

# SUMMIT RETAIL SOLUTIONS

## WHIP-IT SAMPLE SHOW AUDIT

# INSTRUCTIONS • QUESTIONNAIRE

You will visit the assigned Costco/Sam's Club store and locate the Whip-It display and Whip-It representative. The display may also be referred to as a sample station or roadshow. You must have an active Costco/Sam's Club membership to complete this shop. You will thoroughly evaluate the appearance and presentation of the representative. You will also thoroughly evaluate the display and discreetly take several photos.

### Before You Begin

- Review your shop confirmation
- Know your scenario
- Know your assigned location & timeframe
- Plan ahead—must go on assigned shop date
- Review photo requirements

### Don't Forget!

- Follow instructions for locating display
- Fully evaluate representative & display
- Obtain the name of the representative
- Observe display & take specific photos
- Submit survey same-day by 8PM CST



### General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
- Answer all questions and provide detailed supporting narrative to explain your responses.
- Take a selfie photo for shop validation (this is your “receipt”).
- Do not reveal your identity as a mystery shopper to anyone at any time.
- Do not say or do anything to limit the opportunity for the associate(s) to perform the behaviors the survey is designed to evaluate.
- Submit your report to [shopperhub.cxgroup.com](https://shopperhub.cxgroup.com) by 8PM CST the same day as your shop. If your survey is not submitted by the deadline, it will be automatically cancelled.
- 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 Costco/Sam's Club/Whip-It.
- Children are not allowed to accompany you on this shop.
- You must have an active Costco/Sam's Club membership to complete this shop. If you are not an active Costco/Sam's Club member, contact your scheduler immediately to cancel this shop.
- Failure to follow the specifications for this project as outlined in this document may result in shop cancellation and non-payment.
- **The client is able to verify staff activity and sales during your assigned shop time! All information reported in your survey form must be accurate.**



## About the Client

- Whip-It is an all-purpose cleaner and stain remover company with pop-up displays located in Costco/Sam's Club stores. They make eco-friendly, plant-based cleaners that offer powerful stain removal without harsh chemicals.
- Visit the Whip-It website to learn more about their products and brand: [amazingwhipit.com](https://amazingwhipit.com).



## Shop Instructions

### Step #1: Arrive at the assigned location and locate the Whip-It display.

- You must go on your assigned shop date.
  - If you are assigned a specific timeframe, you must arrive at least 30 minutes before the end of your assigned timeframe. If you arrive too late, you may not be able to complete the full shop within the timeframe.
  - If you are not assigned a specific timeframe, call or look online to verify store hours and arrive at least 1 hour prior to closing time.
- Walk the store upon arrival to see if you can find the Whip-It display on your own.
  - If you cannot find the Whip-It display after browsing the store for at least 20 minutes, go to customer service and ask if there is a Whip-It display.
- If a representative is not there when you locate the Whip-It display:
  - Verify if a "Break" sign is visible. The sign might say "On Break," "Be Back Soon," or something similar. Any of these count as a "Break" sign.
  - Browse the store for at least 20 minutes to give them time to return to the display. You can also use this time to discreetly take the required photos of the display. If the representative does not return, go to customer service and ask for the Whip-It representative to be paged, then wait for the representative to come and assist you.
  - If there is a time indicated when the representative will return, and it is reasonable/within 20 minutes, you must wait (e.g., do not leave at 11:55 if the break sign indicates the representative will be back at 12:00—wait an extra 5-7 minutes to allow them time to return).
- If you must go to customer service, be sure to do this before the end of your assigned timeframe.
- If you are told by customer service there is no display and/or no representative is present at the store that day, include all details in your shop narrative.

### Step #2: Thoroughly evaluate the Whip-It display.

- Observe the display for specific compliance standards:
  - If pallets are visible, products are securely stacked and not at risk of falling or causing injury.
  - Personal items (cell phone, personal food/drink) are not visible.
  - Display area is clean and organized.
  - If the representative is on break, all display components are stored out of customer reach.
  - Table covers and banner are in good condition.

- Price signs are visible and in good condition.
- Observe the receiving area (the area behind/next to the display area). If excess inventory is present, evaluate if organized neatly and still wrapped, there are no loose products/boxes.

Example of Whip-It display:



**Step #3: Interact with the Whip-It representative.**

- Briefly interact with the representative to evaluate specific appearance and presentation compliance standards.
- Approach the display and express interest in what the representative is selling. Allow the representative to ask questions to learn about your needs, describe the products, etc.
- Appearance standards:
  - Representative is wearing a visible name tag.
    - If no or you can't read it, ask for their name.
  - Representative is wearing business casual clothing.
    - The representative should be wearing a black polo shirt, black pants (no jeans!), and black shoes. Note in your narrative if the representative is wearing any unacceptable attire.
- Presentation standards:
  - Representative is inviting/pulling members into the display area to avoid traffic backup in the aisles.
  - Representative explains price using high-low-savings method.
    - For example, "The retail price is normally \$40, the Costco price is \$35, so your savings is \$5."
    - Ask about price if the representative does not proactively mention by the end of your conversation.
  - Representative engages customers appropriately (friendly, focused, smile/eye contact, etc.).
  - Representative discusses product benefits.



## Photo Requirements

### WHIP-IT DISPLAY—IF YOU LOCATED THE DISPLAY:

- The client requires you to take THREE (3) DIFFERENT PHOTOS to show the front, side, and back of the display from different angles:
  - A clear photo of the front of the display
  - A clear photo of the side of the display
  - A clear photo of the back of the display
- Include the representative in the photos if possible to do so discreetly/without the representative knowing. It should NOT be obvious or made known to the associate that you are taking pictures. Do NOT ask the associate if you can take a photo! If the associate appears to be posing in your photo, your shop will not be valid.
- If the display is busy, do your best to get a clear photo of the display and the associate around other customers (it is OK if customers are visible in the photo).
- If the display is not located in an area where you can get clear photos from all three angles, do your best to get three clear photos of the display from DIFFERENT ANGLES and explain in your narrative. It must be clear in the photos that the location did not allow for all three angles to be captured.

### STORE AISLES & LOCATION STOREFRONT—IF YOU DID NOT LOCATE THE DISPLAY:

- If you were not able to locate the display after walking the store for 20 minutes AND asking customer service, the client requires THREE (3) DIFFERENT PHOTOS of the store:
  - Two (2) clear photos showing wide angles of DIFFERENT aisles of the store.
  - One (1) photo of the outside of the store, showing the front of the location, including the store name.

### LOCATION EXTERIOR SELFIE:

- Discreetly take one (1) selfie-style photo in front of the location exterior.
- No purchase is required for this shop. Your selfie is your “receipt” for the shop.
- This photo MUST show YOU in the picture (selfie-style).
- The location/building with identifying exterior signage must be visible in the background.
- Note that this photo is different from a regular location storefront photo. If you did not find the display, you should NOT be in the regular location exterior photo that you upload in your survey, but you MUST be in the selfie photo that you upload in the Shop Validation section—these are two different pictures.

**Shops that do not include the required photos/documentation as outlined above will be rejected without payment.**

**All photos will be verified by BestMark to ensure the correct location was visited on the assigned shop date during the assigned timeframe. Blurry photos or photos that appear invalid will not be accepted and result in shop cancellation.**



# QUESTIONNAIRE

**Shop date:**

**Start time:**

**End time:**

## Attendance

**1. Date of Audit:**

*Format response as MM/DD/YYYY*

**2. Day of Audit:**

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

**3. Start Time of Audit:**

*Format response as hh:mm AM/PM*

**4. End Time of Audit:**

*Format response as hh:mm AM/PM*

**5. At least one staff member is present OR a break sign is visible:**

*Select Yes if you end up interacting with a representative (e.g., if there is no rep present initially or you can't find the show at first, but you ask at customer service and do end up finding the show and interacting with the rep, select Yes and explain the details in the narrative). Select No if you are never able to interact with the rep.*

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

**6. If no, which of the following apply?**

*Select "Show was there, just no staff member" if you found the show, but never ended up interacting with the rep even after following the shop instructions for how to locate them. Select "Shopper did not locate show" if the show was not present, which you verified with staff following the shop instructions.*

- Show was there, just no staff member
- Shopper did not locate show
- N/A

**7. Indicate the staffing size present during your audit:**

- Single (1 rep)
- Double (2 reps)
- Triple (3 reps)
- None (0 reps) - show or rep not present

**Appearance/Hygiene/Presentation****8. Indicate the name of the Representative:****9. Indicate the approximate age of the Representative:**

- |                                     |                                      |
|-------------------------------------|--------------------------------------|
| <input type="checkbox"/> 20 or less | <input type="checkbox"/> 41 - 45     |
| <input type="checkbox"/> 21 - 25    | <input type="checkbox"/> 46 - 50     |
| <input type="checkbox"/> 26 - 30    | <input type="checkbox"/> 51 - 55     |
| <input type="checkbox"/> 31 - 35    | <input type="checkbox"/> 56 or older |
| <input type="checkbox"/> 36 - 40    |                                      |

**10. Indicate the gender of the Representative:**

- Male
- Female
- Prefer not to answer

**11. Was the Representative wearing glasses?**

- Yes
- No

**12. Indicate the hair color of the Representative:**

- |  |                                      |
|--|--------------------------------------|
| <input type="checkbox"/> Auburn/Red        | <input type="checkbox"/> Brown       |
| <input type="checkbox"/> Green/Blue/Purple | <input type="checkbox"/> Dark Brown  |
| <input type="checkbox"/> Black             | <input type="checkbox"/> Gray/White  |
| <input type="checkbox"/> Blonde            | <input type="checkbox"/> Shaved/Bald |
| <input type="checkbox"/> Light Brown       |                                      |

**13. Indicate the hair length of the Representative:**

- |  |   |
|--|---|
| <input type="checkbox"/> Short           | <input type="checkbox"/> Long           |
| <input type="checkbox"/> Ear Length      | <input type="checkbox"/> Pulled Back/Up |
| <input type="checkbox"/> Shoulder/Collar | <input type="checkbox"/> Shaved/Bald    |
| <input type="checkbox"/> Mid-Back        |   |

**14. Indicate the approximate height of the Representative:**

- |                                      |                                      |
|--------------------------------------|--------------------------------------|
| <input type="checkbox"/> 5' or less  | <input type="checkbox"/> 5'10"       |
| <input type="checkbox"/> 5'1"        | <input type="checkbox"/> 5'11"       |
| <input type="checkbox"/> 5'2" - 5'3" | <input type="checkbox"/> 6' - 6'1"   |
| <input type="checkbox"/> 5'4" - 5'5" | <input type="checkbox"/> 6'2" - 6'3" |
| <input type="checkbox"/> 5'6" - 5'7" | <input type="checkbox"/> 6'4" plus   |
| <input type="checkbox"/> 5'8" - 5'9" |                                      |

**15. Indicate the apparent race of the Representative:**

- |   |   |
|---|---|
| <input type="checkbox"/> African-American | <input type="checkbox"/> Middle Eastern or Arab |
| <input type="checkbox"/> Caucasian        | <input type="checkbox"/> Native-American        |
| <input type="checkbox"/> East Asian       | <input type="checkbox"/> Other                  |
| <input type="checkbox"/> South Asian      | <input type="checkbox"/> Prefer not to answer   |
| <input type="checkbox"/> Hispanic         |   |

**16. Representative is wearing a visible name tag, above waist and near chest area:**

- Yes (10 points)  
 No (0 points)  
 N/A - representative not present

**17. Representative is dressed in business casual attire - black polo shirt, blank pants (NO JEANS), black shoes:**

*The representative should be wearing a black polo shirt, black pants (no jeans!), and black shoes. Note in your narrative if the representative is wearing any unacceptable attire.*

- Yes (10 points)  
 No (0 points)  
 N/A - representative not present

**18. Representative is pulling customers close to the display to avoid traffic backup in the aisles:**

- Yes (10 points)  
 No (0 points)  
 N/A - representative not present

**19. Representative is properly explaining price using high-low-savings when pitching a customer - retail price, special Costco member price, savings:**

*For example, "The retail price is normally \$40, the Costco price is \$35, so your savings is \$5." Ask about price if the representative does not proactively mention by the end of your conversation.*

- Yes (10 points)  
 No (0 points)  
 N/A - representative not present

**20. Representative is engaging customers appropriately:**

- Yes (10 points)  
 No (0 points)  
 N/A - representative not present

**21. Representative is discussing product benefits to customers:**

- Yes (10 points)  
 No (0 points)  
 N/A - representative not present

**Display Compliance****22. Products are securely stacked on pallets on the sales floor and are not at risk of falling or causing injury:**

*Select N/A if there are no pallets visible.*

- Yes (10 points)  
 No (0 points)  
 N/A - no pallets visible

**23. Personal items and supplies (including cell phone, personal food/drink) are not visible:**

- Yes (10 points)  
 No (0 points)

**24. Display area is clean, organized, and free of trash:**

- Yes (10 points)  
 No (0 points)

**25. If observed during break, all display components (i.e., sample products) are stored out of customer reach:**

*Select N/A if you did not observe the display during the rep's break.*

- Yes (10 points)  
 No (0 points)  
 N/A - did not observe display during rep's break

**26. Table covers, pallet wraps, and banner are in good condition and not wrinkled or faded:**

- Yes (10 points)  
 No (0 points)

**27. Price signs are visible and in good condition:**

- Yes (10 points)  
 No (0 points)

**28. Excess inventory located in the receiving area is organized neatly and still wrapped, there are no loose products/boxes, etc.:**

*The receiving area is the area behind/next to the display area. Select N/A if there is no excess inventory present.*

- Yes (10 points)  
 No (0 points)  
 N/A - no excess inventory present

**Photos****29. Do you have a photo of the front of the sample show?**

*Select Yes and upload your photo of the front of the sample show. If you did not locate the display, select No, upload one of your wide-angle aisle photos here, and explain the details in the narrative.*

- Yes  
 No

**30. Do you have a photo of the side of the sample show?**

*Select Yes and upload your photo of the side of the sample show. If you did not locate the display, select No, upload a different wide-angle aisle photo here, and explain the details in the narrative.*

- Yes  
 No

**31. Do you have a photo of the back of the sample show?**

*Select Yes and upload your photo of the back of the sample show. If you did not locate the display, select No, upload your photo of the outside of the store showing the front of the location and store name (NOT your selfie - you should NOT be in this photo), and explain the details in the narrative.*

- Yes  
 No

**Lasting Impressions****32. Overall, how would you rate the atmosphere of the sample station?**

- Exceeds  
 Meets  
 Disappoints  
 N/A - show not present and/or rep not present



**33. Overall, how did you feel the sample station fit the environment of the location?**

- Adds to the environment
- Fits the environment but does not add to it
- Detracts from the environment
- N/A - show not present and/or rep not present

**34. Did you walk away with a positive impression of the sample station staff?**

- Yes
- No
- N/A - show not present and/or rep not present

**35. Whip-It Audit Supporting Narrative:**

*Explain the responses you selected in this survey. Detail what happened during your experience, and provide any comments about the sample station that you feel would be useful to the staff running the sample shows. Be sure to explain all "No" responses. If you did not interact with a representative and/or the sample station was not present, fully explain what steps you took to attempt to locate the rep and display. You must enter between 250 and 2000 characters.*

**Shop Validation****36. Did you take a location exterior selfie photo?**

*Select Yes then upload your location exterior selfie.*

- Yes
- No

**37. If you do not have a location exterior selfie photo, explain why:**

*Enter N/A if you uploaded your selfie.*

END OF QUESTIONNAIRE