EMERGENCE
emerging & growth chain connection

INSIGHT | CONNECTION | GROWTH

operators
**EMERGENCE**

**WHY EMERGENCE**

**FRESH INSIGHT:** Quarterly reports based on current insights from senior level operator interviews and surveys.

**RELEVANT OPERATORS:** 115+ relevant emerging & growth chain leaders.

**CONNECTION OPPORTUNITIES:** Live quarterly roundtables with operators.

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**What is an Emerging & Growth Chain?**

- 20-500 Units
- Innovative
- Growing
- Differentiated
- Influential

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"It was an informative six hours with other concepts and suppliers. We are all in this together and appreciate the openness from all."

"I enjoyed the discussions with other operators and understanding the capabilities of the suppliers that were there. I left with a much better understanding and formed new relationships."
EMERGENCE CHAIN GROUP - Partial List

This group consists of senior level managers, each who have committed to provide data and insight to Kinetic12, through interviews and surveys.
o The Emergence Group of Operators
o Why Emerging Chains Are Different
o Methodology
o 5 Things to Know
o From the Mind of the Emerging & Growth Chain Operator
  • Journey to the New Future
  • What’s Next
  • Business Model Optimization
    • 6 Business Model Goals
    • Strategies for Long-Term Success
    • Reversing Declining Customer Counts

Part 1: Top Business Issues, Barriers to Execution, The Impact of COVID Restrictions Ending
Part 2: Supply Chain
Part 3: Inflation & Cost Management
Part 4: Labor Retention, Engagement & Work Culture
Part 5: Innovation Mindset & LTO Strategy
Part 6: Automation & Technology Investment
Part 7: Off-Premise Optimization
Part 8: Manufacturer Support, Best-in-Class Supplier
Part 9: Growth Opportunities, Catering, Consumer Engagement
Part 10: The Future Now, Restaurant Prototypes
We are now moving into the 4th phase of our journey to the new future: The Move to Value, where consumers are seeking greater value to combat rising prices and concerns about recession. This is a significant challenge for profit-stressed operators who must now add lower priced offerings in an environment of increasing costs.
Q. What are the 5 greatest over-arching business issues you are dealing with today?

1. Supply chain disruptions – fill rate issues: 82%
2. Rising cost of ingredients and the decision to take price increases: 76% (Up from 37% in Q1)
3. Staff shortages affecting service level standards: 60%
4. Labor - hiring quality staff: 45%
5. Building and opening new stores on time: 40% (Up from 24% in Q1)
6. Availability of packaging: 33%
7. Inadequate communication on supply chain issues: 33%
8. Labor - retaining staff: 25%
9. Driving traffic & customer loyalty: 24%
10. Off-premise optimization – digital ordering, delivery costs, packaging, menu: 22%
11. Customer satisfaction – managing patron expectations: 14%
12. Tech upgrades – prioritizing where to allocate funds: 14%
EMERGENCE ROUNDTABLES

- For active subscribers
- One each quarter
- Connections, insights, applications, operator presentations, collaboration

Q4 2022
- Houston
- December 1

Q1 2023
- Atlanta
- March 1

Q2 2023
- Los Angeles
- June 1

Q3 2023
- Chicago
- September 7

Q4 2023
- Dallas
- December 6

“Thank you very much for a productive year of roundtables. We came away with great insights, an understanding that other operators are facing similar obstacles and many new introductions as a result.”
Operator-Supplier Quarterly Roundtables

15 Suppliers - 15 Operators
Matching operators needs with supplier capabilities

“I enjoyed the event and thought it was well thought out and well managed.”
EMERGENCE
Operator-Supplier Denver Roundtable
June 1, 2022
Value to Operators

- Four 70-page insight reports
- Full year of potential supplier connections
- Access to introductions to other chains
- 1/1 roundtables with 20-30 suppliers
- New business connections
- Relevant insight & data
- Unbeatable return on your time

“The Emergence Group allowed me to meet 1/1 with many suppliers we have not done business with. I also met some very knowledgeable operators. This is well worth the time investment.”

Survey TOPICS

1. Top Business Issues
2. Food & Labor Cost Recovery
3. Off-Premise Optimization
4. Manufacturer Support
5. Best-in-Class Manufacturer
6. LTO Strategies
7. Innovation Mindset
8. Employee Engagement
9. Virtual Brands & Ghost Kitchens
10. Automation & Robotics
11. Restaurant Prototypes
12. Technology Adoption
13. Outside 3rd Party Support
14. New Streams of Revenue
15. Off-Premise %
EMERGENCE subscription package

1. 4 Quarterly Insight Reports
   - 60 pages - based on you completing a 15-minute quarterly surveys & doing a short interview 2x per year

2. 4 Connection Playbooks
   - Introductions to suppliers based upon operator needs and capabilities of suppliers and associations who are part of the Emergence Group

3. 4 Quarterly Live Roundtables
   - Attendance at up to two roundtables for up to three people.

4. Monthly 12-Second Snapshots
   - Current information worthy of a quick review

5. What’s Next Restaurant of the Future Report
   - Annual report
   - Top drivers of the Emerging & Growth chains Restaurant of the Future
EMERGENCE

- Emerging growth chain insight reports
- Live regional roundtables
- Potential new supplier connections based upon needs and capabilities

Sign Up to Participate
- Agree to participate for 1 year, 4 surveys
  - Information is confidential

Optional
- Supplier Connections based upon operator needs & supplier capabilities & differentiation
- “Live” Regional-Roundtables every quarter