

# The More You Know

## Curbside Checklist



### *We live in a convenience culture.*

That means that for businesses to succeed, finding ways to cater to customers is both critical and exciting. While the convenience services, such as curbside pick-up or delivery, are more common these days, when a customer shows gratitude because you created a positive experience for them, something inside does a little happy dance.

**Plan. Protect. Provide.** Three words to help guide you when considering how you can create the ultimate convenience services experience. In addition to maintaining a social distance, wearing a mask and washing your hands, we've created a checklist to help you plan for successful experiences.

*"Businesses planned for service are apt to succeed; businesses planned for profit are apt to fail."*

*~ Nicholas Murray Butler*

## Curbside Checklist

### *Plan*

- Create a convenience services operations plan that includes:
  - Point of sale system compatibility with convenience apps
  - Contactless payment options
  - Online ordering capabilities
  - GPS mapping and distance tracking capabilities
  - Confirmation email capabilities
  - Implementation plan for convenience services
  - Mileage reimbursement policy
  - Communication protocols (i.e. how to share updated procedures with employees or how to tell customers their order is ready)
  - Cost-benefit analysis of partnerships with delivery services or leasing vehicles for delivery
- Create a delivery safety plan that includes:
  - Safe driver apps and how they are used
  - Emergency contact information and protocols
  - Safety measures (i.e. what to do if a driver feels unsafe, team delivery system, park in well-lit areas, lock vehicle until existing and so on)
- Create a pick-up/delivery plan that includes:
  - Documentation protocols (i.e. capture first/last names and telephone number on all orders and call-back to verify)
  - How to track orders, time and who made delivery
  - Payment options and how cash is handled (i.e. require payments and tips in advance)
  - How and where to place deliveries and how to follow up with the customer

- Create a plan for customer traffic patterns:
  - How to move customers on and off the premises (i.e. limit backing into traffic, create one-way patterns and so on)
  - Establish pedestrian zones
  - Establish how employees will delivery or customers will pick up their goods
  - Post clear signage and barriers to restrict entry

*"There's always an opportunity to make a difference"*  
~ Michael Dell

## *Protect*

- Consult with your insurance agent to:
  - Ensure you have the right coverage for convenience services
  - Ask about workers' compensation coverage
- Consult with your accountant or attorney to verify terms of lease agreements or employment contracts
- Verify that delivery drivers have:
  - Appropriate insurance coverage (i.e. delivery or commercial use is not restricted on their policy)
  - Appropriate comprehensive/collision coverage for their personal vehicles (recommended: \$100,000/person and \$300,000/occurrence liability limits)
  - A valid driver's license
- Create a list of all potential drivers and validate qualifications:
  - Conduct background checks
  - Run MVR reports
  - Compare driver qualifications against company/established standards (i.e. five years

of experience, clean MVR, valid driver's license, driver insurance card and so on)

- Check vehicle condition (i.e. reliability, safety features and technology [such as automatic braking, backup cameras, sensor alarms])

- Define and implement driver safety practices:
  - Provide driver orientation and access to defensive driving programs
  - Share safety procedures with employees (i.e. distracted driver policy)
  - Provide incident reporting forms and train how to use them
  - Install safe driver apps for all delivery drivers (i.e. eDriving)
  - Track driver performance and reviews
  - Incent for quality over speed
  - Schedule regular driver performance (positive and negative) reviews to reinforce expectations and offer appropriate instruction/encouragement
  - Require hand's free navigation

## *Provide*

- Update your dress code to include safe shoes
- Provide personal protective gear:
  - Face masks
  - Safety vests
  - Head gear (i.e. head lamps if appropriate)
- Streamline services
  - How to handle cash transactions along with other touch points
  - Use containers to transfer and store goods to limit contact



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