



Evolving Customer Experience.



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Volkswagen Group of America, Inc



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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 an Automotive Mystery Shopper Program supplier. This proposal includes our approach, schedule, team, and qualifications to provide the services VW has requested.

As part of this RFP, we have performed several sample mystery shops for you to review. You can review them and many additional resources at your dedicated website.

Your Dedicated RFP Landing Page: <https://proposal.realitybasedgroup.com/vw/>





Project Overview

It is our recommendation that you exercise a proof of concept for all vendors bidding on this RFP, prior to award. Here is an overview of a sample best practice POC.

Proof of Concept

- 1 month pilot covering multiple regions.
- Shops to be completed within 30 days.
- 15 sales and 15 service. 30 shops total. Specifications to mirror RFP.
- Data to be delivered via portal.
- Program to include process to track coaching and training adjustments.
- Executive Summary presenting results and top opportunities.



Volkswagen Group of America, Inc. Request for Proposal - APPENDIX A

Vendor Profile

1. Organization

- **What are the corporate address, mailing address and telephone number of your company's main offices?**

8701 N. Mopac Expy, Ste 310, Austin Texas 78759. 512-583-0945

- **Who in your sales organization will be our primary contact during the package evaluation process? Provide their direct telephone and facsimile numbers and an address if different from the one above.**

Brian Rothschild, Customer Engagement Director 915-497-0399

- **Who in your organization can negotiate a contract with us? Provide their name, direct telephone and facsimile numbers.**

Brian Rothschild, Customer Engagement Director 915-497-0399

- **Who else can the evaluation team contact within your organization? Provide names, titles, and telephone numbers.**

Chris Davis, Director of Operations, 512-775-2995

- **Name the entity that would support VWGoA**

Reality Based Group, Inc.



Volkswagen Group of America, Inc. Request for Proposal - APPENDIX A

Vendor Profile

2. Background

- Provide a brief history of your company.

RBG is the world's leader in video mystery shopping. Founded in 1992 in Austin, Texas, **RBG** made a name for itself, helping improve the customer experiences of some of the nation's most recognizable brands. As one of the four founding members of the [Mystery Shopping Providers Association](#), **RBG** is one of the historically influential players in the mystery shopping game.

Reality Based Group[™] started as [GameFilm® for Business](#), the world's original video mystery shopping company. Our purpose then was the same as it is now: to positively impact the customer experiences of the world's leading brands in a meaningful way. It's a purpose that's driven us to hone our process over our 29 years in business.

During those 29 years, we have provided valuable insights to some of the most respected brands in the world. Having pioneered the field of video mystery shopping, **RBG** has been an industry leader in evaluating sales and service interactions for almost three decades. We pride ourselves on our strategic and collaborative guidance to help our partners throughout the program.

Reality Based Group[™] has spent hundreds of thousands of hours aggregating data through our secret shopping programs and using it to formulate better ways to evaluate customer experiences. Many other mystery shopping companies ask their evaluators vague and subjective questions about their experiences, but we know better. Our process is built around measuring objective data that can turn into trainable actionable revenue-driving behaviors.

In addition, **RBG** is highly selective with the secret shoppers that it deploys. We are one of the only mystery shopping companies to employ its own video secret shoppers. These professionals have undergone intense training to turn them into more reactive, observable, and reliable secret shoppers.



Volkswagen Group of America, Inc. Request for Proposal - APPENDIX A

Vendor Profile

2. Background

- **Is your company publicly traded? If so, since when? At which stock exchange?**
No, it is privately held.
- **How many years have you been in business?**
29 years.
- **Describe any alliances you have with other hardware, software, or service providers. Focus on how these alliances can potentially benefit or limit our options.**
While we are aware VW is using Shop Metrics, our software provider, Surf Merchants, is one of the premier mystery shop software companies in the industry.

3. Product and Service Mix

Indicate the number, to date, of the product/solutions requested, installed and significant consulting contracts. Also indicate the sales volume for the last three years. Please answer the questions where applicable.

As a privately held company we aren't able to provide financial data.

1. **How many people does your company employ in the area requested?**
51.
2. **How long has your company been offering the product/solution requested?**
29 Years.
3. **Have some of the components offered as part of this solution been developed by other vendors? Please describe.**
No.



Volkswagen Group of America, Inc. Request for Proposal - APPENDIX A

Vendor Profile

3. Product and Service Mix

4. Does your solution include components developed by companies which you acquired in the last two years?

No.

5. What forums do you have in place for discussing your product uses and directions among the user community?

Various, depending on service line.



Volkswagen Group of America, Inc. Request for Proposal - APPENDIX A

Vendor Profile

3. Product and Service Mix

4. Do you have a formal training program? If so, how many days of training would be involved? Can you provide the training at the client site?

Initial Training for brand new shoppers is a one-week process that familiarizes them with the equipment and prepares them to perform a video mystery shop.

Initial training consists of:

1. **Shop Walkthroughs** are instructor guided reviews to help the shopper understand what to expect in real shops.
2. **Role Playing** helps the trainee understand how to interact with associates in a natural way.
3. **Practice Shops** give our shoppers the opportunity to practice what they learned with a real shopping experience.
4. **Feedback and Review** sessions provide the trainees with personalized feedback from their practice video shops.

Initial training for experienced video shoppers is shortened to 2 days with a focus on more advanced scenarios.

Ongoing training occurs regularly to keep our shoppers sharp and prepared for each scenario they are presented with. It consists of:

1. **Learning Management System (LMS)** lessons are designed to introduce shoppers to new clients. These lessons provide shop guidelines, sample videos and images, and an assessment that we use to determine the shopper's level of preparation.



Volkswagen Group of America, Inc. Request for Proposal - APPENDIX A

Vendor Profile

3. Product and Service Mix

Ongoing training continued

2. **Video Review** sessions continue to play a role after training to highlight the shoppers strengths while also providing areas for improvement.
3. **Coaching Calls** provide us with the opportunity to support shoppers in the field with any training needs.

Our shoppers have an average of over three years of experience specifically performing video mystery shops. This sets them apart from the typical written mystery shopper. They are hand selected and highly trained. Our proven training methods also allow us to ramp up quickly to ensure we can expand our roster to any size project.

If needed, we can perform training at the client site.



Volkswagen Group of America, Inc. Request for Proposal - APPENDIX A

Vendor Profile

4. User References

Provide a list of your 5 largest clients where you have performed work relevant to the scope of this RFP. VWGoA will not contact these companies until you have been notified. Please specify:

1. The name of the organization and who to contact when conducting the reference check.
2. The address and telephone of the contact. The organization's industry and estimated size in terms of employees.
3. The technical environment on which they have installed your solution.
4. The length of time that the solution has been in production there.
5. Any other information you believe is relevant to display expertise and experience



Ferrari

Ferrari, Federica Giacometti, federica.giacometti@ferrari.com

Ferrari employs roughly 4,500 employees and generates approximately 5 billion dollars per year. **RBG** has been performing service video mystery shops for **Ferrari** for over 5 years, completing 100's of video service shops at every **Ferrari** dealership in the US & Canada during that time. Each dealer is visited over a 3 month period per round and executive reporting and analysis is rolled up to **Ferrari** North America HQ in New Jersey.



BMW, Tom Black, tom.black@bmwna.com

BMW employs 4,200 employees and generates roughly 99 billion dollars per year. **RBG** has performed more than 1,000 video shops for **BMW** to coach and train both sales and service team members. The program is quarterly with data analysis and exports that roll up to Germany.

Volkswagen Group of America, Inc. Request for Proposal - APPENDIX A

Vendor Profile

4. User References continued



TOYOTA

Toyota, Rachel Colacino, Rachel.Colacino@toyota.com

Toyota employs over 360,000 people and generates roughly 270 billion dollars per year. **RBG** has performed thousands of mystery shops for **Toyota** and has been serving them as a client for over 10 years. **RBG** performs over 20,000 phone and internet mystery shops each year for **Toyota**.

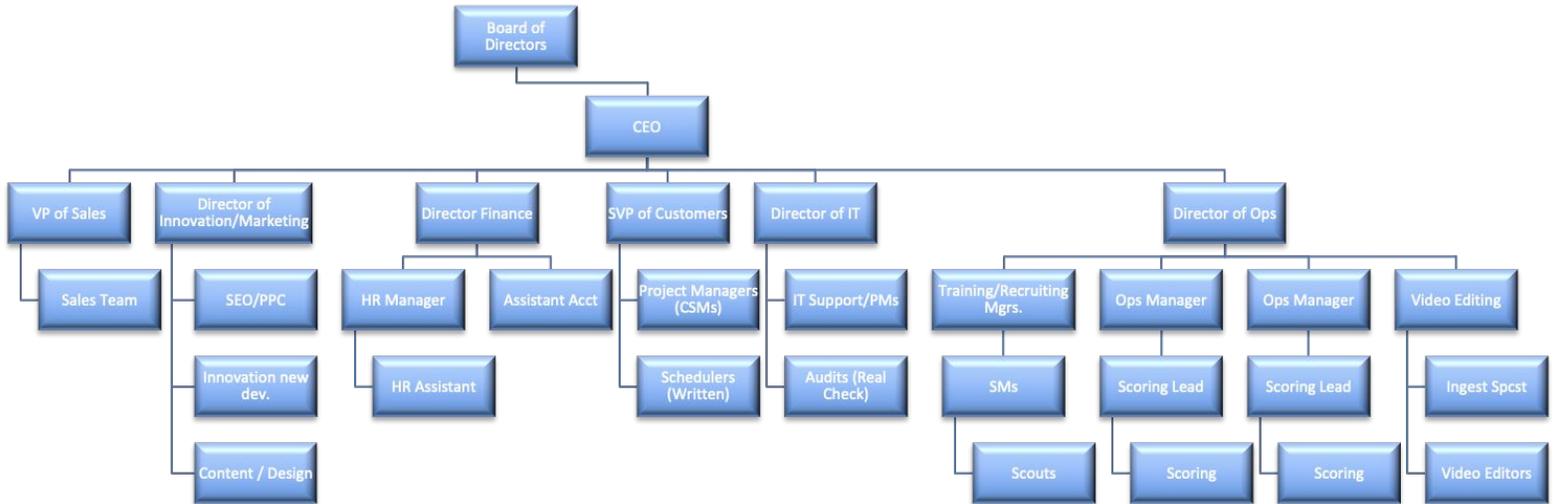


Lexus, Rob McPhail, Rob.McPhail@lexus.com

Lexus has over 7,000 employees and generates roughly 22 billion dollars per year. **RBG** has been delivering thousands of phone and internet mystery shops to **Lexus** for more than 10 years.

Volkswagen Group of America, Inc. Request for Proposal - APPENDIX C

Organizational Structure



Your RBG Management Team



Renee DeSantis, Executive Vice President

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



Jake Dancy, Business Development Manager

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



Chris Davis, Director Of Operations

Chris will lead the operations team, ensuring that your evaluations are performed accurately and delivered to you on time. He will work with the scheduling team to oversee maximum efficiency and time savings. He will also work with the 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.



Volkswagen Group of America, Inc. Request for Proposal - APPENDIX D

Company Officers and Principal Owners Organizational Structure

To complete this appendix, respondents are required to provide biographical information for each of the principal officers of your company and any individuals holding an ownership interest totaling ten percent (10%) or more. Such information should include the names, titles, length of tenure with your firm, professional certifications and licenses, percentage of ownership (if applicable) and a general description of the individual's background, in resume format.

Joe Woskow is the founder and chairman of **Reality Based Group™**. He founded **RBG** in 1992, which revolutionized the mystery shopping industry with the **GameFilm® for Business** product, video mystery shopping. He is a graduate of the University of Texas.

Josh Stern is **Reality Based Group's** CEO, Chief Engagement/Experimental Officer. He has been with **RBG** since 2005 and has held roles from Vice President of Business Development to Chief Operating Officer. With a degree from the University of Arizona and a limitless passion for improving the customer experience, Josh leads by example, fostering growth and improvement within everyone on the RBG team.

Renee Desantis has been with **RBG** for over 20 years. In her role as Executive Vice President, Renee's strength is her desire to deliver above the expectations of her team and customers. Her standards are incredibly high, and the results achieved by her client partners are what keeps the customer retention rate for **RBG** above 95%. Renee attended the University of Texas, earning her degree in Education.

Associations:

- Board of Directors, Mystery Shop Providers Association, 2006-2008
- Founding Member – Mystery Shop Providers Association



Volkswagen Group of America, Inc. Request for Proposal - APPENDIX E

Supplier's Exceptions to VWGoA Requirements

Describe any exceptions to VWGoA requirements, which are part of your information. Indicate the specific provision to which you are taking exception and describe the reason for the exception and the impact of the alternative you have included in your information.

Volkswagen Sales:

- Pricing assumes a fixed number of shops.

Service Shops, Audi and Volkswagen

- Pricing assumes a fixed number of shops.
- We recommend flexibility in regards to the starting date of the waves. Instead of using separate teams and running overlapping waves the waves can be performed consecutively by a smaller team and still fit in the timelines given, pending DMS sharing analysis.
- Both Audi and Volkswagen require the cars to be regionally plated per the RFP's. As we were not provided DMS sharing information, pricing assumes each car will service an entire region. If excessive multiple cars are required to service a region due to DMS sharing, additional costs could be incurred due to impacts on schedule and possible replating requirements.
- Flexibility of weekend shops will increase the slack in the timeline, creating a safety net in the event of setbacks due to mechanical issues, weather, sickness or other unforeseen events. We propose weekend availability for consideration.



Volkswagen Group of America, Inc.
Request for Proposal - APPENDIX F

VWGoA SUPPLIER PROCUREMENT CODE OF ETHICS

1. Perform duties with care, diligence, professionalism and integrity to maintain or enhance the reputation and professional standing of VWGoA/VWC;
2. Provide an environment where potential suppliers, large or small, majority or minority-owned, are afforded an equal opportunity to compete for VWGoA/VWC business;
3. Preserve the integrity of VWGoA/VWC, Inc. by adhering to the corporate policies and procedures section on Ethical Standards. No supplier involved in the procurement process will offer or accept money, loans, credits, prejudicial discounts, favors, or accept gifts from an employee or subcontractors. Entertainment which supports mutual business interests should not influence or be deemed by others to have influenced a business decision;
4. Promote positive supplier relationships through impartiality in all phases of the procurement process;
5. Expect that information exchanged in the course of business should be true and fair and not designed to mislead;
6. Create a professional atmosphere free from any harassment that could create an intimidating, hostile, or offensive work atmosphere. Accordingly, we expect our suppliers to treat all VWGoA/VWC employees according to the same standard as supplier are to be treated by VWGoA/VWC employees;
7. All suppliers are expected to exercise the highest standard of care when entrusted with confidential information by VWGoA/VWC as part of the procurement process, and the supplier will continue to exercise this standard of care until obtaining a written release from VWGoA/VWC which releases the supplier from this duty;
8. Suppliers and subcontractors who confirm compliance with this Code are responsible for ensuring compliance by those with whom they directly contract to provide products or components or products to be used, purchased or distributed to or by VWGoA/VWC.

Supplier Signature  Date 5.20.21



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



Evolving Customer Experience.

Brian Rothschild,
Customer
Engagement Director

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