

SUMMIT RETAIL SOLUTIONS

READY REFRESH SAMPLE SHOW AUDIT

INSTRUCTIONS • QUESTIONNAIRE

You will visit the assigned BJ's/Sam's Club store and locate the Ready Refresh display and Ready Refresh representative. The display may also be referred to as a sample station or roadshow. You do not need to have a store 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 9PM EST



General Requirements

- **Submission Deadline: 9:00 PM EST the same day of your scheduled shop date.** The deadline is noted in eastern standard time. If your completed survey is not submitted to shopperhub.cxgroup.com by the deadline, it will be automatically cancelled.
- 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.
- 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 BJ's/Sam's/Ready Refresh.
- Children are not allowed to accompany you on this shop.
- You do not need to have a store membership to complete this shop! The Ready Refresh display is located inside the assigned BJ's/Sam's Club store. If you are not a BJ's/Sam's Club member, you should still be able to enter the store to complete this shop. If there is a person at the door who says you can't enter without a membership, say that you are headed to membership services to inquire about a membership.

- 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

- Ready Refresh is a bottled water and beverage delivery service. Their goal is to help reduce plastic in the environment by transitioning customers from individually bottled water to the 5-gallon jugs, which they deliver.
- Visit the Ready Refresh website to learn more about their products and services: readyrefresh.com.



Shop Instructions

Step #1: Arrive at the assigned location and locate the Ready Refresh 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 Ready Refresh display on your own*.
 - The display is almost always on an end cap or near the water section/water aisle.
 - Walk the entire store. Your shop is scheduled during a time when a Ready Refresh representative is scheduled to be working.
 - You must spend at least 20 minutes walking the store (check every aisle and end cap).
- If a representative is not there when you locate the Ready Refresh display**:
 - 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.
 - Note 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.
 - If there IS a "Break" sign, and a time is 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 there is NOT a "Break" sign OR if the representative does not return by the indicated time, go to customer service and ask for the Ready Refresh representative to be paged. You must specifically request a page and then wait for the representative to come and assist you.
- If you must go to customer service, be sure to do this before the end of your assigned timeframe.
- If you must go to customer service, you must get the name of the associate you spoke to. Ask for the customer service associate's name if they are not wearing a readable name tag.

**In the rare instance you are unable to locate the Ready Refresh display on your own after walking the store for 20 minutes and checking every aisle and end cap, then go to customer service and directly ask where the Ready Refresh display is.*

***If there is no obvious display or representative, note if you see any individuals in business casual clothing, around the water area, with their phones out—this could be the representative. The representative may or may not be wearing a name tag. Browse near them to see if they proactively say anything to you. Do NOT directly ask them any questions if you aren't sure if they are the representative (i.e., it's possible they are just a normal customer).*

Step #2: Thoroughly evaluate the Ready Refresh display.

- Observe the display for specific compliance standards:
 - Display area is clean and organized.
 - Look for any handwritten signage or phone numbers—the store number being written in near the QR code is expected, but there should be no handwritten signage other than the store number written in near the QR code.

Example of Ready Refresh display:



Step #3: Interact with the Ready Refresh representative.

- Briefly interact with the representative to evaluate specific appearance and presentation compliance standards.
- **During your evaluation, please remain attentive to any statements made by the representative(s) that are directed at you or clearly audible in your presence relating to (Politics, Religion, Gender, Race, or Immigration).**
 - **If such comments occur, be sure to document them in your overall narrative section.**

- 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 product benefits, discuss any fees or special offers, etc.
- Appearance standards:
 - Representative is wearing business casual clothing.
 - The representative should be wearing navy blue or black professional tops or polo and khaki, black, or gray pants. Jeans, jackets/coats, hoodies, hats, t-shirts, open-toed shoes, and/or brightly colored sneakers are NOT acceptable attire. Note in your narrative if the representative is wearing any unacceptable attire.
 - Representative is wearing a visible name badge.
 - It is standard practice that name badges are worn by all representatives.
 - Name badges CANNOT display the BJ's/Sam's Club logo. The client does not want customers confusing vendors with their own employees. If the representative is wearing a name badge BUT it has the BJ's/Sam's Club logo on it, select "No" (to indicate no name badge) in your survey, but explain the circumstances in the narrative.
 - If the representative is not wearing any name badge or you cannot read it, ask for their name AND explain in your narrative.
 - Note if the representative is standing or sitting and where you interacted with the representative during your visit.
 - The representative should be standing, not sitting.
 - The associate should be AT the display or within 10 feet of the display. Describe where the associate was present in your survey narrative.
- Presentation standards:
 - Representative discloses delivery fee.
 - If the representative does not proactively offer this information, ask, "Is there a delivery fee?"
 - Response should be: "Yes. The first delivery is free, but after that there is a \$9.99 flat rate per delivery."
 - \$9.99 is the most common rate, although it may vary depending on where you are located.
 - Representative discloses security deposit.
 - The deposit is \$20.
 - Do not prompt, but evaluate if the representative proactively discloses this information.
 - Representative discloses dispenser rental fees.
 - The rental fee is typically \$1.99 and is charged monthly. Some stores might be different, but it is NEVER free. Any fee higher than \$1.99 would be for an upgraded model—do not inquire about those, but note if they are mentioned by the representative.
 - Do not prompt, but evaluate if the representative proactively discloses this information.
 - Representative offers 5-gallon dispenser service or case pack delivery.
 - Indicate which was mentioned first during the interaction.
 - Prompt if the representative does not proactively disclose this information by saying, "What types of delivery services do you offer?"
 - Indicate if the representative shared anything about signing up for the service to get the free

water and then cancelling shortly after.

- Indicate if the rep shared that this is a recurring delivery service, a one-time service, or both.
- Representative discloses that you will receive a gift card and when.
 - The promotion is a \$25 Amex card sent via regular mail 6-8 weeks after your first delivery. Indicate if the representative shares any other amount or timeframe with you during your conversation.
 - Prompt if the representative does not proactively disclose this information. For example, "I heard there is a gift card when you sign up, can you tell me more about that?" "How much is it for?" "When would I get it?"
- Note if the representative uses their phone or the customer's (i.e., your phone) for sign-up.
 - The representative should ALWAYS use the customer's device (i.e., your phone). No customer information should ever be entered into the representative's personal device.
 - Please note you do NOT need to sign up for the service. For the purpose of answering this question, evaluate if the representative attempts to use their phone or your phone to start the sign-up process.



Photo Requirements

READY REFRESH 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:

- It will be rare not to locate the display.
- If you were not able to locate the display after walking the store for 20 minutes, checking every aisle and end cap, AND asking customer service, the client requires THREE (3) DIFFERENT PHOTOS of the store:
 - At least one (1) clear photo of the water section/aisle.
 - At least one (1) clear photo of the end caps near the water section/aisle.
 - One (1) photo of the outside of the store, showing the front of the location, including the store name.

- You should NOT be visible in any of these photos. Your photos of the water section/aisle should clearly show that the Ready Refresh display was not present in that area. Take multiple photos from different angles.

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 appearance:

The representative should be wearing a navy blue or black professional top or polo, and khaki, black, or gray pants. Jeans, jackets/coats, hoodies, hats, t-shirts, open-toed shoes, and/or brightly colored sneakers are NOT acceptable attire. Note in your narrative if the representative is wearing any unacceptable attire.

- Appearance is neat and professional, wearing business casual clothing (i.e., no t-shirts, no white sneakers, no jeans) (10 points)
- Appearance in need of minor attention, but still wearing business casual clothing (5 points)
- Appears unprofessional, poorly groomed, or not wearing business casual clothing (0 points)
- N/A - representative not present

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

Name badges CANNOT display the BJ's/Sam's Club logo. The client does not want customers confusing vendors with their own employees. If the representative is wearing a name badge BUT it has the BJ's/Sam's Club logo on it, select "No" (to indicate no name badge), but explain the circumstances in your narrative.

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

18. Indicate if the representative is standing or sitting:

- Standing (10 points)
- Sitting (0 points)
- N/A - representative not present

19. Representative is properly disclosing the delivery fee:

If the representative does not proactively offer this information, ask. The response should be: "Yes. The first delivery is free, but after that there is a \$x.xx flat rate per delivery." \$9.99 is the most common rate, although it may vary depending on where you are located.

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

20. Representative is disclosing the security deposit:

The deposit is \$20. Do not prompt, but evaluate if the representative proactively discloses this information.

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

21. Representative is accurately disclosing dispenser rental fees:

Do not prompt, but evaluate if the representative proactively discloses this information. The rental fee is typically \$1.99 and is charged monthly. Some stores might be different, but it is NEVER free. Any fee higher than \$1.99 would be for an upgraded model—do not inquire about those, but note if they are mentioned by the representative.

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

22. Indicate if the representative is using their phone or the customer's phone for sign-up:

The representative should ALWAYS use the customer's device (i.e., your phone). No customer information should ever be entered into the representative's personal device. You do NOT need to sign up for the service. For the purpose of answering this question, evaluate if the representative attempts to use their phone or your phone to start the sign-up process.

- Representative's phone (0 points)
- Customer's phone (10 points)
- N/A - representative not present

Representative Interaction

23. Did the rep offer you the 5-gallon with dispenser service or case pack delivery first?

*Prompt if the representative does not proactively disclose this information by saying, "What types of delivery services do you offer?"
Select the response that aligns with the service they offer FIRST.*

- 5-gallon with dispenser service
- Case pack
- N/A - representative not present

24. Indicate how much the rep told you the gift card would be for:

Format response as xx.xx (e.g., 25.00 for \$25). Do not enter a \$ sign.

25. When did the rep say you would receive the \$25 gift card?

Prompt if the representative does not proactively disclose this information. For example, "I heard there is a gift card when you sign up, can you tell me more about that?" "How much is it for?" "When would I get it?" (NOTE: The promotion is a \$25 Amex card sent via regular mail 6-8 weeks after your first delivery. Indicate in your narrative if the representative shares any other amount or timeframe with you during your conversation.)

- 1-2 weeks from first delivery (0 points)
- 3-5 weeks from first delivery (0 points)
- 6-8 weeks from first delivery (10 points)
- Other (0 points)
- N/A - representative not present

26. If other, indicate when the rep said you would receive the \$25 gift card:

27. Did the rep say anything about signing up to get free water then just cancel?

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

28. If yes, explain what was said about signing up to get free water then canceling:

29. Did the rep say this is a recurring delivery, a one-time service, or both?

- Recurring delivery
- One-time service
- Both
- N/A - representative not present

30. Is there any handwritten signage or phone numbers, etc.?

The store number being written in near the QR code is expected, but there should be no handwritten signage other than this. Select Yes if there is OTHER handwritten signage present.

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

31. If yes, indicate what handwritten signage/phone number was present:

Do not include the store number being written in near the QR code.

32. Where did you speak with the rep?

The representative should be at the display or within 10 feet of the display. Describe where the rep was present in your narrative.

- At/near the display (10 points)
- In a random location not near the display (0 points)
- Near the water/beverage section (0 points)
- Other (0 points)
- N/A - representative not present

33. If other, indicate where you spoke with the rep:**34. Did the rep make clear this was a recurring delivery service?**

- Yes (1 points)
- No (2 points)
- N/A - representative not present

35. If no, indicate what was said about the delivery service:**Display Compliance****36. Display area is clean, organized, and free of trash:**

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

Photos**37. 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 your photo of the water section/aisle here, and explain the details in the narrative.

- Yes
- No

38. 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 your photo of the end caps near the water section/aisle here, and explain the details in the narrative.

- Yes
- No

39. 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**40. Overall, how would you rate the atmosphere of the sample station?**

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

41. 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

42. 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

43. Ready Refresh 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**44. Did you take a location exterior selfie photo?**

Select Yes then upload your location exterior selfie.

- Yes
 No

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

Enter N/A if you uploaded your selfie.

END OF QUESTIONNAIRE