with us as a trusted collaborator, working together to enhance operational outcomes for your organization.
- Provide insights and expertise on your future operational goals to guide the project.
- Attend all meetings promptly and complete assigned tasks and action items within the agreed timelines.
- Approach the project with openness to adopting new processes, while working together to achieve the shared goals of success within the defined time and scope.



Project Overview

Milestone	What to Expect
Initiation	<ul style="list-style-type: none">You'll receive a welcome email with a questionnaire to kick off the discovery process, helping us understand your operational needs and begin preparing a customized experience to meet your goals.If you're new to MealSuite, you'll participate in onboarding for your core products alongside the Point-of-Sale (POS) implementation. For an overview of the core implementation, click here.If you're adding Point-of-Sale to your MealSuite solutions, we will conduct a data audit of your existing menu, recipe, and people information to identify any areas requiring action before launching POS.
Kick-Off	<ul style="list-style-type: none">We'll kick off with a collaborative call to validate your goals, review your project plan, and outline the next steps.During this call, we'll review your questionnaire and continue the discovery needed to configure and train for Point-of-Sale.If a POS interface has been purchased, an additional interface discovery call may be scheduled with our Product Specialist.We'll also provide next steps from the data audit, along with a data collection workbook, outlining the information we need from you to begin building your POS system.
Execution	<ul style="list-style-type: none">You'll update your existing menu and recipe information as necessary, while we build out the POS system.During this time, you'll also install the necessary equipment and implement network changes to support POS.We'll regularly check in as you validate the POS configuration and ensure the hardware is fully operational.If a POS interface was purchased, our development team will build it, and you'll complete user acceptance testing with our Product Specialist to ensure it meets your business needs.Prior to go-live, we'll host virtual training sessions to refine your POS setup and ensure you're prepared to train your team for launch.
Go-Live	<ul style="list-style-type: none">If on-site training has been purchased, we will be there to support you during your go-live.You'll launch the Point-of-Sale system across your various revenue centers.
Monitor and Close	<ul style="list-style-type: none">Throughout this phase, we will monitor your progress and address any questions that arise.Once your success criteria are met, the project will be officially close.Our support team will remain available for any day-to-day questions or issues you encounter.



Example Project Timelines

At the start of your project, you'll receive a tailored project plan designed around your specific goals. However, we recognize the importance of preparing in advance. To help, we've outlined three common scenarios encountered during Point-of-Sale projects. Each scenario includes a timeline summary and a link to the detailed project plan.

Customer A: One POS Location	Customer B: Multiple POS Locations	Customer C: Multiple POS Locations, with Smart Service and POS Interfaces
Your Goals:		
<ul style="list-style-type: none"> ✓ Implement a Point-of-Sale system in one location of your community. ✓ Some menu data is built in core but requires revisions. ✓ Some people data is built in core but may need to be completed. 	<ul style="list-style-type: none"> ✓ Implement a Point-of-Sale system in multiple locations, such as a Dining Room, Bistro, Salon, or Self-Service location. ✓ Some menu data is built in core but requires revisions. ✓ Some people data is built in core but may need to be completed. 	<ul style="list-style-type: none"> ✓ Implement a Point-of-Sale system in multiple locations, such as a Dining Room, Bistro, Salon, or Self-Service location. ✓ Implement Instant Ordering in Assisted Living or similar locations and Advance Ordering in Skilled Nursing or similar locations. ✓ Implement an interface for Bill to Room charges to align with your management system. ✓ Implement Staff Ordering with a Payroll Deduction plan. ✓ Implement an interface for Payroll Deduction charges to align with your management system. ✓ Some menu data is built in core but requires revisions. ✓ Some people data is built in core but may need to be completed.
Estimated Timelines		
<p>10 Weeks to Go-Live</p> <ul style="list-style-type: none"> • Week 1: Kick-Off • Weeks 2-6: Data configuration & validation, hardware installation and go-live readiness. • Week 7-10: Training & Launch! • Week 11-12: Admin Training <p>Click Here to view an example Project Plan</p>	<p>12 Weeks to Go-Live</p> <ul style="list-style-type: none"> • Week 1: Kick-Off • Weeks 2-8: Data configuration & validation, hardware installation and go-live readiness. • Week 9-12: Training & Launch! • Weeks 13-15: Admin Training <p>Click Here to view an example Project Plan</p>	<p>14 Weeks to POS Go-Live, Smart Service Go-Live at 19 Weeks</p> <ul style="list-style-type: none"> • Week 1: Kick-Off • Weeks 2-10: Interface development, Data configuration & validation, hardware installation and go-live readiness. • Weeks 11-14: Training & POS Launch! • Weeks 15-16: Admin Training • Week 16: Smart Service Data & Hardware Validations • Weeks 17-19: Training & Smart Service Launch! <p>Click Here to view an example Project Plan</p>



Roles and Responsibilities

To achieve your goals and stay on track with your timelines, it's essential to involve the right team members during the implementation process. Below are the key roles typically involved in a successful rollout:

MealSuite Team:

- **Implementation Specialist:** Your Implementation Specialist will guide you through the entire project and training process. They will serve as your primary point of contact from start to finish.
- **Customer Success Manager:** Your Customer Success Manager will monitor your progress and satisfaction, helping you maximize the value of the MealSuite applications.
- **Support:** The Support team is available to assist with any day-to-day questions or issues that arise after your implementation.

Customer Team:

- **Project Manager/Lead:** Your Project Lead should be well-versed in the needs of your dietary department and organizational goals. They will ensure your team has the resources and capacity to complete tasks and will work closely with MealSuite to track project success.
- **Operational Experts:** Team members with deep knowledge of your dietary operations will be essential in aligning the implementation with your internal workflows and ensuring successful outcomes.
- **Technical Team Members:** You may require IT team members and hardware installation teams to facilitate network changes to align with the network requirements and complete hardware installation.
- **Front-Line Staff:** These are the individuals who will be using MealSuite daily. Their involvement will be key to ensuring a smooth transition and efficient use of the system.



Project Preparedness

Here are some steps to help you prepare as you embark on your Point-of-Sale project:

- ✓ Provide our [Point-of-Sale network requirements](#) to your technical teams to plan any required changes.
- ✓ In collaboration with your MealSuite Account Executive ensure you've identified all areas in which equipment will be installed.
- ✓ Work with your technical teams to determine if any environmental changes are required to support your hardware installation. [Reference our hardware installation guides](#)
- ✓ Gather all the data that you will utilize within Point of Sale, such as:
 - Menu Item and Product Pricing
 - Item Modifiers. For example, do your servers ask about the doneness of a steak?
 - Applicable Taxes & Percentages
 - Available discounts which include the types of items discounts can apply to and the amount of the discount.
 - Your reservation schedule, this includes reservation lengths, times in which reservations are accepted and maximum number of reservations.
 - Staff charge policies, which includes maximum limits and balance reset periods.
 - Resident meal plans that you will offer, which includes the below details:
 - If the meal plan is point-based, dollar-based, prepaid or unlimited.
 - What frequency does the meal pan reset (i.e. daily, weekly or monthly).
 - Which dining venues will accept the meal plans and which meals or types of food can the plan be applied to.
- ✓ If applicable, review your existing menu, recipe and production area information within the Core application for updates.
- ✓ Identify the roles & staff that will participate in your Point-of-Sale project, which may include the below:
 - IT teams to ensure network compatibility and facilitate hardware installation.
 - Accounting teams to participate in training and/or in interface discovery calls.
 - Resident management teams to participate in resident interfaces and/or marketing updates to prepare your residents for the changes.

We look forward to delivering an exceptional experience that supports your operational goals.

