



Havoline
xpress lube



Chevron
xpress lube

xpress lube[®] shopper[™] program

customer satisfaction
mystery shop guide



customer satisfaction mystery shop

focusing on the customer experience

The ***xpress lube shopper program*** measures success at meeting Chevron's standards for customer service that helps set you apart from your local competitors. Through customer satisfaction surveys conducted by "mystery shoppers" - hired by Chevron to evaluate branded facilities anonymously - you gain insight into areas in which your business and employees excel, as well as areas that offer opportunity for improvement.



what do customers value?

We are in business because of our customers. What matters to customers is what they experience at a site and with the employees, most importantly how they were treated. Everything employees do matters, and that includes for example: tone, facial expressions, body language, energy, teamwork, hustle, callouts, safety, cleanliness, process discipline, knowledge, and thanking customers by name.

The goal is to consistently meet or exceed customer expectations!

Empathy:

caring, individual attention

Assurance:

knowledge and courtesy of employees and their ability to convey trust and confidence

Responsiveness:

willingness to help customers and provide prompt service

Reliability:

ability to perform services accurately

Tangibles:

appearance of facility, equipment, personnel and signage

Social:

ratings and reviews by customers, digital accessibility

who are these “mystery shoppers”?

Anyone who comes to your facility could be a mystery shopper. Mystery shoppers look, act and experience things just like all your other customers. The only difference is that they are trained to recognize excellence in customer service and facility appearance.

A mystery shopper will visit your facility once every quarter.

Visits occur Monday-Friday 9 am - 4:30 pm and Saturday 9 am - 3 pm. Shops will not occur on holidays or Sundays.

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

what’s included?

The questions on the mystery shop survey are worth a total of 116 points. Survey questions, best practices, and point values are included at the end of this guide and cover the following important areas:

1. Customer Service Interaction
2. Location Upkeep
3. Shopper Opinion Ratings
4. Digital Presence

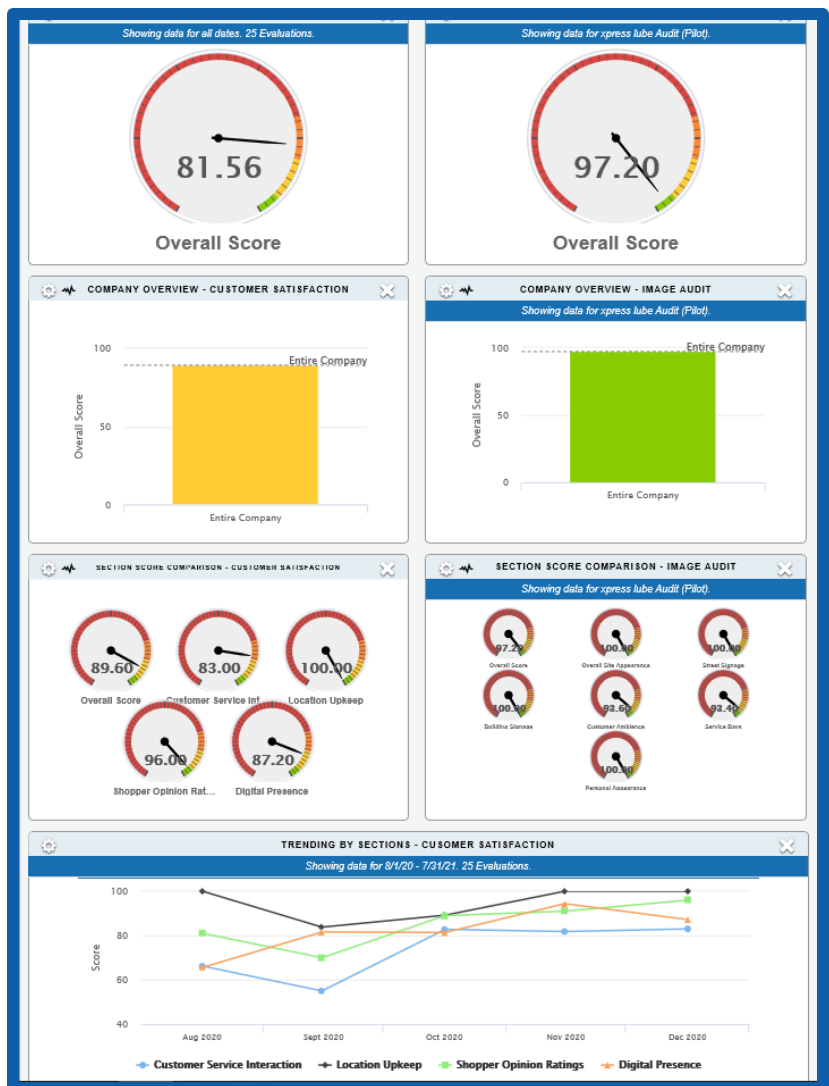
how will i see my results?

Reporting Portal. Chevron’s mystery shop and image audit services provider, Ipsos, trains the shoppers and supports a state-of-the-art dynamic reporting portal www.us-sassie.ipsosmysteryshopping.com. The mobile-friendly portal, available 24/7, provides survey results to help you quickly see strengths and identify actionable opportunities. You will receive log in credentials and a link to the reporting site by email once your enrollment process has been completed.

Email notification

Each time a mystery shop is completed at your location, you will be sent an email notification to let you know your shop results have been posted on the portal. The email will contain a link that will take you directly to your report.

Sample reporting dashboard at right.



minimum customer satisfaction mystery shop score

80%

Chevron and Ipsos established the survey and criteria for evaluation based on the combination of: Do-It-For-Me consumer research, trends, industry experience and pilot participant input. Each question in the survey is worth a certain number of points, weighted based on relative importance. All question points earned on each evaluation roll up into the total score for that evaluation.

Pilot. Chevron conducted a program pilot that involved five (5) Havoline xpress lube® locations throughout the U.S., a mix of both single-site and multi-site ownership businesses. After 5 months and a total of 25 shops, the total average mystery shop score was 81.56.

Decision. The pilot results taken together with collective industry experience gave Chevron and Ipsos confidence in establishing a minimum required customer satisfaction mystery shop score of 80%*.

The experience and the brand. Everything that happens at your site leaves an impression on the hearts and minds of your customers, which in turn is a reflection on Chevron and its brands.

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

how can I help my employees help customers?

- Everyone should know nothing is more important than the customer!
- Remind team members that everything they do is being observed by customers. Every interaction is an opportunity to make an impression.
- Acknowledge employees. Positive feedback reinforces good habits and public recognition motivates everyone to succeed.
- **Require employees to review the mystery shop survey questionnaire to ensure that everyone understands the expectations and scoring.**
- Make sure that your managers are good supervisors, role models, creating a positive environment, coaching, and advancing training.
- Develop your own recognition program, fund it, use it.
- Review your mystery shop scores with all employees. Point out where they are succeeding and areas that are in need improvement.
- Solicit employee input. Many will welcome the opportunity to be part of the solution instead of part of the problem.
- Review social media reviews with your employees, use recognition.



are top performers rewarded?

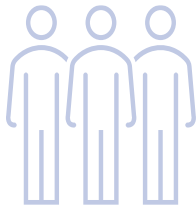
In addition to helping fulfill the brand promise — *providing a premium brand experience to every customer on every visit* — the program provides Chevron the opportunity to recognize and reward outstanding customer service.

After the first full calendar quarter of program operation, Chevron has established a system of rewards for sites with the highest customer satisfaction scores. The rewards will change over time based on participant feedback.



Recognition will be prioritized toward -

1



Employees

- those in the critical role of delivering the customer service experience every day

2



Business owner's facility

- those responsible for attracting, training and retaining quality service employees

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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 and attitude reflect professionalism?	3
	6. Whether or not other maintenance was needed this visit, did the representative make it clear that this service center can handle other vehicle maintenance needs?	2
	7. Did they have a menu of services and prices posted visibly for all customers to see?	4
	8. Did your cash out proceed in an efficient manner reviewing each line item and making sure that you understood the service(s) performed?	4
	9. Did the price you paid match your service review cost estimate?	4
	10. Was your email address captured or were you offered to have your invoice/payment receipt emailed to you? (photo of final invoice required)	3
	11. Were you addressed by name at least once during your visit?	4
	12. Were you kept informed about the length of time it would take to service your vehicle?	4
	13. Was your vehicle serviced in a timely/efficient manner?	3
	14. Did the employees exhibit teamwork as part of servicing your vehicle?	2
	15. Were you thanked and invited back to this service center?	4



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Section	Question	Point Value
Location Upkeep		28 points
	16. Overall, did the exterior seem well-maintained, have an inviting curb appeal?	6
	17. Overall, was the waiting room clean/comfortable, well-maintained?	7
	18. Overall, was the customer restroom clean and stocked with paper goods?	7
	19. 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:		
	20. I was presented with information about vehicle service needs but not pressured to buy.	5
	21. I was left with the impression that the recommendations provided were trustworthy.	5
	22. I was left with the impression that employees are well-trained to do more than oil changes.	5
	23. Please indicate if you would recommend this location to a friend or family member.	5
Digital Presence		14 points
	24. Does this location have 4 or more stars on Google Reviews?	5
	25. Does this location come up on Yelp?	4
	26. Does this business have a website?	3
	27. While waiting for the oil change, using Google, please search 'oil change near me.' Did the site have a paid Ad?	2
TOTAL CUSTOMER SATISFACTION MYSTERY SHOP		Max Points = 113



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