



**Evolving Customer Experience.**



**Winston-Salem**

**Jerry Bates,**  
**City/County Purchasing Director**  
**101 N Main St, Winston-Salem, NC 27101**  
**o: 336.747.6939**  
**e: [jerryb@cityofws.com](mailto:jerryb@cityofws.com)**  
**[www.realitybasedgroup.com](http://www.realitybasedgroup.com)**



Winston-Salem

# Request for Proposals

## Customer Service Evaluations

Proposals will be received by

**\*\*\*DATE CHANGE\*\*\***

**12:00 Noon, Tuesday, April 7, 2020**

IN

Purchasing Department, City Hall Building, Suite 324  
101 North Main Street, Suite 324 Winston-Salem, NC 27101

March 25, 2020

**Please acknowledge receipt of this Addendum and include with your proposal.**

Reality Based Group \_\_\_\_\_

Company

Authorized Signature

4/7/2020

Date

### Due Date Changes/Questions/Responses

In light of the COVID-19 crisis and the knowledge that so many are working with job place restrictions the City has determined **to extend the original due date** for this proposal until **12:00 Noon, Tuesday, April 7, 2020.**

**The question period will be extended to 12:00 noon, Monday March 30, 2020**

Also the City **will allow electronic delivery** of the proposals per the following instructions:

**Bidders may submit a bid electronically or by hardcopy.** Electronic bids should be submitted by attaching a single file of the required bid forms to an email entitled, **“BID - Customer Service Evaluations IF20216”** and emailed to [jerryjb@cityofws.org](mailto:jerryjb@cityofws.org). Such submission will not be opened until the time for receiving bids has come.

If mailing a hardcopy proposal, place the bid in a sealed envelope inside the courier’s envelope and label it “BID ENCLOSED”. The inner envelope should be clearly labeled **“Customer Service Evaluations IF20216”** with company name and bid opening date/time. Submit hardcopy proposals to the City/County Purchasing Department in Suite 324, City Hall Building, 101 North Main Street, Winston-Salem, NC, 27101 **by 12:00 Noon, Tuesday, April 7, 2020.** Bids received prior to the advertised hour of opening will be securely kept unopened. The bidding agent will open them when the specified time has arrived, and no Bid received thereafter will be considered. **Late proposals will not be considered.**



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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.

# Introduction & Executive Summary



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 Mystery Shopper Program supplier. This proposal presents our approach, schedule, team and qualifications, to provide the services you have requested.

It is our belief that our nearly 28 year history of performing mystery shops for some of the world's most recognizable brands makes RBG a uniquely qualified candidate for the city of Winston-Salem. With RBG, you get a completely in-house dedicated team, that is ready and able to meet your needs. Our understanding is that the scope of this project calls for 400 mystery shop phone calls and 100 in person 'on-site' visits. In order to ensure the most accurate and consistent data possible for this scope of work you need a proven team that has the experience to deliver excellence. We have the experience and abilities to ensure all these deliverables 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



# Select Clients

RBG Partners With Over 200 Top Companies

HAMPTON VA

ORANGE COUNTY PUBLIC  
**Library**  
NORTH CAROLINA

MIAMI-DADE  
COUNTY



Centennial

Chick-fil-A

amazon



TEXAS  
ROADHOUSE

FIVE GUYS  
BURGERS and FRIES

7-ELEVEN®



Raising  
Cane's  
CHICKEN FINGERS

# RFP Requirements



## Project Approach

### How your firm will work with City staff to create customized scripts for “mystery shopping”?

Our experienced accounts team will work with you to ensure the scripts for the shops are customized and believable. We have a plethora of experience working on similar projects. We will share with you best practices and guide you to create these scripts.

### How your firm will perform both telephone and in-person evaluations?

**Size** - RBG has over 200,000 active mystery shoppers.

**Quality** - Experienced Shoppers: In order to have the necessary control and consistency, RBG utilizes pre screened, experienced mystery shoppers. We will pinpoint those shoppers that have experience doing this type of shop. In most cases, our competitors are using randomly selected mystery shoppers with no ability to control the quality and no ability to coach and train to the specific scenarios and scripts to meet the clients needs.

### Shopper Auditing

RBG has a full team dedicated to reviewing all evaluations. Each evaluation goes through a detailed process prior to being delivered to our partner clients. RBG’s shoppers are focused on following the scenarios/script for each shop. 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.

**To read our full shopper quality control guidelines, click on the image or the link below:**

<https://www.realitybasedgroup.com/proposals/RBGQualityControlGuidelines.pdf>

Your accounts team will work with you to create the script and guidelines for this shop. We have extensive experience doing this type of work and will guide you along the way, sharing best practices and insights that will benefit you tremendously.

# RFP Requirements



## Project Approach

### How your firm will tabulate and present results?

#### Dedicated Account Management Team

Your RBG team will consist of a dedicated CSM Team (Customer Success Manager), schedulers, and quality assurance personnel. Each team member is constantly updated on program adjustments to ensure accuracy and constancy in the final deliverables. They will be there to create any customized reporting or special requests you may need.

#### 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.

#### RBG's Reporting Tool

Your account management team will help create any customized reporting, build any requested reports, setup automatic, scheduled and tiered distribution of reports. Our smart reporting tool provides geo-level reporting and the ability to export data in all formats.

To see a video of our reporting capabilities, click [here](#).

#### User Account Management and Tool Administration

The RBG account management team will help provide guidance on password issues, permission levels, creating manage accounts and any other administrative requests.

#### Login and Access

The RBG account management team will set up role based permissions and access, track user activity and ensure secure user login and authentication.

#### User Experience

Your accounts team will help create any customized reporting and widgets you request.

Your account management team will present reports and insights on a monthly or quarterly basis.

# RFP Requirements



## Experience Of Firm

### How your firm will identify gaps and deficiencies?

Our team is well versed in digesting the data that will come from your program. Based on other similar projects they will use the data and reporting to convey the top opportunities for your departments to improve. We will also show you how to use our proprietary coaching tool, Gameplan®, to help your staff improve.

### Provide information on your firm and any subcontractor(s)' background and qualifications which address the following:

#### **Name, address, and telephone number of a contact person**

Brian Rothschild, 8701 N Mopac, Ste 310, Austin, Texas 78759, 5125830945.

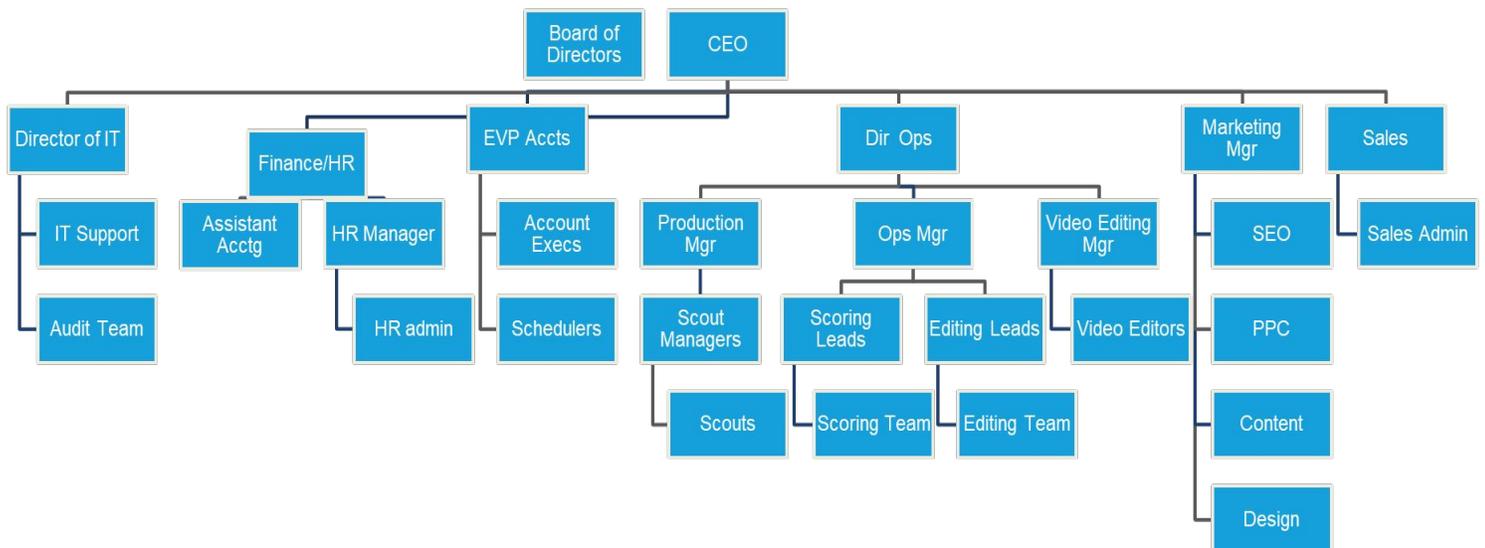
#### **A brief description of your firm:**

RBG was founded 28 years ago on the belief that organizations with a reality-based view of their operations will be able to continuously improve their service quality to achieve a world class customer experience. No other organization in the world has RBG's experience delivering accurate, objective, actionable data to thousands of clients through millions of Domestic and International mystery shops.

# RBG Organizational Structure

RBGs culture is built around our Mission, Vision, and Core Values. Our values drive our decision making process and guide how we conduct business. We operationalize these values through several programs, including our Monthly Celebrations and 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.



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.

# RFP Requirements



Descriptions of at least two similarly sized and scoped “mystery shopping” evaluations performed in the last 36 months. Please include contact information.

## Miami- Dade Park & Recreation

Miami-Dade Park & Recreation decided to partner with RBG, looking for expertise on developing a robust mystery shop program including written evaluations and phone calls. RBG performed roughly 100 ‘in-person’ written evaluations and phone calls to 13 different neighborhoods. RBG was brought on to help report and evaluate on the following:

- Customer Experience
- Ensure employees are following customer service directives established by management and providing the best possible guest experience
- Knowledge and friendliness

Miami-Dade evaluated their Park Services and Facilities, After School Programs, Golf Courses, Facility Operations (including customer transactions and rentals), Marinas, Zoo’s and Attractions.

## Findings

RBG pinpointed several areas that employees could improve with their phone call processes.

The three biggest opportunities were:

- Offering to provide the caller with additional information.
- Referring the caller to their website.
- Introducing themselves to the caller, by name.

As for the in-person written evaluations, RBG was able to help uncover the following:

- Overall, they were performing at a high level.
- The employee was only wearing his name tag 33% of the time.
- Hours of operations were only listed correctly 75% of the time.

Overall, RBG helped Miami-Dade discover their biggest strengths and biggest opportunities to improve and deliver a world class experience to its customers.

**Contact: Miami-Dade**, Elaine Ramirez, Special Projects Administrator, Miami-Dade Parks Recreation and Open Spaces. Ph: (305) 755-7838. Elaine.ramirez@miamidade.gov

# RFP Requirements



## Project Approach

### Metropolitan Atlanta Rapid Transit Authority

RBG partnered with Metropolitan Atlanta Rapid Transit Authority (MARTA) to collect data using scored mystery shops on MARTA station agents. The Program Shops were divided based on shifts. First Shift shops were performed during the timeframe of 6:00 AM to 2:29 PM. Second Shift shops were performed during the timeframe of 2:30 PM to 8:30 PM. Shops were performed on different days of the week, with a heavier focus on weekends with particularly busy travel days. Shoppers used four different scenarios when interacting with station agents: SCENARIO 1: Ask the station agent all 3 questions listed below, unless prevented by the agent:

- Ask the station agent for directions to a specific location that you know is close to the station, but do not ask for directions to a CVS or any other pharmacy.

- After receiving a response, ask the agent if he or she can tell you what types of retail shops and restaurants are within easy walking distance of the station.
- After receiving a response, ask the agent if there is a CVS nearby.

### Shopping Findings

After program completion, we discovered that MARTA station agents are performing very well in some aspects of customer service but have opportunities for growth in aspects of customer service that add value for a customer.

#### Key Station Agent Successes:

- Shoppers were able to speak with a station agent 98.5% of the time. However, please note that shoppers did occasionally have to call for assistance in order to speak with an agent.
- Station agents were noted as being in the correct uniform and being well groomed 98.5% if the time. (Please note that correct uniforms did not count name badges for the purposes of the shop report.)

# RFP Requirements



## Experience Of Firm

### Metropolitan Atlanta Rapid Transit Authority

#### Other Findings of Note

Station agents were typically found either outside of the faregates (not at the bus bay), or inside of the faregates on the concourse. During the scheduling process, we discovered that several RBG mystery shoppers are already MARTA riders. We also discovered that several MARTA riders already know to use the phone system in the stations in order to get help when no station agent is immediately visible. Recommendations Greetings, smiles, and proactively offering help are the main differentiators of customer service. RBG recommends that MARTA utilizes the provided best practice Game Plan to install a regularly-scheduled coaching session, weekly or monthly, with a focus on these primary differentiators. MARTA would then use these coaching sessions to set realistic goals for your teams, provide incentives for employees to reach those goals, and then utilize additional mystery shops to measure whether those goals have been met. Our clients who have followed these steps in order to utilize their mystery shopping program to the fullest extent have had great success in improving their customer service. MARTA is doing a great job of training their station agents to answer questions, but a friendly face will drive customer loyalty and retention. Personalized interactions let a customer know that they are valued. Greetings, friendly farewells, visible smiles, and going above and beyond by offering additional help when a need is noticed, are crucial to building customer loyalty. Station agents are the face of MARTA, and investing in your station agents through coaching and training will drive their performance, make it into muscle memory, and drive your customer retention up.

#### Contact:

Robin Salter

Senior Performance Analyst

404.848.5329

rsalter@itsmarta.com

## Assigned Project Staff



### **Renee DeSantis, Vice President of Operations**

Renee will be responsible for overseeing the development and design of your program to achieve maximum results. She has over 20 years of experience in the industry. She will lead the RBG team and ensure that the program is aligned with the success of your stakeholders.



### **Tim Williams, Director of Operations**

Tim will be responsible for all RBG Customer Success Managers and staff associated with your program. He will assist in overseeing the implementation and development of your program and ensures that there is a constant alignment with your account, including support and dashboard user training.



### **Jake Dancy, Customer Success Manager**

Jae 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.



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

Rae will assist Jake in oversee the implementation and development of your online dashboard, scorecards, and reporting. She will be an additional resource for updates, questions, editing, new user setup, hierarchy updates, or other operational functions. Rae will be responsible for support and dashboard user training and will manage the shopper recruiter and scheduling team. She will be leveraging RBG’s database of employees and independent mystery shoppers and select the most qualified to complete evaluations within your target cities.



## References

### **The Cato Corporation (North Carolina)**

Linda Dalton

Director, Training & Development

ldat@catocorp.com

704.554.8510

### **Orange County Public Library**

Bethany Stone

Chief Branch Officer

407.835.7445

stone.bethany@ocls.info

### **MidPointe Library**

Brielle Maynor

Public Services Director

513.785.0558

bmaynor@midpointelibrary.org



## 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 Proposal Submittal</b>	<b>4.7.2020</b>
<b>2.0 Kickoff Meeting</b>	<b>4.17.2020</b>
<i>4.1 Scorecard Design, Dashboard &amp; Reporting Design</i>	4.17.2020 – 4.24.2020
<i>4.2 Shopper Route Design and Scheduling</i>	4.17.2020 – 4.24.2020
<b>5.0 1st Round Of Shops</b>	<b>5.17.2020 – 5.31.2020</b>
<i>5.2 Month 1 Review Meeting</i>	<i>5.31.2020</i>
<b>6.0 Stakeholder Quarterly Review Meeting</b>	<b>6.1.2020</b>
<b>7.0 Stakeholder Quarterly Review Meeting</b>	<b>9.1.2020</b>
<b>8.0 Stakeholder Quarterly Review Meeting</b>	<b>12.1.2020</b>
<b>9.0 Stakeholder Quarterly Review Meeting</b>	<b>3.1.2020</b>

# Additional Material

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## Reporting & Analytics

### RBG's Reporting Tool

Your account management team will help create any customized reporting, build any requested reports, setup automatic, scheduled and tiered distribution of reports. Our smart reporting tool provides geo-level reporting and the ability to export data in all formats.

To see a video of our reporting capabilities, click [here](#).

# RealCalls™

## Phone Mystery Shopping



### Make Your First Impression A Lasting One

Much like a first impression, the image your customer forms of your business frequently starts with a phone call. This first impression can serve as a key to building positive consumer relationships that can increase your sales and deepen customer loyalty.

The **RealCalls™** program pairs highly experienced telephone mystery shoppers with outbound call recording technology. This program allows you to listen directly to your team's interaction with a potential customer. These calls have helped our clients achieve and maintain that cutting edge over their competition and get the results they've been looking for.

#### Setup Is Simple

The **RealCalls™** programs can be created as either a stand-alone evaluation or in conjunction with an on-site mystery shopping evaluation. With our expert guidance, you have full control over the development of the scripting and approach of each call your team receives from our mystery shoppers, as well as a custom scorecard that tracks and assigns a score to aspects of the interaction that are important to you.

Upon execution of the program, you will receive each scored phonecall and the full recording of the interaction. We will then use our custom reporting tools to analyze data from the scored call, so that you know exactly where your team can improve. You will have the information to build a seamless customer experience for your business from "Hello," to "See you next time!"



#### RealCalls™ Features:

- Robust, Skilled Shopper Database
- Scoring Criteria
- Coaching & Continuous Improvement
- Online Dashboard & Reporting Features



# MysteryShopping+™

## Written Mystery Shopping



## Mystery Shopping+™, More Than A Name

The concept of mystery shopping is not a new one. Knowing what your customers are experiencing when they walk into your locations for products and services is a vital component of keeping them coming back again and again.

We are experts in what is objective, quantifiable and trainable in any portion of a customer interaction. Our expertise is used to create the best written mystery shopping program in the business, designed to deliver real, actionable data.

### Results With Meaning

With our expert guidance, you have full control over the development of your mystery shopping program. It starts with a custom, value-driven scorecard that tracks only the most important key performance indicators for your business. You provide us with the script for our shoppers to follow, and they will visit your business with the knowledge of what it means to be a truly reactive, observant customer, then they will report that data to you.

A high level of focus on the important aspects of your customers' interactions, along with the guidelines and coaching that we provide our mystery shopper team, means that our shoppers can collect a higher caliber of accurate data in the reports you receive. More accurate evaluations lead to better results, providing you with the tools to make your customer experience the best in the business.

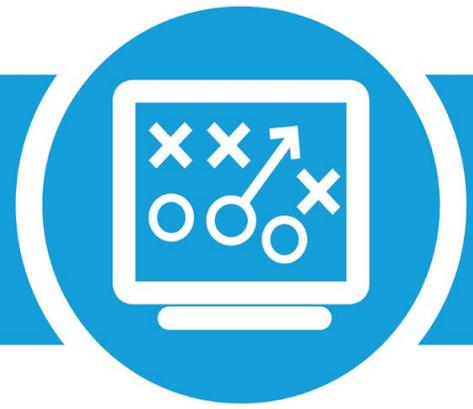
### MysteryShopping+™ Features:

- Custom Scorecard and Scripting
- Consulting By Dedicated Customer Success Managers
- Demographic Filtering
- Photo DNA Matching
- Shopper IRS Social Security Number Validation
- Shopper Rotation/Lockout
- Internal Quality Assurance Team



# GameFilm®

## Video Mystery Shopping



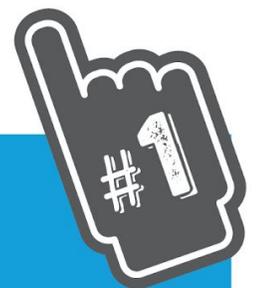
### Watch The Action Unfold

**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



# 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.

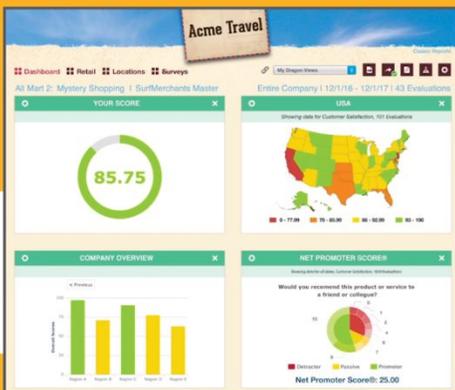
Our robust reporting feature, **RealResults™** is included with all of our solutions because we know how important it is to your business to have reliable data available both in the office and on the go. With **RealResults™** you can **Create, Customize, and Share**.

## 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:

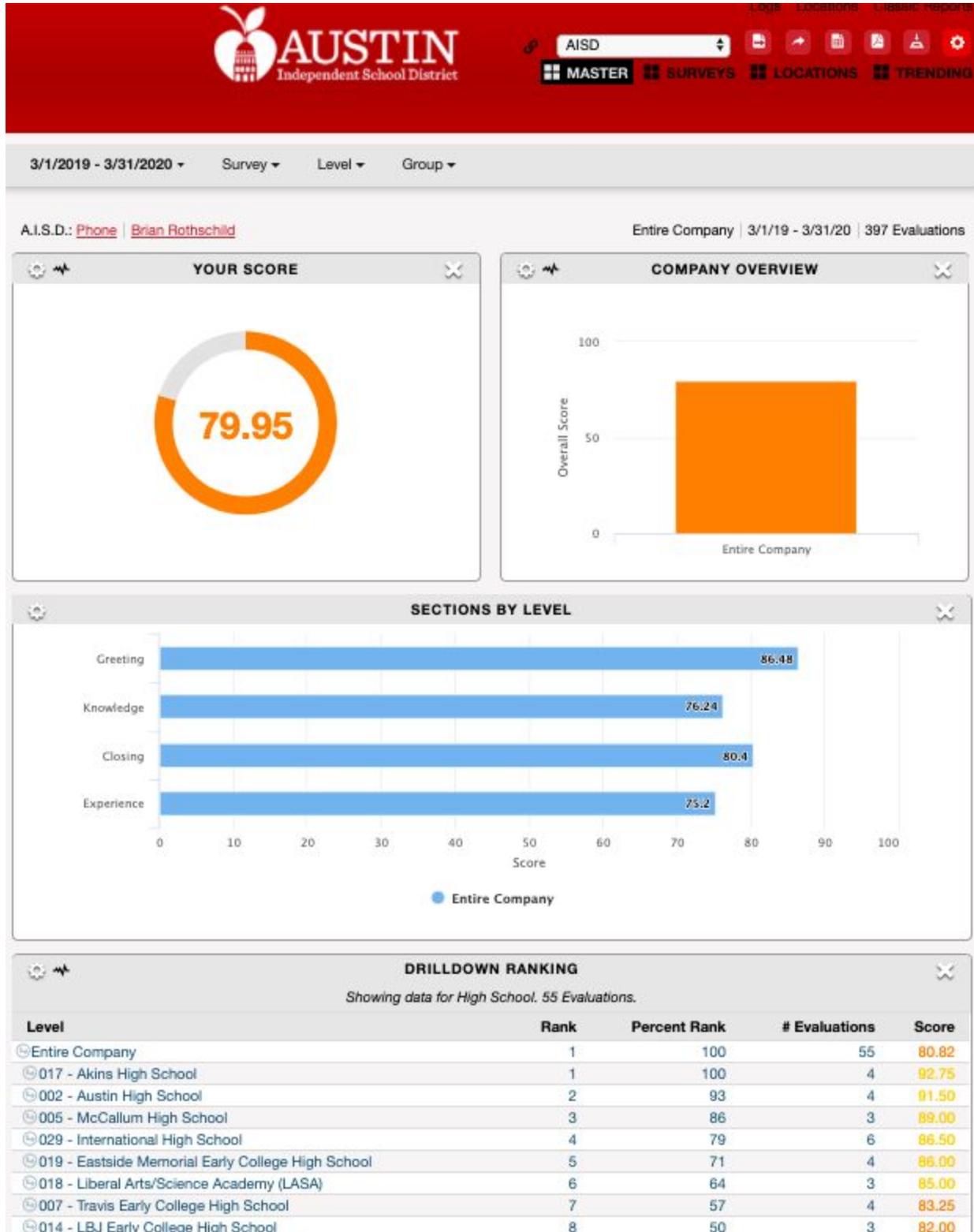
- Me
- Other Client Masters
- Client Supervisors
- District Managers
- Area Managers
- Shop Managers

Other Recipients

Save

Cancel

# City Wide Reporting



# City Wide Reporting

### KEY SUCCESS

Did the AISD employee answer the phone in 3 rings or less?

**Question Score: 99.26%**

### IMPROVABLE QUESTIONS

Question	Points Lost
Did the AISD employee use the standard greeting ("Good morning. Thank you for calling (CAMPUS NAME). This is _____. How can I help you today?")	1141
Did the AISD employee ask clarifying questions to ensure that your questions were answered to the best of their ability, or did they give short answers? (Answer yes if the emp...	618
Based on of the information provided about the campus and its programs, would this positively impact your decision to enroll your child in this school?	532
Did the AISD employee foster a conversation that made you feel as though they were genuinely interested in your needs?	415
When closing the call, did the AISD employee provide a professional and courteous closing statement?	249

### TRENDING - LEVELS

Overall Score

● Entire Company

### SURVEY SUMMARY

Question	Breakdown	Question Score
Did the AISD employee answer the phone in 3 rings or less?	98.24% - Yes 0.76% - No 1.01% - N/A*	99.26%
Did the AISD employee answer with a tone that was welcoming and friendly?	96.22% - Yes 2.77% - No 1.01% - N/A*	97.39%
Did the AISD employee use the standard greeting ("Good morning. Thank you for calling (CAMPUS NAME). This is _____. How can I help you today?")	55.92% - Yes 42.57% - No 1.51% - N/A*	59.68%

# City Wide Reporting

Knowledge		
☺ Did the AISD employee invite you to schedule a campus tour?	30.40% - Yes 56.80% - No 12.80% - N/A*	34.86% 
☺ Did the AISD employee provide detailed information about AISD schools and programs?	58.40% - Yes 32.80% - No 8.80% - N/A*	64.04% 
☺ Did the AISD employee make light conversation while working through your questions and providing information?	44.80% - Yes 48.00% - No 7.20% - N/A*	48.28% 
☺ Was the AISD employee knowledgeable about their campus?	83.88% - Yes 9.82% - No 6.30% - N/A*	91.29% 
☺ Was the AISD employee able to answer your questions about the district?	81.60% - Yes 18.40% - No	81.60% 
☺ Did the AISD employee foster a conversation that made you feel as though they were genuinely interested in your needs?	77.33% - Yes 18.39% - No 4.28% - N/A*	85.04% 
☺ Did the AISD employee foster a conversation that made you feel as though they were genuinely interested in your needs?	68.80% - Yes 23.20% - No 8.00% - N/A*	74.78% 
☺ Did the AISD employee collect your contact information?	7.20% - Yes 85.60% - No 7.20% - N/A*	7.76% 
☺ Did the AISD employee use your name in conversation?	8.80% - Yes 79.20% - No 12.00% - N/A*	10.00% 
Closing		
☺ Did the AISD employee ask clarifying questions to ensure that your questions were answered to the best of their ability, or did they give short answers? (Answer yes if the emp...	73.55% - Yes 26.45% - No	78.28% 
☺ Did the AISD employee verify and confirm your information, needs, and next steps before ending the call?	48.80% - Yes 39.20% - No 12.00% - N/A*	55.45% 
☺ Did the AISD employee determine your needs during the call (when you are moving, what steps you would need to take, etc.)?	52.80% - Yes 40.80% - No 6.40% - N/A*	56.41% 

# Telephone Program Scorecard



**EVALUATION # 2442674**  
30  
**SOUTH DADE PARK**  
09-13-2019  
SURVEY: PHONE

**CONTROLS**  
Close PDF Email

**ORGANIZATION & MANAGERS**  
Location: South Dade Park

**AVGS & SHOP COUNTS**  
Location avg (3) 64%  
Company avg (39) 64%

**SECTIONAL SCORES**  
Telephone Contact : 54%  
(7/13)

**YOUR SCORE**

**54%**  
7/13 points



**COMPANY RANK YTD**

**8/13**



**THIS SCORE VS LOCATION YTD**




**54%** This Evaluation  
**64%** YTD Average

**LOCATION VS COMPANY YTD**




**64%** YTD Average  
**64%** YTD Average

**SECTIONAL CHANGE**

Section	This Evaluation	Last Evaluation	+/-
Overall	54%	85%	-31%
Telephone Contact	54%	85%	-31%

**MGR CHANGE REQUEST**

[Add](#)

**MGR CHANGE REQUESTS**

QUESTION	SCORE	ANSWER
Date of Call:		9/13/2019
Call Start Time:		9:48 AM
Call End Time:		9:49 AM
Did you reach someone in the office?	0/0	Yes
Employee's Name:		Sonya

**TELEPHONE CONTACT 54% (7/13)**

**PHONE CALL**

Call start time: 09/13/2019 09:48am  
Call end time: 09/13/2019 09:49am  
Call length: 45 sec





# Telephone Program Scorecard

1. How many attempts were made to reach the office?	0/0	2 Calls
2. How many times did the phone ring?		2 rings
3. Was the location identified in the greeting?	1/1	Yes
<b>Did the employee...</b>		
4. Identify him/herself?	1/1	Yes
5. Offer assistance?	0/1	No
6. Seem interested in your call?	1/1	Yes
7. Convey a warm and friendly attitude?	0/1	No
8. Provide the requested information?	1/1	Yes
9. Were you placed on hold?	0/0	No
10. If yes, did they ask permission before placing you on hold?	0/0	
11. If applicable, how long were you on hold?		
12. What question did you ask?		
I am interested in doing some kind of organized nature walk. Do you offer anything like that at your park?		
13. How did the employee respond?		
She said, there is a group that meets Monday and Tuesday mornings between 9 and 10. They walk at their own leisure.		
<b>Did the employee...</b>		
14. Seem knowledgeable?	1/1	Yes
15. Speak clearly and in a pleasant voice?	1/1	Yes
16. Offer further assistance?	0/1	No
17. Refer you to the website?	0/1	No
18. Offer to send you additional information?	0/1	No
19. Thank you or offer a pleasant closing remark?	1/1	Yes
20. Based on this phone call, would you visit this location?	0/1	No
21. Comments on Phone Call: Comment on any positive interactions. Please describe in detail any "No" responses that you had.		
1st call attempt 9/12 3:43 pm reached voicemail.		
Sonya did not offer me assistance or convey a warm and friendly attitude.		
After answering my question, she did not offer further assistance or refer me to the website. Nor did she offer to send me any additional information.		
Based on this phone call, I would not visit this location. Sonya was not very friendly or professional. She answered my question with the bare minimum. Even her greeting was lacking "How may I help you?".		

# In-Person Program Scorecard



**CONTROLS**

Close PDF Email

**LOGO**

**YOUR LOCATION**  
HOMESTEAD BAYFRONT PARK  
19

**ORGANIZATION & MANAGERS**  
Location: Homestead Bayfront Park

**AVGS & SHOP COUNTS**

Location avg (3)	91%
District avg (0)	0%
Region avg (0)	0%
Company avg (21)	91%

**SECTIONAL SCORES**

Overall : (22/27)	81%
Environment : (6/10)	60%
Office Interaction : (11/12)	92%
Vending Machines : (0/0)	--
Overall Impression : (5/5)	100%

**YOUR SCORE**

**81%**  
22/27 points



**COMPANY RANK YTD**

**5/7**



**THIS SCORE VS LOCATION YTD**

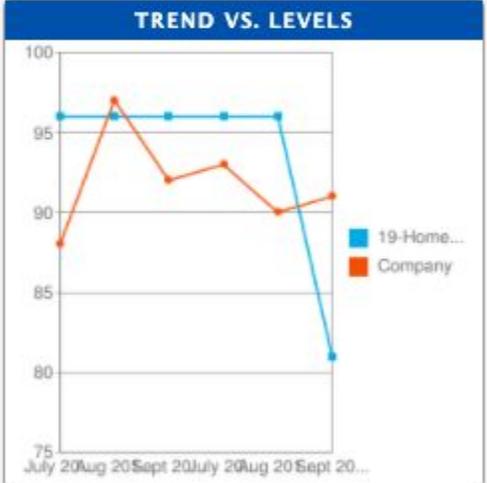
	
<b>81%</b> This Evaluation	<b>91%</b> YTD Average

**LOCATION VS COMPANY YTD**

	
<b>91%</b> YTD Average	<b>91%</b> YTD Average

**SECTIONAL CHANGE**

Section	This Evaluation	Last Evaluation	+/-
<b>Overall</b>	81%	96%	-15%
Environment	60%	100%	-40%
Office Interaction	92%	92%	+0%
Vending Machines	--%	--%	--%
Overall Impression	100%	100%	+0%



QUESTION	SCORE	ANSWER
Date of Visit:		9/20/2019

# In-Person Program Scorecard

QUESTION	SCORE	ANSWER
Date of Visit:		9/20/2019
Arrival Time:		4:30 PM
Departure Time:		6:00 PM

Upload your parking receipt:



<https://d2cavxku0k86dr.cloudfront.net/2dcedb01-f59e-4666-82af-f0c61e2c2274>

Amount paid for parking:		\$5.00
Amount spent at Vending Machines, if applicable:		\$0.00

## ENVIRONMENT 60% (6 / 10)

Was the parking area clean and free of debris?	0/1	No
Was the landscaping well maintained?	1/1	Yes
Were the grounds clean with no visible trash?	0/1	No
Were trash receptacles usable and not overflowing?	1/1	Yes
Was signage visible and easy to read?	1/1	Yes
Were the fields, shelters and basketball/tennis courts well maintained?	1/1	Yes
Were the restrooms...	2/3	Well stocked? In good working order?
Overall, was your first impression positive?	0/1	No

**Comments on Environment: Comment on any positive impressions. Please describe in detail any "No" responses that you had.**

The parking area was somewhat clean, but there was debris around. I encountered a diaper on the ground next to where I parked. The grounds fare no better, there were napkins lying around, plastic bottles and even a Starbucks cup between the plants. Buildings were well maintained and not in need of repairs; shelters were also in good repair.

Bathrooms were not clean and not very sanitary. The baby changing station showed signs of rust on the hinges, too close to the baby's being changed, who would be exposed to it. Soap receptacles were rusted as well; ADA assistance bar was also a bir rusyees; mirrors had dark spots, showing the passing of time. The handle to flush the toilets have not been properly maintained. I would be hard pressed to touch them without gloves.

My first impression was that of the diaper when I parked the car, which caused a negative reaction, and although the grounds were in good condition, the fact that there was garbage in the trash receptacles showed lack of maintenance. There are no people during the week, and when I arrived, the only vehicles parked were of employees and one or two customers.

## OFFICE INTERACTION 92% (11 / 12)

Time of Interaction:		4:37 PM
Was someone available at the office when you visited?	0/0	Yes



# In-Person Program Scorecard

What question did you ask? Availability and pricing of shelters.

How did the employee respond?

I was given a price range of different prices depending on the shelter. I was also told that shelters needed a prior reservation, unlike the large canvases, which were first come/first serve.

Was the employee courteous and enthusiastic?	1/1	Yes
Did you feel your business was appreciated?	1/1	Yes

**Comments on Office Interaction:** Comment on any positive interactions/impressions. Please describe in detail any "No" responses that you had.

Although there were signs pointing to the general location of the office, they were not very clear and I went around, taking the long way, on the opposite side of the buildings (restaurant side). I made it to the office and it was closed at 4:45 pm. I walked around and found the employees as they were leaving.

When I approached the employees, they were professionally dressed, either in a lifeguard uniform, guard uniform, or a pair of slacks and shirt. The employees were friendly, and approachable. They all smiled at me and I received several greetings ranging from "Hi", "Hello", to "Good afternoon". All greetings were enthusiastic and said with smiles. Among the employees, there were a couple of lifeguards, a security guard, and a female park worker. I could not read the name tag of the park worker as the tag was not in my direct view, but I went ahead and requested information about the shelters by asking how much it was to rent a shelter. In response, the park employee asked for my name and addressing me by it, told me that the price of the shelters varies depending on the shelter. She indicated her name was Britany and stated that the shelters could be reserved in person during office hours, by phone, and using the county parks website. Britany gave me a price range and indicated, while pointing to it, that the large shelter in the back was \$79.00. They wished me a nice evening and continued on their way out. I returned to the parking meter and tried a different one by using my credit card. It worked and I placed the parking ticket visible on the car before continuing my visit.

## VENDING MACHINES -

Did you visit the Vending Machines at the park?	0/0	No
Were the vending machines:	0/0	No Vending Machines at this location
Were you given correct change?	0/0	N/A

**Comments on Food and Beverage:** Comment on any positive interactions/impressions. Please describe in detail any "No" responses that you had.

I did not find a vending machine on the grounds. There was a restaurant at the park.

## OVERALL IMPRESSION 100% (5/5) -

Based on your experience, would you return to this location?	1/1	Yes
--	-----	-----

Explain why or why not.

The park has a calming environment. Shelters are well maintained and the greenery is well kept. There is plenty of parking and not a lot of people. It is not suitable to go late in the day or during the week as the park is fairly empty, but it seems like a good location for a weekend picnic, provided access roads are not flooded.

Did this location meet your expectations?	1/1	Yes
Was the location safe?	1/1	Yes
Was the location a good value?	1/1	Yes
Would you recommend this location to others?	1/1	Yes

# Sample Coaching Gameplan

## Track and Monitor Manager Use And Progress

Our proprietary coaching gameplan allows you to ensure that stores and managers are taking the time to coach to the evaluations. Pull reporting to see who has coached and what kind of coaching they have implemented.

**GAME PLAN © 2012 REALITY BASED GROUP, INC. ALL RIGHTS RESERVED.**



### What Happens After A Mystery Shop Has Been Completed?



**MYSTERY SHOP COMPLETED**  
You will be notified once the shop has been completed via email.



**REVIEW SHOP EVALUATION**  
Identify most important areas of success and most important areas of opportunity.



**COMPLETE COACHING SESSION**  
Discuss what behaviors were observed that were successful and that need to be improved.



**USE COACHING GUIDE TO RUN SESSION**  
Take detailed notes and remember to make the session as fun as possible.



**COMPLETE GAMEPLAN**  
Don't forget to log your results by clicking "Save" at the bottom of your shop.

**Please provide an overview of the shop to the employees attending this session. It is recommended that the shop is printed out or posted two days prior to the shop review session. The employees names should be blacked out if the shop score is low.**

To view the [Coach's Guide](#), click here or paste the link below  
[//www.realitybasedgroup.com/gameplan/coachsguide.pdf](http://www.realitybasedgroup.com/gameplan/coachsguide.pdf)

Please enter the date of this Manager Game Plan

/   
 /

**For the Coach to complete prior to team meeting**  
 Please enter 1 strength and biggest opportunity:

# Sample Coaching Gameplan

**Initial Shop & Coaching Review Session:**

Was this session one on one or in a group?

0/0

One on one

Group

List who attended the session:

How did the team members respond when asked what they felt was the biggest success from this evaluation?

What do the associates think is the most important opportunity from this last shop? What are the most important behaviors that drive customer service?

Action Plan – what are 2 steps the team has committed to, to enhance customer experience as a

# Data Security

Dropbox, Venmo, & Sassie



## Your Privacy Matters

At **Reality Based Group™** we understand that your data is important and we are committed to ensuring that your information stays protected and secured.



Sensitive data is encrypted at rest and during transmission (db encrypted fields and SSL)

ALL data encrypted in transit (SSL, SFTP)

Databases are not directly accessible via the Internet, only through UI

Platform is hosted on Amazon's AWS Cloud platform in the US, available option to be hosted in EU

Data is "hot replicated" (backed up in realtime)

Daily snapshots and SQL dumps are also performed for backups

Server software patching is done quarterly

Urgent security patches are done as needed and typically within 24 hours of being released

Hosted in a LAMP (Linux/Apache/MySQL/php) environment so not prone to Microsoft vulnerabilities

Vulnerability and Penetration scans are performed monthly by Comodo

99.9% uptime (monthly interval)

Uptime monitoring is done by Pingdom

Yearly Risk Assessments are performed internally

Rate limiting/IP blocking is employed on all password fields to prevent scripted attacks



Accounts are password protected and retain archived raw video files for 12 months, purging them after the 12 month period expires.



All videos are uploaded securely with hidden privacy.



## Cost Proposal Form

### MUST BE SUBMITTED WITH PROPOSAL

Instructions: Using this form, provide a total cost for all services to be delivered and a breakdown of costs delineated by services as described in your proposal.

All cost proposals must be signed and dated.

Description	Cost
a. Cost to construct the template(s) for telephone evaluations	\$ 2,000.00
b. Cost per department to construct the templates for in-person evaluations	\$ 1,000.00
c. Cost per evaluation for telephone method	
i. Cost for 400 telephone evaluations	\$ 16,000.00
ii. Cost per each individual evaluation after 400 (in case additional testing is needed)	\$ 40.00
d. Cost per evaluation for in-person method	
i. Cost for 100 in-person evaluations	\$ 9,900.00
ii. Cost per each individual evaluation after 100 (in case additional testing is needed)	\$ 99.00
e. Cost for report writing, which includes all final deliverables	
i. Cost for report writing for phone-based evaluations	\$ 2,000.00
ii. Cost for report writing for in-person evaluations	\$ 2,000.00
f. Cost for in-person presentation	
i. All travel and presentation costs associated with coming to Winston-Salem to deliver the results of the evaluations to a committee of the City Council	\$ *We can do this virtually. If in-person is required, this would cost \$5,000.00 + travel costs.
<b>TOTAL COST:</b>	<b>\$ 35,900.00</b>

Name of Firm: Reality Based Group

Authorized Signature: 

Printed Name & Title: Brian Rothschild, Customer Engagement Director

Date: 4/7/2020



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

**RBG**  
Reality Based Group<sup>TM</sup>

Evolving Customer Experience.

Brian Rothschild,  
Customer Engagement Director  
o: 512.583.0945 | f: 512.233.5040  
e: [brothschild@realitybasedgroup.com](mailto:brothschild@realitybasedgroup.com)  
[www.realitybasedgroup.com](http://www.realitybasedgroup.com)