



BEST PRACTICE
GUIDE

The ultimate guide to operational excellence

4 key elements to modernizing
& optimizing your OpEx strategy

What's at stake


Most brands have a strong vision for the standards and experiences they wish to deliver in their products and services. However, limitations in abilities to implement that vision create a chasm between those policies that are set and what front-line employees are able to execute.

This is often due to multiple reasons, not just a single issue:

- › Can't manage data properly
- › Not having access to the right tools
- › Being overly burdened & consumed with operational tasks

These compounding factors hold you hostage, creating inefficiencies, confusion, excess costs, and experiences that don't deliver to that standard. Instead of delivering on a brand promise, brands are "just compliant enough," not holistically ensuring quality & safety, or leaving themselves open to operational risks.

It's only through a comprehensive quality & risk program—one that unifies workflows, systems, and people—that organizations can truly move the needle on operational improvements and drive everyday excellence.



Two out of three executives don't believe their organization is equipped to execute their strategy—creating an operational gap between brand standards & front-line execution.*

What's inside

To help you more quickly and consistently deliver the quality, safety, and experiences your customers can trust — and have come to expect — this best practice guide covers:

01

The benefits of an effective operational excellence program

02

The essential components of an effective operational excellence program

03

How to measure your operational excellence program

04

How to choose the right operational excellence platform

OT

Benefits of an effective operational excellence program

Inefficient operational practices limit your team's potential and put your business at risk. Manual processes cost organizations time, energy, and resources—causing a disconnect between standards & execution, lack of collaboration & correction, and painfully inadequate visibility & insights that leave them vulnerable to unforeseen risks.

Here are 3 key benefits
you should expect from the
right OpEx software

An operational excellence platform helps organizations by automating daily activities, improving operational workflows, driving customer satisfaction, and so much more.



Empower your front-line teams

Provide teams with the instruction and continuous learning they need to stay proactive and do their best work. By digitizing your standards and policies, employees have immediate access at their fingertips via phone or tablet. With access to digital SOPs, video demos, and a direct line of communication to corporate, team members can easily report what they see, and you can ensure issues are addressed in a timely manner.



Meet quality & safety standards

Ensure you are delivering consistent quality and safety across all operations with quick, user-friendly checklists and corrective actions that enforce operating standards on the front lines while giving leadership real-time visibility into business performance.



Achieve “always on” compliance

Be audit-ready at all times by deploying a platform that gives you a structured, repeatable playbook for achieving compliance against your standards. Easily make changes to your program to ensure teams quickly adopt new procedures or regulations and keep you free from risk.



THE BOTTOM LINE

The adoption of operational management software not only safeguards organizations against legal and regulatory risks, but also contributes to a more agile, well-informed, and compliant corporate culture.

Checkers & Rally's empowers employees & drives efficiency gains through operational automation

Opportunity

After experiencing significant growth across the brand, Checkers & Rally's identified the need for a comprehensive solution for managing restaurant audits, self-assessments, and checklists. The team checked out no less than 15 different software options before selecting CMX1 to digitize its protocols and operational procedures for a systematic approach to achieving and maintaining quality and operational excellence.



Action

Since its program launch in 2020, Checkers & Rally's has empowered restaurant operations team members—at all levels—with an easy-to-use system that fosters accountability, provides transparency, and aligns focus across the enterprise.

This includes the implementation of:

- Daily HACCP-based line checks in the restaurants, using integrated Bluetooth thermometers to ensure food safety
- Food safety and brand standards self-assessments for restaurants to perform each period to prepare for third-party health inspections and audits
- Construction punch list and walk-through checklist for project teams to ensure new location build-outs and remodels are ready to open
- Damage inventory form for inspecting restaurants impacted by natural disasters, fire, and accidents



Outcomes

Checkers & Rally's has seen significant results since launching its partnership with CMX1:



Paperless processes

Digitizing its program saves the brand \$1000s each month by eliminating the costs for printing & shipping monthly binders and the need for storage facility rental & insurance



Higher team engagement

Managers & employees have the automated tools they need for training, driving compliance, and improving performance—all with less guesswork and enhanced accountability



Historical data

After building years of metrics, the brand now has reporting data to benchmark & analyze—including hierarchical info that provides both a holistic view and granular focus



Essential components of an effective operational excellence program

Operational excellence software is designed to be the backbone of an organization's governance structure, providing a centralized platform to create, communicate, and enforce effectively. But not every solution is created equal.

Here are **6 things** you'll be empowered to do with the right software solution

01 | Digitally transform your brand standards, policies, & procedures

Policies and standard operating procedures (SOPs) are what turn brand processes into a playbook for employees to deliver the optimal customer experience—and ensure the consistency of operations across locations. But often policies are created in disparate tools, updated & distributed manually after lengthy approval processes, and physically stored in binders on shelves.

By ditching these old-school practices and replacing them with a singular digital solution for policy management, brands can:



Implement a comprehensive solution for creating, publishing, & keeping employees up-to-date on the latest content



Leverage tools to easily publish or update materials to specific user groups or company-wide

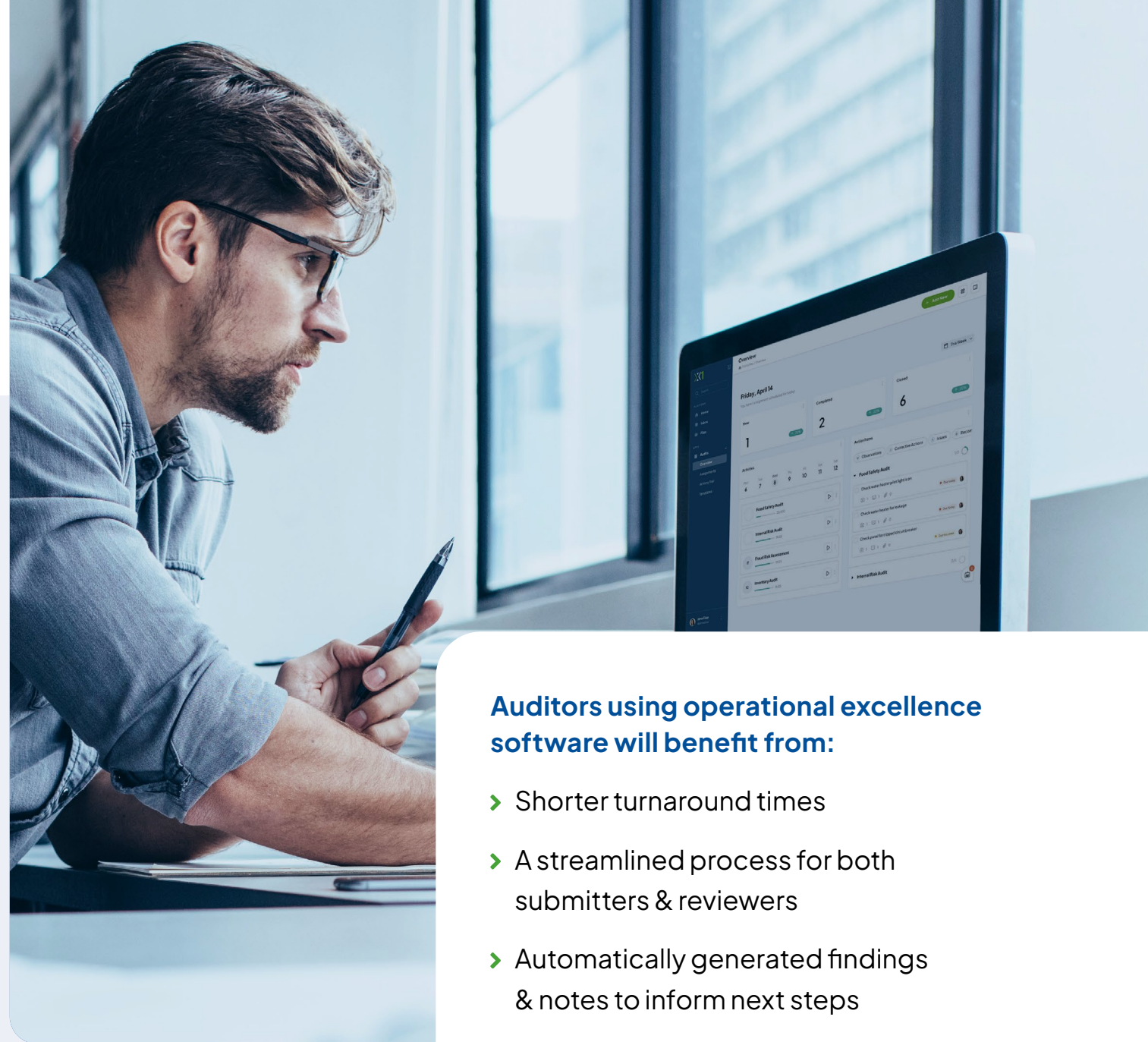
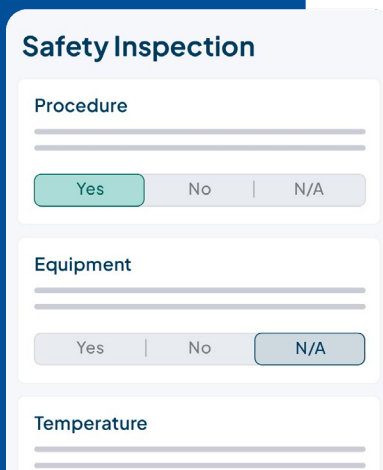
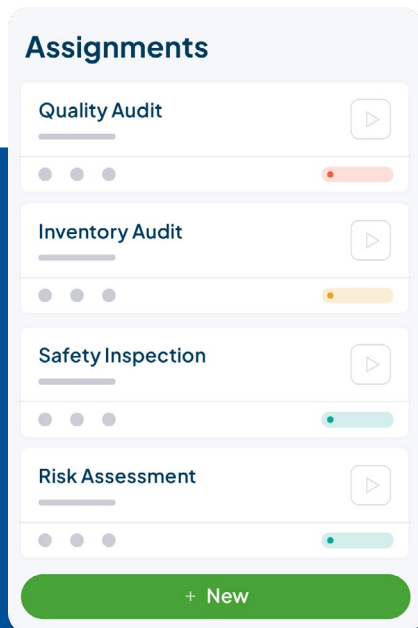


Provide employees a simple means for finding & acting on the info they need, with searchable instructions, images, photos, multimedia, & links to supporting content



02 | Elevate your auditing success with digital transformation

Audits are the glue that hold operations together, but the auditing process is often tedious and inefficient. By automating and digitizing audits, assessments, and inspections, organizations can ensure internal controls are in place to uphold governance, ensure compliance, and mitigate risk.

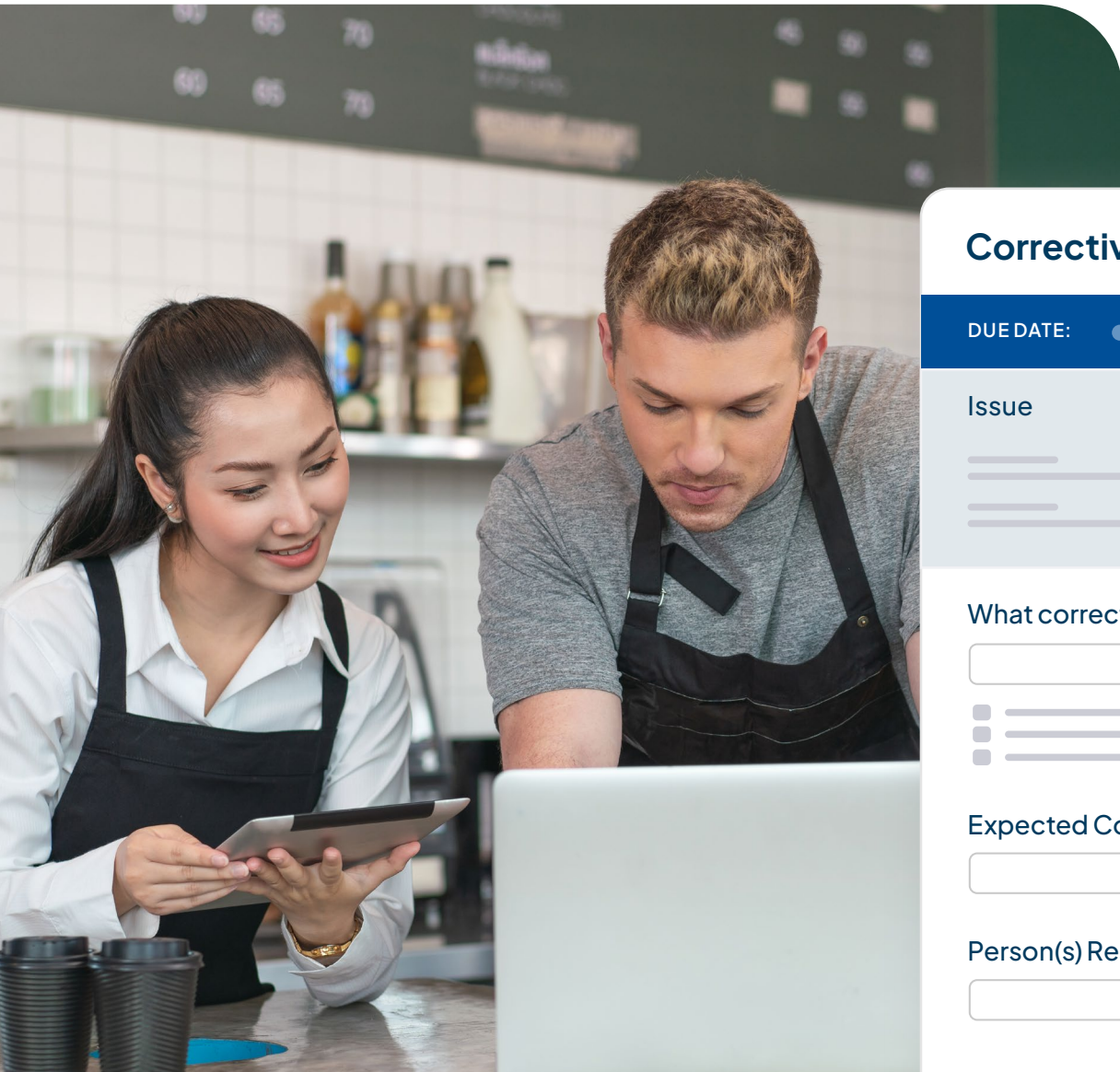


Auditors using operational excellence software will benefit from:

- Shorter turnaround times
- A streamlined process for both submitters & reviewers
- Automatically generated findings & notes to inform next steps

03

Close the loop on issues with automated corrective action & remediation



Corrective Action

DUE DATE:

Issue

What correction will you put in place?

Expected Completion Date

Person(s) Responsible

The ability to catch quality and safety issues before they impact customers and employees can make or break a brand. An automated corrective action process not only ensures swift action and optimal resolution—it helps assess the root cause to prevent recurrence.

The right solution should:

- Automatically identify issues
- Generate CAPA plans from detailed findings
- Automate closed-loop workflows for real-time resolution

04 Automate the entire incident management process to expedite issue resolution

Creating a swift action plan to identify and resolve systemic issues is critical in risk mitigation. Responsibility often falls on a third-party system (e.g., call center, email, spreadsheets), creating a disconnect with other systems of information. The result is a disparate and challenging process, with a spiderweb of manual emails and follow-ups in an attempt to resolve issues among all parties.

Brands need an easy-to-use, automated system that gives them:



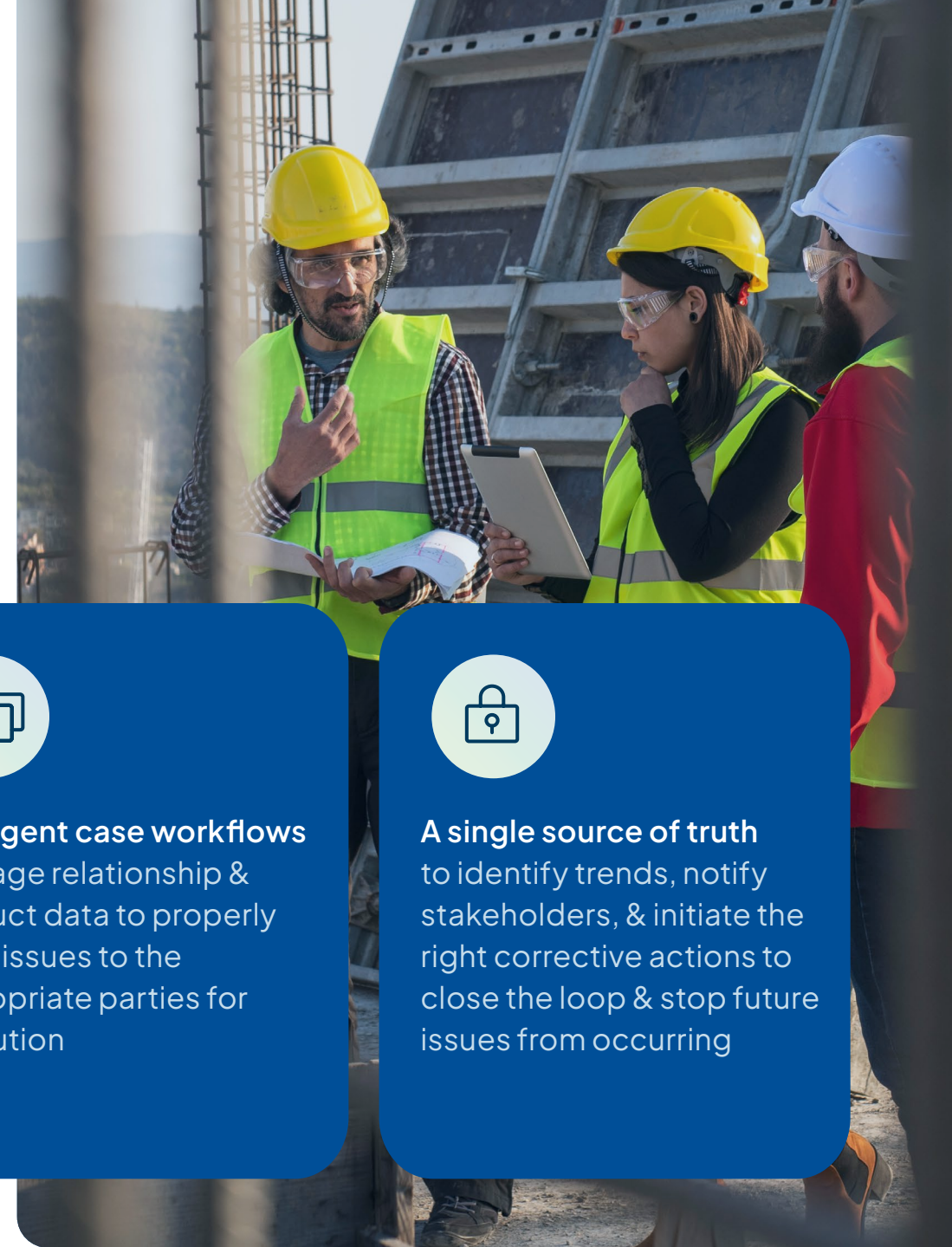
Simple reporting forms allowing anyone to input raw information that is actioned into an automated incident creation process for tracking, collaboration, & closure



Intelligent case workflows leverage relationship & product data to properly route issues to the appropriate parties for resolution



A single source of truth to identify trends, notify stakeholders, & initiate the right corrective actions to close the loop & stop future issues from occurring



05 | Streamline inspections based on variables of shift, location, equipment, & more

Increase uptime and reduce human error—including equipment or fleet failures—by digitizing work instructions, scheduling preventive maintenance checks, and conducting facility audits. With real-time visibility into performance through centralized reporting, you can ensure things are running smoothly and take swift action when they aren't.

Inspection Checklist

- Work area is in good condition
- No equipment is broken
- HACCP program is properly implemented
- Fire escape plan is properly displayed
- Temperatures and sanitizer strength recorded accurately
- Gloves are worn when hands have cuts / wounds



The right solution should allow you to:

- › Create & schedule inspections to be conducted during specific times of day
- › Dynamically modify inspections & questions based on active equipment at a location
- › Leverage automated assignments & scheduling to ensure the right people complete the right tasks at the right time

06

Operate with a single source of enterprise reporting

Establishing KPIs, identifying risk, and measuring ongoing performance are key to achieving enterprise quality & risk management. But too much information can be just as useless as too little information. With the right data visualization, KPIs, and business intelligence reporting, you'll gain real-time access to program status and actionable insights for every level of your organization—enabling you to make better-informed decisions.

This includes the ability to:

- Democratize data, empower users, and understand performance at every organizational level with real-time data integration through BI analytics & visualizations
- Support all internal & external stakeholders across your business with distinctly configured custom reporting
- Harness data from across your business with APIs for importing critical business data or exporting program data for external purposes



“With CMX1, we can instantly engage with every restaurant, gathering real-time data or feedback. We can digitize simple to complex activities, from a manager doing a quick check to in-depth operational and brand standard audits conducted by specialized subject matter experts. CMX1 is essential for performance measurement, identification of opportunities, and automation of corrective action for continuous improvement.”

ANNA ELIZABETH BRETON

Vice President, Center of Excellence
Raising Cane's

“CMX1's intuitive interface makes it very easy for our team to develop and execute programs to ensure all locations are compliant and operating with consistency. The impact on operational excellence has been impressive and immediate.”

DREW ROBERTS

Director, Brand Ops Performance
Buffalo Wild Wings

THE BOTTOM LINE

Operational excellence is harder to achieve with stand-alone point solutions. To truly move the needle, brands need a comprehensive enterprise platform that unifies workflows, systems, and people by providing a single source of truth from the front lines to the corporate office and across the entire supply chain.



How to measure your operational excellence program

Implementing a quality & risk management program is only the first step. You need to be able to demonstrate the impact operational efficiencies have on the bottom line.

Organizations typically use key performance indicators (KPIs) to measure operational excellence & prove the impact of their programs



Operational KPIs you can consider building into your program include:

- › Quality audit scores
- › Safety audit scores
- › Supplier audit scores
- › Equipment uptime
- › Cost savings
- › Cycle times
- › Non-conformance rates
- › Product testing results
- › Incidents reported & resolved
- › Recall volume & costs
- › Corrective actions created & completed
- › Employee engagement scores
- › Customer satisfaction scores
- › Regulatory compliance scores

Tracking the right metrics is imperative to predicting bottom-line impact. No organization is the same, but with the right combination of KPIs, you'll have a deeper understanding of the success of your operational excellence efforts.

THE BOTTOM LINE

By proving your operational excellence program has demonstrative business outcomes, you'll gain the type of organizational buy-in needed for long-term success.



Validated business outcomes achieved by CMX1 customers

For more than a decade, CMX1 has helped hundreds of organizations in over 160 countries drive operational excellence and achieve tangible results.

+26%

efficiency gains with team members by automating daily operational activities

+95%

efficiency gains with corporate by eliminating manual entry, sorting, & reporting

+38%

efficiency gains with field operations by streamlining audits, evaluations, & visits

1.7-2x

potential ROI from CMX1's OpsX1 solution family

What's your potential ROI?

To show how investing in operational excellence helps drive financial success, use this ROI calculator to plug in your organization's information and instantly see your estimated business results.

In less than a minute, you can calculate your potential savings and efficiency gains with CMX1.

What's your potential ROI?

In less than a minute, you can calculate your potential savings and efficiency gains with CMX1 using our ROI calculator, based on JLA's Return on Investment (ROI) Study

Select your industry	Calculate your ROI for
<input type="text" value="Choose"/>	<input type="text" value="Select a CMX solution group"/>
How many locations do you have?	How many supplier facilities do you source from?
<input type="text" value="20"/>	<input type="text" value="20"/>

[Calculate ROI](#)

04

How to choose the right operational excellence program

Selecting the right operational excellence platform can profoundly impact an organization's quality, safety, risk, and compliance management efforts. And with so many choices, finding the right fit for your investment can be overwhelming.

Selecting the right operational excellence platform is a critical decision. Here's how to start the process:



Evaluate your company's needs

Identify the types of policies you manage, the regulatory landscape, and any unique aspects of your organizational structure. Consider whether you need a solution that caters to a global workforce or one that is tailored to a specific industry.



Compare different software options

Not all operational excellence software solutions are created equal. Look for features that align with your requirements. Assess the scalability of each solution to ensure it can grow with your organization. Read user reviews and case studies for insights into how well a software performs in real-world scenarios.



Consider scalability, customization, & self-serve capabilities

These components are paramount. As your organization expands, the software should allow you to make changes as you go, accommodating the growing volume and complexity of policies. A static, one-size-fits-all solution may not adequately address the unique needs of your business.



Assess user-friendliness and support of vendors

UX is a key factor in the success of adapting to new software. A friendly UI promotes field-level adoption and ensures that employees can easily navigate and understand policies and procedures. Prioritize software providers that offer robust customer support. A responsive support system can be crucial in resolving issues quickly.



THE BOTTOM LINE

With a myriad of options available, it's essential to carefully evaluate and choose a solution that aligns with the unique needs and scale of your company—or else your entire strategy could fail.

Why CMX1?

We power everyday excellence in the world's most trusted brands.

OpsX1 by CMX1 is a powerful, all-in-one solution that helps organizations digitize policies & training, create activities for field-level compliance, conduct audits & inspections, identify issues & automate corrective actions, and gain insights from real-time reporting. The result is empowered employees, prescriptive action, and improved business outcomes.



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To learn more about how CMX1 can help you achieve operational and quality excellence across your organization, visit cmx1.com/contact.

CMX1 is trusted by global businesses in over 160 countries to power everyday excellence. Our Enterprise Quality & Risk Management (eQRM) platform gives businesses integrated, easy-to-use solutions for automating quality, risk, and compliance—so they can more quickly and consistently deliver the quality, safety, and experiences their customers can trust (and have come to expect). For over a decade, our unrivaled suite of enterprise solutions has equipped businesses with a single source of truth from the front lines to the corporate office and across the entire supply chain.