



**Evolving Customer Experience.**



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## Statement of Confidentiality:

The contents of this proposal are confidential and proprietary information of **Reality Based Group™**. Your acceptance of this proposal and review of its contents constitutes your acknowledgment that the contents are confidential and proprietary information and your agreement not to disclose the same to any person other than persons in your organization who have a need to know in order to evaluate a possible business relationship with **Reality Based Group™** for Customer Experience Management and Measurement.



# Project Overview

Hello Team,

**Reality Based Group™** (RBG) is excited for the opportunity to present a response to your Request for Proposal to evaluate and select a Retail Mystery Shopper Program supplier. This proposal presents our approach, schedule, team and qualifications, to provide the services Brookshire Grocery Company has requested.

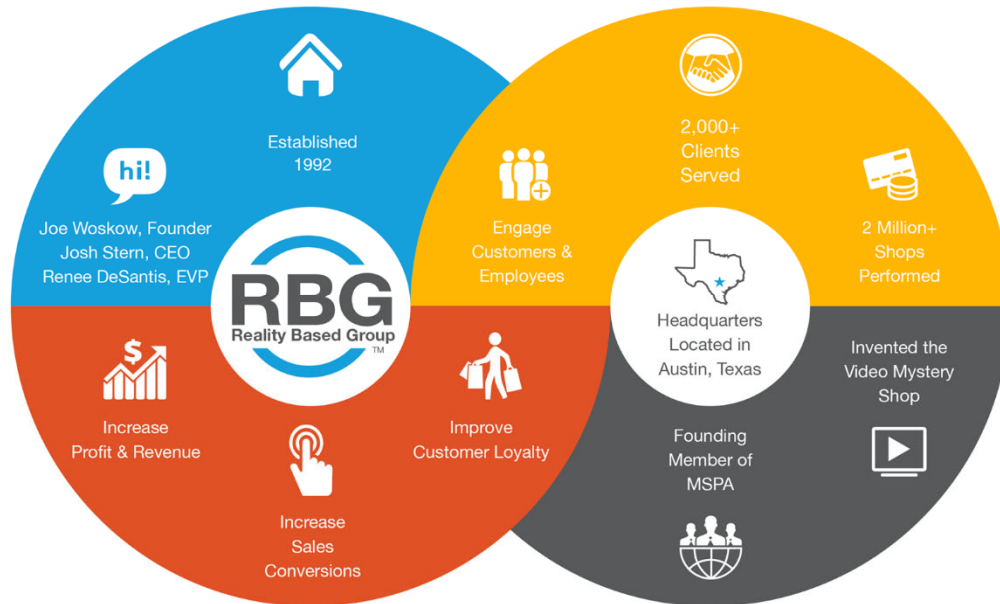
It is our belief that our nearly 25 year history of performing video mystery shops positions RBG as a uniquely qualified candidate for BGC. With RBG, you get a completely in-house team, not reliant on outside contractors, that is ready and able to meet your needs. Our understanding is that the scope of this project calls for a round of 3 demonstration shops to evaluate our capabilities, a round of 181 pilot shops, and then full project launch on October 1. In order to meet these deadlines you need a team that has done this before. We have the experience and abilities to ensure all these deadlines are met and your program will be a success.



# Excellence Is No Accident

## Our Mission:

To deliver 'Reality Based' continuous improvement programs that create world class customer experiences.



## Our Vision:

To be the first thought every best-in-class company leader has when thinking about how to improve their customers' experience.

## Our Core Values



## Client Success



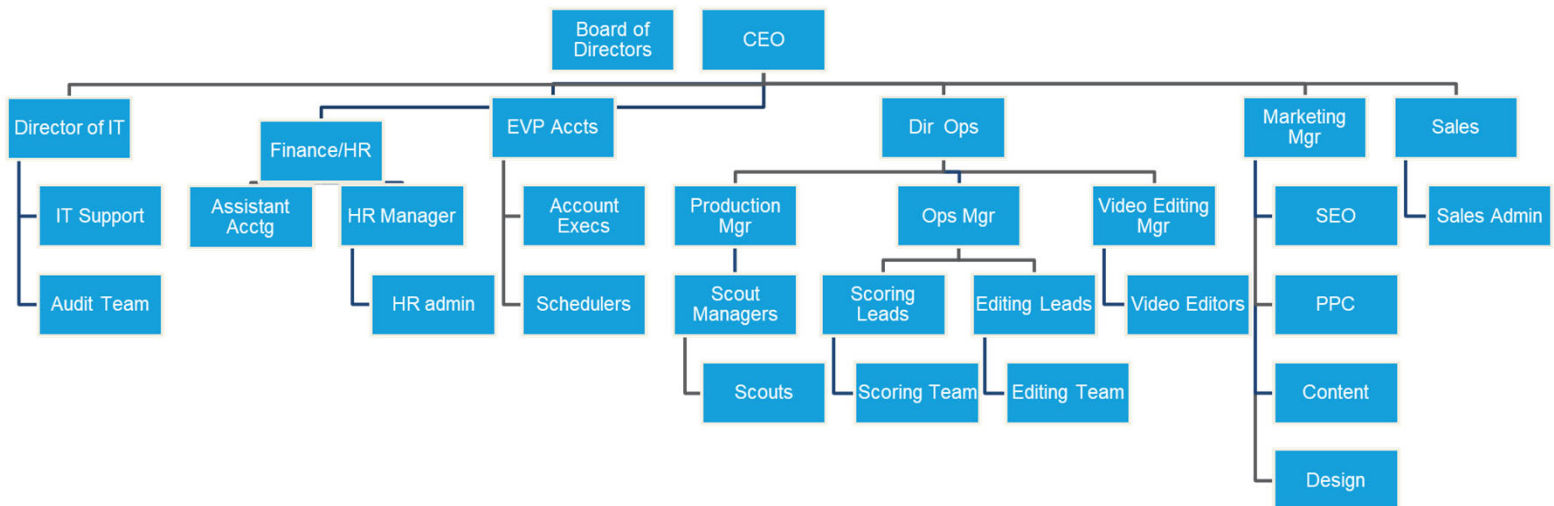
# RFP Requirements



## Please share with us the culture of your organization including company values.

RBGs culture is built around our Mission, Vision, and Core Values shown on the previous page. Our values drive our decision making process and guide how we conduct business. We operationalize these values through several programs, including our On The Spot program where any team member can ‘spot’ another demonstrating one of our values and provide them with a certificate. Quarterly and Annual Awards are given out based on these peer to peer and manager to peer observations. Ultimately we are a customer experience company, and if our experience to our customers is not of the highest excellence we have failed in our mission.

## Please share your organizational structure.



With RBG you will have a dedicated team of professionals dedicated to ensuring your project is a success. The chart on this page outlays our corporate structure. The team on the next page are the individuals you'll be working with directly and indirectly to achieve your goals.

## Your Management Team



### **Josh Stern, Chief Executive Officer**

Josh will be responsible for overseeing the development and design of your program to achieve maximum results. He will lead the RBG team and ensure that the program is aligned with the success of your stakeholders.



### **Renee DeSantis, Executive Vice President**

Renee will oversee the implementation and development of your online dashboard, scorecards, and reporting. She is your “go to” for updates, questions, editing, new user setup, hierarchy updates, or other operational functions. Renee will also be responsible for the day-to-day operations of your account, including support and dashboard user training.



### **Rae Campbell, Customer Success Manager**

Rae will support the team with custom reporting and back end expertise. She ensures your scorecards are built to your specifications and provide the insight you need.



### **Chris Davis, Director Of Operations**

Chris will oversee the operations team. He coordinates the scout management, video editing and quality assurance teams to deliver reality-based reports in a user-friendly format that you can rely on to improve your operations.



### **Veronica Strother, Production Manager**

Veronica will manage the team of scout managers. She is responsible for ensuring the scouts that visit your locations are fully prepared. She will track the project and work with the team of in house scouts to deliver your shops to you accurately and on time.

# RFP Requirements



**Provide current number of mystery shoppers. Please differentiate between video and non-video mystery shoppers.**

We have over 100,000 active non-video contract mystery shoppers.

We have over 100 full time and part time employee video mystery shoppers.

**Please provide two case studies for your mystery shop work in the retail sector.**

## **Bristol Farms:**

The initial program began as a Retail Audit shop for all Bristol Farms locations in 2018. Shoppers are instructed to visit 12 areas of the store and answer questions about cleanliness and inventory levels. Photos are submitted of each department as a requirement of each shop. They range from sample food items, sushi bar, produce, meats and the daily market board. They also review the store's weekly advertisement and check for specific items, plus visit one aisle within the grocery department and check for shelf tags. Shops are performed twice a month at all client locations. Overall, the project has been quite successful. The client finds our monthly Dragon reports very useful. We have also developed reports for the client which breaks up the shops into groups depending on the time of day the shop was done, before 3PM and after 3PM to monitor quality of service provided during shift changes. This client also uses special reports to keep track of trends in each department.

The Retail Audit program exceeded their expectations, so much so, that in less than a year, they moved all of their traditional Onsite Mystery shops to RBG as well. The Onsite program is similar to the Retail Audit shops in that shoppers visit 12+ areas of the store, but for these shops, shoppers also interact with store staff, if/when available. These shops are performed once a month at 12 locations and includes purchases/cashier experiences as well. The client is very satisfied with this program and finds it very useful for training and development as well as a means to improve the guest experience.

# RFP Requirements



**Please provide two case studies for your mystery shop work in the retail sector (grocery experience preferred.)**

## **7-Eleven:**

We began providing video mystery shopping services to 7-Eleven U.S. in June of 2018. Every month we shop their nearly 8,000 locations nationwide.

The program began in June, 2018 with the planning and setup. From July through September we processed a significant ramp up and ran a pilot at each location. Monthly services at each location commenced in October of 2018. Our shoppers visit each area of the store and provide information on exterior, interior, gas pumps, food, beverage and customer service. 7-Eleven has found the business intelligence we provide very informative. On many occasions we have been able to identify programs they have in place that their employees are engaged in and are succeeding with. We have also identified programs that have not received the dedication that they anticipated, recognizing more opportunities for increased ROI.

The program with 7-Eleven has been a huge success thus far. We are expanding the program to 625 locations in Canada in May, 2019. It is also being integrated into the Franchisee awards and recognition program as a key metric for them to hit to earn incentive pay.

We have included additional case studies on Edible Arrangements, Rent A Center and Cinnabon on the resource link provided.



# RFP Requirements



**We would like to pilot the program by the end of June 2019 and rollout to all 181 stores by end of October 2019. Provide your process to complete that need.**

The lead up to the project kickoff in October is very important. During this time, the RBG Customer Success Manager (CSM) will work with BGC to perform the necessary due diligence to ensure a successful project. This includes the design for all the back-end reporting permissions, scorecard customization and pilot. We will work with you to train you on our system, customize comparison and trending reports and finalize the guidelines for capturing the areas critical to each locations success.

RBG has the in house resources necessary to perform the pilot and ongoing program currently so there will be no ramp up delay on our side. Because our scouts are all employees we have control over the training that each one of them will receive prior to going to your locations. That will allow us to focus more resources making sure your team of managers and coaches are fully prepared on day one.

As you will see on the following schedule page, we will use the month of June to do the preparation work. A pilot will be performed in July and August with regular status meetings between BGC and RBG. We will discuss any unforeseen issues during these calls and give you updates on what we are seeing in the data. The pilot will set the bar for improvement during the regular program. Once the pilot is complete we will use September to really dig into the data with you and collaborate on areas of focus. We recommend a focused approach with coaching and training in order to improve 1-2 areas of the scorecard at a time. Our GamePlan coaches guide that is included with the shops is the perfect tool to help your team achieve this and systematically lead to the improvements that are most important to you.

# RFP Requirements



**Would this be the process followed ongoing? If not, please provide that as well.**

Once all adjustments are made the program will begin in earnest starting October 1, and continue monthly thereafter. One of our core values is continuous improvement. The process going forward from launch is driven by the results you desire and we work with you to continuously improve those areas.

When you add new locations we will incorporate them into our planning and you will see them in your reporting. As your focus changes over time we can make adjustments to the scorecard to reflect those desires. Our CSM team will meet with you regularly to review the data, explain what we see and receive feedback on ways we can improve your shops.

In general, once the initial setup and pilot are complete the focus is on the small changes that can be made to continuously improving the program. The process will become much less systems oriented and more behavioral oriented.

# Project Schedule with Milestones

The timeline below provides a general idea of project implementation

**Reality Based Group™** handles all of the heavy lifting, leaning on years of experience and best practices.

Activity	Dates
<b>1.0 Demonstration Shop Preparation</b>	<b>4.15.2019 – 4.19.2019</b>
<i>1.1 Sample Scorecard, Dashboard &amp; Reporting Design</i>	<i>4.15.2019 – 4.19.2019</i>
<i>1.2 Shopper Scheduling In Anticipation of Selection</i>	<i>4.15.2019 – 4.19.2019</i>
<b>2.0 Proposal Submittal</b>	<b>4.19.2019</b>
<b>3.0 Banner Location Demonstration Shops</b>	<b>5.6.2019 – 5.8.2019</b>
<b>3.0 Demonstration Shop Delivery to Brookshire</b>	<b>5.9.2019 – 5.10.2019</b>
<i>3.1 In-house Video Editing and Production</i>	<i>5.9.2019</i>
<i>3.1 In-house Shop Scoring and Delivery</i>	<i>5.10.2019</i>
<b>4.0 Vendor Selection</b>	<b>5.28.2019</b>
<b>5.0 Kickoff Meeting</b>	<b>5.30.2019</b>
<b>6.0 Pilot Collaboration</b>	<b>6.1.2019 – 6.30.2019</b>
<i>6.1 Scorecard Design, Dashboard &amp; Reporting Design</i>	<i>6.1.2019 – 6.30.2019</i>
<i>6.2 Shopper Route Design and Pilot Scheduling</i>	<i>6.1.2019 – 6.30.2019</i>
<b>7.0 Pilot Round</b>	<b>7.1.2019 – 8.31.2019</b>
<i>7.1 Weekly Status Check Meetings</i>	<i>7.1.2019 – 8.31.2019</i>
<i>7.2 Shop Delivery within 10 Business Days of Shop Date</i>	<i>7.1.2019 – 8.31.2019</i>
<i>7.3 Pilot Month 1 Review Meeting</i>	<i>8.8.2019</i>
<b>8.0 Final Operations Preparation for Launch</b>	<b>8.1.2019 – 9.1.2019</b>
<b>9.0 Pilot Review Meetings and Adjustments</b>	<b>9.1.2019 – 9.30.2019</b>
<b>10.0 Program Launch Round 1</b>	<b>10.1.2019 – 10.31.2019</b>

# RFP Requirements



## **Explain how you work with your clients to develop the stimuli for the mystery shops.**

We start with the end in mind. Working backwards to understand how the shops will be used for coaching and training. Once this is determined we'll advise on which behaviors and process will deliver the most value to your company and begin to assign weighted values. At the same time we'll use demo or pilot video shops to ensure calibration on all sides. We don't believe in measuring too many data points as ultimately we want to dial in to what is most important and most impactful and make improvements in those areas. This also will help send a clear message to the field team about what matters most and will help align the company from bottom to top. It's extremely important that the measurements be objective and trainable to in order to get the highest ROI.

## **Describe how you eliminate subjectivity in the shops.**

As the leader in GameFilm® video evaluations we will use our best practices, expertise, and demo videos to eliminate the subjectivity. If we can all watch a piece of film and agree on a behavior than it's a good measurement. If not, its not. For example we can easily measure a smile, or a verbal greeting. However, we cannot easily measure 'friendliness' so we'll want to break that into measurable behaviors that when connected equal friendly. If we cannot all agree on a data point or set anchors for those data points we recommend to not measure.

# RFP Requirements



## **Describe the hiring, training, and retention process of the mystery shoppers. Are they employees? Independent contractors?**

Our recommendation is to use GameFilm® and to use our trained employees to complete this work. We understand that in the past ICs have been used and the desired ROI was not achieved. Our process to hire, train, and retain looks similar to other full time roles. Our HR team executes the initial recruiting and screening, we have a full training staff that on-boards the Video Scouts, and we have a robust package along with our values that promote and lead to retention.

## **Explain how mystery shoppers are held accountable for their objective output.**

We have a number of checks and balances in place to ensure objectivity and hold our team accountable to it. First, it all starts with the scorecard design. Our team will work with you to design questions that get to the heart of what you want to measure while actively removing gray areas and feeling questions. Second, we minimize the number of questions that our shoppers answer. This insures that the shopper is focused on the experience and behaving naturally rather than trying to remember all the details we are trying to measure. Third, in order to provide you with the most accurate data, we uncouple the video shoot from the video score. Our shoppers return their video to our video editing department who then put into a format that our scoring team uses to watch and evaluate the shoppers experience based on criteria we develop with you. Our team of in house scorers are trained using our coaching best practices in order to provide you with unbiased, consistent intelligence. Finally, our managers provide regular feedback and performance reviews to our shoppers so that they are held accountable to behaving how they have been trained.

Through this carefully designed system the question isn't really how we hold our shoppers accountable for objective output, but how have we designed the program to ensure you receive objective and consistent output, regardless of who the shopper is; which we have done.

# RFP Requirements



## How do you compensate and/or incent your mystery shoppers?

Our full time Video Scouts receive a salary, benefits, 401(k) with matching and performance based bonus. They accumulate personal travel rewards points as they see the country as a shopper for our clients.

## What are the resource requirements to complete the ask from your company as well as ours?

We'll supply a full team as previously outlined on Page 6. We ask that you have a point person on your end.

## What type of training do you provide your clients and in what format? CBT, WebEx, other?

RBG has robust training materials as well as our offering of online tutorial training sessions with your team. Our GamePlan coaches guide and tracking system provides your team with step by step guides for using our products to get the best results. The simple and consistent methodology takes the heavy lifting out of training to the video shops. Your managers can easily access, download, print the coaching tools and follow the 4 step process with their team. We will use GoTo Meetings for session training with your team.

## What is the average amount of time for an employee (with an average level of computer proficiency) to become fully trained?

RBG will provide dashboard training sessions to level managers and a quick start guide that provides similar system and access training. Our dashboard is intuitive and minimal computer experience is needed to become fully comfortable in 30-60 minutes.

# RFP Requirements



## What online technical support do you offer your clients?

Your CSM will provide your team with email resources, and best practice tutorial documents. We also offer a [help@realitybasedgroup.com](mailto:help@realitybasedgroup.com) email address for users to have access to our team for support and questions.

## What type of analytics, reporting, recommendations do you provide? Can you show trends by location, market, region over time? Please provide two examples.

Prior to starting shops the RBG team will work with you to design the ideal scorecard based on best practices and your unique needs. The scorecard will be customized into reporting areas that fit your needs, allowing for endless ways to view and dissect the data.

Trend reporting is a powerful function of your database that you will become very familiar with. You will be able to see changes in scores over time in both table and chart formats by location segment or reporting topic. The following pages have three examples of what you can expect, along with a sample dashboard that will be customized to your brand. Additional information on our reporting capabilities can be found in the link we have provided with this proposal.

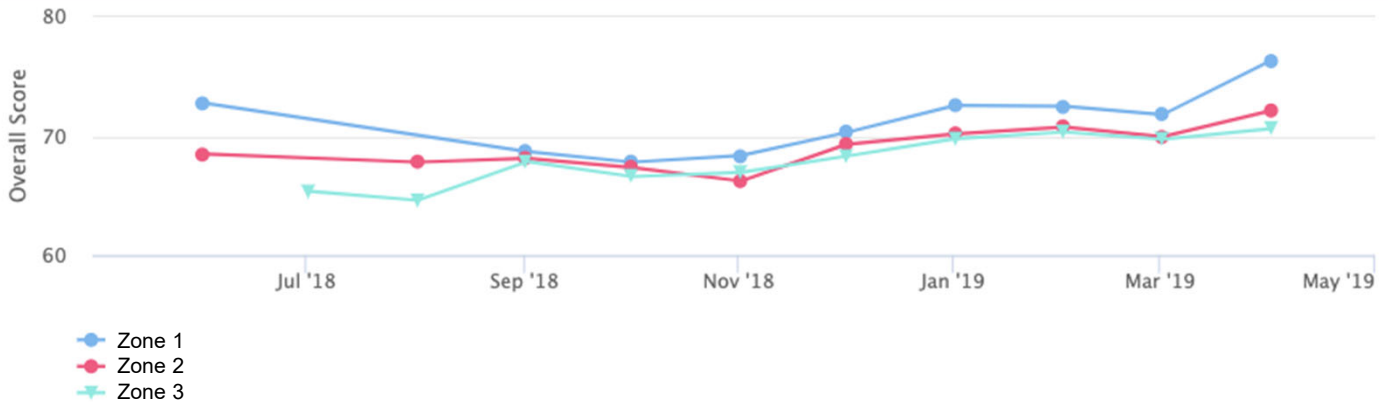
# RFP Requirements



## Trend Reporting Examples by Location Segment or Question

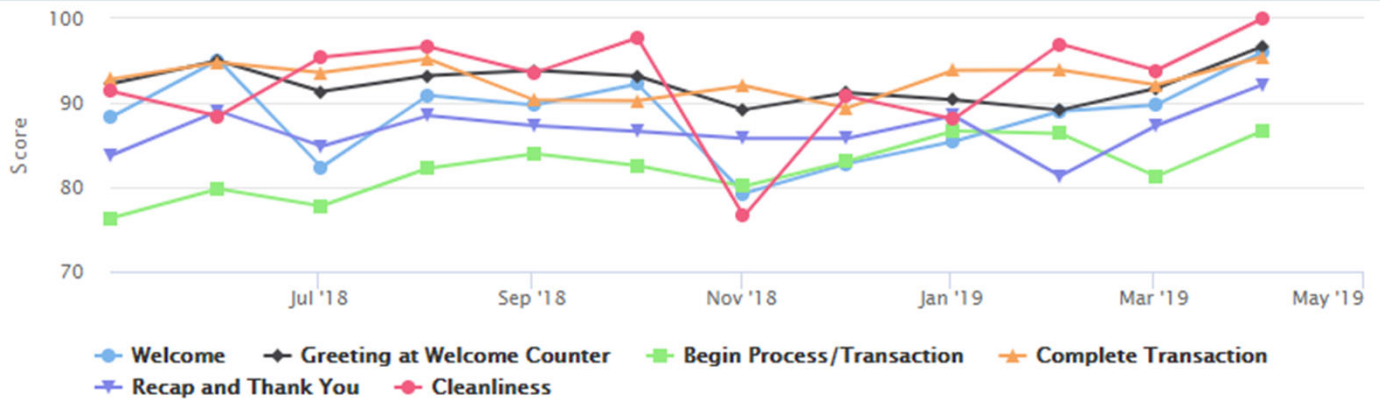
### SCORE TRENDING- REGION

Showing data for 5/1/18 - 4/30/19, Zones. 58200 Evaluations.



### TRENDING - SECTIONS

Showing data for 5/1/18 - 4/30/19. 1414 Evaluations.



### TRENDING UPSELL

Showing data for 5/1/18 - 4/30/19. 57877 Evaluations.

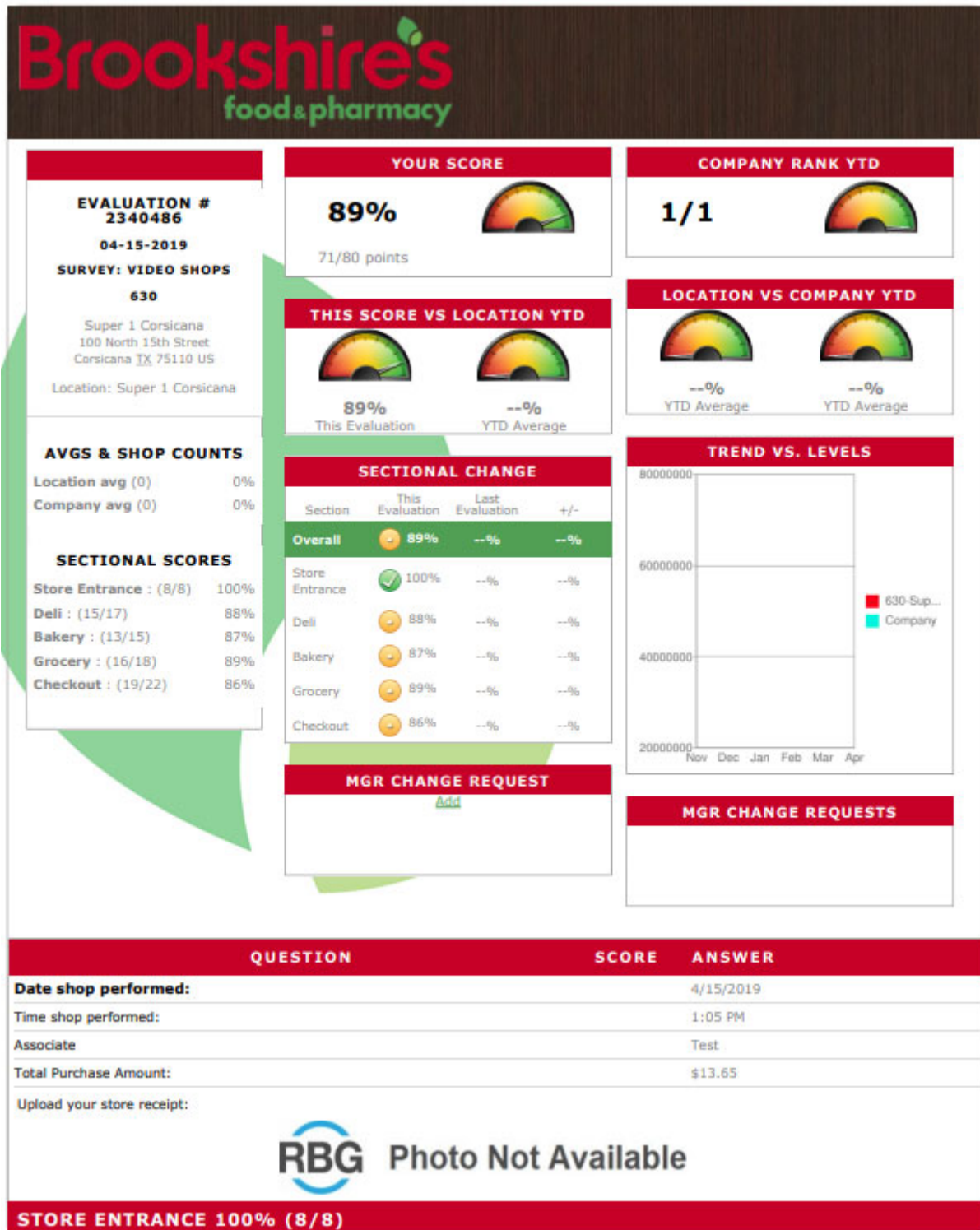




# RFP Requirements

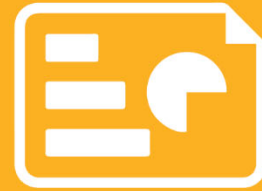


## Example Custom Location Specific Dashboard Reporting



# RealResults™ Reporting

The Bridge From Good Data To Good Decisions



Individual shop or audit reports contain valuable data and can be pulled for any time frame you need and all data is live – that means if an individual shop or audit is adjusted, you can immediately pull a new report to reflect the adjustment.

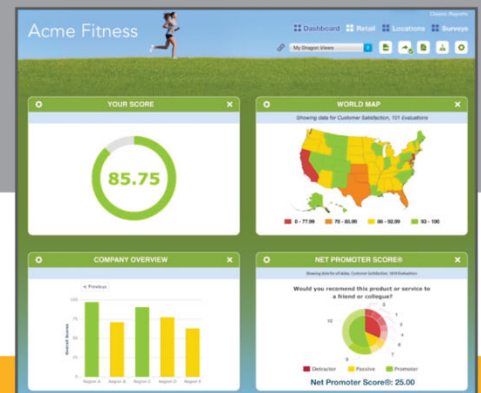
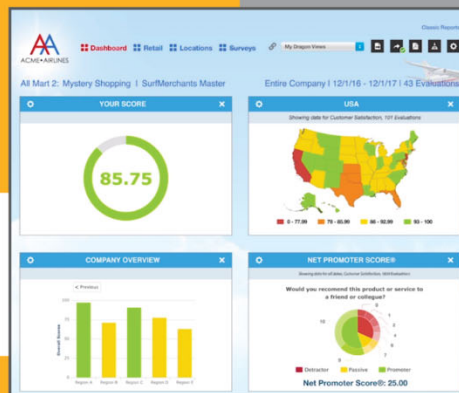
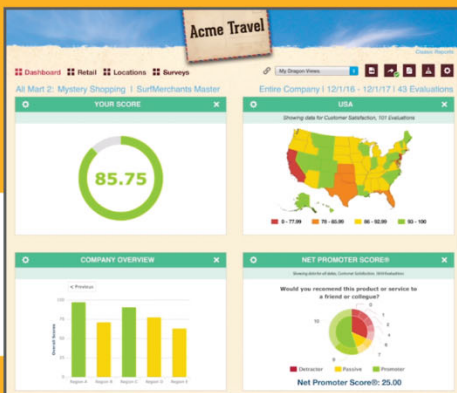
Our robust reporting feature, **RealResults™** is included with all of our solutions because we know how important it is to your business to have reliable data available both in the office and on the go. With **RealResults™** you can **Create, Customize, and Share**.

## Create

Report views are easy to create. Choose from the full list of individual mini-reports, drag and drop to place them on your view, and rearrange them as needed. Each user can create a custom view of their data to share it with their teams. Our Customer Success Managers can also help you create any kind of custom report, combining your needs and our best practices.

## Customize

Each report can be customized to suit your unique business needs. We don't stop there. Reports aren't the only things that can be customized. Your contacts at **Reality Based Group™** will brand all of your reports to YOUR business. Whether you need a report to look beautiful for an on-screen presentation, or simpler for a low-ink printout, our team can make your reports feel like home.



## Share

With Push Reporting, there is no need to email individual team members. Instead, automate your reports to send the most up-to-date actionable data every month. It's another way RBG is helping you work smarter, not harder. There's no need to worry about location managers seeing company-wide data when these reports are sent, either. Team members see only the data for the locations they manage, so that they can focus on what is most important to them

### Report Delivery

Results delivered will be ready for the previous month and not include results for the current month.

Deliver PDFs on day  of every month, for the following:

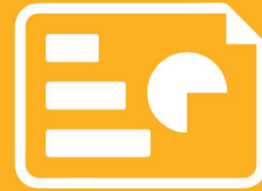
- ☒ Me
- ☐ Other Client Masters
- ☐ Client Supervisors
- ☒ District Managers
- ☐ Area Managers
- ☐ Shop Managers
- Other Recipients

Save

Cancel

# RealResults™ Reporting

The Bridge From Good Data To Good Decisions



## Flashpoints

Flashpoints can help you identify areas of your program that may need your immediate attention by identifying outliers. You can see locations that have scored significantly different, better or worse, than their past performance, or the performance of the company as a whole. If you've made a change recently this is a good report to view to monitor the impact.

FLASHPOINTS		
	Score	Significance
Location: 177 - Location 177	51.3 pts above Entire Company	2.08 std. deviations above
Location: 655 - Location 655	28.63 pts above Region: Region 3	2.02 std. deviations above

FLASHPOINTS		
	Score	Significance
District: 11	54.3 pts below 12 month average	2.05 std. deviations below
District: 525	16 pts below 12 month average	1.93 std. deviations below

FLASHPOINTS		
	Score	Significance
Question Did the sales associate escort you to the area of the store of interest? (to the item of interest)	15.35 pts below 12 month average	1.23 std. deviations below (x4 question weighting)
Question Did the Associate invite you to return to the store?	10.03 pts below 12 month average	0.81 std. deviations below (x4 question weighting)



## EKG

Using the EKG view you can get a better picture of how a specific question impacts the vitality of the overall shop. It allows you to drill down deeper into the specifics of how this question is impacting your location and how it is correlated with other significant questions and company overall.



## Have a Specific Request?

We will work with you to create any kind of specialized report you need!

# RFP Requirements



Please describe your competitive advantage. Why should we choose you?

## **Experience**

RBG was founded 27 years ago on the belief that organizations utilizing GameFilm® video to collect a reality-based view of their operations will be able to continuously improve their service quality and achieve a competitive advantage in the marketplace. No other organization in the world has RBG's experience delivering accurate, objective, actionable data to thousands of clients through millions of mystery shops.

## **In-House Video Shoppers**

Through the many years of providing video mystery shops RBG and our clients have learned that the key to a successful program is in the quality of the data collected. In order to have the necessary control and consistency, RBG utilizes in-house employees to collect our video mystery shops. In most cases, our competitors are using independently contracted mystery shoppers with no ability to control the quality of the equipment being used and no ability to coach and train to the specific scenarios and scripts to meet the clients needs.

## **Dedicated Account Management Team**

With each program, RBG assigns a dedicated in-house team to work with your organization's stakeholders and leadership to fully understand culture and objectives. Your RBG team will consist of a dedicated CSM (Customer Success Manager), a lead video scout, video editors, schedulers, and quality assurance personnel. Each team member is constantly updated on program adjustments to ensure accuracy and constancy in the final deliverables.



# RFP Requirements



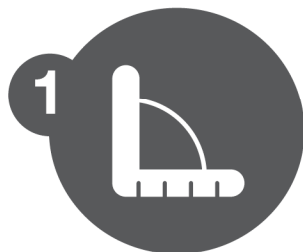
Please describe your competitive advantage. (cont'd)

## **Quality Assurance Team**

Each GameFilm® video goes through a detailed process prior to being delivered to our partner clients. RBG's video scouts are focused on camera angles, audio quality and following the scenarios/script for each shop. Our video editing team edits each video based on the touchpoints to create a professional edited video. RBG's Quality Assurance Team is the final touch to ensure that each report/scorecard is filled out properly and to verify that the final deliverable is up to RBG's standards.

The following page provides additional information on the RBG Difference. We are presenting Video Mystery Shopping as the focus of this proposal, but we do so much more. With GameFilm® as the cornerstone of a well run program, often clients will choose additional services to supplement the intelligence they are already receiving.

## The RBG Difference



### Design

Unique Programs,  
Tailored Scorecards



### Evaluate

Measurable,  
Actionable Data



### Report

Customizable &  
Accessible 24/7



### Coach

Specialized  
Improvement Plan

## Get A 360° View of How Your Customer's See Your Business.

Our unique and tailored process is perfect for understanding every aspect of your business. We work with you to deliver results that drive your business.

## RBG Solutions

### Mystery Shopping



#### MysteryShopping+™

Written Mystery Shopping



#### RealCalls™

Phone Mystery Shopping



#### GameFilm®

Video Mystery Shopping



#### WebShops™

Online Mystery Shopping



#### InstaShops

On-Demand Mystery Shopping

### Audits & Surveys



#### RealCheck™

Competitive Pricing Intelligence



#### RealAudits™

Mobile Data Collection



#### RealFeedback™

Customizable Surveys

### Coaching & Training



#### InTheHuddle™

Video Training



#### CoachMe®

In Person Team Training

**RealResults™** Included With Every Solution

# GameFilm®

## Video Mystery Shopping



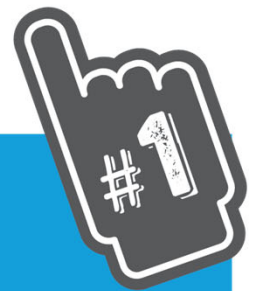
### Watch The Action Unfold

**GameFilm®**, the original video-based mystery shopping solution uses customer experience videos, in the same way that high-level athletes use game film to improve their performance.

Have you ever wanted to see how your field level associates interact with real customers when you aren't around, from their words to their facial expressions and tone of voice? That is the difference between a traditional written mystery shop and a **GameFilm®** mystery shop.

During setup of the program, **Reality Based Group™** creates a scorecard based on your customer service objectives to measure and track key performance indicators. Then, once customer interactions are recorded through subtle hidden cameras, **GameFilm®** videos are analyzed and scored. The videos are available through streaming, while the data is analyzed via a comprehensive reporting suite on your online dashboard. You will even receive customized playbooks for a start-to-finish training program that helps your team to provide consistent coaching across your organization.

Results speak louder than words. Overall behavior increases of over 15%, sales conversion rates up by over 10%, and more. See our case studies for how **GameFilm®** has changed the industry.



#### **GameFilm®** Features:

Personalized Scorecard

Customized Playbooks On How To Coach & Train With Analyzed **GameFilm®** Results

Online Dashboard & Scoreboard For Reporting & Trending

Coaching From **Reality Based Group™** To Ensure Success Of The Program





## Pricing

Please include your pricing model(s) outlining costs by function. What have your cost increases been over the past five years?

Pricing is set on a per location basis. Our price increases have typically been 2% – 5%. A sample agreement has been provided with our proposal link so you may review as part of your selection process.

### Financials

We are a private company and we do not share our financials.

### Pricing Quote

Qty	Description	Unit Price	Total
181	Monthly Video Evaluations	\$215.00	\$38,915.00
181	Monthly Purchase Reimbursement	NTE \$15.00	\$2,715.00
Monthly Estimated Total			\$41,630.00
One Time Set Up Fee			\$24,500.00
Estimated 1-Year Program Total			\$524,060.00





Thank you for the opportunity to  
submit this proposal, we are  
excited about the next steps.

A white handwritten signature on a dark grey background, appearing to read 'J Stern'.



Evolving Customer Experience.

**Josh Stern, CEO**

o: 512.275.1352 | c: 512.731.5055

e: [jstern@realitybasedgroup.com](mailto:jstern@realitybasedgroup.com)

[www.realitybasedgroup.com](http://www.realitybasedgroup.com)