

# GROCERY PICKUP COMPETITOR SHOP

## INSTRUCTIONS • QUESTIONNAIRE

Place an online order and pick it up at the assigned store to make anonymous observations of timing, freshness, bagging protocol, and customer service to ensure standards are being met.

### Before You Begin

- Review your shop confirmation
- Know the observations to make
- Understand the purchase requirements:  
Buy at least 8 different items totaling \$25 or more, and get a receipt

### Don't Forget!

- Arrive for pickup during the chosen time
- Spend at least 10 minutes onsite making observations
- Get associate name from badge carside when they greet you

## General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
  - Be aware that the exact pickup process will vary by retailer and possibly even by location. Please do your best to complete the shop as instructed.
  - Target shops: Use the drive-up service, not in-store pickup. Park your car in the drive-up zone, and use the Target app to check in.
- Shop between 9am-9pm. Pick up the order on the date assigned.
- Shop the store at the address listed in your shop confirmation.
- Submit your report with a clear copy of your receipt to CX Group within 8 hours of the shop.
  - NOTE: When submitting your report, enter your shop date and visit times as the date/time you picked up the order, not when the order was placed.
- Retain all screenshots and documentation for six months following your shop.
- You or your immediate family members cannot currently nor have ever worked for the evaluated store.

## Placing the Order

- If you don't already have it, download the app that matches the retailer you are assigned to evaluate (Walmart, Publix, Target, Meijer, Safeway, Sam's Club, etc.).
  - If you prefer, you may place the order using the store's website instead of the app.
- Place an order for pickup at the store/address listed in your shop confirmation.
  - Place the order up to one week before your scheduled shop date. Request to pick up the

order on your assigned shop date. If this date is unavailable for pickup, select the next available date, and notify your scheduler of the new date.

- Some retailers do not allow you to select a future date for pickup (same day pickup only). For these stores, place the order on your assigned shop date.
- **Important!** Make sure the address of the store you're shopping and picking up from matches the address listed in your shop confirmation. If you have placed pickup orders before, you may need to change your default store prior to beginning your order.
- Select 8 or more different items of your choice totaling at least \$25.
  - At least 8 of the items in your order must have different/individual bar codes. For example, two boxes of Cheerios is okay as long as one is cinnamon and one is multi-grain.
- Turn on allowing substitutions (look for this option in the app or when placing the order). This is required to evaluate the car-side substitution review process.
  - If possible in the app, choose a specific backup item for each product you order to see if the store uses that specific item as your substitution if necessary.
  - Do not respond to any texts or other messages you receive about substitutions being required for your order. Ignore them and proceed to the store at your scheduled pickup time to see how substitutions are handled.
- At retailers who charge for plastic bags, you may accept the charge or bring your own bags.
  - If you bring your own bags, bring sufficient bags for your order, and allow the associate to re-bag your items following the store's required bagging protocols.
- If you have attempted to place a pickup order via app and website (try both) and have been unable to do so after at least two attempts during different days/times, please notify your scheduler.



## Picking Up the Order

- Before you leave, use the "On My Way" feature (if available) on the mobile app to let the store know when you're on your way to pick up the order.
- Arrive at your assigned store at the scheduled pickup date/time.
  - If you are informed of a delay (pickup date/time pushed back by the store), you must agree to the new pickup date/time. Submit your report after picking up your order.
  - If your entire order is cancelled by the store (no option to reschedule for a later pickup date/time), submit your report with any supporting documentation of the cancellation.
- Park in a designated pickup parking spot, and if possible, check in using the mobile app to let the store know you've arrived ("I'm Here").
  - If the app does not offer a way to check in, follow the store's posted procedures to notify them that you have arrived for pickup.
- Once you check in, record the elapsed time it takes for an associate to come to your car.
- Note the name from the name badge and the physical description (hair color, hair length, approximate height, age, etc.) of the pickup associate.

- Check for any of the following issues with the pickup associate:
  - ✓ Attire was dirty
  - ✓ Attire was not in good repair
  - ✓ Attire was wrinkled
  - ✓ Name badge was not worn
  - ✓ Safety vest was not worn
- Remember if the associate verbally greets you at the start and verbally thanks you at the end.
- If you are asked if you would like to review substitutions, say yes. The associate should review any substitutions needed to fill the order. Decline any substitutions you do not want.
- Access a digital copy of your final order receipt to upload with your report.
  - Go into the store's app or website, sign in, and look for a section to review past orders ("Orders & Receipts," "Purchase History," etc.). Locate the transaction, and then look for a way to view the final receipt. Take a screenshot or photo of the final receipt to upload.
  - **Important!** The receipt image you upload must be a copy of the receipt generated after pickup showing what you were ultimately charged after substitutions and out of stocks. An image showing the order confirmation screen after the order was placed is not acceptable for reimbursement.
  - The date, address, items purchased, and amount spent must be readable. If you cannot fit the receipt into one image, upload multiple images to ensure all details are visible.
- NOTE: Associates do not expect or accept tips, and tips will not be reimbursed.



## Product Observations

- Immediately after pickup, drive to another part of the parking lot, and park in a regular spot away from the pickup zone in order to inspect the received items. Do this before driving home to avoid thawing/shifting of contents.
- Check the items in your order to ensure the following:
  - ✓ Refrigerated and frozen items are cold to the touch
  - ✓ Chemicals are bagged separately
  - ✓ Meats are bagged separately
  - ✓ Organic produce is bagged separately from non-organic produce
  - ✓ Crushable items such as bread, eggs, or chips are not placed beneath heavier items
  - ✓ All items are within their stamped expiration/sell-by date
- Remember the type (paper, plastic, etc.) and color (white, brown, blue, etc.) of bags you receive with your order.



# QUESTIONNAIRE

Pickup date:

Pickup arrival time:

Pickup departure time:

## Placing the Order

1. Select the channel the order was placed through:

- |   |   |
|---|---|
| <input type="checkbox"/> Smartphone – App     | <input type="checkbox"/> Tablet – Website         |
| <input type="checkbox"/> Smartphone – Website | <input type="checkbox"/> Laptop/desktop – Website |
| <input type="checkbox"/> Tablet – App         |   |

2. Select the time of day your order was placed on the website or app:

- |   |  |
|---|--|
| <input type="checkbox"/> Before 9:00am    | <input type="checkbox"/> 3:01pm – 6:00pm |
| <input type="checkbox"/> 9:00am – 12:00pm | <input type="checkbox"/> 6:01pm – 9:00pm |
| <input type="checkbox"/> 12:01pm – 3:00pm | <input type="checkbox"/> After 9:00pm    |

3. Were you able to easily select your assigned store?

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|------------------------------|-----------------------------|

4. How would you rate the level of effort it took to locate the items you wanted on the website/app?

- |   |   |
|---|---|
| <input type="checkbox"/> 1 – Low effort, easy | <input type="checkbox"/> 4                          |
| <input type="checkbox"/> 2                    | <input type="checkbox"/> 5 – High effort, difficult |
| <input type="checkbox"/> 3 – Neutral          |   |

5. Were you able to reserve your desired pickup time?

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|------------------------------|-----------------------------|

6. If no, how many hours beyond your desired pickup window were you able to get a space?

- |  |  |
|--|--|
| <input type="checkbox"/> Up to 2 hours | <input type="checkbox"/> 6-8 hours         |
| <input type="checkbox"/> 2-4 hours     | <input type="checkbox"/> More than 8 hours |
| <input type="checkbox"/> 4-6 hours     | <input type="checkbox"/> N/A               |

7. Select the type of confirmation received once the order was placed:

*Confirmations arrive via email or text.*

- |  |   |
|--|---|
| <input type="checkbox"/> Only received confirmation that order had been received | <input type="checkbox"/> Received confirmation both when order was received and when it was ready |
| <input type="checkbox"/> Only received confirmation that order was ready         | <input type="checkbox"/> No confirmation was received after order was placed                      |

8. Select the type of substitution confirmation you received prior to pickup:

*Confirmations arrive via email or text.*

- |  |   |
|--|---|
| <input type="checkbox"/> Received text to confirm substitutions        | <input type="checkbox"/> Received both text and email regarding substitutions |
| <input type="checkbox"/> Received email that substitutions were needed | <input type="checkbox"/> No communication on substitutions was received       |

## Store Pickup

9. How would you rate the level of effort it took to locate the pickup parking zone and park or join the queue?

- 1 – Low effort, easy  
 2  
 3 – Neutral

- 4  
 5 – High effort, difficult

10. How many minutes elapsed between checking in and the time your order was brought to your car?

- 1 minute or less  
 1:01 – 2 minutes  
 2:01 – 3 minutes  
 3:01 – 4 minutes  
 4:01 – 5 minutes  
 5:01 – 6 minutes

- 6:01 – 7 minutes  
 7:01 – 8 minutes  
 8:01 – 9 minutes  
 9:01 – 10 minutes  
 10:01 or more

11. Pickup associate name:

*Enter the name from the name badge. Enter 'Unknown' if you were unable to obtain the name. If the name was overheard or you only have a portion of it due to a covered or unreadable name badge, enter the information you have and note that the name was overheard or incomplete.*

12. If unable to obtain a name from a name badge, select the reason:

*Only select 'No name badge worn' if the associate was clearly not wearing a name badge at all or if the name badge area of the chest was fully obstructed so that you couldn't tell whether a name badge was worn. Do not select this option if you could see any portion of a name badge but could not read the name.*

- No name badge worn  
 Badge did not have a name  
 Badge covered

- Badge unreadable  
 N/A – name was obtained from a badge

13. Pickup associate hair color:

*Select the predominant color or the option closest to the color you observed. If a non-traditional color (pink, rainbow mix, etc.), select purple, green, or blue.*

- Black  
 Light brown  
 Brown  
 Dark brown  
 Blonde  
 Red  
 Gray

- Salt/pepper  
 Green  
 Blue  
 Purple  
 None/shaved  
 Unable to determine

14. Pickup associate hair length:

- Short  
 Medium  
 Long

- Very long  
 Unable to determine

15. Pickup associate height:

- Under 5'0"  
 5'0" - 5'3"  
 5'4" - 5'6"  
 5'7" - 5'9"

- 5'10" - 6'0"  
 Over 6'0"  
 Unable to determine

**16. Pickup associate age:**

- |                                   |                                  |
|-----------------------------------|----------------------------------|
| <input type="checkbox"/> Under 18 | <input type="checkbox"/> 40-44   |
| <input type="checkbox"/> 18-24    | <input type="checkbox"/> 45-49   |
| <input type="checkbox"/> 25-29    | <input type="checkbox"/> 50-54   |
| <input type="checkbox"/> 30-34    | <input type="checkbox"/> 55-60   |
| <input type="checkbox"/> 35-39    | <input type="checkbox"/> Over 60 |

**17. Pickup associate additional descriptors:***Select all that apply.*

- |  |  |
|--|--|
| <input type="checkbox"/> Glasses         | <input type="checkbox"/> Highlights                |
| <input type="checkbox"/> Mustache        | <input type="checkbox"/> Curly hair                |
| <input type="checkbox"/> Beard           | <input type="checkbox"/> Braids                    |
| <input type="checkbox"/> Tattoo          | <input type="checkbox"/> Hair pulled back          |
| <input type="checkbox"/> Goatee          | <input type="checkbox"/> Jewelry                   |
| <input type="checkbox"/> Hat or hair net | <input type="checkbox"/> N/A – none of these apply |
| <input type="checkbox"/> Braces          |  |

**18. Was the pickup associate's appearance clean and professional?***The associate should wear a safety vest, and attire that is in good repair (not ripped, torn, faded) with no excessive wrinkles or visible stains.*

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|------------------------------|-----------------------------|

**19. If no, what was observed regarding the associate's appearance?***Select all that apply.*

- |  |  |
|--|--|
| <input type="checkbox"/> Attire was dirty                                    | <input type="checkbox"/> Safety vest was not worn  |
| <input type="checkbox"/> Attire was not in good repair (ripped, torn, faded) | <input type="checkbox"/> Badge was not worn        |
| <input type="checkbox"/> Attire was wrinkled                                 | <input type="checkbox"/> Badge did not have a name |
|  | <input type="checkbox"/> N/A                       |

**20. Did the associate provide a pleasant verbal greeting?**

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|------------------------------|-----------------------------|

**21. Did the associate confirm your first and last name?***Answer Yes if your order was confirmed by either your name or a 4-digit code sent to your phone.*

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|------------------------------|-----------------------------|

**22. Did the associate place the items down safely in the area you asked for them to be placed?**

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|------------------------------|-----------------------------|

**23. After loading the order, did the associate notify you that all the groceries were loaded?**

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|------------------------------|-----------------------------|

**24. Did the associate provide a "Thank you" before you departed?**

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|------------------------------|-----------------------------|

**Order Satisfaction****25. Did the associate review substitutions with you?***Select 'No substitutions were reviewed' if you were only given a piece of paper with the substitutions listed OR substitutions were not mentioned at all, but you received items in your order that appear to be substitutes for the items originally ordered.*

- |   |  |
|---|--|
| <input type="checkbox"/> Yes – physical product was shown | <input type="checkbox"/> Yes – digital image was shown |
|---|--|

Yes – verbally only (nothing shown) N/A – no substitutions were needed No substitutions were reviewed

26. If you selected a specific backup item to substitute, was that item provided to you if the initial item was not available?

 Yes N/A – I did not select a specific backup item No N/A – no substitutions were needed

27. Were all items you ordered accounted for when you picked up the order?

*When answering this question, do not consider substituted items or out-of-stock items already communicated by an associate. If you are missing an item, but you were told it was out of stock/unavailable, answer Yes. If you received a different item but it is obviously a substitution for the original item, answer Yes. If you were missing an item completely that shows on your digital order/receipt with no explanation or substitution provided, answer No.*

 Yes No

28. If no, how many items were missing?

 1 4 2 5 or more 3 N/A

29. Were any items included that you did not order (i.e., another customer's items)?

*When answering this question, do not consider substituted items or free samples provided by the store. If you received a totally different item than expected (clearly not a substitution), answer Yes. If you received an item you were told was a substitution (or substitutions were not reviewed, but it appears to be a substitution for an item you ordered), answer No. If the items appear to be free samples, answer No.*

 Yes No

30. Were items bagged to prevent cross-contamination and to protect the integrity of the products?

*Chemicals must be kept separate from food items. Organic produce must be separate from non-organic produce. Fresh meat should be individually bagged in a clear plastic bag. Crushable items like bread, eggs, or chips should be placed on top of heavier items. Associates should follow these bagging protocols even if you brought your own bags. If the associate did not re-bag your items (you did it yourself) or you did not bring sufficient bags, answer Yes.*

 Yes No

31. If no, which issues were noted?

*Select all that apply.*

 Chemicals bagged with food items Crushable items placed under heavier items Organic produce bagged with non-organic N/A Fresh meat not packaged separately in a clear bag

32. Did the items in your order appear fresh?

*Produce items should be bright in color, and chilled items should be cold to the touch. If you did not purchase any consumable items, answer Yes.*

 Yes No

33. If no, which issues were noted?

*Select all that apply.*

 Produce was not bright in color Dairy item (milk, eggs, yogurt) was not cold to the touch Produce was warm or wilted Dairy item (milk, eggs, yogurt) was leaking Fresh or packaged meat or fish was not cold to the touch Frozen item was not cold to the touch Fresh bread/bakery item was hard or stale

Jar or seal on a box was leaking/opened  N/A

**34. If you ordered avocados or bananas, did you receive the level of ripeness you selected when ordering?**

*Select N/A if you did not order avocados or bananas, you did not select a ripeness level, or the app did not offer this feature.*

Yes  N/A

No

**35. Were the items in your order within the printed expiration/sell-by date?**

*If you did not purchase any items with an expiration/sell-by date, answer Yes.*

Yes  No

**36. If no, select the departments expired items were received from:**

*Select all that apply.*

<input type="checkbox"/> Produce	<input type="checkbox"/> Dairy (milk, eggs, yogurt)
<input type="checkbox"/> Bakery	<input type="checkbox"/> Center aisles (dry and packaged goods)
<input type="checkbox"/> Deli	<input type="checkbox"/> Non-food item (OTC medication, vitamins, batteries, beauty supplies, etc.)
<input type="checkbox"/> Meat	<input type="checkbox"/> N/A
<input type="checkbox"/> Seafood	
<input type="checkbox"/> Frozen	

**37. Based on your experience, how likely are you to recommend this service to a friend or colleague?**

*10 = Highly likely; 0 = Not at all likely*

<input type="checkbox"/> 10	<input type="checkbox"/> 4
<input type="checkbox"/> 9	<input type="checkbox"/> 3
<input type="checkbox"/> 8	<input type="checkbox"/> 2
<input type="checkbox"/> 7	<input type="checkbox"/> 1
<input type="checkbox"/> 6	<input type="checkbox"/> 0
<input type="checkbox"/> 5	

**38. Select all types of bags you received when you picked up your order:**

<input type="checkbox"/> Brown plastic	<input type="checkbox"/> Other bag type/color
<input type="checkbox"/> White plastic	<input type="checkbox"/> No items were bagged
<input type="checkbox"/> Blue plastic	<input type="checkbox"/> N/A – I brought my own bags
<input type="checkbox"/> Brown paper	

**39. Was the order successfully fulfilled by the store on the confirmed pickup date?**

<input type="checkbox"/> Yes	<input type="checkbox"/> No, entire order was cancelled by store before scheduled pickup time
<input type="checkbox"/> No, date was pushed back by store after order was placed	

**40. If the entire order was cancelled, please explain:**

*Include the date/time your order was originally scheduled for pickup, the date were notified of the cancellation, and how you were notified or what was said about the cancellation. If you were sent a text or email notifying you of the cancellation, please upload it.*

**41. Time range order was picked up at store:**

<input type="checkbox"/> Monday AM	<input type="checkbox"/> Wednesday AM
<input type="checkbox"/> Monday PM	<input type="checkbox"/> Wednesday PM
<input type="checkbox"/> Tuesday AM	<input type="checkbox"/> Thursday AM
<input type="checkbox"/> Tuesday PM	<input type="checkbox"/> Thursday PM

Friday AM

Saturday PM

Friday PM

Sunday AM

Saturday AM

Sunday PM

42. Upload a clear image of your digital receipt for your purchase:

END OF QUESTIONNAIRE