



General overview

xpress lube[®] shopper[™] program

What is it?

Chevron's new **xpress lube® shopper™ program** is a mystery shop and image audit program designed to assess customer satisfaction and brand image in the eyes of Do-It-For-Me consumers and Chevron. It is specifically intended to enhance and improve customer satisfaction and how the brand is represented (the facility image) across the entire xpress lube branded fast lube network.

Unannounced mystery shops occur quarterly, and overt image audits are conducted twice a year. Results are captured in a 24/7 mobile-friendly, user credentialed reporting portal. Sites are required to maintain minimum mystery shop and image audit scores. The program pilot in 2020 validated survey questions, weighting and helped determine minimum required scores. There are employee and facility rewards for sites with the highest customer satisfaction scores in the network.

The structure of the program has been adapted from the successful mystery shop and image audit program fine-tuned in the Chevron and Texaco retail fuels network over roughly 25 years - and using the same global research agency, **ipsos**.

The annual cost is \$825 per location pro-rated based on enrollment timing. Specific program T&Cs are available in the online [enrollment portal](#).



Who is eligible to participate?

The xpress lube shopper program is exclusively for owner/operators of Havoline xpress lube® and Chevron xpress lube® locations in the United States.



What other businesses have similar programs?

Auto Dealerships

Between 4 and 10 service shops are conducted annually at each dealership depending on the dealership volume. Focus is on the interaction with the customer service representative. Individual dealerships receive specific feedback from each evaluation without compromising customer identity.



Quick Lube Companies

Quarterly mystery shop with emphasis on the customer interaction. Annual image audit with emphasis on representation of the brand. Quarterly engine alteration, diagnosis shops focusing on accurate diagnosis of problems



Chevron Retail Fuels Network

Quarterly mystery shop with the emphasis on the customer interaction. Twice-annual image audit with the emphasis on the representation of the brand.



Why is customer satisfaction so important?

What your customers say about you is easily accessible and makes an impact on your business.



- Two-thirds of customers are influenced by online reviews (Moz).
- Research from Moz suggests that businesses risk losing 22% of business when potential customers find one negative article on the first page of your search results. That number increases to 44% lost business with two negative articles, and 59% with three negative articles.
- Northwestern University's Spiegel Research Center found online reviews could increase customer conversion rates by 270%.
- Research from Harvard University found that each rating star added on a Yelp review translates to approximately 7% direct effect on revenues.



What are the benefits to you?

Businesses with higher customer satisfaction levels have more customer reviews, more positive reviews and a higher star rating on influential social platforms. The benefits of a high customer satisfaction level (index or score) are many. How the facility image, how the brand is represented, leaves an impression on consumers hearts and minds and works hand in hand with customer satisfaction.



More word-of-mouth referrals to family/friends



Attract more new customers (looking at reviews)



Attract younger customers (looking at reviews)



Higher customer loyalty and retention rate



More satisfied employees



Higher employee retention (less turnover)



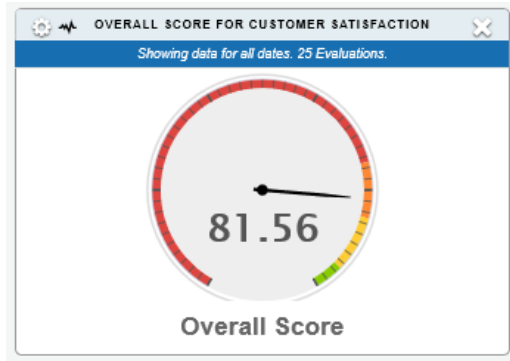
Increase revenue



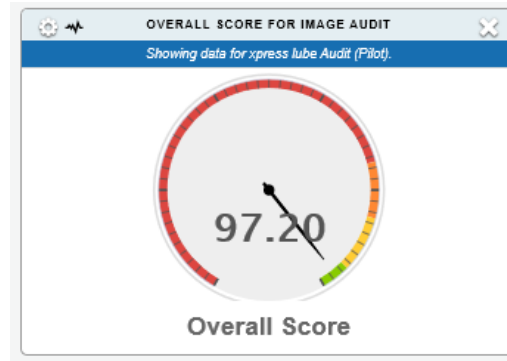
Pilot findings

Chevron piloted the xpress lube shopper program in 2020 at 5 Havoline xpress lube locations. Each site received 5 mystery shops and 5 image audits for a total of 25 mystery shops and 25 image audits. Owner feedback was excellent.

Aggregated score reflecting 25 customer satisfaction mystery shops.



Aggregated score reflecting 25 image audits.



Within Customer Satisfaction, **Customer Service Interaction** and **Digital Presence** were two areas of opportunity.

What is expected of me and my store(s)?

Customer satisfaction

Chevron provides you with the actual customer satisfaction survey that is used by the mystery shoppers. The questions and ranking are based on what is important to Do-It-For-Me consumers and to Chevron, auto industry experience, trends, and were validated in the program pilot.

This way you and your staff will all know, in advance, exactly what is expected and how xpress lube® locations will be scored.

xpress lube® shopper™ program customer satisfaction mystery shop 2023		
Section	Question	Point Value
Customer Service Interaction		51 points
	1. Were you greeted or acknowledge with a hand wave, smile, "how may I help you today"?	4
	2. Did the representative explain the manufacturer's maintenance recommendations for your specific vehicle?	2
	3. Did a representative discuss your motor oil options, sharing information that helped you make an informed choice about the product to have installed in your vehicle?	4
	4. Were you presented with the results of your vehicle inspection (cost estimate printout, or verbal), that identified specific items checked on your vehicle during the visit?	4
	5. Did the representative's appearance make it clear that this service center offers other maintenance services?	4
	6. Were they have a menu of services available to see?	4
	7. Did your cash out proceed in an efficient manner making sure that you understood the total amount?	4
	8. Did the price you paid match your service order?	4
	9. Was your email address captured (invoice/payment receipt emailed to you)?	4
	10. Were you addressed by name at the time of service?	4
	11. Were you kept informed about the status of your vehicle?	4
	12. Was your vehicle serviced in a timely manner?	4
	13. Did the employees exhibit teamwork and professionalism?	4
	14. Were you thanked and invited back?	4
	15. Overall, did the exterior seem well-maintained, have an inviting curb appeal?	6
	16. Overall, was the waiting room clean/comfortable, well-maintained?	7
	17. Overall, was the customer restroom clean and stocked with paper goods?	7
	18. Overall, was the service bay area well-kept and tidy?	8
Shopper Opinion Ratings		20 points
Based on your visit, please rate the degree to which you agree/disagree with the following statements:		
	19. I was presented with information about vehicle service needs but not pressured to buy.	5
	20. I was left with the impression that the recommendations provided were trustworthy.	5
	21. I was left with the impression that employees are well-trained to do more than oil changes.	5
	22. Please indicate if you would recommend this location to a friend or family member.	5
Digital Presence		14 points
	23. Does this location have 4 or more stars on Google Reviews?	5
	24. Does this location come up on Yelp?	4
	25. Does this business have a website?	3
	26. While waiting for the oil change, using Google, please search 'oil change near me.' Did the site have a paid Ad?	2



What is expected of me and my store(s)?

Image audit

Chevron provides you with the actual image audit survey that is used by the image evaluators. The questions and ranking are based on what is important to Chevron as it relates to representing the brand, to Do-It-For-Me consumers, auto industry experience, and validated in the pilot.

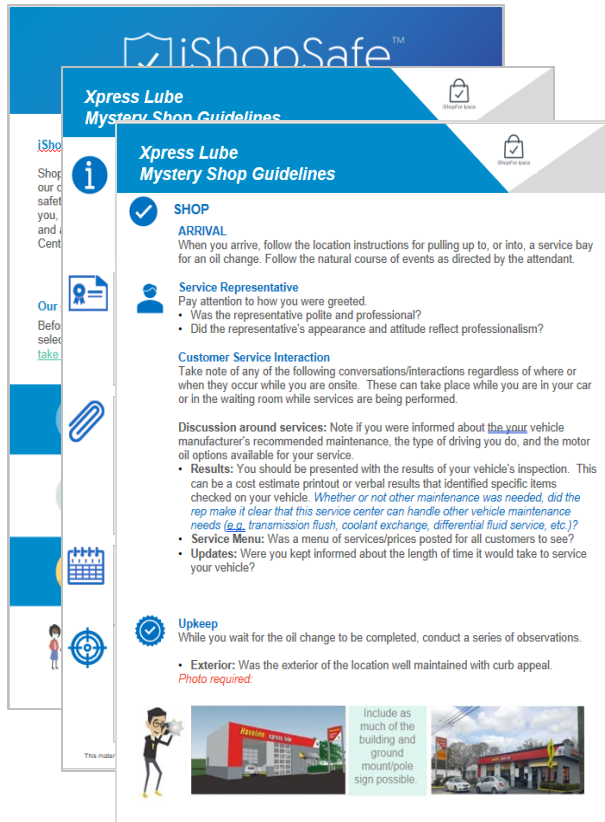
This way you and your staff will all know, in advance, exactly what is expected and how xpress lube® locations will be scored.

xpress lube® shopper™ program image audit 2023	
Section Question	Point Value
Overall Site Appearance points	14
1. Were landscaped areas well-maintained (plants, grass, trees, etc.)?	2
2. Were all paved areas well-maintained (asphalt, curbs, walls, borders, fences)?	3
3. Were the premises free of unauthorized competitive signage (other motor oil brands)?	2
4. Did the building have a well-maintained inviting curb appeal (paint not faded, sidewalks, parking space lines, windows, unobstructed walkways)?	4
5. Was all exterior lighting operational and well-maintained? If lighting could not be evaluated, select NA.	3
Street Signage 10 points	
6. Is the ground mount/pole sign, correct?	4
7. Is the ground mount/pole sign in good repair (no cracks, no fading, clean)?	6
8. Is the ground sign free from any obstructions?	4
9. Is the ground mount/pole sign lighting operational? If lighting could not be evaluated, please select NA.	4
Building Signage points	14
10. Is the building signage correct?	4
11. Is the building sign in good repair (no cracks, no fading)?	6



Who are mystery shoppers/image auditors?

Anyone that comes to your facility could be a mystery shopper or image auditor. They look, act and experience things just like any customer. Shoppers are thoroughly screened and trained by Ipsos before conducting mystery shops and image audits. They are trained (using training guides) to recognize excellence in facility appearance and customer service.



iShopSafe™

Xpress Lube Mystery Shop Guidelines

SHOP

ARRIVAL
When you arrive, follow the location instructions for pulling up to, or into, a service bay for an oil change. Follow the natural course of events as directed by the attendant.

Service Representative
Pay attention to how you were greeted.

- Was the representative polite and professional?
- Did the representative's appearance and attitude reflect professionalism?

Customer Service Interaction
Take note of any of the following conversations/interactions regardless of where or when they occur while you are onsite. These can take place while you are in your car or in the waiting room while services are being performed.

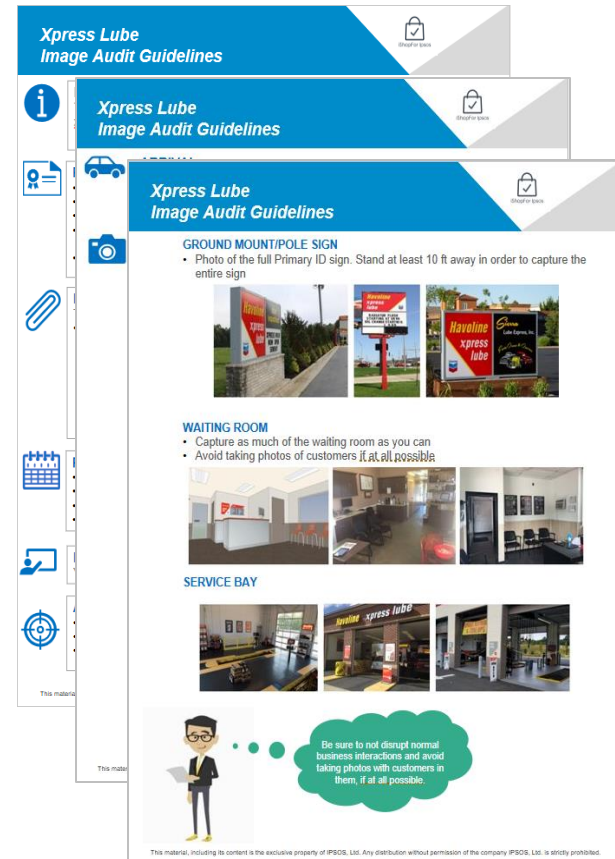




Discussion around services: Note if you were informed about the your vehicle manufacturer's recommended maintenance, the type of driving you do, and the motor oil options available for your service.

- Results:** You should be presented with the results of your vehicle's inspection. This can be a cost estimate printout or verbal results that identified specific items checked on your vehicle. *Whether or not other maintenance was needed, did the rep make it clear that this service center can handle other vehicle maintenance needs (e.g., transmission flush, coolant exchange, differential fluid service, etc.)?*
- Service Menu:** Was a menu of services/prices posted for all customers to see?
- Updates:** Were you kept informed about the length of time it would take to service your vehicle?

Upkeep
While you wait for the oil change to be completed, conduct a series of observations.

- Exterior:** Was the exterior of the location well maintained with curb appeal. *Photo required.*


Include as much of the building and ground mount/pole sign possible.



Xpress Lube Image Audit Guidelines


GROUND MOUNT/POLE SIGN

- Photo of the full Primary ID sign. Stand at least 10 ft away in order to capture the entire sign.




WAITING ROOM

- Capture as much of the waiting room as you can
- Avoid taking photos of customers if at all possible.



SERVICE BAY



Be sure to not disrupt normal business interactions and avoid taking photos with customers if at all possible.

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When do the shops occur?

In a calendar year, there are 4 customer satisfaction mystery shops and 2 image audits (see periods below). Visits occur Monday-Friday 9 am - 4:30 pm and Saturday 9 am - 3 pm. Shops will not occur on holidays or Sundays.

Customer satisfaction mystery shops	Image audits
Period 1: Jan-Mar	Period 1: Jan-Jun
Period 2: Apr-Jun	Period 2: Jul-Dec
Period 3: Jul-Sept	
Period 4: Oct-Dec	

The site staff will not know that the person evaluating them is a mystery shopper, and the shopper will not reveal their identity as a shopper while performing the evaluation.

The evaluator will announce to the site staff that they will be evaluating the location, and a Chevron letter of authorization will be presented - upon request - to affirm their business on the premises. This evaluator will walk around the store and lot and is asked to take photos as part of their evaluation.

How will I see the results of the shops and image audits?

Mystery shop and image evaluation results are captured a state-of-the-art mobile-friendly, secure online portal, available 24/7. It provides survey results to help you quickly see strengths and actionable opportunities.

Individual email shop notifications will be sent to owners and Chevron staff when an evaluation has been completed. The email will contain the date of the evaluation and a link to the portal to access the detailed evaluation report.

You will receive log-in credentials and a link to the reporting site by email once your enrollment process has been completed.



Customer satisfaction mystery shop process

After the shopper is screened and trained, and the shop is scheduled, the following scenario takes place.



2. Shopper Interaction

Shopper interacts with customer service rep as part of getting an oil change, just like a normal customer, while taking note of the key aspects of the interaction.



4. Information Debrief

The shopper provides responses to all survey questions and photos online. The information is QCed by Ipsos before installers are notified that it is reported online.



1. Shopper Arrives

Unannounced shops will occur M-F 9am-4:30pm and Saturday 9am-3pm. No Sundays or holidays.



3. Mystery Shop Evaluation

While waiting for service, the shopper evaluates other parts of the location, according to the survey, taking photos of the restroom, overall location, and their receipt. The shopper will be on-site for approximately 15 minutes, or the duration of the oil change service.

Image audit process

After the image evaluator is screened and trained, and the image audit is scheduled, the following scenario takes place.



2. Introduction

Evaluator introduces themselves as the auditor to the site staff. Chevron letter of authorization will be presented, upon request.



4. Information Debrief

The evaluator provides responses to all survey questions and photos online. The information is QCed by Ipsos before installers are notified that it is reported online.



1. Auditor Arrives

Locations can be evaluated M-F 9am-4:30pm and Saturday 9am-3pm. No Sundays or holidays.



3. Site Evaluation

The auditor evaluates parts of the location, according to the evaluation, taking photos of multiple areas across the location. The evaluator will be on-site for approximately 30 minutes.

Are we required to maintain minimum scores?

Yes. Chevron and Ipsos developed the surveys to be used for each program and the criteria for evaluation. Questions are associated with a certain number of points and weighted based on importance. All points earned roll up into the calculation of the total score. Survey questions, points, weighting and the minimum required scores were all tested and validated in the program pilot.

**Required minimum
customer satisfaction
mystery shop score** **80%**

Failure to maintain the minimum score three (3) times in a row over a twelve (12) month period may result in de-branding

**Required minimum
image audit score** **90%**

Failure to maintain the minimum score two (2) times in a row over a twelve (12) month period may result in de-branding. Locations that do not meet Chevron's minimum required 90% image audit score are subject to an additional re-audit fee of \$125.00.

APPEAL OPPORTUNITY FOR THE IMAGE AUDIT. If a location disagrees with how a specific image audit question was scored, they may dispute the score for that question using the portal-based appeal process. The steps for submitting an appeal are outlined on the reporting portal. Mystery shop scores are not subject to the appeal process.



Are there any incentives/rewards?

Yes. The program gives Chevron the opportunity to recognize and reward outstanding customer service. After the first full calendar quarter of program operation, Chevron has established a system of rewards for sites with the **highest customer satisfaction scores**. Rewards will be geared toward the site owner and the employees.



Employee rewards will change over time based on participant feedback. Employees have the critical role of delivering the customer service experience day in and day out.



Business owners of the highest scoring sites will receive a special plaque from Chevron to display proudly inside the location for all employees and customers to see.

What does it cost and how do I enroll?

The annual program participation cost is \$825 per location (fee is pro-rated based on time of enrollment during a calendar year). A full calendar year of participation includes 4 customer satisfaction mystery shops, 2 image audits and the 24/7 reporting portal.

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	N -Next Year*	D -Next Year*
Enroll By	Jan 31	Feb 28	Mar 31	Apr 30	May 31	Jun 30	Jul 31	Aug 31	Sep 30	Oct 31	Nov 30	Dec 31
Number of Mystery Shops this year	4	3	3	3	2	2	2	1	1	1	4	4
Number of Image Audits this year	2	2	2	2	1	1	1	1	1	1	2	2

Enrollment process

- [Online enrollment portal](#)
- T&Cs are signed electronically
- Signed T&Cs will be emailed
- Signed T&C are also available for download
- Enrollment can occur throughout the year

Payment options

- Major credit card
- EFT. Only for direct-served customers where the contract/relationship/receivable is with Chevron. The program fee will be EFT'd from your account 3-4 weeks after enrollment .
- Havoline Installer Co-op Advertising funds (Co-op) for customers that have a sufficient balance in their Co-op account to cover the total fee.



What's the payback?

The payback on a cost of \$825 per location is just 11 new customer visits based on an industry average ticket of \$75. The average fast lube is open 6 days/week and sees ~33 or more cars/day or ~794 cars/month. Customers typically get ~ 2.7 oil changes/year and can stay with a business for years provided they are having a positive service and site experience - which is the whole intent of the xpress lube shopper program.

Industry average ticket ⁽¹⁾	\$75.00
Average days per week of operation	6 days/week
Industry average car count per day ⁽²⁾	33 cars/day
Industry average car count per month	792 cars/month
Miles driven between oil changes ⁽³⁾	4,934
Average miles driven per year ⁽⁴⁾	13,500
Average # of oil changes per year per customer	2.7/year

(1) (2) (3) National Oil and Lube News

(4) U.S. Department of Transportation's Federal Highway Administration



What other program support materials are available?

- XPRESS LUBE® SHOPPER™ PROGRAM PARTICIPANT TERMS AND CONDITIONS are available on the [enrollment portal](#)

The following are available in the **Chevron Lubricants Marketing Hub**

- **XLSP mystery shop guide** goes into detail about the customer satisfaction mystery shop process and has the survey
- **XLSP image audit guide** goes into detail about the image audit process and has the survey and shopper training guide
- **XLSP Image Audit Compliance Process** is a visual depiction of the image audit, appeal and re-shop process
- **XLSP mystery shop FAQ** answers frequently asked questions about the customer satisfaction mystery shop process
- **XLSP image audit FAQ** answers frequently asked questions about the image audit process



Appendix



Ipsos is the largest Mystery Shopping agency in the world



MSPA NORTH AMERICA
MYSTERY SHOPPING PROVIDERS ASSOCIATION

MSPA LATIN AMERICA
MYSTERY SHOPPING PROVIDERS ASSOCIATION

MSPA EUROPE
MYSTERY SHOPPING PROVIDERS ASSOCIATION



Ipsos is one of the largest, most innovative research companies in the world



M O S T

Innovative

Large market research company, globally
(2019 GRIT REPORT)



5,000+

Clients



18,000+

Employees



100m+

Interviews
per year

World-class organizations choose to partner with Ipsos

NUMBER OF PROJECTS IN 2019

353

Financial services

322

Automotive

158

Tech & Telco

120

Retail

77

Oil & Gas

65

Food, Drink & Tobacco

229

Other

62

Travel & Leisure

80

Prof/Business services

1,466 : TOTAL

Apple
VISA
Domino's
Chevron
Shell

Mastercard
Jiffylube
BRIDGESTONE
McDonalds
BP
ExxonMobil

Toyota
VW
GM
BMW
Mercedes Benz

Volvo
Renault
Honda
Ford
Peugot

Tesco
Amazon
Walmart
Richemont
Samsung
HSBC
Google



260K+ mystery shoppers are located in **all states**

Ipsos employs **250+ specialist staff** along with a team of independent schedulers across the US for full coverage



Schedulers manage and oversee shopper recruitment, qualification & training

Shoppers are screened, tested, briefed, and certified to make sure reliable results are provided