Successful Restaurant Online Ordering Checklist

After consumers took an unmistakable turn toward online restaurant orders in 2020, restaurants serious about competing in their markets began adapting their businesses to meet the demand. However, many restaurants are finding that there's more to accepting and managing online orders than they originally thought.

This checklist will walk you through each part of the online ordering process and what your restaurant needs to operate profitably and provide great customer experiences.

Online Menu

- Plan menu items that can be presented well when packaged
- Choose dishes that travel well and withstand temperature changes
- Include more variety than the competition
- Set attractive price points, even with added fees

> **TIP**
> All items on your dine-in menu won't work for takeout or delivery, e.g., souffles or frozen desserts. Create an online menu that will guarantee great dining experiences.

Online Ordering Solution

You have two options for accepting online orders: Working with a third-party platform or accepting orders directly.

How to Choose a Third-Party Ordering Platform

Ensure the platform's penetration into your market

When you evaluate platforms, log on, enter the ZIP code where your business is located and see if the platform provides service to your area. Also, take note of competitors that use – or don't use the platform. This will give you an indication of whether or not they see ROI from the service.

Evaluate third-party provider fees and your profitability

Review the contract with the platform vendor and ask questions so you have a clear understanding of the fees you and your customers will pay.

Consider integration with your restaurant point of sale (POS) system

Before deciding on a third-party ordering platform, contact your POS provider to see if integration with your system is possible. If it's not possible to integrate the platform with your POS system, your employees will need to accept orders on tablets or other devices and rekey them into your POS system, taking time and creating a chance of mistakes.

Understand your access to customer data

When you use a third-party platform for online ordering, the platform vendor controls data on your customers, such as when they typically order, how often they order, and their favorite menu items. That data typically won't be available to you for analysis later.

How to Choose Software to Accept Orders Directly

Demo the solution to evaluate its functionality and usability

Before you choose an online ordering platform, demo it to make sure it's user friendly, both for your customers and your employees.

Consider monthly costs of SaaS solutions

Many online ordering platforms are provided to restaurants under the Software as a Service (SaaS) model, which means you'll pay a monthly subscription fee to use it. Ensure the system you choose is cost-effective and within your budget.

Ensure the solution integrates with your POS system

Talk to your POS provider to ensure the online ordering platform will be fully integrated with your POS system. The platform should automatically share orders with your POS system, no intervention by employees required.

Plan to use the data you collect to enhance decision making

The data you collect with a system that allows you to accept orders directly belongs to you. You can analyze it for more effective marketing and to personalize service for return customers.
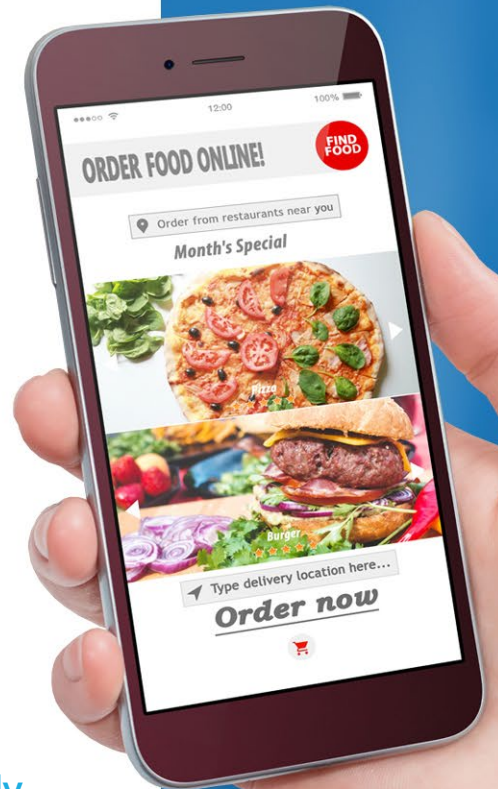
	Third-Party Orders	Direct Orders
Market	Can expand your reach if the platform vendor is active in your region	Reach your customers online and increase website traffic with SEO
Fees	Fees can total as much as 30% or more of the sale	Minimal monthly fee to use online ordering software
Integration	May be possible to integrate with your POS system	Choose a solution that integrates with your POS system
Data Accessibility	The platform vendor controls the data	The data you collect is yours

E-Commerce Payments

Expand your account with your payment processor when you accept orders directly so you can manage payments on all channels from one account

Insist on payment upfront before an order can be placed to reduce the risk of loss due to phony or fraudulent orders

Prioritize security; consider hosted payments to avoid expanded PCI scope

TIP

Maximize back-office efficiency with one omnichannel platform integrated with your POS and accounting systems. Using different payment providers for different channels will mean you are managing two different payment service vendors, receiving two different reports, and taking more time to complete end-of-day reporting. Fees may also be lower if you work with one vendor for payments on all channels versus having accounts with different vendors.

Kitchen Efficiency

Train staff on the differences between online and dine-in menus

Balance priorities for the kitchen for orders from the dining room and online orders

Streamline management with a kitchen display system (KDS)

Employee Scheduling

Analyze in-house and online order data to optimize labor for each revenue stream

Use employee data to assign staff based on their strengths

Monitor performance, such as table turns and time to fill an online order to maintain a holistic view of your business.

Delivery Management

Use delivery management software that integrates with your POS system

Set delivery zones to ensure profitability

Optimize routes for time and fuel savings

Customer Experience

Ensure your omnichannel restaurant provides excellent experiences to both online and dine-in customers

Online experiences should be convenient, easy, and personalized from the time orders are placed until the customer receives meals

Use data from your online ordering platform to understand customer preferences

Request customer feedback to provide information that will help improve service

Understand that consumer habits continually change, and always be ready to adapt to meet new demands

NOTES

Are you ready to optimize your restaurant's online ordering processes and position your business for profitability and growth?

CONTACT US