



CustomerFirst™

Mystery Shop Program

Focusing on the Customer Experience





Chevron Customer First Mystery Shop Program

Focusing on the Customer Experience

The Customer First Mystery Shop Program measures our success at meeting the cleanliness and service standards that help set the Chevron and Texaco brands apart from the competition. Through surveys conducted by “mystery shoppers” – customers hired to evaluate our facilities anonymously – you can gain insights into the areas in which you excel, and the areas that offer opportunities for improvement.

Who are these “mystery shoppers”?

Anyone who comes to your facility could be a mystery shopper; mystery shoppers look and act just like all your other customers. The only difference is that they're trained to recognize excellence in the appearance of your facility and the service you provide.

A mystery shopper will visit your facility once every quarter. Visits can occur between 6 a.m. and 10 p.m. any day of the week.

What's in this thing?

There are 26 questions on the mystery shop survey, worth a total of 100 points. (Survey questions, standards, and point values are included at the end of this guide.)

The survey covers three areas:

1. Forecourt (approach and fueling area)
2. Store and restroom
3. Customer service delivery (including CSR appearance).

What if I disagree with my results?

Mystery shoppers are trained on our facility standards and service expectations. If you strongly believe that points were deducted from your results in error, you can file a Request for Action (RFA) to appeal for reinstatement of lost points or clarification on the reason for the deduction. It is only to be used when you have a legitimate disagreement with your results. You will be asked for a detailed explanation and supporting evidence, and past results will not be accepted as “proof” that current results are inaccurate.

Mystery Shop Period	Timing
1	January 1 - March 31
2	April 1 - June 30
3	July 1 - September 30
4	October 1 - December 15

RFA Process

Marketer/Retailer submits RFA



1 business day

Maritz reviews RFA and recommends course of action to Chevron



3 business days

Chevron approves or revises Maritz's recommendation



1 business day

Maritz notifies Marketer/Retailer of RFA decision and updates site report

If there is sufficient reason to challenge the result of your RFA, you may file an escalation within two weeks of the RFA deadline for the appropriate mystery shop period.

Request for Action (RFA) Deadline

April 15

July 15

October 15

December 31



Retail Excellence

Maritz Research, Chevron's mystery shop services partner, trains the shoppers who visit our stations and supports our Web site, Retail Excellence.

Accessible through Chevron Business Point at the path below, Retail Excellence and the Customer First reporting tool provide mystery shop survey results, ranking summaries, and resources to help you identify performance gaps and turn results into action.

[Chevron Business Point > Marketing > Performance Programs > Customer First > Customer First Reporting](#)

What's in it for me?

In addition to helping fulfill the brand promise – providing a premium brand experience to every customer on every visit – Customer First gives Chevron the opportunity to recognize and reward outstanding service. The awards detailed in the table below are based on the total number of points that a station earns over four mystery shops.

	Gold Level	Silver Level	Bronze Level	40 Club	100 Club
Criteria	Earn an average over four mystery shop periods to rank from 1 st to 46 th place in your region	Earn an average over four mystery shop periods to rank from 47 th to 87 th place in your region	Earn an average over four mystery shop periods to rank from 88 th to 387 th place in your region	Earn a perfect score on the Customer Service Delivery section of the survey	Earn a perfect score on the survey
Eligibility	Retailers	Retailers	Retailers	CSRs	Retailers
Number of Awards	East Retailers: 46 per year West Retailers: 46 per year	East Retailers: 41 per year West Retailers: 41 per year	East Retailers: 300 per year West Retailers: 300 per year	Unlimited; awarded after the close of each mystery shop period	Unlimited; awarded after the close of each mystery shop period
Award*	\$1,000	\$750	\$350	\$40	\$100

* Company-operated stations are not eligible to win Club Awards or Gold, Silver, or Bronze Level Awards. Certificates of appreciation are available to all customers on the home page of the Customer First reporting tool.

Spend one hour per week at the pump island inviting people to complete a credit card application.



Regional Recognition Events

Gold, Silver, and Bronze Level Award winners and their guests will be invited to attend district-wide or regional celebrations in their honor. The regional celebration will feature special events designed exclusively for Chevron, private tours of popular attractions, and free time for shopping or taking in the local culture.

Contest Tiebreakers

If two or more facilities earn the same number of points, a two-level tiebreaker will determine award winners.

- **Level One Tiebreaker:** Tied facilities will be ranked a second time based on their average annual Image Execution evaluation scores.
- **Level Two Tiebreaker:** Facilities that are still tied after the level one tiebreaker will be ranked a third time based on periods in which they obtained a minimum of three approved credit card applications (up to a maximum of four periods).

Tell your employees that nothing is more important than the customers standing in front of them – including you!

How do I earn a Gold Recognition Award?

Marketers are eligible for a Gold Recognition Award if all of their eligible facilities are enrolled in Customer First, and if their facilities score a minimum average of 90 percent on their mystery shop surveys. Marketers who meet these criteria will be ranked within volume groups by total average score to determine which award winners will earn an invitation to their district-wide or regional recognition event, as illustrated in the table below.

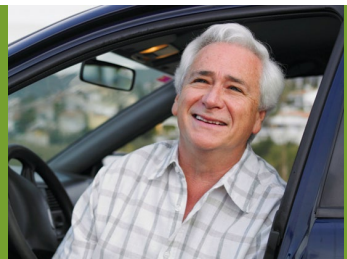
2012 Year-end Volume* (Gallons)	Number of Awards	
	East	West
50 million or more	3 per year	3 per year
25 - 49.9 million	5 per year	3 per year
15 - 24.9 million	4 per year	1 per year
5 - 14.9 million	3 per year	1 per year

* Volume categories are set at the beginning of the program year and are based on the previous year's year-end volume of Chevron and Texaco MOGAS only; diesel volume is excluded.

How can I help my employees help customers?

- Remind CSRs of the financial incentives for perfect scores: \$40 for the employee who scores the full 40 points on the Customer Service Delivery section of the survey and \$100 for a storewide recognition event.
- Develop your own incentive program to supplement the Chevron awards.
- Acknowledge employees who perform well. Positive feedback reinforces good habits, and public recognition motivates everyone to succeed.
- Suggest that CSRs keep their name badges at the station so they won't leave them at home.
- Ask employees for their input. Many will welcome the opportunity to be part of the solution instead of part of the problem.

Have the items that your regular customers purchase ready for them when they walk into the store.



Why should I hand out credit card applications?

Converting customers to a Chevron and Texaco Credit Card can help save your station money while helping to increase fuel sales. Our experience has shown that our cardholders are more loyal to the brands and purchase more fuel per transaction than non-cardholders. And most of our cards have zero transaction fees, which can equate to increased sales and decreased cost.

Handing out applications can be an easy step to earning the monthly and annual Credit Card Awards, and approved applications sourced from your facility can help break ties for the annual awards.* To help ensure that you receive the credit you deserve, stamp or write your facility number on all your applications. Employees can also include their Employee ID to identify the person who handed out the application.

Criteria	Annual Awards [†]			Monthly Awards	
	First Prize	Second Prize	Third Prize	Consumer Card	Business Card
Criteria	Open the most new credit card accounts overall in your region	Open the most new credit card accounts in your district	Open 36 or more new credit card accounts	Submit a valid and complete consumer card application	Open a new business card account
Eligible Team Member	Retailers	Retailers	Retailers	Customer Service Representatives	Customer Service Representatives
Number of Awards	East Retailers: 1 per year West Retailers: 1 per year	10 per year (1 per district)	Unlimited	Unlimited	Unlimited
Cash Award	\$3,000	\$1,500	\$1,000	\$2	\$50

* To be eligible for annual and monthly awards, facilities must be participating in the Customer First Mystery Shop Program. Applications submitted by Business Card Field Sales do not qualify for awards.

[†] Each station is eligible for one annual prize only.

Ask customers if they'd like to use their Chevron or Texaco credit card. If they don't have one, hand them an application and explain the card benefits.

Customer First Mystery Shop Program Survey

Question	Standards*	Point Value
Forecourt (Approach and Fueling Area)		
1. Were the fueling and landscaped areas properly maintained?	<ul style="list-style-type: none"> ■ The fueling area is free of significant debris and recent spills such as food, soda, oil, grease, etc. that can be wiped clean. ■ Landscaped areas (grass, trees, flower beds) are free of significant debris and well manicured. 	8 points
2. Were the dispensers (pumps) and nozzle handles at the fueling position you used clean and well maintained?	<ul style="list-style-type: none"> ■ Dispensers are free of excessive gasoline, oil, or grease. ■ Pump skirts are free of dust and grease. ■ The nozzle handles are free of anything that could stain or leave an odor on the customer's hands. ■ The nozzle handles and covers are free of excessive wear – major tears, abrasions, and obvious signs of long-standing neglect. 	8 points
3. Were clean waste containers available and not full or overflowing with trash/rubbish?	<ul style="list-style-type: none"> ■ The surfaces of waste containers are free of encrusted food or other build-up signifying poor maintenance or neglect. ■ Waste containers are not full or overflowing. 	4 points
4. Were windshield washing materials available and in good condition?	<ul style="list-style-type: none"> ■ The windshield washing facility nearest to the customer has clean water. ■ A sponge or window washer is available and in good condition. 	4 points
5. Was the towel dispenser nearest to you properly stocked?	<ul style="list-style-type: none"> ■ A paper towel dispenser with paper towels is available nearest to you. 	4 points
6. Were air and water available?	<ul style="list-style-type: none"> ■ The air and water dispenser is available and in working order. 	2 points

* Please refer to the sample evaluation for full descriptions of standards.

Remember that people who take the time to complain usually do so because they want to come back.

Question	Standards	Point Value
Store & Restroom		
7. Was the store or payment area clean and orderly?	<ul style="list-style-type: none"> ■ The approach to the store or payment area is not cluttered with advertising or product displays that hinder a customer's access. ■ The floor is dry and free of litter, dirt, and gum. ■ Merchandise is free of dust. ■ There are no marks, smudges, or spots on the store windows or payment area windows. ■ The counter and floor surrounding the payment area are free of dust, litter, and other debris. ■ Waste containers are not full or overflowing. 	8 points
8. Did the restrooms appear clean and orderly?	<ul style="list-style-type: none"> ■ The mirror, sink and counter are free of recent spots and dirt. ■ The floor is dry and free of litter and dirt. ■ The restrooms do not have unpleasant odors. ■ Waste containers are present and not full or overflowing. ■ Toilets appear to be checked and cleaned regularly. 	10 points
9. Were the restrooms appropriately stocked?	<ul style="list-style-type: none"> ■ Toilet paper, soap and paper towels are readily available. ■ If the restroom has a hand-drying machine, it is in working order. 	7 points
Customer Service Delivery (Including CSR Appearance)		
10. Did the Customer Service Representative (CSR) offer you a polite greeting when it was your turn to be served?	<ul style="list-style-type: none"> ■ The CSR verbally greets you politely and with enthusiasm. ■ The CSR makes eye contact and smiles. 	10 points
11. Did the CSR attempt to determine if there was anything else you needed?	<ul style="list-style-type: none"> ■ The CSR is friendly and engaging, asks if there is anything else needed, offers the current promotion, or offers an item associated with your primary purchase. 	5 points
12. Did the CSR verbally confirm the transaction?	<ul style="list-style-type: none"> ■ The CSR states the total amount of the sale. 	2 points
13. Was the CSR attentive and prompt in serving you?	<ul style="list-style-type: none"> ■ The CSR starts the transaction promptly; there is no delay in serving you. ■ The CSR is attentive during the transaction. 	5 points

Ask a friend or colleague to mystery shop your facility.



Question	Standards	Point Value
Customer Service Delivery (Including CSR Appearance), cont.		
14. Did the CSR offer you a friendly parting remark?	<ul style="list-style-type: none"> ■ The CSR thanks you for the purchase, offers a friendly parting remark, makes eye contact, and smiles. 	10 points
15. Was the CSR who assisted you wearing an authorized name badge?	<ul style="list-style-type: none"> ■ The CSR is wearing an authorized name badge or approved uniform shirt with a name embroidered on it. (The badge or shirt may display the word "Trainee." A temporary name badge made with a label maker is acceptable. However, a handwritten badge is not acceptable.) ■ The name badge or embroidered name is visible and clearly shows the CSR's name. ■ The logos on the CSR's name badge are clear and not faded, cracked, or peeling. ■ The name badge does not cover a company logo. ■ The name badge or embroidered name is not covered by a sweater, jacket, safety vest, or long hair. 	2 points
16a. Did the CSR have on an approved uniform and look neat and tidy in appearance?	<ul style="list-style-type: none"> ■ The CSR is wearing an authorized uniform that is clean and free of wrinkles, tears, holes, and missing buttons. ■ A full-length, button-down uniform shirt is tucked in and pants or shorts are worn on the hip or waist. ■ The uniform features a collared shirt and displays an approved Chevron or Texaco logo, or the store's approved proprietary trade name or logo. ■ The CSR is not wearing a T-shirt instead of an approved uniform shirt. ■ The uniform, outerwear, and/or cap displays an approved Chevron or Texaco logo, or the store's approved proprietary trade name or logo. The bill on the cap is facing forward. ■ The approved Chevron or Texaco logo, or the store's approved proprietary logo, is crisp and clear and not faded or damaged. ■ If the CSR is wearing a safety vest over an approved uniform shirt or jacket, the name badge is worn on the outside. ■ If the CSR is wearing a smock over an approved uniform shirt or jacket, the smock displays an approved Chevron or Texaco logo, or the store's approved proprietary name or logo. 	3 points
16b. Did the CSR who assisted you have on authorized uniform pants?	<ul style="list-style-type: none"> ■ The CSR is wearing authorized uniform pants; jeans are not acceptable. 	3 points

Question	Standards	Point Value
U.S. Region		
17a. Were the station fueling area and exterior building free of expired national point-of-purchase (POP) signage?	<ul style="list-style-type: none"> ■ The station fueling area and exterior building are free of expired national point-of-purchase (POP) signage. 	1 point
17b. Did the station have the correct national POP promotional materials posted?	<ul style="list-style-type: none"> ■ The current national Chevron or Texaco POP promotional materials are posted. 	2 points
18. Were you able to obtain a Chevron or Texaco credit card application?	<ul style="list-style-type: none"> ■ Credit card applications are available and on display. ■ If applications are not available, the CSR knows the toll-free telephone number and Web site for credit card applications. 	2 points
General		
19. Did your experience make you feel appreciated and valued as a customer?	<ul style="list-style-type: none"> ■ The CSR behaves in a way that makes you feel appreciated and valued. 	0 points
20. Was there anything else that affected your experience today?	<ul style="list-style-type: none"> ■ There are events beyond the scope of the survey that affected your experience. (For example, the site is undergoing renovations, or the store is especially busy.) 	0 points
21. Were Chevron or Texaco credit card applications available inside the store?	<ul style="list-style-type: none"> ■ The credit card display is stocked. 	0 points
22. Were Chevron or Texaco credit card applications available at the fuel dispenser?	<ul style="list-style-type: none"> ■ The credit card display is stocked. 	0 points
23. Was a facility number present on the credit card application you checked?	<ul style="list-style-type: none"> ■ The facility number is on the credit card application. 	0 points
24. Was the Chevron or Texaco credit card application you checked current?	<ul style="list-style-type: none"> ■ The credit card application is current. 	0 points

General Program Guidelines

Participation

- As of 2006, new stations and those with contracts up for renewal are required to participate in the Customer First Mystery Shop Program to receive brand authorization.
- You may begin participation in the 2013 program at any time during the year by calling the Retail Marketing Center (RMC) at 1.877.243.8457 (Option 1, Option 2).
- Participants in the 2012 program are automatically rolled over to the 2013 program at their 2012 status (active, on hold).
- Stations that join (or are automatically rolled over) between November 1, 2012, and February 28, 2013, will receive a full complement of four mystery shops and will be billed \$350.
- Billing for the 2013 program year will occur in February 2013. No refunds of participation fees will be given after February 1, 2013.
- Stations that join and are ready to be shopped or that are removed from hold between March 1, 2013, and June 30, 2013, will receive one mystery shop for each remaining period in the program at the time mystery shops begin, and will be billed \$350.
- Stations that join and are ready to be shopped or that are removed from hold between July 1, 2013, and October 31, 2013, will receive one mystery shop for each remaining period in the program and will be billed \$175.
- If a station joins or is removed from hold after October 31, 2013, its mystery shops will begin on January 1, 2014, provided it is open and ready to be shopped and the RMC has been notified. The program fee will be billed in accordance with the program fees and rules for 2014.

Canceling Participation

- If a station will be closing in 2013, you may terminate participation in the 2013 program without incurring a program fee by giving notice on or before January 31, 2013.
- You may end a closing station's participation in the 2013 program at any time during the year by contacting your Business Consultant.
- No refunds of participation fees will be given after January 31, 2013.

Refunds

- No refunds of participation fees will be given after January 31, 2013.
- As of February 1, 2013, each station in the program is responsible for the full program fee, even if the station closes.

Changes in Operator/Trade Class

- If a station changes Marketers during the program year, the outgoing Marketer's survey scores will be deleted from the database.
- If a station changes Retailers during the program year, the outgoing Retailer's survey scores will be deleted from the database.
- If a station changes trade class during the program year, survey scores posted prior to the change will be deleted from the database.
- There will be no make-up shops for the incoming Marketer, Retailer, or Chevron Stations Inc. (CSI) station.
- If a station changes Retailers during the program year and the program fee has already been paid, the incoming Retailer may continue to participate in the program for the remainder of the year without incurring any additional participation fees.

New Facilities Under Construction

- If a Marketer or Retailer has one or more stations under construction that are already set up in the program, that Marketer or Retailer must notify the RMC when the station is open and ready to be shopped.
- The Marketer or Retailer will be billed in the same month that the RMC is notified, and the station will receive a shop for each remaining period in the program year.

Temporary Closures (Less Than 30 Days)

- If a station is undergoing construction or repairs or needs to close because of special circumstances (for example, Image Refresh, damages to the station, theft, or damages resulting from acts of nature and/or man), it is the responsibility of the Marketer, Retailer, or Business Consultant to notify the RMC immediately to suspend a mystery shop during the time of closure.
- If a Marketer or Retailer gives notice that a station will be closed for more than 30 days, the facility will remain enrolled and “on hold” in the program. It is the responsibility of the Marketer, Retailer, or Business Consultant to notify the RMC when the station has reopened and is ready to be shopped.
- When a Marketer or Retailer fails to notify the RMC that a station has closed, and a mystery shop is attempted at that station, the Marketer or Retailer is responsible for the costs associated with the mystery shop. The Marketer or Retailer will be billed a fee of \$58 once the RMC has confirmed that the station is closed.

Annual Awards Disclaimer

- You must be the Marketer- or Retailer-of-record throughout the entire program year and at the time the prize is awarded to win Gold, Silver, or Bronze Level Awards.
- Non-corporate Marketers and Retailers who have earned, or who have facilities that have earned, a Gold, Silver, or Bronze Level Award will receive a 1099 Miscellaneous Form by mid-February the year after the awards are given and will be responsible for tax reporting.

Shop Awards Disclaimer

- Chevron or Texaco direct served Retailers receive cash awards via electronic funds transfer (EFT) approximately 10 days after an evaluation has been completed.
- Cash awards for Marketer-served facilities are transferred to the Marketer's account for distribution to the stations where the winners are employed.

Cancellation Clause

- Chevron reserves the right to cancel, amend, or revoke this program at any time.

Collusion

- Infraction of company policies, unethical practices, collusion between Marketers and Retailers, or any other attempt to gain unfair advantage in the program will disqualify you from participation in the program.

Tax Liability

- All federal, state, or local taxes and any other fees imposed on any award in the program are the responsibility of the award winner, not Chevron.
- Non-corporate Marketers and Retailers who have earned, or who have facilities that have earned, a Gold Level Award will receive a 1099 Miscellaneous Form by mid-February the year after the award is granted and will be responsible for tax reporting.

Audits

- Chevron reserves the right to audit the Marketer or Retailer's records and, in their sole discretion, to disqualify participants in the event of irregularities.

