

# Choosing the Tech Platform that is Right for You

## Questions to Ask

Every 'food hub' is unique and it can be daunting to find the software solution that works best with your model. These questions will help you reflect on your food hub (business model, values, ethics, and budget) and the functions you need your software 'solution' to do.

1. Remember there will likely be trade-offs. So think about how important these various issues are for your food hub. Prioritize what you 'need to have' versus what would be 'nice to have'.
2. Remember that all your different stakeholders (growers, buyers, co-op members, hub manager) have different things they consider important in the technology platform/service you choose. Make sure you include different perspectives when you are evaluating technology solutions for your food hub.

### **Does the software/vendor reflect your model, values and ethics?**

Are the values and ethics of the software firm/organization aligned with yours? For example: Do you want to reflect co-operative or not-for-profit ethics in your choice? Do you prefer 'open source' or closed source (proprietary)?

To what extent do you want to collaborate and work with others on this project? Do you want something 'off the shelf' or do you prefer to work in a community on a collective solution?

How important is transparency? For example, is it important that the software features the producer and tells their story? Is it important that it shows price transparency or transparency about production methods to the consumer?

What do others say about this vendor? Do they have a reputation in the industry? How important is 'tried and true' to you? Are you willing to take a chance with new developers who might be more 'cutting edge'?

To what extent do you hope the vendor will help improve your model? For example, is this 'just technology' purchase, or are you interested in a vendor that can also consult with you and share other food hub experiences and connect you with resources?

How important is your data ownership? What are the vendor's policies re: data ownership and sharing? How secure is the data?

What cost efficiencies do you expect? Are you expecting increased sales? How do these compare to the software costs? Be sure to calculate the 'all in' or annual costs.

What about future upgrades and new functionality? Does the vendor let you have input into creating new features? Do you have to pay for upgrades?

Architecture - Do you prefer the 'control' of an application that resides on your machine? Or do you prefer the more 'hands off' nature of a cloud-based service that can be accessed by any computer? How important is access from hand-held devices?

Integration: What other systems (e.g. accounting systems, routing systems) do you have that need to be integrated? Can these be accommodated?

Timeline: What is your timeline for deployment? Can the vendor meet this?

On-boarding process/training: Will the vendor assist with on-boarding? At what cost? Are you prepared to invest in the training time? Is there a no-charge trial phase of at least 3 months? How easy will it be to use for your staff? For your suppliers/producers? For buyers?

## **Does it do what you need it to?**

### **Customer Ordering**

How easy is the on-line store for your buyers? Does the store have all the info you need displayed (prices, product descriptions, photos, links to information about the producer)

Do you need the ability to sell in a given 'cycle' where the shop opens and closes at projected dates? And/or do you need the capacity for a permanent shop?

Can the buyer search in the shop front (e.g. for 'organic' items, or for product categories like 'dairy' or 'fruits') to make their shopping easier?

Does the shop automatically calculate prices for the buyer to see, and does it include all necessary fees and mark-ups in this process?

Does the shopper receive a confirmation of their order automatically? Does the hub/shop manager/coordinator receive notification of orders?

Is there a 'standing order' feature where customers commit to a regular or repeating purchase with the option of editing and pausing? Are customers notified when their standing order is open for editing?

Can a customer pause and order and come back to it?

If a customer calls you, can you place an order on their behalf?

### **Receiving Payments from Customers**

Are multiple payment gateways available? Can you add 'fees' to a payment so that you have the option of recovering the costs of these gateways to the buyer?

Does the platform have a 'wallet' system and/or a direct deposit/withdraw system, where customers can set up an on-line account where they top up and draw down funds over time (therefore decreasing fees associated with on-line payments)

### **Managing Orders**

Are customer orders stored in the system's database for review and editing later? Can you easily edit customer orders as they come in – for example to reconcile ordered versus delivered products?

Do the orders sync with the accounting package you use? Or can you download sales reports as CSV (which can then be uploaded into your accounting package.)

### **Customer Order Fulfillment**

Can the software generate the kinds of packing lists you need? (i.e.: lists by customer? By supplier? By distributor/hub?)

Can the hub/store manager set up different delivery/shipping options that the customer chooses from? Can fees be attached to these and can they be calculated in various ways (i.e.: flat rate, charge only if total is under a given amount....)

Can you easily track order payments and customer balances?

### **Customer Management & Communications**

Can you 'tag' particular buyers (like volunteers for example) and offer them access to special products? Can you restrict certain payment methods (like cheques) to certain customers only? Or can you tag a customer for other reasons like for route planning or priority service? Can you easily implement discounts and promotion codes to give benefits to certain customers?

Can you make a 'members only' or 'private' shop where only people you designate have access?

Does the system have communication tools (emails, social media integration...) included? Or can you easily download a customer list to integrate with marketing programs?

### **Inventory Management**

Are inventories updated 'live' as soon as the customer 'checks out'? If an order is modified and an item removed does it go back to inventory?

Do hub managers get an 'early warning' when stock levels are low (so they can contact the supplier about more stock potentially)?

Can a supplier/producer login and update their inventory themselves? If a supplier adds more of a product is this reflected in the shop(s) front automatically?

How easy is the product entry/editing process? Can inventory be uploaded from a database or CSV file versus entering products one at a time?

Does the software help with supply planning? For example can suppliers/producers forecast availability dates for products?

### **Purchase Orders, Procurement & Producer Payments**

Can you easily notify suppliers/producers with the amounts of their products that have been ordered? Can this easily turn into the kind of invoicing you need for your business?

Can you track inventory that is 'on-order' or 'back-ordered'?

Does the software make it easy to track incoming stock as 'received' and checked?

Does the software support 'split payments' where an on-line producer 'wallet' is automatically credited once the consumer pays?

Does the software facilitate logistics for supplier/producer delivery to the hub? (i.e. – routing maps? Crowd-sourcing delivery arrangements?)

## Reports

What kinds of reports can you draw from the system? Are these you need? For example can you download sales data in CSV files for tracking over time?

Does the system offer a dashboard for tracking key performance indicators such as sales, number of orders, etc.?

## Branding

Does the software embed the storefront onto your website so your brand is dominant?

Can you personalize your shop with images and a logo? Is there a place to 'tell your story' and link to more information/website, social media?

## Collaboration/Network Building

Can product lists/inventories be shared between producers, suppliers and hubs to facilitate building food networks and systems? Or must they be managed independently?

Are there flexible tools for setting up satellite hubs, drop spots or buying clubs? Can you have multiple shop fronts that are customized for different sites, delivery routes or days? Will these funnel orders through a central coordinating hub so that producers get an aggregated list of product to be delivered?

Can a producer sell products through multiple hubs, plus their own on-line shop, simultaneously? Will all of these draw down one inventory or must they make separate inventory lists for each 'hub' they sell through?

Open Food Network Canada works with sister organizations around the world to build a global 'tech commons' for the sustainable food movement. We develop and deploy open source solutions that help farmers, food co-ops, food hubs and others, join together, scale-up and achieve greater impacts.



Whatever tech you choose, take your time and make sure it is right for you.

Learn about the global project: <https://www.openfoodnetwork.org>

Try out the Canadian platform – <https://www.openfoodnetwork.ca>

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