

Leveraging Technology to Maximize Auxiliary Performance

October 11, 2016



Today's Panelists



- Mark Kraner – Executive Director Retail Operations



- Martha Davidson – Director of Finance, Auxiliary Operations



- John Diaz – Vice President-Product Management



- Tom Strange – President/CEO

Learning Outcomes

- Learn how to effectively leverage and collaborate multiple technologies to streamline processes.
- Learn how the power of analytics reporting dramatically transforms raw static data into actionable intelligence.
- Learn how the collaboration substantially reduced labor, increased revenues and provided insight to better predict student purchasing patterns.

Today's Presentation Agenda

- Opening Remarks
- Case Study: George Mason University –Using Technology to Measure Advertising Effectiveness
- Case Study: Duke University – Merchant on Point and On Campus Dining Management
- Other Uses for Data = Actionable Intelligence
- Questions

About George Mason University

- 6 Campuses – Fairfax, Arlington, Science and Technology, Mason Korea, Front Royal, Loudoun
- Over 33,000 students – 6,000 residential
- Largest public research university in the Commonwealth of Virginia
- Auxiliary Enterprises accounts for \$44 million in annual dining revenues

Overview of George Mason Retail Operations

- 28 Sodexo Retail Brands
- 5 Independently Operated Brands
- 4 Residential Dining Halls
- 75 point of sale units (Sequoia)
- 70 display devices (ORCA TV)
- 40,000 transactions per week
- Multiple and disparate systems



The Challenge

- Too much data and too little time
- Data does not equal information for actionable intelligence
- Measure the impact of various marketing initiatives through data analytics

The Process

- Advertising message placed on Orca TV
- Coupon codes recorded at Starbucks POS
- Sequoia data files loaded into RevenueVision
- Trend analysis completed

SCREENING: The Mask You Live In

JOIN US FOR THE SCREENING OF THE MASK YOU LIVE IN AND A WORKSHOP ON MASCULINITY INCLUDING A PANEL DISCUSSION ON MASCULINITY & VIOLENCE AS PART OF DOMESTIC VIOLENCE AWARENESS MONTH

FREE PIZZA

THE MASK YOU LIVE IN

October 12, 2016
JC Cinema - 4:00 - 7:00 PM

UNITED KINGDOM
Applications Deadline
OCTOBER 9, 2016

LONDON THEATRE TOUR
JANUARY 2 - 16, 2017
Led by Prof. Kristin Johnsen-Neshati

Compared to a girl the same age, a boy in late adolescence is 7 times more likely to die by his own hand.

Boys under 17 drink more heavily than any other population group.

Boys in the U.S. are 30% more likely than girls to flunk out of high school.

GEORGE MASON UNIVERSITY
Laura Scobey
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Study Abroad

shop Mason
MasonAds

Electronically • U.S., Philippines Begin Combat Exercise:

ORCATV
61°F

Measuring the Impact

- Week Before – 140 Refills
- Cups Given away (Coupon) - 41
- Week After – 143 Refills



The Results

- Advertising led to less than desired outcome
- Ability to analyze sales resulted in knowing that the promotion didn't work
- Did not meet student preferences



The Benefits

- Ability to quickly analyze the results of advertising or other marketing campaigns
- Able to quickly perform trend analysis and daily comparisons
- Better understanding of student purchasing behavior



Overview of Duke Dining

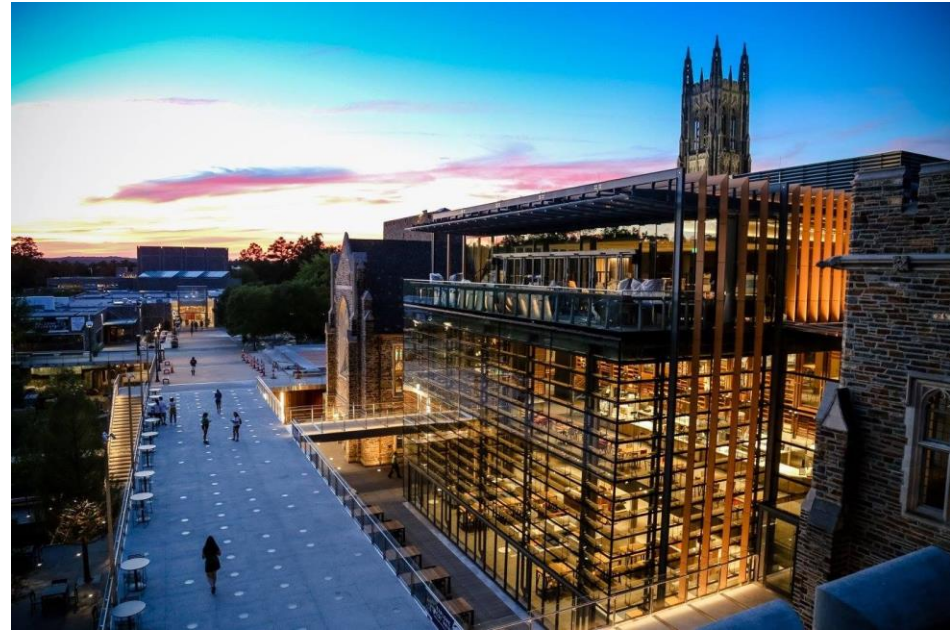
- Campus Population
 - 6,485 Undergraduate Students
 - 8,465 Graduate & Professional Students
 - 8,380 Campus Employees
 - 23,330 Total Campus
- 19,748 Schools of Medicine / Nursing & Duke Hospital Employees



Overview of Duke Dining (cont'd)

Dining Options

- 3 On Campus Self-Op Restaurants
- 32 On Campus Individually Contracted Restaurants
- 13 Merchant on Points
 - delivery to Campus only
 - individual contracts
- 7 Food Trucks
- 55 Total**



Overview of Duke Dining

- Systems
 - On-Campus POS:
Sequoia Quadpoint
 - POS Delivery & Food Trucks:
Blackboard POS (iPod devices)
 - DukeCard System:
Blackboard Transact
 - University Accounting System:
SAP
 - Contract Repository, Revenue Reporting and Reconciliation:
RevenueVision®



The Role of Aux Finance (AFO)

- Tracking of contract terms
- Reconciliation of deposit bags for all registers
- Calculation of amount due and creation of invoices for weekly commission payments to vendors
- Distribution of reports to support payments
- Posting and Reporting of revenue and tenders in SAP



Keys to the Aux Finance (AFO) Process

- Availability of the latest Contracts
- Number of Locations and Tenders
 - Daily Deposits – Duke collects all tenders for all on-campus dining registers
- Reconciliation / validation of data from multiple sources
 - Quadpoint, Blackboard, Merchant Bank, Bursar, etc.
 - By day, location, POS, tender
- Remission of Sales Tax for On-Campus Vendors
- Calculate over/short by tender & calculate payment of weekly vendor commission payments based on contract terms
- Provide reports to contract vendors to support payments
- Post revenue and tenders in SAP Accounting System

The Before Challenges

- **Contract Accuracy**
 - Contracts provided via email
- **Staff Effort Requirements**
 - Manual re-keying of data from multiple source systems with varying report formats
 - Campus expansion - increasing number of locations (registers) and volume of transaction data
 - Over 340,000 DukeCard transactions per month for Dining locations
 - Plus all transactions for other tenders (cash, check, credit card, internal charge, etc.)
 - Addition of new tenders for new programs increasing reconciliation time
 - mostly new stored value accounts on the DukeCard
 - Issues were identified often weeks after payments issued
 - Time-consuming to track sources of problems and make adjustments

The Before Challenges (cont'd)

- System Constraints
 - Utilization of a custom-written Revenue & Reconciliation application
 - end of life with limited support
 - Implementation of data changes (ex. new data fields, commission calculation changes) required reprogramming of Revenue & Reconciliation application;
 - limited flexibility for AFO to control & deliver changes, even for reporting
- Reporting Flexibility
 - Multiple POS = no single system for generating overall sales reports
 - Large, complex Excel spreadsheets for tax reporting
 - Limited ability to analyze YTY trends without re-keying into spreadsheets

In Search of Solutions

Goals:

1. Select a single POS system
2. Identify revenue and reporting software applications to replace end of life system



Implementing RevenueVision®

- By FY13, Sequoia Quadpoint deployed as single POS solution for on-campus Dining
- July 2015 launch RevenueVision for Merchant on Points and Food Trucks
 - Tenders limited to DukeCard Food & Flex accounts
 - Simple commission calculations
 - Opportunity to eliminate maintenance and updates to Excel 1099K reporting spreadsheets
 - Able to load 1 prior year of data for YTY comparison
- July 2016 launch RevenueVision for On-Campus Dining
 - Numerous tenders compared to MOP & Food Trucks
 - More complex commission calculations
 - Ability to track Board plan as a monetary value
 - Single reporting tool for all data sources

Post-Implementation Outcomes

RevenueVision® / Quadpoint

- Contracts Repository
 - Procurement loading contracts directly into RevenueVision
- Staff Effort Requirements
 - Managing 54 Contracts with terms in RevenueVision
 - Business rules in RevenueVision drive commission calculations
 - Loading data from source systems as opposed to re-keying
 - Issues identified and resolved more timely

Post-Implementation Outcomes

RevenueVision® / Quadpoint

- Systems Flexibility
 - Utilization of Single On-Campus POS = Sequoia Quadpoint
 - Retirement of end of life systems = cost savings
- Reporting & Analysis
 - Centralized data with access available to all who need it
 - Flexible statistics to hold track data from different sources
 - Flexible reporting for generating answers to the “question of the day”
 - Limited use of spreadsheets for reporting (unless exported from RV)

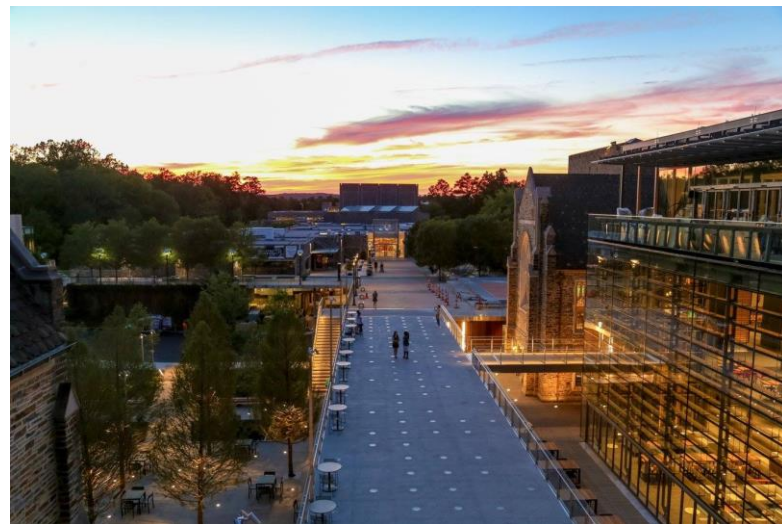
Summary of Benefits

- Proactive rather than reactive
- Reduction of time securing most current contracts
- Better staff resource allocation
- Reduction of keying errors
- Improved accuracy of payments
- Improved response time to issues
- Improved flexibility for reporting
 - ability to report YTY sales with transaction counts
 - ability to report revenue trends from multiple data sources



Next Steps at Duke

- On-Campus Dining
 - Automation of daily data source file creation for load
 - Automation of revenue posting to SAP
 - Automation of over/short posting to SAP
 - Increased flexibility for email report distribution
- Vending
 - data loads from vending companies
- Parking
 - data loads from T2 Systems



Wrap-Up

Questions???