

THE BEST IN DRIVE-THRU '07

BUILDING A BETTER DRIVE-THRU

Consumers know what they want from a drive-thru experience. Is the industry listening? BY MICHAEL W. NUCKOLLS

MAKING THEM FEEL IT

When it's right, you can feel it. The greeting is immediate, pleasant, and clear. Menu choices are easy to choose from and the order is verified on screen, by voice, or both. The food is waiting for you at the window. Payment is exchanged, condiments are offered, and the food passed through the window, all with an inviting smile and pleasant attitude. It could be relief or contentment or outright joy but when the drive-thru experience is right, you feel it.

What we know is that feeling needs to be replicated hundreds of times a day. The 1,000 consumers participating in the 2007 Drive-Thru Consumer Survey reported visiting drive-thrus an average of 5.7 times over a 60-day period. More than one-third use a drive-thru more than six times over 60 days. Forty-five percent pre-

fer the drive-thru over the dining room. Jack In The Box says that more than two-thirds of its orders are passed through its drive-thru windows.

What we know is that satisfaction is desired by the consumer. Fifteen percent of respondents said they have stopped going to a quick-serve because of one bad experience. Another 33 percent are pushed away by several bad experiences. With so many consumers using the drive-thru and demanding an uncompromising experience, building a better drive-thru has become an industry-wide obsession.

At the most basic level, the order has to be right. More consumers (80 percent) rated order accuracy as important to a good



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drive-thru experience than any other factor. Accuracy outranks speed any way the question is posed. Seventy-two percent said they would choose a restaurant with better quality food over a fast drive-thru, and 68 percent said they want the order to be accurate over fast. On the other end, only 21 percent said their biggest concern was speed and a low 8 percent said speed was more important than accuracy.

Even though the percentage of respondents satisfied with order accuracy (73 percent) is less than the number who feel it is important, its value is not lost on the industry. About half of all the chains surveyed said preparation was the top priority, with the other half placing equal weight on preparation and speed.

"Our goal is to always provide the highest-quality food and the fastest service around," says KFC spokesperson Rick Maynard. "Each is equally important, and we don't compromise on either."

"Taste always comes first," says Brian Dixon, vice president of marketing for Taco John's. "We won't compromise quality but we have had to look at added equipment and some ingredient changes in order to improve cooking or holding [time] to facilitate speed."

After order accuracy, 74 percent of consumers said an easy-to-read menuboard was important to them. The percentage of those satisfied with the boards they saw is lagging somewhat (70 percent) but the industry is responding.

Of the 16 chains QSR surveyed, 14 report having made changes to their menuboards over the past year. Changes include using more visual representations, repositioning featured items, standardizing value meal positioning and numbering systemwide, expanding combo offerings, and redesigning from the ground up. With only 45 percent of respondents reporting that they know what they want before reaching the menuboard, the potential is obvious.

After seeing the chain ranked low several years in the QSR Consumer Drive-Thru Performance Study, Dairy Queen COO Chuck Chapman says his chain decided to target its menuboards in an effort to improve. With cooperative input from the home office, franchisees, and branding consultancy Tesser, Dairy Queen redesigned its boards away from a text-driven model to a picture and numbers model. Rollout began in May and

some 25 percent of stores feature the new boards. Chapman says sales of à la carte items have decreased and sales of combos, specialty beverages, and DQ's royal treat line—all more profitable items—have increased. More important, the new images on the boards have "let people know we're in the food business," Chapman says.

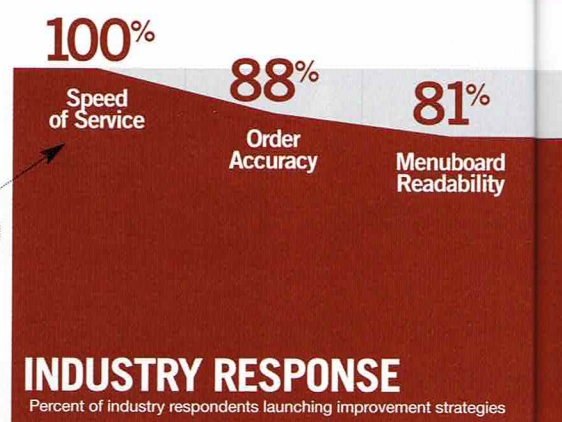
Bojangles' will complete its new menuboard rollout to company stores this month and has the support of a majority of franchisees as well. Designed and manufactured by the Howard Menu Board Company and SynQ Solutions, Senior Vice President of Marketing Randy Poindexter says the new boards improve readability, improve brand perception and consistency across the system, use visuals to drive purchases, provide more merchandising opportunities, eliminate menu slats and digit carriers, and feature easy-to-change panels and improved hardware.

To prove how important the menuboard is, 44 percent of consumer respondents say they are influenced by specials on the menuboard.

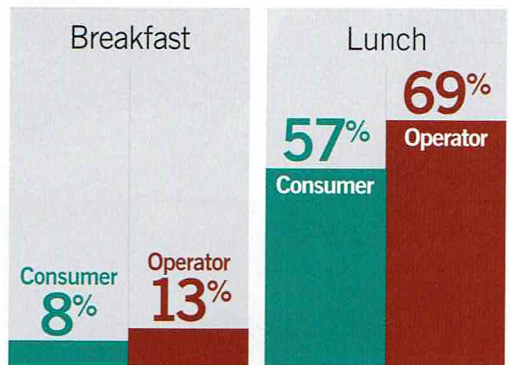
A lot of the feeling that comes from a good drive-thru experience depends on what Noah Griggs, executive vice president of training for Carl's Jr. and Hardee's, calls the "X Factor"—courtesy. Just under accuracy and an easy-to-read menuboard, 71 percent of respondents said customer service is important to them, while 63 percent said they were satisfied with their experience. But there is still room for improvement.

Several chains recently implemented comprehensive drive-thru programs to improve customer service. Six Dollar Service, employed at Carl's Jr. and Hardee's, for instance, encourages employees to create the feeling customers are seeking. "Part of the experience," Executive Vice President of Training, Operations, and Loss Prevention Mike Liby says, "is getting treated in a friendly manner."

Dave Emberton, vice president of training at Arby's, says that his company's new D.A.S.H. (Drive-thru, Accuracy, Speed, Hospitality) training program came from service inconsistencies experienced across the chain's 3,600 stores. D.A.S.H. is a compilation of best practices gleaned from stores systemwide. Divided into areas of people, organization, operations, and equipment, the kit includes a

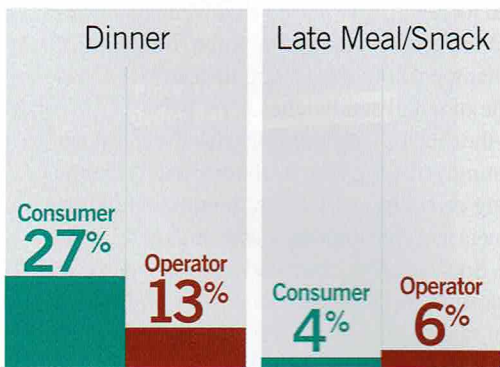
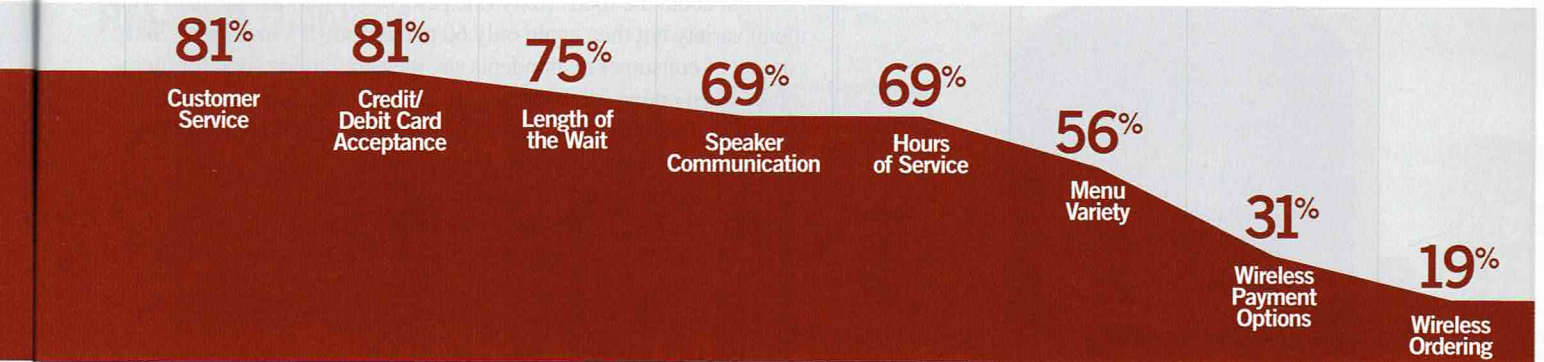
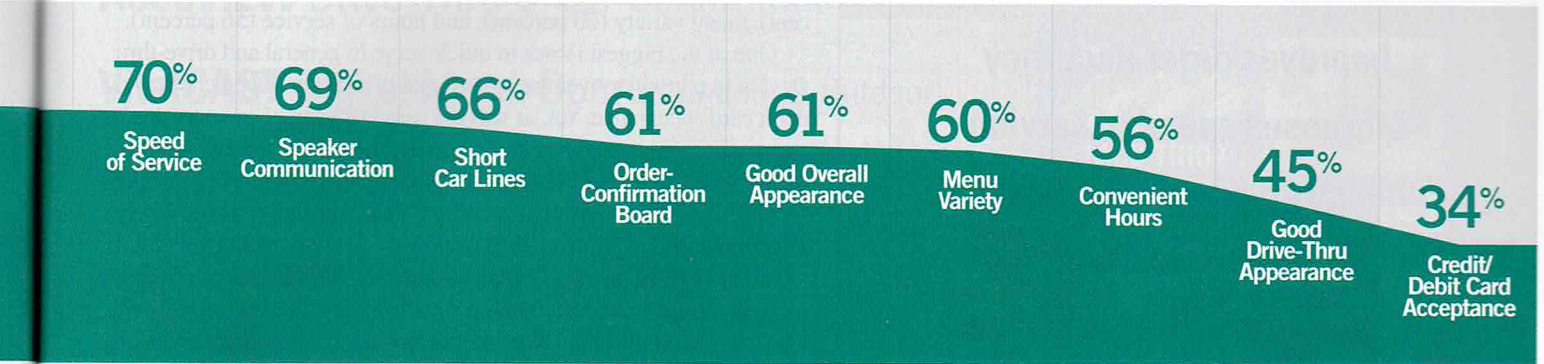


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guidebook, instructional DVDs for employees and managers, a quick-shop evaluation pad, a poster for tracking progress, and the indispensable D.A.S.H. stopwatch.

One of the keys to success with the D.A.S.H. program is proper staffing. Key positions are order taker, cashier, and packer. The important component, Emberton says, is getting the right people—friendly and energetic—in those positions. Scheduling teams of employees who regularly work together takes the concept further by encouraging them to learn and play off of each others' work habits and strengths.



In the last few years, various chains and franchisees have experimented with call-center ordering to improve service at the drive-thru. El Pollo Loco tested a call-center ordering system at its headquarters in early 2006 and, while the test has been discontinued, El Pollo did see some benefits. Steve Sather, senior vice president of operations, notes El Pollo Loco found more opportunities for suggestive selling versus an in-store order taker and there was a slight reduction in order-taking time. The key goal, reducing in-store staffing, was the big question and might only be answerable over the long term.

Service is about the whole experience, though. Carl's Jr. and Hardee's Griggs lumps quality, accuracy, friendliness, courtesy, and speed of service under the customer service heading.

"We've been working on a number of fronts to improve communication and interaction with our guests using [order-confirmation boards], timers, easier-to-read menuboards, exception-based reporting, and monitoring long wait times to determine the causes and solutions," Griggs says.

Perhaps the most interesting divergence of consumer demands and industry response is in speed of service. QSR's consumer survey respondents are more concerned with accuracy and quality than speed. Seventy percent of respondents said speed was important, ranking it under accuracy, menuboard readability, and customer service. That said, 63 percent claim they are satisfied with the speed of drive-thru service. Forty-two percent of respondents are not willing to spend more than five minutes in the drive-thru, and 30 percent will not spend more than 10 minutes.

While none of the chains surveyed placed speed as a priority over accuracy when asked

directly, all the chains said they had implemented speed-improvement strategies as opposed to 88 percent implementing accuracy strategies.

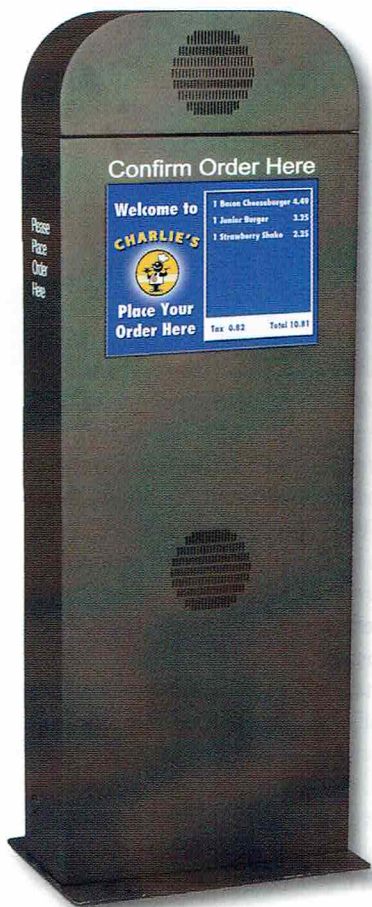
Though they have been around for some time, the speed improvement strategy mentioned most often was the installation of drive-thru timers. Four of the 16 chains surveyed already have or will be installing drive-thru timers system-wide beginning this year. El Pollo Loco's Sather says the chain's FastTrak timers are used to measure the success of its "Gone in 60 Seconds" program. In-store managers, franchisees, and district and headquarters managers can monitor performance at any time during the day to determine where goals are met and improvements can be made.

The benefits of timers are tangible if not fully transparent, according to Todd Walker, director of restaurant support services for Church's Chicken. "We have seen over a one-minute improvement in speed of service in company restaurants since implementation of drive-thru time systems. However, we have not been able to associate additional profits to this improvement," he says.

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Other areas that more than half of consumer respondents rated as important were speaker communications (69 percent), the number of cars in line (66 percent), the presence of an order-confirmation board (61 percent), menu variety (60 percent), and hours of service (56 percent).

One of the biggest issues in quick-serve in general and drive-thru service in particular over the past couple of years has been credit and debit card acceptance. Yet, as was the case last year, consumers don't seem quite as eager about being able to use their cards at the drive-thru.


While 52 percent of consumer respondents report having used a credit/debit card at a drive-thru, only 38 percent said it would likely affect their choice of drive-thru restaurant. Sixty percent said that it would have no effect at all. Payment card acceptance is one area where more respondents reported being satisfied with the service (42 percent), while on the chain side, 81 percent said card acceptance is on their list of improvement strategies for their drive-thru service. Chalk this one up to the industry being forward thinking.

What about the food? Sixty-one percent say they are satisfied with menu variety but then again only 60 percent say it's important. Sixty percent of consumer respondents say they are buying food for themselves when opting for the drive-thru, and half say they are sometimes buying for their families. Thirty-eight percent are taking it home, and 35 percent are eating it in the car.

To make meals more consumable in the car, Carl's Jr. and Hardee's have expanded their line of breakfast burritos and collar-wrapped their burgers for several years. Checkers/Rally's Western Barbeque Burger introduced early this year was specifically designed to retain its shape and be eaten with one hand. Bojangles' is testing boneless wings and minibiscuits that are easier to eat on the go. Jack In The Box redesigned the entrée salad bowl to make mixing in the dressing easier. Arby's has followed others and introduced popcorn chicken to its lineup this year in a convenient shake-it-with-the-sauce cup. McDonald's new cinnamon melts were "designed to allow a cinnamon roll to be eaten in the car." KFC has expanded its Snacker line of small sandwiches.

Building a better drive-thru begins with knowing what the consumer wants and values. Interestingly, the top-two methods used by chains (75 percent) for evaluating drive-thru service are internal—holding conversations with customers and crew members and employing internal customer service staff. Somewhat less frequently used (50 percent) were focus groups, online surveys, and telephone surveys. In open questions, only one chain said its customer feedback system was an important component to its drive-thru service.

In the end the question of building a better drive-thru begins with where consumers think improvements are needed. A negative discrepancy between the percent who find a particular factor important and the percent who are satisfied with the industry's performance exists in every area except appearance (overall and drive-thru), menu variety, hours of service, and payment card acceptance. Factors with a spread of seven points or more between importance to the customer and his satisfaction were accuracy, customer service, speed of service, speaker communications, and the presence of an order-confirmation board.

So, a focus on the basics is in order. Get the order right, deliver it in a reasonable amount of time, and appreciate the customer. Continue working on that, and the consumers will feel it. 

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