A restaurant company’s journey to building an enterprise-wide BI program with MicroStrategy
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• Identifying the Enterprise-Wide Business Demand
• Creating a Future State Vision
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ABOUT
FIESTA RESTAURANT GROUP
Fiesta Restaurant Group, Inc., owns, operates and franchises Pollo Tropical and Taco Cabana® restaurant brands. The brands specialize in the operation of fast casual restaurants that offer distinct and unique flavors with broad appeal at a compelling value. The brands feature fresh-made cooking, drive-thru service and catering.
What began in Miami as a simple recipe for citrus-marinated grilled chicken has evolved into a world of tropical flavors, and is quickly transforming into a lifestyle of happy, healthy, laid-back fun. Pollo Tropical continues to prove that life's better under the palm. Welcome to Pollo Tropical where passion is married to freshness to create a bite-of-a-kind experience.
Freshly Prepared, Caribbean-inspired Menu
Founded in San Antonio, Texas in 1978, Taco Cabana specializes in Mexican-inspired food made fresh by hand – tacos, quesadillas, flautas, enchiladas, rice, beans, and a selection of made-from-scratch salsas offered on our complimentary salsa bar. Flour tortillas are prepared and grilled from fresh dough balls in view of the guests while taquitos are grilled over an open flame. Taco Cabana offers a selection of beer and tequila margaritas, patio dining, and a convenient drive-thru.
Fresh, Authentic Flavors of Mexico
REPORTING & ANALYTICS CHALLENGES
Fiesta was founded in mid-2012 following a spin-off of these two brands from another restaurant group.

Bifurcation created significant challenges across people, process, and technology categories related to data management and analytics.
Fiesta IT organization is small, with limited bandwidth and in some cases skills to implement the solutions needed to address business demand.

IT team members consumed with “run the business” and “break/fix” requests which left little time for new or enhancement requests.

Financial analysts (and other department analysts) spent more time mining and massaging the data than analyzing it.

Lost tribal knowledge yielded reports that could not be recreated.
Manual processes executed through tribal knowledge and lack of governance and standardizations were impediments

- Heavy dependence on manual processes and Excel spreadsheets as the system of record
- Lacked standardization of metrics and reporting between brands
- Lacked clear definition of the metrics and business rules
- Lacked data governance (e.g. Comp Stores/Store Master)
Disparate data sources and tools were causing issues with users, developers, and administrators.

- Disparate data sources and no consolidated single source of truth
- Accessing information became increasingly difficult
- Various reporting tools compensated for system shortcomings
- Structure of data varied across brands, complicating standardization
- Difficulty for existing tools to adapt to changes in the business
- Challenging to incorporate data points from new external sources

TECHNOLOGY
IDENTIFYING THE ENTERPRISE-WIDE BUSINESS DEMAND
We wanted to make sure we would put in place a program to address the needs of the entire enterprise.

So we conducted an assessment and included stakeholders from all major functional departments.
## Reporting & Analytics Feedback by Functional Group

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### Consolidation, Visibility, Access to Data, Single Source of Truth
# Reporting & Analytics Feedback by Functional Group

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### Advanced Analytical Capabilities
- Reporting & Analytics Feedback by Functional Group
Across all the functional groups we heard several common themes:

1. Simplification
   “We need to be herded”

2. Visibility & Access to data
   “We have an organization-wide data mining problem”

3. Standardization & Rationalization
   “We need fewer reports”

4. Automation
   “All of these reports are produced manually today”

5. Single source of truth
   “We spend too much time debating the truth”
CREATING A FUTURE-STATE VISION
Our future state vision required changes across all components of our reporting & analytics operations

- **PEOPLE**
  - Added new internal IT staff positions related to data management and business intelligence
  - Worked with external partner to augment staff and lay foundation and accelerate time to value

- **PROCESS**
  - Established a new BI steering committee to help focus and prioritize the program
  - Embedded functional analysts into the BI project team to streamline delivery
  - Created a hybrid agile methodology to be more responsive to changing requirements

- **TECHNOLOGY**
  - Selected and implemented MicroStrategy as enterprise BI platform
  - Built new data infrastructure and architecture to consolidate reporting and analytics data sources
Future State Reporting & Analytics Environment

**USERS**
- Restaurant & Field Users
- Business Analysts / Authors / Power Users
- IT Content Developers
- IT Administrators

**DELIVERY**
- MicroStrategy Web & Mobile
- MicroStrategy Dossier
- MicroStrategy Desktop
- MicroStrategy Office
- MicroStrategy Developer
- MicroStrategy Architect

**BI ENGINE**
- MicroStrategy Analytics Server
  - Intelligent Cubes
  - Metadata
  - Security Service

**DATA**
- Data Warehouse
- Database SQL Server

**SOURCES**
- POS
- BOS
- ERP
- Loyalty
- Mobile
- Media
- Customer
- CRM
- Auditor
- Social Media
- HCM & Fin.
- OTHER SOURCES

**DATA INTEGRATION SERVICE**
A ROADMAP TO GET THERE
We identified a list of initiatives required to realize our future state vision:

<table>
<thead>
<tr>
<th>ID</th>
<th>OPPORTUNITY</th>
<th>DESCRIPTION</th>
<th>DEPENDENCY</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>Data Warehouse - E/Transactions</td>
<td>Transaction-level detail data will be loaded into a data warehouse and initially bypass RAS for Flash data. A secondary corrected</td>
<td>There is a soft dependency on the RAS Unbundling project but can still proceed forward by building a temporary interface from the</td>
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<tr>
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<td>Data Warehouse - Audits, Food Safety, EHS</td>
<td>Audit and compliance data will be consolidated and loaded into the data</td>
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<td>3</td>
<td>Mobile Dashboard/Reporting Pilot</td>
<td>Pilot enabling mobile access to key information in an initiative and reporting</td>
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<tr>
<td>4</td>
<td>Off-premise reporting enhancements</td>
<td>Improve and enhance off-premise reporting and analysis</td>
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<tr>
<td>5</td>
<td>HR Reporting – Turnover, Retention, Benefits, Recruiting</td>
<td>Implement and automate HR reporting in the areas of Turnover, Retention, Benefits and Recruiting</td>
<td>Dependency on the data warehouse – HR data</td>
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<td>6</td>
<td>Loss Prevention Analytics</td>
<td>Develop proactive and intelligent loss prevention analytics that will send qualified alerts to the field and Internal Audit teams</td>
<td>Dependency on the data warehouse – transactions</td>
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<td>7</td>
<td>Accounting audit reporting enhancements</td>
<td>Track and report on accounting audit process and warnings/errors as well as action/resolution</td>
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<tr>
<td>8</td>
<td>Restaurant pending vendor credits report</td>
<td>Create a report that tracks pending vendor credits that are due to restaurants</td>
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<tr>
<td>9</td>
<td>Marketing/Promotions Advanced Analytics</td>
<td>Leverage advanced analytical techniques in marketing use cases including pricing analysis, forecasting, simulation, etc.</td>
<td>Dependency on the data warehouse – transactions, marketing data</td>
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<tr>
<td>10</td>
<td>Executive Viewer Replacement with MicroStrategy</td>
<td>Replace Executive Viewer tool with MicroStrategy connected to the existing SSAS cubes</td>
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Performed a cost benefit analysis

**DATA FOUNDATION INITIATIVES**

1. Data Warehouse - EJ/Transactions
2. Data Warehouse - Labor/COS
3. Data Warehouse - Financial
4. Data Warehouse - Customer
5. Data Warehouse - Marketing – media spend, loyalty, mobile
6. Data Warehouse - HR
7. Data Warehouse - Audits, Food Safety, Focus Walks, etc.
8. Self-Service Detail-level Cubes
17. Store Master Data (Comp Stores & Other Master Data)
23. Polling validation process automation

**REPORTING, DASHBOARDS, ANALYTICS PROJECT OPPORTUNITIES**

10. Finance/Operations Report Standardization & Rationalization
11. Dashboards & Reports Modernization and Visualization
12. New Simplified Operations Dashboard
13. Mobile Dashboard/Reporting Pilot
14. Map-based operations KPI dashboard
15. Promotions Analysis Enhancements
16. New Unit Performance Reporting Enhancements
18. Event Impact Tracking & Analysis
19. Off-premise reporting enhancements
20. Crisis Management Store History Dashboard
21. Consolidated audit/inspection/compliance dashboard
22. Consolidated customer/guest dashboard
24. Recipe master reporting enhancements
25. HR Reporting – Turnover, Retention, Benefits, Recruiting
26. Loss Prevention Analytics
27. Accounting audit reporting enhancements
28. Restaurant pending vendor credits report
29. Marketing/Promotions Advanced Analytics
30. Executive Viewer Replacements with MicroStrategy

- Performed a cost benefit analysis
And sequenced the initiatives to create a roadmap

<table>
<thead>
<tr>
<th>PHASE 1</th>
<th>PHASE 2</th>
<th>PHASE 3</th>
<th>PHASE 4</th>
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EXECUTING THE ROADMAP
Each of our roadmap initiatives were broken down into work streams that were further defined.
Used a hybrid agile methodology to accommodate smaller work streams with changing requirements and priorities vs. larger foundational work streams.

**Agile**

- **Phase X Planning**
  - Scope for development will be planned after initial leadership planning meeting

- **Phase X Execution**
  - New development that requires new data feeds requires longer design, development and testing cycles that will occur over a 2-4 month period

- **Sprint 1**
  - Items that do not require data services, reporting defects or enhancements, and general smaller complexity items are included in our 3-week sprint development cycles

- **Sprint 2**

- **Sprint 3**

- **Sprint X**
  - Scope for sprints are planned, prioritized, and reviewed in BI leadership meetings
Leveraged prebuilt data models and solution accelerators to quickly lay the foundational data architecture and MicroStrategy reporting.
Worked with users to rationalize, standardize, and improve reporting and analytics, as opposed to just building the “old reports” in MicroStrategy.

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<tr>
<td>• Use current PT Operations KPI dashboard as a basis for building MicroStrategy Report Document</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OPTION B</th>
<th>Report Document with Tiered Metrics / Analytical Workflow</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Build a Report Document but only show tier 1 metrics on page 1.</td>
<td></td>
</tr>
<tr>
<td>• Other pages and tier 2 and 3 metrics can be added later</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OPTION C</th>
<th>Interactive Dashboard with Tiered Metrics / Analytical Workflow</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Build an interactive dashboard</td>
<td></td>
</tr>
<tr>
<td>• Allow for drill down, filtering, etc. to enable analytical workflow</td>
<td></td>
</tr>
</tbody>
</table>

Diagram:

- Operations Summary Dashboards
  - Single-Entity View
  - Map-based View
  - Exceptions-Based or Comparative Multi-Entity View

- Category Summary & Multi-Entity Dashboards
  - Sales Dashboard
  - Guest Feedback Dashboard
  - COS Dashboard
  - Labor Dashboard

- Detail Dashboards & Reports
THE RESULTS
We are piloting a MicroStrategy Mobile application that will change the way our operators run the restaurants.
Using transaction services to allow analysts to add context to key operations reports

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Fiscal Week</th>
<th>Org Hierarchy</th>
<th>Primary</th>
<th>Secondary</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>Week 10</td>
<td>Shrimp Steakes YG19 Combo</td>
<td>Shrimp Steakes combo</td>
<td>A la Carte</td>
</tr>
<tr>
<td>2016</td>
<td>Week 16</td>
<td>Half Chicken Combo</td>
<td>Shrimp Steakes combo</td>
<td>A la Carte</td>
</tr>
<tr>
<td>2015</td>
<td>Week 4</td>
<td>Shrimp Steakes</td>
<td>Shrimp Steakes combo</td>
<td>A la Carte</td>
</tr>
<tr>
<td>2014</td>
<td>Week 8</td>
<td>POLLO TROPICAL</td>
<td>Shrimp Steakes</td>
<td>A la Carte</td>
</tr>
<tr>
<td>2012</td>
<td>Week 4</td>
<td>POLLO TROPICAL</td>
<td>A la Carte</td>
<td>A la Carte</td>
</tr>
<tr>
<td>2008</td>
<td>Week 8</td>
<td>POLLO TROPICAL</td>
<td>A la Carte</td>
<td>A la Carte</td>
</tr>
</tbody>
</table>
MORE TO COME...
We have other exciting projects and MicroStrategy use cases on the horizon. One example is a grill station mobile app that will use predictive analytics to help reduce waste and increase customer satisfaction.
THANK YOU

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