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The POS Saga Continues

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Your POS is the bedrock of your retail venture—and if it isn't, I HIGHLY encourage you to make it such. And you can do that without investing in a $20K a month system or, possibly, without switching your system. This month we're going two directions. You can decide which one is right for you.

1. Keep your POS and learn how to use it.
2. Switch it, but learn from your peers who've already switched.

Start Here: Keeping Your Existing POS

If I had a dollar for every time someone told me they hated their POS I could buy a nice, new handbag. Here's the thing: I have a very well-founded suspicion that many who say they hate their POS don't actually know how to use everything in their POS. And/or the POS isn't set up well for their business needs.

These next steps will help you make sure that you're using everything the POS has to offer.

The POS Tuneup

Any type of software/system is merely a TOOL. If your business processes are a mess, changing the tool is not going to help you. Here's your POS tuneup checklist:

Reports: Can you find them? Do you know how to use them? Did you know your POS has reporting capabilities? Even the most entry level systems have reporting capabilities. Find the reports and actually look at what's being generated. Here are examples:

Item specificity—Will your POS tell you down to the container size or variety what people are buying? If not, is that because you don't tag your products that way or because the system isn't configured to work that way. *Why this matters:* Because this amount of detail, if used well, can help you plan inventory forecasting. It also allows you to set up automatic communications with customers regarding items they purchased.

Customer specificity—Can you find out the average number of visits per customer during a specified time frame? Can you tell what each customer bought? Are your transactions even broken down by customer? Do you have an email associated with each customer? *Why this matters:* You can use this information to segment your marketing

and tell your customers about items/events that they care about. This reduces churn in your lists (unsubscribes and resubscribes) and improves your customer experience.

Inventory—Can you tell how quickly inventory turns over? What's your Days on Hand inventory number? What's your Inventory Turnover Ratio? What products are slow moving? *Why this matters:* Sometimes numbers can tell you something your eyes graze over when you're walking the floor. The right data can help you forecast what to replace and what to drop.

Connections to Other Programs: Right off the bat, does your POS connect to anything else? Bookkeeping? Inventory (if it isn't built in)? Email Marketing system? SMS? Rewards program? Website? Why this matters: One of the easiest ways to gain efficiency is to automate administrative tasks and the available connections between programs keep growing. You just need to use them. Automatic connections also help reduce errors in data transmission. If your POS is making you crazy, getting this area buttoned up will help a LOT.

Mobile Checkout Units: Does your POS offer mobile checkout? Ten years ago that would cost you $10K per device. Now you can get a Shopify mobile checkout device for less than $300. If you have Square you can make a cell phone a mobile checkout device. Why this matters: When spring is bananas you need to be nimble. Opening a second, third or fourth register can vastly improve customer experience, which will improve sales and your staff's mood.

Switching it Up: Peer Tips on Making the Move

When you've decided to make the move, make it as smooth as possible! Kori Zawojski from Sunnypoint Gardens, a seasonal garden center in Wisconsin, and Ken Lain from Watters Garden Center in Arizona shared their tips for a smooth transition. These two retailers are in vastly different locations with vastly different business needs, yet shared many of the same tips for navigating a POS switch.

Kori and her team switched from QuickBooks POS to VMX, and Ken and staff switched to Shopify.

Both Kori and Ken said (paraphrased): The new system will have a new language. A category might be called a collection or a department. From the get-go, train the team to use the same language. Here are their other no-fail tips:

- Appoint a champion within your staff. One person should ultimately own the migration and task out to train others.
- It's going to be rocky, no matter how well you prepare.
- Clean up your data! Ken said they expected data upload to Shopify to be easier after many years on the same system and this switch being their fourth. He recommends merging customer profiles and getting a handle on historical data.

Kori took a phased approach and spent time really cleaning and organizing product information before implementing. In the run-up to the switch, they finally tagged each type of annual individually due to some inventory features in the POS they switched to and she said it's made inventory planning a breeze.

She recommended to do your homework. Everyone's objectives will be different.

"Don't overbuy," said Kori. "Some systems are overkill for your individual business needs. More is not necessarily better."

Use the power of your new systems! Ken said they've seen huge gains by pairing Shopify and Klaviyo for email marketing. "We can truly personalize the customer experience based on what they purchase or the type of gardener they are. Online sales have tripled and growing. In-store sales have also increased, along with gift card sales. Customer emails have increased by 9,000, SMS is now a feature with 4,000 customers and we are only getting started."

Here's a thought: You might not need to move systems. Even if you don't move, pretending like your current system is new and doing a clean-out and refresh of systems will improve your efficiency. Throw out the bathwater, but maybe keep the baby ...? **GP**

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