

New Delivery Operator Checklist

2022



Grass Ceiling Cannabis Consulting

Hey, You.

Before we dive in, we want to introduce ourselves!

Grass Ceiling is a partnership between Janelle Mucci and Sarah Martine, two cannabis and retail experts. But, why is that important? Why should our advice matter?



Well, we've been where you likely are right now: headaches from reading the 300+ pages of cannabis regulations, uncertainty around what systems are best for your operations, and let's be real, you've probably broken down a few times trying to prioritize the endless list of to-do's.

We've been there, and more importantly, we've supported businesses just like yours, even supplying the tissues to wipe away the inevitable tears.

We've helped brand new operators navigate the volatile delivery opening processes by supporting recruiting efforts, assisting with operational systems and implementation, compliantly leading inventory setup and flow of product, and providing full premise audits to ensure they passed their final licensing inspections.

We created this handbook to guide you through the actionable steps you can take to become organized and proactive when it comes to your opening efforts. We've included checklists, helpful tips, and a few of our favorite resources to ensure you're prepared for whatever comes next.

We hope this guide is a helpful resource for our team, and if you need additional support, you know where to find us!

Janelle & Sarah

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What support looks like:

You WILL need support for your retail operations. You've gotten this far in the licensing process, so you know that this rollercoaster of a ride isn't normal. Here are a few more teams that can support you through the operational hurdles and ensure you're set up for continued success, come what may.

Checklist for support:

SECURITY SUPPORT

Search "Security" in the regulations and you'll see over 80 results. Do you have someone in place to write your security SOPs? Per the regulations, you need a security manual in place per AU/Med license. (500.105)

MARKETING SUPPORT

Marketing in cannabis requires a dedicated team to create and maintain a website, boost a social media presence and consistently communicate with customers.

HR/PAYROLL SUPPORT

Bringing on a team in cannabis requires background checks through the state & RMD badging through the cannabis commission. This combined process can potentially take 4-8 weeks to complete. If you're not setup with an experienced HR partner to accurately process onboarding paperwork, you're risking time & money from your budget.

I.T. SUPPORT

Your technology, internet, phone lines, POS systems, etc. are your lifeline in cannabis. Five minutes of an internet shortage can result in hundreds of dollars lost. Invest in an I.T. contact from Day 1!

RETAIL OPERATIONAL SUPPORT

Let this checklist serve as your guide to retail operations, but just know, you are not alone in having to own every process. There's a lot that needs to happen prior to launch, and that's what Grass Ceiling Consulting is here for!

Pro-tip: Read the regulations!

The Cannabis Control Commission Regulations are your friends! Sure, there are 300+ pages to read through, but the knowledge you gain from learning them will save time, money, heartaches, and potential deficiencies down the road.

As a business owner or operator, your understanding of, and passion for the regulations will instill that value in your leadership team to uphold in your absence. This is invaluable.



**Medical
Regulations**

**Adult Use
Regulations**



Inventory & Operations

Inventory and operations will be your top priority when setting up a delivery operation. The checklist below is a simplified run-through of areas of focus, though each item entails institutional knowledge of the industry in order to establish a compliant and smooth launch. This area is where Grass Ceiling excels and will ensure you're ready to open and make those \$ales!

Operations Checklist:

- INVENTORY SETUP**
SOPs, ordering vault supplies, & configuring your space for flow.
- SETUP METRIC**
Metric training, setup account, order metric tags, receive IIN #'s and add employees to Metric/Inventory ERP system.
- INVENTORY TRAINING**
Training on systems and inventory compliance
- SUPPLY ORDERING**
Cash counters, office supplies, banking setup, etc.
- I.T. SETUP**
Setup of your systems, phones, internet, ATM terminals, scanners, printers, etc.
- SECURITY SETUP**
Cameras, Body Cameras, ID readers, etc.
- BANKING**
Discreet, randomized times of pickups, no uniforms or marked vehicles, etc.
- INTEGRATION SETUP**
Integrating your ERP with your loyalty program, website, online ordering platform. etc.
- BINDER SETUP**
Manifests, invoices, SOPs, handbooks, audits are ready for CCC inspection.

Systems you'll need:

- Inventory management/POS system and Online Ordering, such as [Leaf Logix/Dutchie](#)
- Route Optimization system- We recommend [Onfleet](#).
- Cloud communication service to integrate with your business so drivers can communicate with HQ & customers on the road. We recommend - [Ring Central](#)
- Scheduling software for performance management & tracking. We love [StoreForce](#) solutions.
- A virtual payment solution, such as CanPay
- Loyalty program software such as Alpine IQ

Logistics Checklist

Cannabis delivery in the state of MA is still very new, and constantly evolving. There are a lot of moving pieces to prioritize prior to hitting the road. Below are a few things to consider when setting up your operation. We love supporting delivery operators efficiently setup their backend and tech stacks. Reach out, anytime!

Logistics Checklist:



DELIVERY FEE

Will you have a delivery fee? What are your competitors offering customers?



DELIVERY MINIMUM

Set a delivery minimum that ensures each delivery is profitable for your business.



DELIVERY RADIUS

How far will your vans deliver? Ensure this radius allows for efficient daily operations & is realistic to the number of delivery vans available.



VAN MAINTENANCE

Ensure you have a plan in place for performing daily and monthly van maintenance. This will save you time and money down the road.



ROUTING MANAGEMENT

To ensure deliveries are optimized at random (Per the Regs), a delivery routing software will need to be integrated with your POS.



DELIVERY TIME SLOTS

When will customers be able to place deliveries for? Decide on same day or next day and how many in each route.



PAYMENT SETUP

What types of payment will you accept? Keep in mind the regs require efforts to minimize the amount of cash in a vehicle.



CUSTOMER COMMUNICATION

What will communication to the customer look like before they receive their order? Ensure you have a plan for notifying the customer when the order is on the way.

Know the Delivery Regulations!



ID Pre-verification Regulations



Safety Regulations



Delivery Residence Regulations



Traffic Stops & Inspection Regulations



Body Camera Regulations



Delivery Log Regulations

**Adult Use
Regulations**



Equitable Recruitment

As a woman-owned business, Grass Ceiling believes in conscientious cannabis and ensuring an inclusive industry for all. Thankfully, the state of MA also believes in an equitable industry for those disproportionately harmed by cannabis prohibition.

A diversity plan will ensure equity amongst the below groups of individuals:

- People of color, particularly: Black, African American, Hispanic, Latinx, and Indigenous people
- Women
- Veterans
- Persons with disabilities
- LGBTQ+ individuals

Consider -

- What is your current team missing?
- Is there a gap in demographics?
- What perspectives are missing?

Tip: To diversify your applicant pool, expand your recruitment efforts by hosting hiring events, interviews and meet & greets in multicultural communities.

Recruitment to start date timeline

Interview - Offer- CSI/CORI check (3-5 wks) - RMD badging (1-2 wks) - on-boarding paperwork (start date) =6-8 weeks total.

TIP: New establishment's should budget their labor to accommodate opening delays & ensure new hires remain on payroll.

Recruitment Resources to Consider:

- Invest in an applicant tracking platform such as [JazzHR](#) or [Greenhouse](#). Candidates have a lot of choices for employment; don't miss out on top talent by being disorganized in your search.
- Utilize the CCC website to remain up to date on equity [resources](#). The commission will expect operators to adhere to all regulation updates & be proactive in their efforts. Tip: YOU will need to educate yourself--the commission will not send updates to you!
- Ensure your payroll software allows you to keep track of compliance with badging renewal notifications & provides ease of access for on-boarding paperwork processes. We like [Wurk](#), which is an all-in-one cannabis HR partner.

Cannabis Training

At Grass Ceiling, we LOVE training and supporting the agent onboarding process. We've had the honor of building retail delivery training programs from the ground up, and we believe that a well-rounded training focuses on diligence in compliance, understanding your tech stack, and trains on inclusive and memorable experiences. Below is a sample training program that sets a team up for success and ensures customer retention!

Delivery Agent Training Checklist:

- HISTORY OF CANNABIS
- INCLUSION IN THE WORKPLACE
- CANNABIS COMPLIANCE
- CUSTOMER CARE BEST PRACTICES
- DELIVERY & DISPATCHER TRAINING
- ID VERIFICATION
- INVENTORY & METRC
- INTAKE & INVENTORY AUDITING
- POS ERP TRAINING
- RESPONSIBLE VENDOR TRAINING
- SAFETY TRAINING
- LOYALTY/DISCOUNT TRAINING (IF APPLICABLE)
- PUTTING IT ALL TOGETHER WITH SCENARIOS

Responsible Vendor Training:

All cannabis agents are required by the regulations to take a Responsible Vendor Training within their first 90 days of hire. The 4 RVT training hours will count towards the required 8 hour annual minimum that is required by the regulations. 935 CMR 500.105(2)(b).

Grass Ceiling now offers an accredited, Responsible Vendor-Basic Core Curriculum course, on demand! Bulk pricing available!



Grass Ceiling's RVT program includes:

- ✓ Effects of cannabis on the body
- ✓ Preventing diversion to minors
- ✓ Compliance & Safety
- ✓ Inclusion in the workplace
- ✓ An accredited exam by the state

Thanks for stopping by!



Stay connected:



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