

HOSPITALITY TECHNOLOGY

# POS SCOREBOARD

Summer 2005

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## THE TOP 20

POS companies  
based on  
system  
functionality  
and user  
satisfaction

- >> Ratings for ROI, TCO and More
- >> Top POS Systems >> Segment Leaders



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# Top 20 POS Systems >>

**FEW SYSTEMS ARE AS CRITICAL TO A BUSINESS AS THE POINT** of sale is for foodservice. Restaurants of all shapes and sizes now rely on their POS system for processing orders, tracking important customers, ana-

lyzing data and a host of other functions. Once the sole property of high-volume or high-end operations, increasingly a POS can be seen virtually everywhere.


Reflecting the changing dynamics of the industry, the POS Scoreboard charts that growth. Expanding from a short list of the top ten systems in 2004, the 2005 POS Scoreboard has doubled in size this year. Mirroring the diversity of the restaurant and foodservice industry, the top 20 POS software solutions include companies with as little as a few thousand installed terminals to well in excess of 100,000 installs.

The top 20 ranking is based on two separate criteria: Questionnaires completed by the software companies and online surveys completed by restaurant operators. The company questionnaire detailed the number of installations, company revenue and POS functionality. The Scoreboard does not and cannot evaluate the quality of the functions of a given point-of-sale system,

but rather assigns points for a broad-range of functionality. Companies that cater to the broadest range of restaurants fare better in the Scoreboard's top 20 than companies that specialize in specific niche markets. POS companies can receive up to 55 total points based on the questionnaire: up to

Total Points	Company	POS Functionality	Installs	Company Revenue	User Satisfaction
88.81	1. Micros Systems	40	10	5	33.81
85.10	2. Radiant Systems	37	10	5	33.10
82.78	3. Maitre'd by Posera	36	6	2	38.78
80.83	4. POSitouch	36	9	3	32.83
80.51	5. SilverWare	36	5	1	38.51
79.25	6. PC America	32	6	1	39.25
78.93	7. Restaurant Manager by ASI	33	6	1	38.93
77.96	8. Digital Dining/Menusoft	30	6	3	38.96
77.12	9. ParTech	30	9	5	33.12
75.71	10. Volante Systems	33	3	1	38.71
75.57	11. xpient (Progressive)	28	8	2	37.57
73.24	12. Compris	25	8	5	35.24
72.38	13. Wand	33	2	2	35.38
71.15	14. Panasonic	31	10	5	25.15
70.15	15. InfoGenesis	28	6	3	38.15
69.49	16. Squirrel Systems	30	5	3	31.49
69.32	17. FuturePOS	29	1	2	37.32
68.73	18. Speedline	27	2	1	38.73
68.17	19. NextPOS	24	5	1	38.17
63.92	20. Savista	16	6	3	39.02

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# Top 20 POS Solutions >>

40 points for POS functionality; up to 10 points for the number of installed POS terminals and five points for company revenue.

## Who voted:

Nearly five hundred people participated in the 2005 POS Scoreboard, an increase of 38% overall from the 2004 Scoreboard. Of the 485 total responses, 70 were eliminated because they could not be identified as restaurant operators. Of the 415 remaining responses, 43% were casual-dining restaurateurs, 17% indicated that they operated quick-service restaurants, and 11% were fine-dining restaurateurs. Once again, a healthy percentage of the respondents came from the lodging industry, with 13% coming from hotels, resorts and spas and 4% from casinos. The remaining 12% indicated "other" on the survey with responses ranging from a baseball stadium, an Air Force base, bars and nightclubs and a museum.

Of the 415 responses, 399 respondents indicated the number of restaurants used the POS system in question. The sum total of respondents restaurant locations was 33,418—a good sample size of the industry. However, the vast majority of the responses came from smaller restaurant companies. Twenty-eight percent of respondents had a single unit and another 24% had between two and five locations. On the other end of the spectrum, nearly 14% of the respondents had more than 100 locations.

Forty-seven POS companies were initially identified for the POS Scoreboard. Of those companies, 35 were selected and evaluated by survey respondents. In addition to those 35 companies survey respondents identified twelve more companies by selecting "other" and identifying the company in the open field, for a total of 47 POS systems evaluated.

## The results:

The top four POS companies from 2004—Micros Systems, Radiant Systems and Maitre'd by Posera—remained unchanged in the 2005 POS Scoreboard. In fact, each of

three companies registered strikingly similar scores over the two years. Interestingly, the three companies also received the top three number of votes in the Scoreboard with 67, 37 and 23 respectively (since votes are averaged, more votes do not necessarily translate into higher scores). Micros, was once again strengthened by both its industry-leading number of installations as well as its broad range of functionality—scoring a perfect 40 on POS functionality. Similarly, Radiant System received a strong score of 52 out of 55 for the company portion.

The race for fifth position was extremely tight with three companies separated by little more than a single point. SilverWare squeaked in above PC America and Restaurant Manager by Action Systems. SilverWare is the highest ranking debut entry in the

Scoreboard for 2005. All three companies registered high customer satisfaction scores, with PC America receiving the highest overall score (39.25). In fact strong customer satisfaction scores bolstered the position for many companies, including Menusoft's Digital Dining, Volante Systems and xpiet.

Expanding the POS Scoreboard to 20 companies allowed many companies that are focused on meeting the needs of smaller niche foodservice markets to be recognized. Many of these companies had lower functionality scores because their systems are specifically designed for QSRs, pizzerias and casinos and hotels.

## Top POS software solutions:

Although the POS Scoreboard measures POS companies by the sum total of all their POS software versions, a few stood out above the rest. The survey asked respondents which version of the POS software they were evaluating. To qualify, a top POS system needed to have at least five responses. Owing to increased competition from last year, only Radiant Systems managed to repeat with a top system from last year. For many companies, the 2005 versions did not receive enough votes to qualify. ■

Score	Top Solutions	POS Version
38.4	1. Menusoft	Digital Dining 7.3
37.1	2. Radiant Systems	Aloha 5.3
36.8	3. Maitre'd by Posera	Maitre'd 2003



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# 20 Overall Performance >>

**NEARLY HALF OF THE TOTAL SCORE FOR A POS COMPANY IS** derived from its "User Satisfaction" score. This essential element is drawn from the feedback of survey respondents who were asked to evaluate their point-of-sale software on nine different criteria: Overall Performance, Return on Investment, Total Cost of Ownership, Strategic Value, Ease of Upgrade, Ease of Installation, Ease of Integration, Ease of Administration and Quality of Support and Service.

Respondents gave each POS system ratings on a scale of one (poor) to ten (excellent). To balance the User Satisfaction scores with the company data, each score has a weighted value of up to five points. Therefore a company that receives an average score of 9.0 would receive a weighted score of 4.5. All scores are averaged so that each company has an equal opportunity to succeed. However, since the results for a company with relatively few responses can be thrown off by a few bad (or good) responses, we also added to every company the overall average score for each category. This weight would have minimal affect on companies with a large number of responses, while companies with few responses will be pulled toward the overall average.

In the further interest of fairness, the companies were divided into three categories based on the number of installations: Fewer than 20,000, 20,000 to 80,000, and More than 80,000. While on some level, all the POS companies here compete with each other, company size plays a large role in determining which companies play in which markets. To supplement these charts, The 2005 Scoreboard also includes comparisons for different industry segments as well as those based on the size of the restaurant respondents.

Company Size	Overall Performance	Score
Fewer than 20,000	1. Speedline	4.56
	2. SilverWare	4.52
	3. Volante Systems	4.45
	4. Dinerware	4.36
	5. NextPOS	4.34
20,000 to 80,000	1. InfoGenesis	4.56
	2. Savista	4.45
	3. Digital Dining	4.44
	4. Restaurant Manager	4.25
	5. xpient	4.21
More than 80,000	1. Micros Systems	4.12
	2. Radiant Systems	3.98
	3. POSitouch	3.84

## Overall Performance

When asked, "Which criteria is most important," 54% of the respondents that answered (220) indicated that "Overall Performance" was most important. This was the most general question and suggests that restaurant and foodservice operators are not tied to a single factor when evaluating a POS. Fortunately for the industry, most of the respondents are quite happy with their current system. Overall Performance received the highest average score of all the questions (8.19), up from 7.7 in the 2004 POS Scoreboard. Of the 405 respondents that answered this question, 29% (116) gave their POS system a "10." Another 24% (96) respondents gave their POS system a "9," while only 6% (23) gave their company a score below "5." ■

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# ROI & Strategic Value >>

**A POINT-OF-SALE SYSTEM REPRESENTS A SIGNIFICANT** investment for any foodservice or restaurant company. Not surprisingly, determining the return on that investment has been a classic measure for evaluating POS as well as other technology solutions. Interestingly, however, only 6% of the respondents indicated that ROI was the most significant criteria when selecting a POS system. This probably indicates that restaurant operators are developing more complex and comprehensive ways to evaluate critical technologies like the POS.

The closeness in all the scores also reflects the growing competitiveness of ROI measures and perhaps the sophistication of the Scoreboard respondents. The overall average score for all respondents was 3.98, suggesting that nearly all users believe that they are receiving a reasonable return on their investment and that no company stands apart.

## Strategic Value

For many restaurant and foodservice operators, the point of sale has transformed from a simple tool to an essential element of their overall business strategy. How the POS fits into that strategy, of course, will differ dramatically based on the size, concept and approach to technology of the restaurant companies involved. Unlike with ROI, there is no standard measure for determining the strategic value of a POS. What constitutes strategic value may differ significantly among respondents, which may help explain a somewhat larger variation in the scores from the highest (4.66) to the lowest (3.08) among all the POS companies.

Six percent of the respondents indicated that strategic value was the most important criteria for selecting a POS system. Nearly all of those respondents were multi-unit operators ranging from a few small operators to a 3500-unit restaurant operator. ■

Company Size	Return On Investment	Score
Fewer than 20,000	1. NextPOS	4.44
	2. Speedline	4.41
	3. Dinerware	4.36
	4. Volante Systems	4.34
	5. Visual One	4.12
20,000 to 80,000	1. xpient	4.33
	2. Restaurant Manager	4.33
	3. Digital Dining	4.29
	4. Maitre'd by Posera	4.25
	5. InfoGenesis	4.25
More than 80,000	1. ParTech	3.91
	2. Micros Systems	3.89
	3. Radiant Systems	3.75

Company Size	Strategic Value	Score
Fewer than 20,000	1. NextPOS	4.55
	2. Dinerware	4.44
	3. SilverWare	4.23
	4. Wand	4.11
	5. Speedline	4.02
20,000 to 80,000	1. Savista	4.66
	2. PC America	4.43
	3. xpient	4.28
	4. Maitre'd by Posera	4.17
	5. Restaurant Manager	4.12
More than 80,000	1. Micros Systems	3.89
	2. Radiant Systems	3.83
	3. ParTech	3.78

# Ease of Upgrade & Installation >>

**ACCORDING TO THE RESTAURANT INDUSTRY** technology study, "Driving Restaurant Productivity," 32% of foodservice operators plan to replace their POS within two years and 65% plan to replace their POS within four years. Given the pending turnover in POS, ease of upgrade and installation will be top-of-mind concerns for IT departments in the next few years.

It is not however, at the top of minds for POS users right now. Among the 405 respondents that indicated a single criteria for evaluating point-of-sale systems, only one responded that either was the utmost concern. This, of course, is not to say that ease of upgrade and installation are not important, but rather it is not the single most important concern for foodservice operators. Most likely, as POS hardware increasingly adopts the plug-and-play model and more POS companies gravitate towards hardware agnostic systems, these two issues are becoming secondary to other more strategic concerns.

## Ease of Upgrade

For ease of upgrading there was relatively little variation from the average score for all respondents, 3.89. The POS companies varied from a high score of 4.48 to a low of 3.08. The closeness is reflected in the tightness of the score among the leaders, with only .15 separating the top companies in the More than 80,000 category and .18 separating the top five companies in the Fewer than 20,000 category.

## Ease of Installation

Scores for Ease of Installation exhibited a slightly greater distribution from top to bottom than for some of the other categories, though this question did have the second highest average score (3.98). Interestingly, the largest difference between first and second place for any of the questions occurs in the More than 80,000 category for this question. ■

Company Size	Ease of Upgrade	Score
Fewer than 20,000	1. Dinerware	4.48
	2. FuturePOS	4.36
	3. SilverWare	4.35
	4. Speedline	4.32
	5. Volante Systems	4.30
20,000 to 80,000	1. Maitre'd by Posera	4.48
	2. Restaurant Manager	4.38
	3. Compris	3.90
	3. Digital Dining	3.90
	3. xpient	3.90
More than 80,000	1. Micros Systems	3.73
	2. ParTech	3.70
	3. Radiant Systems	3.58

Company Size	Ease of Installation	Score
Fewer than 20,000	1. Speedline	4.47
	2. SilverWare	4.39
	3. Volante Systems	4.35
	4. NextPOS	4.06
	5. Wand	4.00
20,000 to 80,000	1. Restaurant Manager	4.56
	2. Digital Dining	4.55
	3. Maitre'd by Posera	4.42
	4. InfoGenesis	4.36
	5. PC America	4.35
More than 80,000	1. Radiant Systems	3.93
	2. POSitouch	3.64
	3. ParTech	3.61

# Ease of Integration & Admin >>

**INCREASINGLY, FOODSERVICE OPERATORS ARE** recognizing the challenges of integrating information technology systems. The point of sale remains the essential heart of a restaurant's technology structure and if a foodservice operator's POS does not communicate with other key systems (accounting, payroll, loyalty and procurement to name a few), then the operation will be severely handicapped. Integration (or more aptly interfacing) with the POS can be expensive, time consuming or just plain impossible without industry-wide accepted standards.

These concerns are especially pressing for lodging and casino operators, which must integrate/interface the POS into lodging and gaming systems. Not surprisingly, four of the eleven respondents that indicated this was the most important criteria came from the lodging industry.

This question also illustrated some of the highest variations, with large gaps between first and second place companies in all three categories and a variation between one of the highest overall scores (4.6) and the lowest (2.64).

## Ease of Administration

How easy it is to keep your point-of-sale system up and running? The answer to this question is probably as important as any in determining how happy a restaurant IT executive is. The more time spent supporting, repairing and administering the point of sale, the less time there is for virtually anything else.

Five percent of respondents indicated this was their most significant criteria for selecting a point-of-sale system, behind total cost of ownership (TCO), quality of support and service and overall performance. Interestingly, foodservice companies of every size and in every market responded that this was a significant criteria. Perhaps it is no coincidence that the company with the highest score for this category (Digital Dining from Menusoft) also had the most restaurant users indicating this was the most significant criteria for selecting a POS system. ■

Company Size	Ease of Integration	Score
Fewer than 20,000	1. Volante Systems	4.39
	2. SilverWare	4.19
	3. FuturePOS	4.12
	4. NextPOS	4.11
	5. Wand	4.03
20,000 to 80,000	1. Savista	4.60
	2. Maitre'd by Posera	4.47
	3. Restaurant Manager	4.46
	4. Digital Dining	4.45
	5. xpient	4.40
More than 80,000	1. Micros Systems	3.68
	2. Radiant Systems	3.59
	3. POSitouch	3.40

Company Size	Ease of Administration	Score
Fewer than 20,000	1. Dinerware	4.48
	2. Speedline	4.32
	3. Volante Systems	4.31
	4. FuturePOS	4.30
	5. SilverWare	4.24
20,000 to 80,000	1. Digital Dining	4.51
	2. Maitre'd by Posera	4.48
	3. PC America	4.44
	4. Restaurant Manager	4.38
	5. xpient	4.28
More than 80,000	1. Micros Systems	3.64
	2. Radiant Systems	3.59
	3. ParTech	3.43

# TCO >> 20

## Total Cost of Ownership

Total cost of ownership (TCO) is another classic measure of technology solutions. Recognizing that the cost of a technology goes well beyond the initial investment to include service, repairs, time spent on implementation and support and a host of other factors, more people are moving towards TCO as a way to evaluate the true cost of a given technology.

In fact 7% of the respondents indicated that this was the single most important criteria for selecting a POS, including many of the largest foodservice operators. Given its importance, it is little surprise that the top scores are separated by a relatively small margin. Nearly all POS companies recognize that lowering the total cost of owning a POS is essential, making this one of the closest and most competitive questions. ■

Company Size	Total Cost Of Ownership	Score
Fewer than 20,000	1. Dinerware	4.45
	2. Speedline	4.38
	3. Visual One	4.37
	4. Volante Systems	4.35
	5. NextPOS	4.32
20,000 to 80,000	1. PC America	4.62
	2. Compris	4.36
	3. xpient	4.34
	4. Digital Dining	4.34
	5. Maitre'd by Posera	4.22
More than 80,000	1. ParTech	3.91
	2. Micros Systems	3.86
	3. POSitouch	3.76

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# 20 Support & Service



**IF THERE IS ONE CAUTIONARY NOTE FOR POINT-** of-sale providers, it is that support and service received the lowest average score in the survey (3.85), while at the same time 15% of the respondents indicated that it was the most important criteria for selecting a point-of-sale system. Most of the restaurants in this group were smaller operations, with many at five units or fewer. Given that smaller restaurant and food-service operations are likely to have fewer internal resources to commit to supporting the point of sale, it is likely that these companies are far more dependent on the POS company for support and service and far more aware of the quality of service they receive.

POS support and service is probably the topic that garners the strongest emotional response from foodservice operators. Of the 426 respondents that answered this question, 149 (35%) gave their POS company a score of "10," while 24 (6%) gave a score of "1." In both cases

those were the highest numbers of all the questions. Some 22% of the respondents gave their company a score of five or below indicating real dissatisfaction with the quality of support. Clearly, many foodservice operators feel that there is real room for improvement.

The responses to this question generated a wide range of responses ranging from a high of 4.53 to a low of 2.64. Still, the scores for the top companies were relatively close. In the Fewer than 20,000 category, for example FuturePOS and Volante Systems missed the top five by less than five hundredths of a point. In the More than 80,000 installs category, Radiant Systems missed the top three by only six hundredths of a point

## User Satisfaction

The user satisfaction score represents the sum total of each of the nine questions POS Scoreboard respondents answered. Given the larger scale, it would stand

Company Size	Support & Service	Score
Fewer than 20,000	1. Speedline	4.38
	2. SilverWare	4.36
	3. Volante Systems	4.25
	4. Dinerware	4.23
	5. NextPOS	4.16
20,000 to 80,000	1. Restaurant Manager	4.53
	2. Savista	4.52
	3. PC America	4.49
	4. InfoGenesis	4.24
	5. Maitre'd by Posera	4.22
More than 80,000	1. ParTech	3.69
	2. POSitouch	3.67
	3. Micros Systems	3.40

Company Size	Total User Satisfaction	Score
Fewer than 20,000	1. Dinerware	39.47
	2. Speedline	38.73
	3. Volante Systems	38.71
	4. SilverWare	38.51
	5. NextPOS	38.17
20,000 to 80,000	1. PC America	39.25
	2. Savista	39.02
	3. Digital Dining	38.96
	4. Restaurant Manager	38.93
	5. Maitre'd by Posera	38.78
More than 80,000	1. Micros Systems	33.81
	2. ParTech	33.12
	3. Radiant Systems	33.10

to reason that there would be a far greater variation among the POS companies. As the top scores indicate, this was not the case. Less than half on one point separate the top five finishers in the 20,000 to 80,000 installs category and the separation in the other two categories was only marginally larger.

Another indication of the quality of the competition is to look at the scores from the 2004 POS Scoreboard. In 2004 Maitre'd by Posera, for example, had the highest user satisfaction score (36.7). This year, Maitre'd improved its overall score by two full points, but dropped to the sixth highest score.

Other companies showed a marked improvement over 2004 as well. InfoGenesis registered the highest gain by improving an impressive 5.6 points. Other companies that registered significant improvements include Micros Systems (+3.7), PC America (+3.2), Restaurant Manager by ASI (+3), Radiant Systems (+2.9) and Squirrel Systems (+2).

A number of factors probably contributed to the

overall rise in scores. In 2004, the POS Scoreboard was an entirely new concept for both foodservice operators as well as POS companies. Many companies made a concerted effort to either be included or to improve, by reaching out to their customers and encouraging them to participate. The rising scores may also indicate a larger trend towards better POS systems and more satisfied restaurant operators.

In addition, with the expansion of the POS Scoreboard to include more companies, it also is reaching a broader cross-section of the industry. Many of the respondents, operate fewer than five restaurants and may have distinctly different views of the meaning of ROI, TCO and strategic value (for an analysis of the relationship between the size of restaurant companies and scores, see "A Final Look," p. 18). With nearly 500 responses and drawing from a larger pool and with a more diverse audience, the 2005 POS Scoreboard probably offers a more accurate and realistic picture of the views of the foodservice industry towards point-of-sale software systems. ■

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# 20 Industry Breakdown >>

Restaurants Surveyed	Fine Dining POS	Score
7	1. FuturePOS	40.6
11	2. Restaurant Manager	38.8
6	3. Micros Systems	36.3

Restaurants Surveyed	QSR POS	Score
177	1. Maitre'D by Posera	39.0
38	2. Wand	36.4
99	3. Panasonic	24.5
3225	1. Savista	41.3
2600	2. xpient	33.1
2195	3. Radiant Systems	31.2
671	4. ParTech	30.1
7553	5. Compris	29.1

**WHILE ALL FOODSERVICE POINT OF SALE SYSTEMS** share many traits, there is also a great deal of diversity. A quick-service restaurant, for example, will handle a large volume of transactions, but once the order is placed, it is completed, while a fine-dining restaurant will have far fewer transactions, it may have multiple additions and changes over the course of an evening. In fact, very few POS companies play in every market, most companies compete head-to-head only within specific segments.

To help determine how POS systems compare within specific segments of the industry, all respondents were asked to select their type of restaurant operation from a list including casual dining, fine dining, QSR, hotels and resorts and casinos. Four hundred and seven respondents identified themselves with casual dining representing the largest group by far with 43%, followed by QSR (17%), Hotel & Resort (13%), and Casinos (4%) with the remaining respondents selecting other. The total user satisfaction score (combining the responses from all nine questions) was taken for each company within a given segment. Companies were required to have at least five responses within the segment to qualify. In addition, because there were only 18 casino responses, the sample was deemed to be too small to represent a valid comparison.

Respondents were also asked to identify the number of restaurant for their foodservice operation. To help add weight and context to the comparisons, the number of restaurants associated with each POS company was also added to the charts. When the number of restaurant varied significantly—as it did for hotels and resorts, QSRs and casual-dining restaurants—the top companies were divided into separate groupings based solely on the number of restaurants represented in the responses.

## Industry segments

Of the 43 Scoreboard responses from fine-dining restaurants 16 different POS systems were evaluated. Scores tended to be quite high overall with an average score of 4.24 for overall performance.



Sixty-eight quick-service restaurant operators evaluated 18 POS vendors. The number of restaurants varied dramatically from POS vendor to POS vendor as did the overall scores.

Casual-dining restaurants made up the largest segment, with 177 total responses, an amount that exceeded the number of responses for the next three segments. The segment ranged from many single-unit restaurants to a chain of more than 1,000 units with 28 POS companies evaluated as well as a proprietary system. Due to the range of responses this category was divided into two groups: POS companies with fewer than 50 restaurant responses and those with more than 50.

Fifty-one respondents indicated they represented hotel, resort or spa operators. These companies evaluated 13 POS systems including a few POS systems that are bundled with property-management systems. Nearly all of the lodging respondents represented more than one property with two of the largest brands also involved. ■

Restaurants Surveyed	Hotel & Resort POS	Score
77	1. InfoGenesis	36.3
28	2. Visual One	30.0
72	3. Squirrel Systems	27.6
208	1. HSI Solutions	36.9
4173	2. Micros Systems	31.9

Restaurants Surveyed	Casual Dining POS	Score
13	1. PC America	42.2
16	2. Restaurant Manager	39.7
28	3. FuturePOS	37.5
402	1. xpiant	39.3
96	2. Digital Dining	37.7
361	3. Maitre'd by Posera	36.3
299	4. Squirrel Systems	33.8
1869	5. Micros Systems	30.8
366	5. Radiant Systems	30.8
232	5. POSitouch	30.8

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# A Final Look >>

## DOES SIZE REALLY MATTER IN A FOODSERVICE OPERATION?

To help understand the true importance of the size and scale of a foodservice operation, we looked at the data purely on the basis of the number of restaurants operated by each respondent. Many have suggested that “enterprise” operators have the most experience with a wide range of technologies and therefore will have the most jaundiced view of point-of-sale technology, holding the POS vendors to a higher level of accountability. Conversely, many single-unit restaurants, it is argued, will have lower expectations of their POS system and its provider.

Survey responses were divided into four categories: Single unit restaurants, restaurant companies with at least five units and no more than 50, restaurant chains of between 51 and 200 total units and large-scale enterprises with at least 201 restaurants.

While the types of restaurants and revenue may differ dramatically each of these categories share much in common. Single-unit restaurants rarely have a dedicated IT staff or even an IT expert. By and large single-unit restaurants are run by an owner/operator or family that handles everything.

By the time a restaurant company expands to five units, they tend to start to develop a more structured management approach and may even have a director-level person handling IT. Around 50 units, however, foodservice companies need to develop a more sophisticated approach to technology with a support staff to help manage all the distant units. And restaurant companies beyond 200 units tend to be the most advanced in the business with relatively large IT staffs and long-term IT strategies.

## The results

Indeed, size does seem to matter. Single-unit restaurants consistently gave their POS companies among the highest ratings in the Scoreboard survey, with three of the top five companies topping 40 points. Interestingly, that did not carry over into the small chains, which gave scores that were consistent across the board.

Both the enterprise chains and large chains displayed a wide distribution of scores, while scores remained somewhat tighter and more competitive for both the small and large chains.

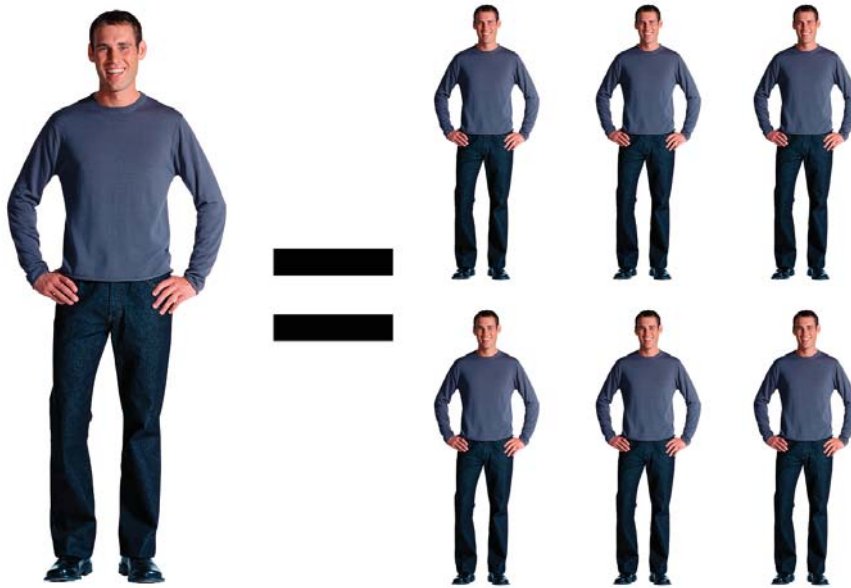
For all four categories the number of restaurants represented in the responses was also given to help provide additional context for the results. ■

Restaurant Responses	Single-Unit Restaurants	Score
9	1. Dinerware	42.5
10	2. PC America	42.1
10	3. SilverWare	41.1
8	4. Restaurant Mgr.	39.9
19	5. FuturePOS	37.9

Restaurant Responses	Small Chains 5-50 units	Score
145	1. InfoGenesis	38.9
135	2. Maitre'd	38.3
112	3. Digital Dining	37.3
286	4. Radiant Systems	32.5
141	5. ParTech	32.1

Restaurant Responses	Large Chains 51 - 200 units	Score
579	1. Maitre'd	39.2
467	2. xpient	38.5
709	3. Radiant Systems	35.9
390	4. Micros Systems	31.3
536	5. ParTech	27.6

Restaurant Responses	Enterprise Users 200+ units	Score
3235	1. Savista	41.3
7600	2. Compris	38.8
3490	3. xpient	34.9
6166	4. Micros Systems	31.1
2024	5. Radiant Systems	29



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