



## Costa Vida | Case Study

Costa Vida is a Fresh Mexican favorite of Utah locals since it opened in Layton, Utah, in 2003. By living by the motto “*Serving Amazing*,” they quickly gained fans far from their headquarters in Lehi, Utah, and now have more than 100 locations across the U.S and Canada.

CEO Dave Rutter’s dedication to helping every store hit profitability margins attracted attention from franchisees and spurred expansion. As a fresh prep daily concept, food and labor costs can get away from industry standards quickly, and Rutter knew without good visibility into this data, franchisees wouldn’t be able to meet their margins. With rapid growth, he knew they needed a tool to provide this data that general managers can use.

Costa Vida needed a restaurant management system that gave them easy reporting and faster inventory, while having the capability to handle raw food SKUs that are used in multiple recipes. Reliable food cost data that creates action was a key focus for Kip Prestwich, Vice President of Menu and Innovation, because he saw it as an area that many people needed more knowledge in. For labor, better scheduling and more visibility into every facet of their

operations was critical. Costa Vida partnered with SynergySuite to provide what they call the Focus 5: sales and budgeting, purchasing, inventory, scheduling (HRM), and COGS reporting on actual vs ideal. Phase 2 involved very important food safety and operations tools for all corporate and franchise locations.

### **“All the Data’s There”**

As Costa Vida began configuration and implementation, they were focused on ensuring all locations have the data they need to make successful business decisions. Prestwich also had the goal of helping free up general managers’ time, so they can spend more time mentoring employees and interacting with guests.

**“A big thing for me was knowing that I was talking to people that understand our concept, and what we were doing,” Prestwich said. “I’ve seen SynergySuite grow and evolve, which says to me they’re still listening to their partnerships.”**

By using six of SynergySuite’s eight back-of-house modules, Costa Vida was able to reduce the total amount of time spent on daily and weekly tasks, as well as get comprehensive reporting that

pulled in data from across their business. Key functionality Costa Vida was able to add included:

1. Reviewing the reports that matter most to each GM, regional manager and corporate, including daily P&Ls, scheduled vs actual labor and food costs.
2. Monitoring cost increases or variances from suppliers, and streamlining the purchasing process. This was particularly important as Costa Vida deals with eight separate Sysco opcos and has more than 200 products, including 30 that are proprietary.
3. Scheduling to hit labor numbers, and the system learning how to schedule to properly manage peaks and valleys throughout the day. Creating awareness of numbers by having more visibility using the app or desktop.
4. Inputting nested recipes in the system to account for more complex menu items and purchases.

## Knowledge, Data and Savings

With SynergySuite implemented across every company location, Costa Vida is seeing reduced time spent on inventory, purchasing and scheduling; money saved with optimized labor; and money saved with more controllable food costs.

### BY THE NUMBERS



1.5 hours saved on ordering each week



\$400 average saved each week on labor



30 minutes saved on inventory each week



1-2% average saved each week on food



1 hour saved on scheduling each week



1% saved on reporting

***“SynergySuite has changed the way we think about issues. Previously, I didn’t have the same level of detail. Now when we have a question, I can look at the numbers first. I like it because I have knowledge and data,”*** Prestwich said.

Prestwich said he has seen major food savings in some locations with purchasing price alerts that let managers know when they’re being charged prices out of contract. ***“Once you know the numbers you can start taking action,”*** he said.

- **App-based access.** The ability to see up-to-date reports on their phones has been a big benefit for busy managers.
- **Commissary function.** Costa Vida has found it especially helpful to be able to track inventory and sales between regional commissaries to the locations they serve.
- **Employee scheduling preferences in the app.** Employees like being able to set their schedule needs, request time off, pick up open shifts and swap shifts in the SynergySuite app.

### The Add-Ons

While these tools didn’t seal the deal in Costa Vida’s selection of SynergySuite, Prestwich said they have found some unexpected benefits after using the system for more than a year.

At a corporate level, the ability to more thoroughly understand and control purchasing has led to smarter decisions about food costs, menu mix and pricing. An easy-to-understand movement report has given more insight into inventory and waste. Franchisees are seeing profitability gains from streamlined labor and purchasing. The Costa Vida operations team is empowered to make data-driven decisions because of the information in SynergySuite.

At a store level, Prestwich said GMs love being able to get real-time information about day-to-day business on the SynergySuite app. He said, ***“I’ve had managers say, ‘I have everything I need in the palm of my hand.’ And by saving managers time, we get better data, so win-win.”***

Managers are better able to hit corporate labor targets by using the scheduling tool in SynergySuite, which then optimizes their labor over time to better account for peaks and valleys across the day and week.



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Learn more about SynergySuite at [www.synergysuite.com](http://www.synergysuite.com) or by calling **888.531.2090**.