

COUNTRY SUPPLIER

COASTAL FARM / CAL RANCH PICKUP SHOP

INSTRUCTIONS • QUESTIONNAIRE

You will make an online purchase and schedule an in-store pickup at your assigned location. You will pick up the item and then return it the same day. You will evaluate the customer experience at each touchpoint.

Before You Begin

- Review your shop confirmation
- Know your scenario & shop timeframe
- Know your assigned store location
- Review purchase requirements
- Review associate interaction requirements

Don't Forget!

- Order before 1pm on your shop date
- Select email for your order confirmation
- Complete pickup and return on the same day
- Obtain purchase and return receipts
- Ask for employee names

General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
- Answer all questions and provide detailed supporting narrative where requested.
- Get an itemized return receipt to upload with your report. Ask for the itemized receipt if you are not offered one when you complete your return. Your purchase receipt can be an online screenshot or your pickup receipt.
- Do not reveal your identity as a mystery shopper to anyone at any time.
- Submit your report to shopperhub.cxgroup.com within 12 hours of completing the shop.
- If a Quality Assurance Editor contacts you for additional information or clarification about your experience, respond promptly.
- Retain all documentation for six months following your shop.
- You or your immediate family members cannot currently nor have ever worked for a Coastal Farm or CAL Ranch store.
- Children are not allowed to accompany you on this shop.

Shop Instructions

Step #1: Make an online purchase—complete this step before 1PM on your shop date.

- Visit the store's website ([CAL Ranch](#) or [Coastal Farm](#) as assigned).
 - Locate and select your assigned store to ensure you browse and then schedule your purchase and pickup at your assigned store location.

- Select an item that is available for same-day pickup.
 - Do NOT select/purchase an item that shows as out of stock, on backorder, or where the date listed as available for pickup is not the same day.
- Add the item to your cart and click on “Checkout.”
 - Select the option for in-store pickup when adding the item to your cart.
 - Select the "FREE Pickup" option when checking out.
- The next screen will confirm your delivery/pickup selection and provide your total. Confirm your store, date, and item selections are correct.
- Enter your email address to receive the order confirmation. Be sure to enter a valid email address.
- Enter your payment information and review and place your order.
- Check your email for the order confirmation, followed by the “ready for pickup” email. Be sure to check your junk/spam folders. If you provided your phone number, you might also receive a text message.
- Once you receive the “ready for pickup” email or text, visit the store to pick up your item.
- If you do not receive the confirmation or “ready for pickup” email or text, call the store to see if the item is ready. If it is not ready same-day or there are other issues with your order, contact your scheduler with the details.

Step #2: Pick up your item.

- When you arrive, look for any directional signage related to where you should pick up your item.
- Pick up in-store (not curbside) if possible.
- Interact with the pickup associate. Evaluate their appearance, greeting, attitude, efficiency, and parting remarks. Note how they handle any issues with your order, if applicable.
- The pickup associate’s name is required. Ask for their name if they are not wearing a visible name tag or do not introduce themselves.

Step #3: Return your item—plan ahead so you can complete this step the same day.

- Wait at least 20 minutes, then return at least one item. If you purchased multiple items, you only need to return one item.
- The return must be completed on the same day. Return reasons include: “I found something different that works for me,” “I no longer need the item,” or “I decided against spending the money today.”
- Interact with the return associate. Evaluate their appearance, greeting, friendliness, efficiency, and parting remarks. Note how they handle any issues with your order, if applicable.
- The return associate’s name is required. Ask for their name if they are not wearing a visible name tag or do not introduce themselves.
- Get a return receipt. Ask if you are not offered a receipt.

Step #4: Evaluate your overall impressions.

- Rate your overall experience, including how likely you would be to recommend or repurchase from this retailer and anything that stood out as positive or negative.
- Do not score down for factors outside the staff’s control.



QUESTIONNAIRE

Shop date:

Start time:

End time:

Website Experience

1. Desktop/mobile layout

- Layout was well-organized and easy to navigate (10 points)
- Layout was mostly well-organized and/or easy to navigate (5 points)
- Layout was not organized and not easy to navigate (0 points)

2. Website/mobile responsiveness speed

- Site was more responsive (speed) than expected (10 points)
- Site was as responsive (speed) as expected (5 points)
- Site not responsive or was slower than expected (0 points)

3. Visual appearance of the site

- Very appealing (10 points)
- Somewhat appealing (5 points)
- Not appealing (0 points)

4. Store locator easy to understand

- Easy to Understand (10 points)
- Confusing (0 points)

5. Store locator was accurate

- Found to be accurate (10 points)
- Not accurate (0 points)

6. Website clearly indicated which items were available for same-day pickup

- Yes (10 points)
- No (0 points)

7. Explain the responses you provided for the Website Experience questions:

Use complete sentences to explain what occurred or what you observed during this part of the evaluation. You must enter between 100 and 1000 characters.

Online Purchasing Experience

8. Product availability

- Item was available and in stock (10 points)
- Item was not available or not in stock (0 points)

9. Received "order confirmation" email or text indicating the store has record of your online order Yes (10 points) No (0 points)**10. Time between placing order and receipt of order confirmation email or text** 5 minutes or less 5:01 minutes to 10 minutes 10:01 minutes to 15 minutes Greater than 15 minutes**11. Received "ready for pickup" email or text** Yes (10 points) No (0 points)**12. Time between placing order and receipt of email or text stating your order was ready for pickup** Within 1 hour 1-3 hours 3-5 hours 5-8 hours 8+ hours**13. Received "order has been picked up" email or text after visit** Yes (10 points) No (0 points)**14. Emails or texts indicated the deadline to pick up your order** Yes (10 points) No (0 points)**15. Indicate which inbox your emails went to:** Inbox Junk/Spam**16. If you ordered multiple items was it clear when you could pick up the items and when your full order was complete?** It was clear when each of my items would be ready and when I could pick them up (10 points) It was not clear when all of my items would be ready (0 points) N/A - Did not order multiple items**17. Explain the responses you provided for the Online Purchasing Experience questions:**

Use complete sentences to explain what occurred or what you observed during this part of the evaluation. You must enter between 100 and 1000 characters.

In-Store Pickup**18. Pickup area location** Pickup area was clearly visible and easy to find (10 points) Pickup area was somewhat easy to find (5 points) Pickup area was not clearly visible and was difficult to find (0 points)

19. Directional signage

- Signage for the pickup area was clearly visible (10 points)
- Signage for the pickup area was present but not clearly visible (5 points)
- No signage for the pickup area was found (0 points)

20. Indicate the name of the Pickup Associate:

Ask if no name tag and they do not introduce themselves.

21. Provide a description of the Pickup Associate:

Include age range, hair color, hair length, height, and glasses or none.

22. Pickup associate appearance

Select the bottom response if the associate is not wearing a nametag, even if their appearance is otherwise neat and professional.

- Wearing nametag AND appeared neat and professional (10 points)
- Wearing nametag BUT appearance was in need of minor attention in one or more areas (5 points)
- NOT wearing nametag or appeared unprofessional or poorly groomed (0 points)

23. Initiated friendly greeting

- Initiated a friendly verbal greeting AND engaged you in conversation (10 points)
- Initiated a friendly verbal greeting OR engaged you in conversation (5 points)
- Did NOT initiate a friendly verbal greeting AND did NOT engage you in conversation (0 points)

24. Indicate the activity the associate with whom you interacted was engaged in as you approached:

- Busy assisting another customer
- Stocking merchandise / cleaning or straightening
- Was not busy
- Conversing with a co-worker

25. Check the type of greeting (if applicable):

- Verbal
- Non-Verbal
- Not Greeted

26. Smiled and made eye contact

- Used every opportunity to smile and made eye contact as appropriate (10 points)
- Smiled and made eye contact but there was opportunity for more (5 points)
- Did NOT smile and/or avoided eye contact (0 points)

27. Associate asked for ID to help locate order

- Yes (10 points)
- No (0 points)

28. Associate experienced issues accessing your pickup barcode during pickup

- Yes (0 points)
- No (10 points)

29. If yes, did the associate call a manager to complete the pickup through the register?

- Yes (10 points)
- No (0 points)
- N/A - No issues with my barcode

30. Offered substitution or to place an online order if item(s) were not available at pickup

- Yes (10 points)
 No (0 points)
 N/A - My item(s) were available at pickup

31. Processed transaction efficiently and in a timely manner

- Transaction was processed in an efficient and timely manner (10 points)
 My transaction was NOT processed in a timely and efficient manner (0 points)

32. Associate used mobile device to process transaction

- Yes
 No

33. Confirmed satisfaction

- Asked if you found everything you need and did so in a natural manner (10 points)
 Did not ask if you found all you needed or seemed to be going through the motions (0 points)

34. Projected positive attitude

- Projected a friendly, outgoing attitude and seemed to sincerely enjoy assisting you (consistently smiled, made eye contact, and used upbeat tone of voice that conveyed enthusiasm and energy) (10 points)
 Pleasant, polite and reserved (e.g. used minimal gestures and a positive, steady tone) (5 points)
 Appeared to be going through the motions or seemed disinterested (0 points)

35. Informed receipt would be emailed upon completion of pickup order

- Yes (10 points)
 No (0 points)
 Order not completed

36. Expressed appreciation

- Offered a positive closing remark (e.g., thank you, have a nice day, etc.) AND invites you to return (10 points)
 Offered a positive closing remark (e.g., thank you, have a nice day, etc.) OR invites you to return (5 points)
 Did NOT offer a positive closing remark (e.g., thank you, have a nice day, etc.) AND does NOT invite you to return (0 points)

37. Explain the responses you provided for the In-Store Pickup questions:

Use complete sentences to explain what occurred or what you observed during this part of the evaluation. You must enter between 250 and 2000 characters.

Return Visit**38. Indicate date of the return:**

Format date as MM/DD/YYYY

39. Indicate time of the return:

Format time as hh:mm AM/PM

40. Indicate the name of the Return Associate:

Ask if no nametag and they do not introduce themselves.

41. Provide a description of the Return Associate:

Include age range, hair color, hair length, height, and glasses or none.

42. Approached by an associate prior to reaching the cashwrap

Yes (10 points)

No (0 points)

43. Did the associate have issues locating your order in the system?

Yes (0 points)

No (10 points)

44. If yes, please indicate the issue and describe how it was resolved:**45. Acknowledgement/Greeting**

Acknowledgement may be either verbal or non-verbal, e.g., nod, smile, or wave.

You were welcomed within a few minutes of entering the store (verbally or non-verbally--e.g. wave, smile, nod) by at least one associate (10 points)

You were NOT welcomed (verbally or non-verbally--e.g. wave, smile, nod) by at least one associate upon entering the store (0 points)

46. Return associate appearance

Select the bottom response if the associate is not wearing a nametag, even if their appearance is otherwise neat and professional.

Is wearing nametag AND appears neat and professional (10 points)

Is wearing nametag but appearance in need of minor attention in one or more areas (5 points)

NOT wearing nametag or appears unprofessional or poorly groomed (0 points)

47. Offered an exchange

Associate asked questions regarding the return and offered suggestions for an exchange (10 points)

Associate asked you if you want to exchange the item(s) (5 points)

Associate did not offer an exchange (0 points)

48. Processed return efficiently and in a timely manner

Return transaction was processed in an efficient and timely manner (10 points)

My return transaction was NOT processed in a timely and efficient manner (0 points)

49. Return associate expressed appreciation

Offered a positive closing remark (e.g., thank you for coming, have a nice day, etc.) AND invited you to return (10 points)

Offered a positive closing remark (e.g., thank you for coming, have a nice day, etc.) OR invited you to return (5 points)

Did NOT offer a positive closing remark (e.g., thank you for coming, have a nice day, etc.) AND did NOT invite you to return (0 points)

50. Staff friendliness

Associates projected a friendly attitude and interacts with you in a manner that made you feel completely comfortable and at ease (smiled, made eye contact, etc.) (10 points)

Associates were polite but reserved with the interaction (5 points)

Associates make you feel unwelcome or uncomfortable (contact avoidance, unfriendly tone) (0 points)

51. Explain the responses you provided for the Return Visit questions:

Use complete sentences to explain what occurred or what you observed during this part of the evaluation. You must enter between 250 and 2000 characters.

Overall Impression

52. How would you rate your overall experience?

Rate your overall experience with 0 being the worst and 10 being the best.

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

53. How likely would you be to purchase from this retailer for future products?

Rate your likelihood to purchase from this retailer again with 0 being not at all likely and 10 being extremely likely.

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

54. How likely would you be to recommend this retailer to friends and family?

Rate your likelihood to recommend this retailer with 0 being not at all likely and 10 being extremely likely.

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

55. Indicate any area of opportunity that will allow this retailer to better serve you about your experience:

56. Indicate anything that you experienced that made the experience abnormally unique and/or retailer went above and beyond:

57. Explain the responses you provided for the Overall Impression questions:

Check your previous responses. Do not score down for factors outside the staff's control. Use complete sentences to explain your responses. You must enter between 100 and 1000 characters.

Shop Validation**58. Did you get a purchase receipt AND a return receipt?**

Your purchase receipt can be an online screenshot or your pickup receipt. Ask for a return receipt if you are not offered one when you complete your return. Click "Yes" and then upload your receipts. You must upload at least 2 images.

Yes

No

59. If you do not have a purchase and/or return receipt, explain why:

Enter N/A if you uploaded both receipts.

END OF QUESTIONNAIRE