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Cub Foods Vendor Training Guide

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Partnership with Cub Foods

Cub Foods utilizes Tactiq's Globalworx Platform to enhance communication, grow sales, and improve the customer experience.

Streamlined Communication

GlobalWorx eliminates inefficient communication methods between stores and vendors and provides transparent service issue tracking for both parties.



Immediate Notification

Vendors are instantly alerted to in-store product and service opportunities via phone call and email.



Data Collection and Reporting

GlobalWorx aggregates service and product opportunity data into actionable reporting, providing vendors with real-time insights.



GlobalWorx Service Alert Process

Users can submit Service Alerts and track the alert through the alert lifecycle of acceptance and completion.





Service Alerts



Service Alerts

Service Alerts are submitted to notify the vendor of any opportunities in the store.

Manual Service Alerts

 Manual Service Alerts are manually submitted by Cub Foods Store Team Members to communicate specific opportunities in the store.





Manual Service Alerts

Manual Service Alerts are created by store team members when they see an opportunity in the store and follow pre-configured escalation paths based on alert type.

Service Alerts

- Stocking Standards
- Out of Stock
- Need Merchandising
- Out of Date
- Missed Service
- Backstock
- Inventory
- Other

Vendor Feedback

- Positive Comment*
- Other*



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Vendor Violations

- Housekeeping
- Unprofessional Conduct*
- Tag Removal*
- Failure to Check Out with Management*

Receiving Violations

- Product Left on Truck*
- Excessive Product Delivered*
- Late Delivery*
- Overstock
- Failure Processing Credits
- Missing Paper Invoice*
- Missing Invoice

Escalated Service Alerts

Escalated Service Alerts follow a pre-configured escalation path based on alert type. Each contact will have **60 minutes** to accept the request before it is escalated to the next contact.





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Escalated Service Alerts

The following alerts follow an escalation path and require acceptance and completion by the vendor.

Alerts that follow the direct escalation path of Contact $1 \rightarrow 2 \rightarrow 3$:

- Stocking Standards
- Out of Stock

Missed Service

Inventory

Backstock

•

- Need Merchandising
- Out of Date

• Other

Alerts that follow a pre-configured escalation path:

Housekeeping Contact 1 → 3
 Missing Invoice Contact 2 → 3
 Failure Processing Credits Contact 2 → 3
 Overstock Contact 2 → 3

OUT OF STOCK Hi Laura Desantis, A service issue was created for Demo #103 - Richmond Date/Time: 10/14/2024 03:22 PM Issue Type: Out of Stock Description: Ad items out of stock Notes: Out of Stock. Ad items out of stock. Product ABC Out of Stock Click here to respond to this issue *

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Non-Escalated Service Alerts

The following alerts DO NOT follow an escalation path and DO NOT require acceptance and completion.

Alerts that escalate directly to Contact 3 and will send a "Communicated" notification that does not require a response:

- Unprofessional Conduct
 Product Left on Truck
- Tag Removal

Missing Paper Invoice

• Late Delivery

- Vendor Feedback: Other
- Excessive Product Delivered

Alerts that are for reporting only and will not send a notification:

- Failure to Check Out with Management
- Positive Comment



```
LATE DELIVERY
 Hi Laura Desantis 3,
 A violation was created for Demo #103 - Richmond.
 No immediate response required.
 Date/Time: 12/20/2024 01:10 PM
 Issue Type: Late delivery
 Notes: Late delivery.
 Created By: Manager, Demo #103 - Richmond
 Reason: Receiving closing time: 3:00 PM
 Time of arrival: 7:45 PM
 Days: Monday, Thursday, Saturday
  Please click here to communicate back to the store
```

Receiving Service Alerts

Vendor contacts are notified of a Service Alert via:



Receiving Service Alerts

Service Alerts can be accepted through the Interactive Voice Response (IVR) phone call.

Answer the IVR phone call from

1-(866)485-5915

- Say "Hello" to activate the IVR call, otherwise, the call will go to voicemail.
- Select an option after reviewing the description and response options.
- The Service Alert phone call will come from the same phone number every time.
- We suggest you save this number to your phone contacts.





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Receiving Service Alerts

Service Alerts can be accepted and completed through the email notification.

All Service Alert emails will come from

MailAgent@Synergies4U.com

- If you are not receiving Service Alert emails, please check your spam folder.
- We suggest you save this email address to your contact list to ensure Service Alerts go directly to your inbox.

Need to update your contacts?

Please reach out to our Account Services team at <u>CubFoodsDSD@tactiqtech.com</u>

M	MailAgent@synergies4u.com Oct 1
INI	GlobalWorx Service Alert created for Demo #103 - Richmond - 1 LAURA DESANTIS - Ref: #DS
	Learn how to respond to this issue by watching this short training video: Vendor Training Vide
	MailAgent@synergies4u.com Oct 1
	GlobalWorx Service Alert created for Demo #103 - Richmond - 1 LAURA DESANTIS - Ref: #DS
	Learn how to respond to this issue by watching this short training video: Vendor Training Vide
	MailAgent@synergies4u.com Oct 1
IMI	GlobalWorx Service Alert created for Demo #103 - Richmond - 1 LAURA DESANTIS - Ref: #DS
	Learn how to respond to this issue by watching this short training video: Vendor Training Vide
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	GlobalWorx Service Alert created for Demo #103 - Richmond - 1 LAURA DESANTIS - Ref: #DS
	Learn how to respond to this issue by watching this short training video: Vendor Training Vide
	MailAgent@synergies4u.com Oct 1
M	GlobalWorx Service Alert created for Demo #103 - Richmond - 1 LAURA DESANTIS - Ref: #DS
	If you are not the proper contact to resolve this issue, please contact your account manager o

 \equiv

Search in mail



Accepting Service Alerts

Follow the steps below to **accept** a Service Alert:







Select "Click here to respond to this Issue"



Select one of the **"Accept Here"** icons Select the **time frame** you will resolve the Service Alert

SAMSUNE

Accept Issue

I expect to resolve this issue...

within 1 hour

nter comments

Enter vour name



Enter your name and select "Accept Issue"



Completing Service Alerts

Follow the steps below to **complete** a Service Alert:



Find the service alert email



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Select "Click here to respond to this Issue"



Select one of the "Complete Here" icons

Completing Service Alerts

Once an escalated alert is created, you will have **48 hours** to complete the alert in the GlobalWorx Platform. **If an alert is not completed within 48 hours, it will be marked as a Missed Alert**.





Cub Foods Escalated Alert Guide

Step-by-Step Guide To Accepting & Completing Escalated Alerts





STEP 1



ACCEPTING AN ALERT

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RECEIVING AN ALERT

- IVR Phone call: (866) 485-5915 Description of the service alert
- Verbally prompted steps on how
- to ACCEPT escalated alerts

Email: MailAgent@Synergies4U.com

- Additional service alert details
- ACCEPT AND COMPLETE escalated alerts through platform
- Provide additional comments

<u>STEP 1</u>	STEP 2
Open the email	Once you are ready
and select the	to accept the alert,
"click here to	select one of the
respond to this	"Accept Here"
issue" button.	icons.

STEP 3 Select the timeframe when you intend to resolve the opportunity. Enter in your name. Then select "Accept Issue".

SAMSUNG

Accept Issue

I expect to resolve this issue...

within 1 hour

nter comments

Enter your name

Accepting the Escalated Alert provides instant feedback to the store that you are aware of the alert and when you anticipate the opportunity will be resolved. To view alerts created on a previous day, use the white arrows at the top of the screen.

*Please direct any inquiries to CubFoodsDSD@tactigtech.com.



COMPLETING AN ALERT

Click the link to open the escalated alert from the original email. Select one of the "Complete Here" icons. Alerts can also be completed at the tablet when checking in or out.

Note: Escalated Alert cannot be completed through the phone call



Alert Status

Once in the GlobalWorx platform, vendors can track a Service Alert through its lifecycle by the status.

- **Open** Alert is not yet accepted
- Active Alert is accepted
- Completed Alert is completed
- Verified Alert is completed and verified as satisfactory or unsatisfactory
- **Communicated** Notification was sent to the 3rd-level contact. No acceptance or completion is required.

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▼ 10/07/2024 - 10/14/2024
1 LAURA DESANTIS SERVICE ISSUE COMPLETED 10/14/2024 10:20 A M E S T
1 LAURA DESANTIS COMMUNICATED 10/14/2024 10:19 AM EST
1 LAURA DESANTIS SERVICE ISSUE OPEN 1 0 / 1 4 / 2 0 2 4 1 0 : 1 7 A M E S T
1 LAURA DESANTIS SERVICE ISSUE A C T / V E 1 0 / 1 4 / 2 0 2 4 1 0 : 1 6 A M E S T
1 LAURA DESANTIS VERIFIED 10/14/2024 10:07 AM EST



Deleted Alerts

Stores can **Delete** an alert if an error was made during creation.

- Stores have the **Delete Alert** action available after submitting an alert.
- When the store deletes an alert, all vendors that were notified of the alert will receive an email notification letting them know that no further action is required.

DELETED

Hi Laura Desantis,

The service issue for Demo #103 - Richmond has been deleted. No further action is required.

Date/Time: 10/14/2024 03:22 PM

Issue Type: Out of Stock

Description: Ad items out of stock

Notes: Out of Stock. Ad items out of stock. Product ABC Out of Stock An email was sent to Laura Desantis (<u>laura.desantis@goglobalworx.com</u>) to inform them of this issue [10/14/2024 03:22 PM EST]. (10/14/2024 03:23 PM EST) GlobalWorx called Laura Desantis and left a voicemail.

Comments: Incorrect Vendor [10/14/2024 03:23 PM EST]



Re-Escalated Alerts

Stores can **Re-Escalate** an alert to bring the alert to the attention of the vendor.

Stores can **Re-Escalate** an alert for the following reasons:

- Not accepted in reasonable time period: Alert escalated through all contact levels without being accepted
- Resolution time is unacceptable: Responded resolution time is deemed unacceptable by the store
- **Did not mitigate in expected time period**: Vendor did not resolve the Service Alert in the response time provided when accepting the alert

The **3rd level contact** will receive an email notifying them that the store escalated the alert

ATTENTION REQUIRED

Hi Laura Desantis 3,

The service issue for Demo #103 - Richmond has been escalated by the store. Please check notes for details.

Date/Time: 10/14/2024 03:26 PM

Issue Type: Out of Stock

Description: Ad items out of stock

Notes: Out of Stock. Ad items out of stock. Product ABC An email was sent to Laura Desantis (<u>laura.desantis@goglobalworx.com</u>) to inform them of this issue [10/14/2024 03:26 PM EST]. (10/14/2024 03:26 PM EST) Laura Desantis has been sent an IVR phone call. This issue was accepted on 10/14/2024 03:27 PM EST. This service issue is expected to be resolved within 3 hours. The store has escalated this service alert for the following reason: Did not mitigate in expected time period. Alert accepted with a 3 hour response time, but store was not serviced within 3 hours. [10/14/2024 03:28 PM]

Comments:

Click here to respond to this issue *



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Verified Alerts

Stores can **Verify** whether a completed alert has been resolved to their satisfaction.

If the alert is marked as **Satisfactory**:

- Store was satisfied with the resolution of the Service Alert
- It is marked in reporting and no further action is necessary for the vendor

If the alert is marked as **Unsatisfactory:**

Store was not satisfied with the resolution of the Service Alert

Not reopened:

- 3rd level contact is notified via email
- Marked for reporting and no further action is necessary for the vendor

Reopened:

- 3rd level contact is notified via email
- Alert is reopened and must be accepted and completed

REOPENED

Hi Laura Desantis 3,

The service issue for Demo #103 - Richmond has been verified as unsatisfactory by the store. This issue has been reopened and requires immediate action. Please see comments below for more information

Date/Time: 10/14/2024 03:32 PM

Issue Type: Out of Stock

Description: Ad items out of stock

Notes: Out of Stock. Ad items out of stock. Product ABC An email was sent to Laura Desantis (laura.desantis@goglobalworx.com) to inform them of this issue [10/14/2024 03:25 PM EST]. (10/14/2024 03:25 PM EST) Laura Desantis has been sent an IVR phone call. Service Issue reopened after unsatisfactory verification.

Comments: Service issue was unsatisfactory. Supplier marked issue as complete, but did not resolve the issue. [10/14/2024 03:32 PM]

Click here to respond to this issue *

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Digital Check-In & Out



Logging In to the Tablet

All vendors are required to check in and out on the tablet located in the backroom.



Select DSD Servicer





Checking In for Service

All vendors are required to check in and out on the tablet located in the backroom.





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Completing Alerts from the Tablet

Vendors will be notified of any Open or Active Service Alerts upon checking in or out.

- If the vendor is able to resolve the Service Alert during their store visit, the Vendor can select Yes and the Service Alert will be marked as complete.
- If the vendor is not able to resolve the Service Alert during their store visit, the Vendor can select No and the Service Alert will remain in its open or active status.
- Comments can also be added to the Service Alert in the
 Comments section at the bottom of the prompt.



	No No
Date/Time Created: 12/11/2024 02:46 PM	
Site: Demo #103 - Richmond	
Issue Type: Out of Stock	
Description: Ad items out of stock	
Notes: Out of Stock. Ad items out Stock An email was sent to (laura.desantis@goglobalw this issue [12/11/2024 02:4 PM EST) Laura Desantis has	of stock. Product ABC Out of Laura Desantis orx.com) to inform them of 6 PM EST]. (12/11/2024 02:46 s been sent an IVR phone call
Comments:	
Please add additional comm	ents if applicable.

Checking Out After Service

All vendors are required to check in and out on the tablet located in the backroom.



Select your previously **checked-in event**, highlighted in green



Select Check Out



Tablet Assistance

If a tablet is down, please follow the steps below:

- Please notify a store employee if the tablet is not working properly.
- To check in and out if the tablet is not working, call:

(855) 451-1535

- When calling to check in and out, leave the following information when prompted:
 - Name of the vendor company you represent
 - Retailer Store # you are servicing
 - Service being performed (Delivery, Merchandising, etc.)





Cub Foods DSD Servicer Program Expectations

Step-by-Step Guide To Digital Check-In & Out

Logging In

All DSD Servicers must log in via the tablet.

1. Select the "DSD SERVICER" button.

2. Select your company name from the list of vendors who service the store.

3. Select "Continue" to log in.





Checking In

All DSD Servicers are **required** to Check In on the tablet before service.

1. Log in to the tablet. Refer to – *Logging In*.

- 2. Select "Check In For Visit".
- 3. Select your service role.
- 4. Select "Check In".

Service Alerts

After checking in, you will be prompted with any open service requests.

Select **"Yes"** to complete the request during your visit

Select **"No"** to keep the request open

*Note: You can add comments to the service alert in the "Comments:" section at the bottom of the notification.



Checking Out

All DSD Servicers are **required** to Check Out on the tablet after service.

1. Log in to the tablet. Refer to *– Logging In*.

2. Select your previously checked in event.

3. Select "Check Out".



Vendor 1. Review video tutorials on the tablet for help with how to check in and check out.

Assistance: 2. Vendors can check in and out if the tablet is not working by calling: 1-855-451-1535.



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Contact Us

Account Services:

CubFoodsDSD@tactiqtech.com

Account Manager: Justin Calabrese Justin.Calabrese@tactiqtech.com

