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foodbank
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Strategic Analyses and Performance Augmentation of the Service Insights Platform (SIP) employed by FBST

Vinit Kr Khicha
Rahul Singh

Project Introduction

WHAT IS A SERVICE INSIGHTS PLATFORM (SIP)?

A **Service Insights Platform (SIP)** is an **electronic client intake and data collection platform** in use at brick-and-mortar food pantries and Mobile Food Pantries. It can be thought of as an **'ERP tool'** for food banks and pantries.

PROJECT TIMELINE

Pivoted in February 2021 because Feeding America announced acquisition of FreshTrak

Began project in November 2020 to identify a more robust and better functionality SIP for FBST

Aggregated customer research and user feedback to suggest ways to upgrade FreshTrak

Executive Summary

Project Scope

- ✓ **Initial** Project Scope – strategic analyses to compare existing food bank service insights platforms across multiple criteria
- ✓ **Performed** gap analyses, user feedback aggregation, pricing study, vendor discussions, executions capabilities et al
- ✓ **Revised** Project Scope – agile pivot to provide suggestions to Feeding America Working Group on SIPs to have superior functionalities in line with Link2Feed, Oasis Insights etc.

Key Learnings

- ✓ **Homepage customization** – diverse data capture functionality, pre-reservation feature
- ✓ **Database issues** – mitigate by higher key tags usage & automated duplicate records removal
- ✓ **Reporting** – visual charts and reports functions need refurbishing for quick analyses

Risks

- ⚠ Slower **rollout** of **new features** in the Feeding America sponsored FreshTrak 2.0 platform
- ⚠ Incremental **user adoption** is feeble
- ⚠ **Post-sales technical support** poses challenges for training and re-training purposes

Link2Feed vis-à-vis Oasis Insights

Link2Feed

- **Device Integration** – phone, tablet, signature pads
- **Data ownership** resides with both food bank users and pantry users
- **Visual reports & data analysis** functionality is superior
- **Pre-reservation feature (CNCT)** for clients is available – very helpful during pandemic
- **Offline data capture** functionality isn't feasible

Oasis Insights

- **Device Integration** – Signature pads, *barcode scanners*, webcams, ID card printers
- **Data ownership** for food bank users by default
- **Visual reports** functionality can be upgraded to do quick analysis
- **Pre-reservation feature** isn't available in the system
- **Offline data capture** feature works well with this system

Customer Survey Methodology & Feedback Highlights

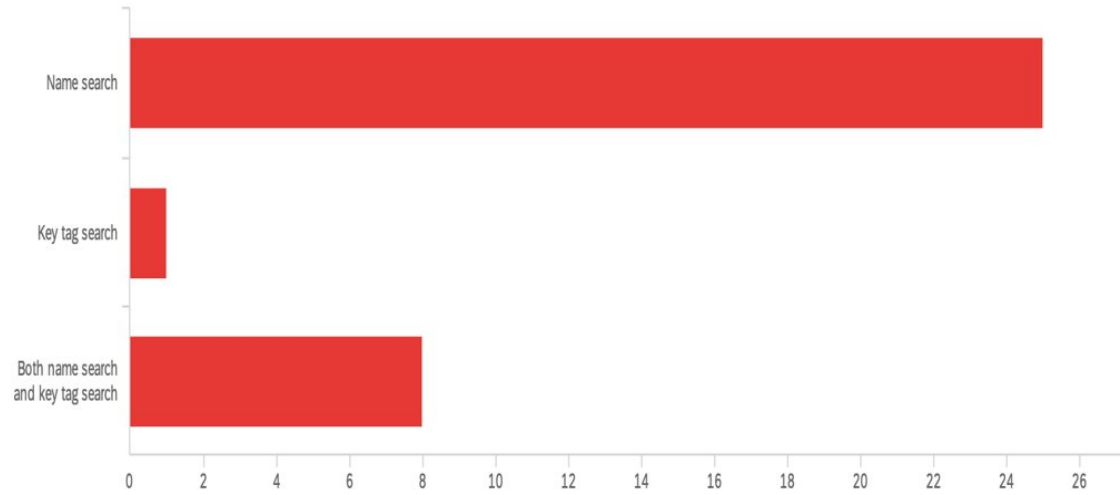
SURVEY METHODOLOGY

- ✓ Survey was designed in consultation with Matt & Kathryn to understand FreshTrak user experience around 11 major areas
- ✓ Both numerical and text box responses were incorporated
- ✓ Survey administered to 40 users across pantries associated with FBST; response rate of 90%
- ✓ Feedback analyzed and follow up conversations with three users conducted; learnings recorded

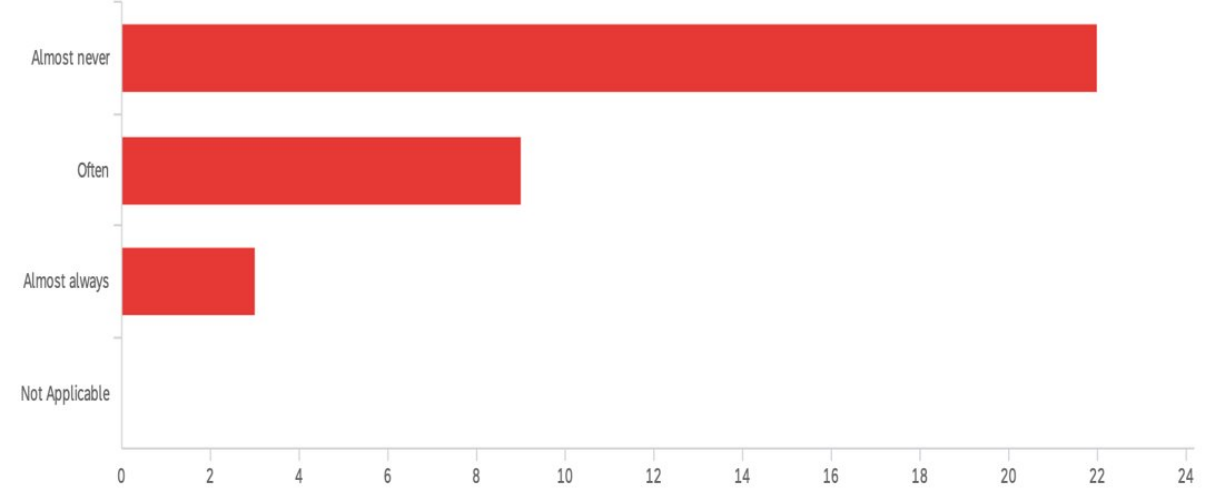
FEEDBACK HIGHLIGHTS

- ✓ Client records are flagged as reserved for the day even if they are just clicked upon
- ✓ Difficulty with identification, and merging or deleting of duplicate records from database
- ✓ Unannounced and frequent time outs in between checking in clients
- ✓ Unavailability of an option to check TEFAP attestation status without entering client records

Clients are primarily searched for by name but misspelling of client names is an issue which can be resolved by key tag usage and software improvement



- ✓ 75% of respondents search for clients by name and 24% by both name and key tag

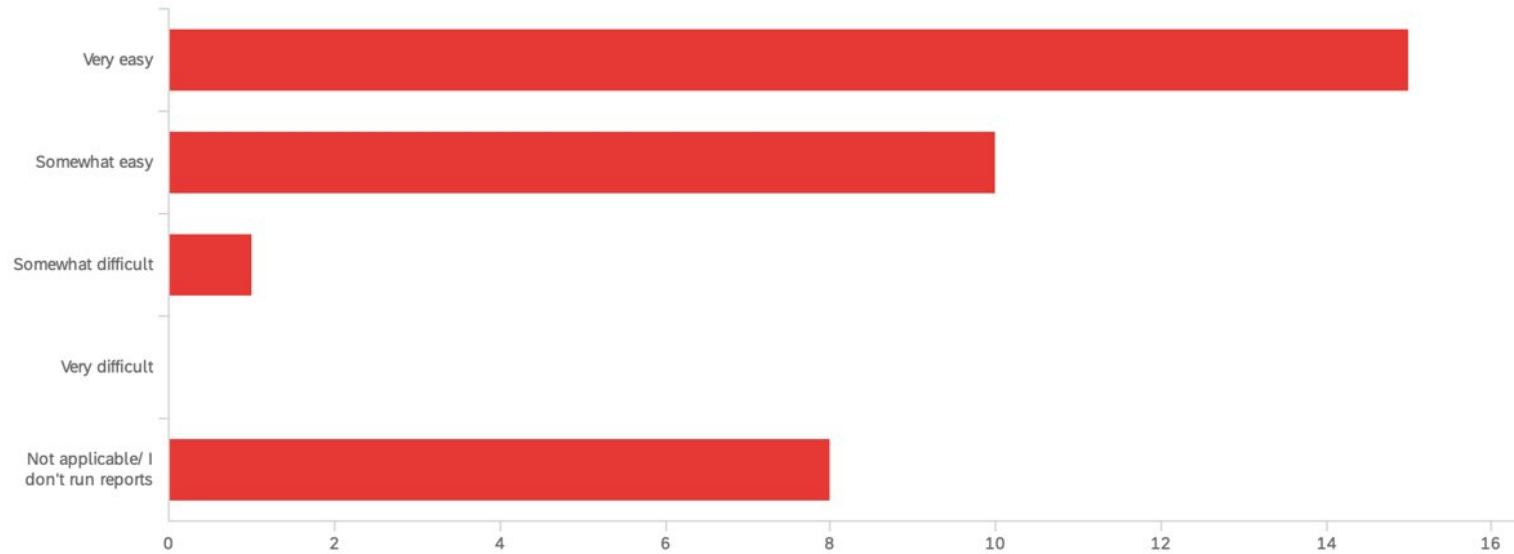


- ✓ 35% respondents face issues in client name search due to misspelled names in the database and the issue is not localized by pantries

Short term solution: Target wider adoption of key tags across the network

Long term solution: Build software capability to easily identify duplicate records followed by resolution through either merging or deletion

Reports are easy to pull and download but this section needs process mapping and newer report formats for intuitive usage



- ✓ Most of the respondents who use reports do not have any issues generating and downloading them
- ✓ Potential issues such as page formatting for newer users can be solved by process mapping
- ✓ Operations managers need improved charts which are also compatible with viewing on mobiles for better visibility and inventory/shift planning
- ✓ Potential new charts for introduction:
 - ✓ Clients served intraday
 - ✓ Daily rolling peak service times
 - ✓ Heat maps – geospatial mapping for mobile pantries to better manage distribution

FreshTrak requires introduction of new features and homepage customization availability to improve operational efficiency

- ✓ Given the range of users with different priorities, FreshTrak homepage should have customizable features
- ✓ Potential features to enhance FreshTrak's operational efficiency:
 - ✓ Client referral tracking
 - ✓ Mass text broadcasting
 - ✓ Pre-visit client reservation
 - ✓ Capturing demographic data such as disability, food sensitivity, and homelessness

Bringing it Home

- ✓ Both Link2Feed and Oasis Insights have certain features which work very well, however, they come at a cost
- ✓ Across the States, there are foodbanks still operating in a non-digital SIP environment, this acquisition of FreshTrak by Feeding America can provide a good low-cost competitor platform
- ✓ For FBST, the next focus should be on helping to build FreshTrak's software capability and process mapping to ensure ease of use by volunteers
- ✓ Kathryn is associated with the Feeding America working group which is utilizing feedback such as ours for software changes to FreshTrak
- ✓ Changes are already underway – case in point, an issue with a non-functional window closing button which caused inconvenience to users has been resolved

Our thanks to **Natasha, Matt, Kathryn**, and the entire FBST team for their invaluable support in our project during these unprecedented times!