

Work Project presented as part of the requirements for the Award of a Masters Degree from NOVA –School of Business and Economics

**Consulting project for the marketing oil department of Galp Energia:  
Methodology to map the customer journeys in Galp's gas stations, in the Lisbon region, and  
guidelines to improve the services provided**

Consulting lab carried out under the supervision of: Professor Constança Monteiro Casquinho

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## Acknowledgements

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# Consulting Lab

The field lab program aims to provide a practical approach for Master's students to solve a company's real challenge.

## Overview

The Consulting Lab has the ultimate objective of preparing students for the working environment by providing an opportunity to conduct a real-world consulting challenge. In this case, the team had to find a suitable methodology to “Map the Customer Journey on Galp’s gas stations” and apply it in order to make recommendations headed for its optimization.

During approximately 3 months, the team gathered at Galp’s headquarters and in-field on the gas stations to build and present meaningful results, create a strong relationship with the company’s team and guarantee the so important syndication.

The team was able to adapt and absorb the company’s culture, always keeping in mind the valued vision of the client.

## Objectives

- Apply concepts learned during academic programs to real life company challenges, hence adding value to the company by providing an unbiased opinion
- Know, and immerse in, the companies’ culture
- Understand and meet the client’s prospects
- Work on Skills such as team work, empathy creation, presentational skills, and data analysis

## Advisor



Galp Marketing-  
Oil Department



Nova SBE

### Advisors:

- Eng. João Torneiro
- Dr. Luís Madeira Lopes
- Eng. Alexandre Machado
- Eng. Nuno Vaz Neto
- Dra. Isabel Colaço
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## Team



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# Executive Summary

## Executive Summary - Part I - Business Context

Galp Energia is the biggest Oil&Gas company in Portugal and as any retailer (especially the ones selling commodities), customer's purchase experience should be a priority.

### Company

Galp Energia was founded in 1999 and quickly became the **biggest energy company**<sup>1</sup> in the Portuguese market. The company currently operates in 13 countries, employs more than 6500 workers and supplies **energy to millions of people** everyday.

The firm is divided into three businesses: Exploration & Production unit, Refining & Distribution unit and Gas & Power unit. The project was developed under the “**Iberian Oil and Marketing Department**” which is part of the Refining & Distribution Unit of the company. This department is in charge of the **marketing and customer centric initiatives**.

### The Project

Galp's position as market leader in Portugal enhances the importance of understanding and recognizing the quality of **customers' experience when they interact with the brand**, especially on the moment of purchase, to increase loyalty and its perceived quality.

Last year, the company identified that **customers' interests should be a top priority** and created a “Voice of the Client Team” responsible for ensuring that strategic decisions take into account the customers' perspective. Bearing it in mind, the department asked the students' team to develop a project with the purpose of **better understanding the customer's journey** in the gas stations and to **identify and mitigate/replicate the “Pain and Pleasure Points”** that they are currently facing.



## Executive Summary - Part II – Situation and Challenge

The aim of the project is to associate Personas to the “Customer Journeys” and identify key points to be optimized, thus improving customer’s satisfaction.

### Challenges



What is the ideal methodology to map the “Customer Journey”?

Which are the current “Customer Journeys”?

Which are the opportunities to improve the “Customer Journey”?

How would the ideal “Customer Journeys” be?

How would we value and implement the improvement actions?

### Aim and Objectives

#### Aim

To identify the “Customer Journey as it is” and propose Quick Wins and Challenging initiatives in order to design the “Customer Journey as it should be”

#### Main Objectives




- Develop a methodology to map the different Customer Journeys in the gas stations
- Identify the Customer Journeys and the associated Personas to comprehend their Pain and Pleasure Points during the Journey
- Recommend actions in order to mitigate the Pain and replicate the Pleasure Points
- Redesign the Customer Journey



## Executive Summary - Part III – Recommendations

In order to mitigate 19 critical Pain Points and replicate 3 relevant Pleasure Points the team recommends the implementation of 48 “initiatives” applied to different stages, categorized as quick-wins and challenging.



	Entrance	Refuel	Outside Payment	Inside Payment	Convenience Store	Car Wash	Air & Water
Pain Points Incidence	61	43	31	60	53	26	15
 # Quick Win Initiatives	4	2	2	4	5	3	3
 # Challenging Initiatives		2	8	9	4	4	1
 # Impact in Pain Points <sup>[1]</sup>	90%	74%	71%	72%	75%	35%	80%

[1] Percentage of total Pain Points per stage that are impacted by the initiatives

## **A. Theoretical Context**

- A1. Customer Centric Approach
- A2. Customer Journey Mapping

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- E2. Relevant Journeys
- E3. Personas
- E4. Pain & Pleasure Points
- E5. Clients' Suggestions

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## **I. Limitations and Further Research**

## **J. Individual Reports**

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# Theoretical Context

# Theoretical Background

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Comprehending the customer needs and its experience is as important as finding ways to optimize it.

## Customer Centric Approach

Companies are facing the challenge to evolve **from a merely transactional approach**, in which the company aims to get more value from customers by selling as much as possible in each interaction, **to a relational approach**, in which the aim is to get value from the customer through a fertile relationship.

Based on “Customer Strategist, The Executive Journal by Peppers & Rogers Group” (2014)<sup>2</sup> since 2012, companies are evolving in terms of customer centricity by measuring the **impact of customer experience on its business performance**. However, some are still failing on acting accordingly to the data available or on collecting the right data from customer’s to build the desired relationship.

For a company to become customer oriented, all level employees must demonstrate customer centric behaviors. To do so, customer facing employees and back office employees must know what **different customers need and value**, and the importance of their role to satisfy it.

## Customer Journey Mapping

With the intention of being able to build a more **user-friendly and enjoyable Customer Journey**, companies, with the help of designers, decided to create a **visual map** to represent the **story of the customer experience** with the brand.

The importance of building a **Customer Journey Map** (from now on denominated as CJM) is connected to the need to get knowledge about the customer, and how well the company is performing in the client’s point of view.

To build a successful CJM it is imperative to keep the **client’s vision** of the journey and to avoid pre-conceived ideas that may exist inside the company. According to “Salesforce UK” (2016)<sup>3</sup> the modern customer wants to have a **seamless experience**, expecting that companies know who they are and what are their preferences.

Lastly, CJM has been developed not only to associate customers profiles to the different journeys but also to identify what are their Pain and Pleasure points.

# Methodology

## Methodology – General Methodology (1/2)

It was proposed that the scope of the project would encompass the interactions between the client and the brand, only from the moment he enters the gas station to the moment he exits, on weekdays and in the Lisbon region.

### Scope

#### Geography



**Lisbon** was the obvious choice, as it is the location of the headquarters and it represents a great percentage of Galp's **volume and value of sales**.

#### Location

Internally, **gas stations** are categorized in four segments, based on **services offered, store size, and client typical behavior: local, metropolitan, road, and long distance**.

As such, the 12 stations chosen for the project represent the different segments somewhat proportionately to sales in the region.



#### Services

Of the wide variety of services provided by Galp, the project focused on **fuel, convenience store, and car wash**. Bottled gas was not considered as there weren't enough respondents.

#### Time Frame



**Weekdays** were selected as they represent the typical client, **excluding Wednesdays** due to a promotional campaign on additive fuels.

#### Customer

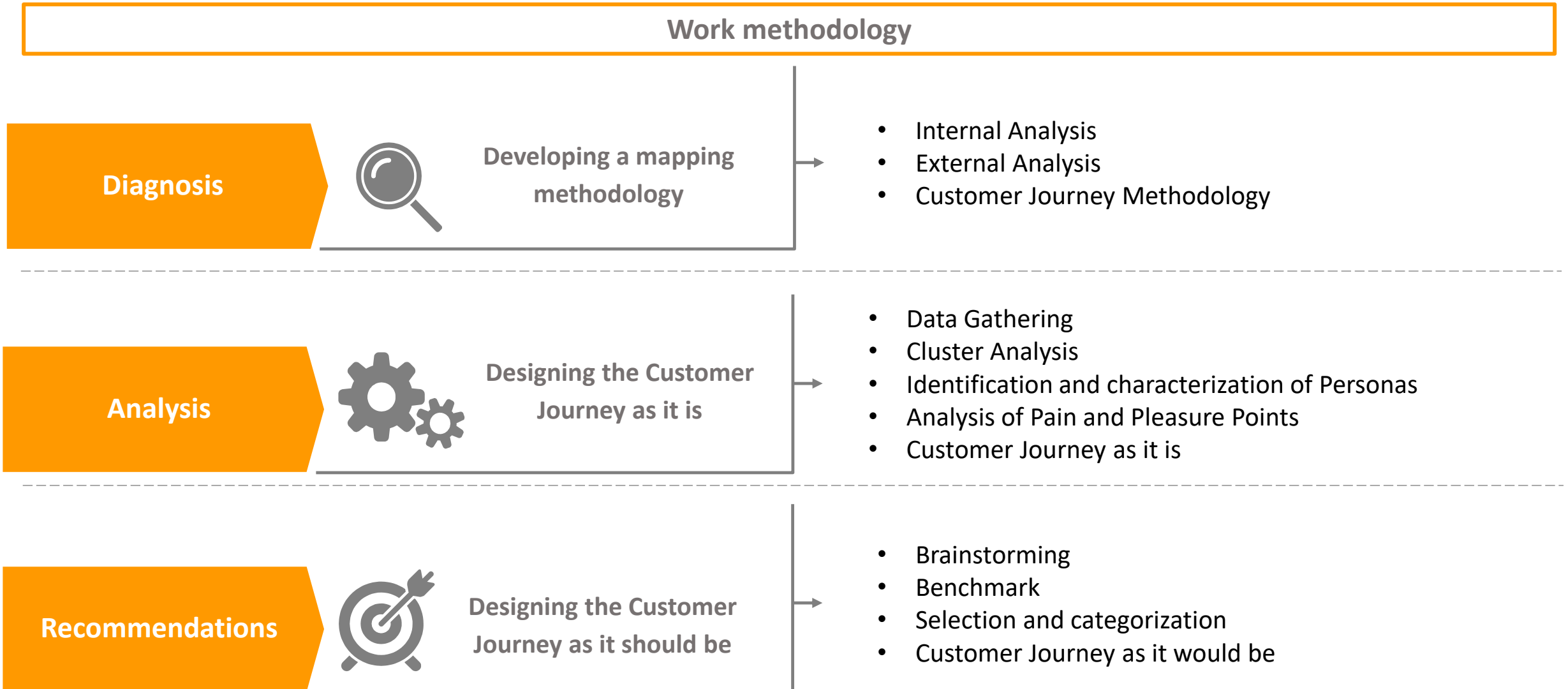
The research focused on the **moment of purchase** for two main reasons:

- The decision process is already somewhat **captured** by the **current market research** led by Galp
- **Time:** three months would not be sufficient to achieve the goal if the moments of decision and post-purchase were considered



## Methodology – General Methodology (2/2)

The project was divided in three main stages<sup>4</sup>: diagnosis, which included contextual research on internal and external conditions, and on mapping methodologies; analysis of the clients journey; and selection of recommendations.



# Methodology – Diagnosis – Situation Analysis

On the first stage, it was important to analyze the current situation within the organization, and changing contextual conditions, to understand the behavior of customers, its impact on the industry, and Galp's response.

## Internal Analysis

**Objective:** Understand the **company's resources and capabilities** to compete in the market.

**Method:** Research **organizational capabilities**, as human, informational, financial, and supply resources; reviewing its **current offering** of products and services; and analyzing **previous performance** regarding customer metrics.<sup>5</sup>

### Main components:

<b>Organization</b>	<ul style="list-style-type: none"> <li>Resources</li> </ul>
<b>Current offer</b>	<ul style="list-style-type: none"> <li>Fuel</li> <li>Convenience</li> <li>Car Wash</li> <li>Complementary</li> </ul>
<b>Previous Performance</b>	<ul style="list-style-type: none"> <li>Customer metrics</li> </ul>

## External Analysis

**Objective:** Understand how the **competitive landscape** affects the actions of Galp and its competitors.

**Method:** The external environment includes the **industry in which the company competes** as well as those **against whom it competes**, specifically fuel and grocery retailing.<sup>6</sup>

### Main components:

<b>Context</b>		<b>Market</b>
Social/ Demographic	<ul style="list-style-type: none"> <li>Population shifts</li> </ul>	<ul style="list-style-type: none"> <li>Fuel</li> <li>Retail</li> <li>Car Wash</li> </ul>
Economic	<ul style="list-style-type: none"> <li>Buying power</li> </ul>	
Political/ Legal	<ul style="list-style-type: none"> <li>Laws and regulations</li> <li>Governmental action</li> </ul>	<b>Industry Trends</b>
Technological	<ul style="list-style-type: none"> <li>Customers</li> <li>Organizations</li> </ul>	<ul style="list-style-type: none"> <li>Fuel</li> <li>Retail</li> </ul>

# Methodology – Diagnosis – Customer Journey Map (1/3)

A CJM helps chart customer experience and understand how their journey impacts them. It is an important tool to develop a cohesive planning process targeting improvements based on the steps of the experience with more impact.

## Customer Journey Map

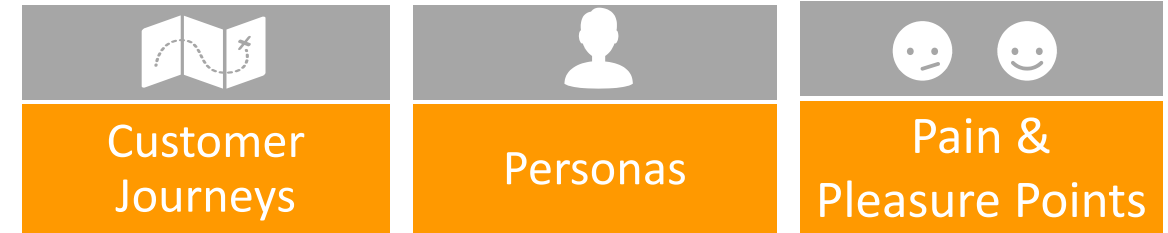
**Objective:** Reflect and analyze all the **interactions** and **steps** that different customers' take when **using Galp services** during their **journey in the gas station**. CJM illustrates customers' **actions, motivations** and **Pain/Pleasure Points** on different stages.

**Method:** Creation of a diagram that illustrates the **relation between customers and the company** exactly as it is experienced. Representation of the **journeys' stages completed** by different customers in order to understand which touch points are used, and the way each of them assists and interferes in the journey.<sup>7</sup>

Development of a **qualitative research method**<sup>[1]</sup> in order to identify **customers' emotions** (Pain and Pleasure Points), associate them with specific actions, and assess how they change as the experience unfolds.<sup>8</sup>

Assemble customers according to their **different characteristics**, with the purpose of studying their behavior and understanding which journeys are more relevant to the analysis.

## CJM main components:



## Customer Journey



**Objective:** Map Galp customers' path in the gas stations to comprehend which actions they make, which services they use, and its sequence.

**Method:** During the in-field research, the **customers' path is described**, explaining the **actions performed and services used**.

Customers' interactions with the different services are **grouped in stages** enabling a more **detailed comprehension and analysis** of the total experience.

Customers may have **different journeys**, meaning that they used different services and/or completed stages in a different sequence. Similar journeys are assembled in **clusters** with the objective of finding **behavioral patterns** and obtain the most **relevant journeys**.

[1] The importance of Qualitative Data can be found in Appendix B 1.1 – Methodology – Importance of Qualitative Data

## Methodology – Diagnosis – Customer Journey Map (2/3)

Customers use companies services in different ways and each journey step has a different emotional impact on them. It is important to understand the several types of customers and the steps in which their emotional state changes.

### Persona



**Objective:** Comprehend different customer's profiles and which differences exist in the way they experience Galp services.

**Method:** In order to associate **customers' preferences** with the **different journeys** found, it is necessary to define the **key characteristics** that together will build the **profile** of a specific journey's **typical customer**, called **Persona**. To create the different Personas one must collect information about customers' **demographic characteristics, motivations, needs and mindset**.<sup>9</sup> By using this method it is possible to illustrate the main characteristics of the typical customers (Personas) that fit each of the journeys instead of segmenting based on a pre-determined factor.

### Pain and Pleasure Points



**Objective:** Understand how each interaction builds or destroys value in the customers' point of view and how the level of satisfaction changes as the experience unfolds.

**Method:** During the customers' tracking it is relevant to document their **emotional response** to the service and to understand if the reaction is **positive or negative**, classifying it as **Pleasure or Pain Point**, respectively.<sup>10</sup>

Customers' Pain and Pleasure Points collected during the in-field research are **associated to the each Persona's Profile**.



## Methodology – Diagnosis – Customer Journey Map (3/3)

The CJM should be a visual representation of customer's experience, facilitating its analysis and companies' planning process. In order to map the experiences of different types of customers it is necessary to create several CJMs.

### Customer Journey Map Template

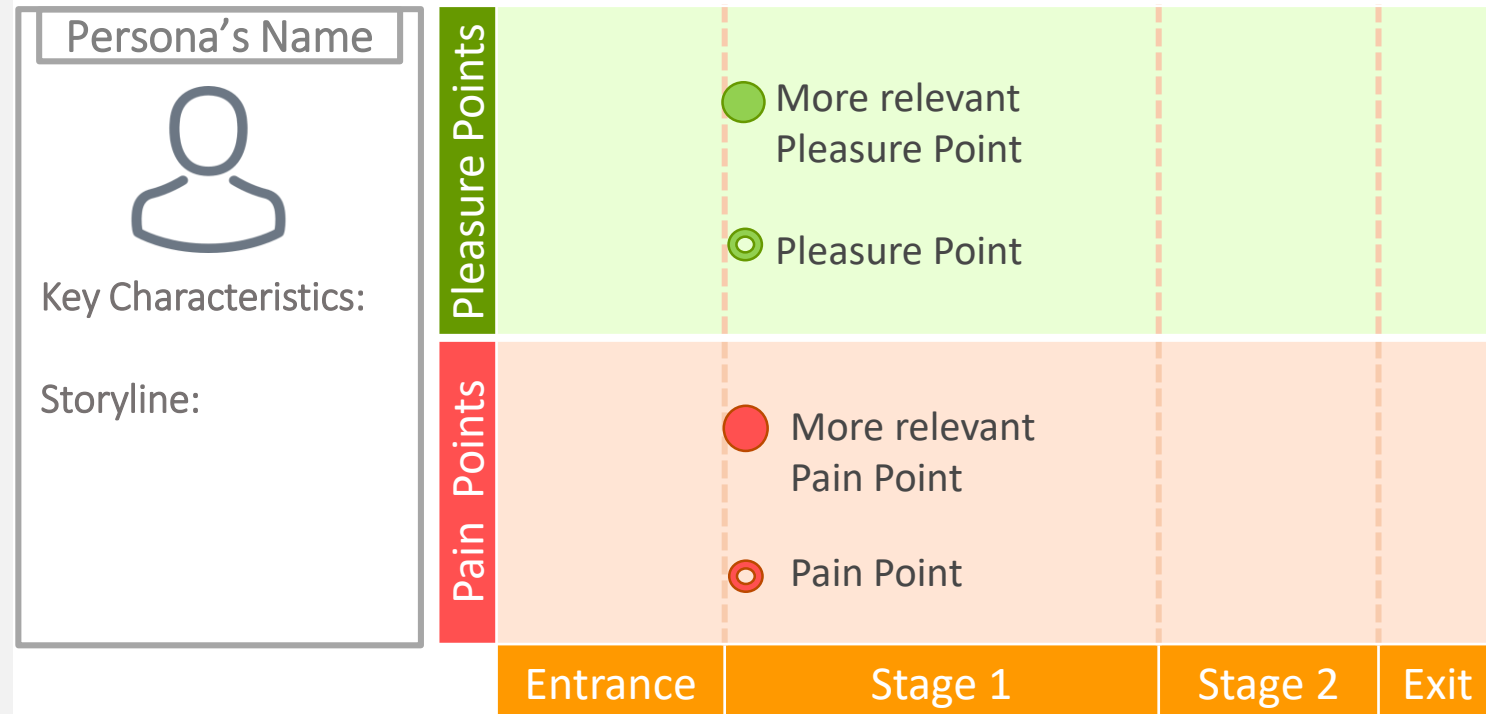
**Objective:** Clearly and intuitively represent two sections: **Personas' Profile**, and **Pain & Pleasure Points distribution by journey's stage**.

#### Method:

The Persona's Profile contains the defined **key characteristics** about the typical customer and the Persona's **storyline**, including the information about the Persona's **preferences, motivations and mindset**.

In the second section, Pain and Pleasure Points are distributed according to the stage in which they were identified. **Pleasure Points** are displayed in the **top green field** of the map and the **Pain Points** in the **bottom red field**.

It is given a **stronger highlight** to the Pain and Pleasure Points that have a **higher incidence** by using a full circle. Pain and Pleasure Points with a lower incidence are identified using a donut.



## Methodology - Analysis – Data Gathering – In-Field Observations

Building a CJM is crucial to understand the complexity of customers behaviors and interactions with a service. Customers' observations in-field allow a detailed comprehension since customers are observed in their own environment.

**Objective:** Mapping customers' Journey in Galp's gas stations and identifying customers' Pain and Pleasure Points, in order to gather data for clusters' creation and to prepare Interview's script.

**Method:** The Observations phase is adequate for collecting data of **spontaneous behaviors** in their usual contexts. This phase is performed **without any sort of interaction** with the clients.

The data obtained during the Observation phase allows the **validation** against subjective reporting of what is preconceived to be the clients' behavior and the important factors that might not be contemplated or unknown to the group, allowing a better preparation and the design of the customers' Interview.<sup>11</sup>

### Main activities<sup>[1]</sup>:

#### Creation of the Observations' grid

- Select clients' characteristics to be collected
- List of all relevant clients actions to be observed in-field
- Structure observable actions by level of detail

#### Observations in-field

- Track and sort all the clients' actions and services used in the gas station
- Identify and list the occurred Pain and Pleasure Points
- Time the queue, payment time and time spent in the station

#### Data analysis

- Sample description
- Analysis and categorization of observable Pain and Pleasure Points
- Clusters' creation and analysis

[1] The observations' grid and its components can be found Appendix B 1.2 – Methodology –Observation Grid Preparation and B 1.3 - Methodology –Observation Grid

## Methodology - Analysis – Data Gathering - In-Field Interviews

In-field interviews allow a direct interaction with different types of customers which is useful to learn their perspectives, to create the Personas' profile, and to understand in a deeper way their respective Pain & Pleasure Points.

**Objective:** Comprehend **customers' profile**, individual preferences, expectations, needs and Pain and Pleasure Points in several stages of their journey.

**Method:** The Interview phase is useful to learn **customers' perspective**, allowing them to share their opinion, personal feelings and experiences, and to approach sensitive topics.

Customers are surveyed **during their journey** in the gas stations with the interviewers making questions after main stages and interactions with the service.

The questions should be made face-to-face in a **neutral manner**, with an active listening to the clients' responses, and asking follow-up questions based on those responses.<sup>11</sup>

### Main activities<sup>[1]</sup>:

#### Creation of the Interviews' script

- Delineate customers' characteristics and information to be collected
- Define and select relevant questions to be probed

#### Interviews in-field

- Track services used by each customer in the gas station and its key actions
- Register customers' preferences and opinions
- Create a list of referred Pain and Pleasure Points
- Time the queue and time spent in the station

#### Data analysis

- Sample description
- Analyze and categorize answers, Pain and Pleasure Points and suggestions

[1] The interviews' grid and its components can be found Appendix B 1.4 – Methodology – Interview Grid Preparation and B 1.5 - Methodology – Interview Grid

## Methodology – Analysis – Data Analysis (1/3)

Analyzing the Data collected is paramount to transform it into information that can be used to complete the discussed methodology and work towards improving Galp's customer experience.

### General Methodology <sup>12,13</sup>

**Objective:** The goal of this analysis is to **obtain groups of customers with similar journeys** to be analyzed and studied, based on the journey customers make during their time in the gas station.

**Method:** Each phase was done sequentially and based on different data. **Cluster analysis** was performed based on **data from the observations**, with the information of the journeys made. The **second phase** was built on the output of that analysis to determine the **final groups to be studied**.

It was then possible to **match the personas to the customer journeys** based on the data collected from the **interviews**.

For the **following step**, both periods of data gathering were relevant, as **Pain and Pleasure Points** were collected during both phases.

### Cluster Analysis

**Objective:** Segment observations into clusters of customers with **homogeneous customer journeys**.

**Method:** This type of analysis is done on an Ad Hoc basis, tailored to the specific situation under analysis. In this case, the goal was to **separate customers based on the services they used**.

- The cluster analysis was done using **binary variables** and data from the observations.
- For each of the simulations, it was asked that the results gave us the possibilities **between 3 and 8 clusters**.
- The **R<sup>2</sup>** test gives the **percentage of total variance** that is **explained** in each cluster solution. In practical terms, it means that a higher R<sup>2</sup> occurs with more **homogeneous cases** inside the cluster and more **heterogeneity between** different clusters.



## Methodology - Analysis – Data Analysis (2/3)

The cluster analysis can be subdivided into 4 stages, used to decrease the number of different simulations obtained initially into the final one, which will be used as a basis for the subsequent steps of the data analysis.

### Main components:

#### Hierarchical Cluster Analysis

Run **hierarchical cluster analysis** based on the services used during the observations, combining **three clustering methods** (Binary Euclidean Distance, Size Difference, and Pattern Difference) and **three dissimilarity measures** (Nearest Neighbor, Furthest Neighbor, Ward's Method); resulting in **nine simulations**<sup>14</sup>.

Look at the **dendrogram** to **reduce** the number of **usable simulations to six**. The reduction is based on the fact that the agglomeration is not done gradually and, therefore, it makes it impossible to select an appropriate number of clusters.

#### Dendrogram

#### R<sup>2</sup> Test

Perform the **R<sup>2</sup> test**, using the **One-Way ANOVA** tool in SPSS, to **calculate** which simulations have more **relevance** (the bigger the R<sup>2</sup>, the more different are the clusters in a simulation, and more solid it is). The ideal number of cluster is five in any of the **three simulations** that **pass this test**.

**Analyze** the clusters given in the three simulations to see if and **which** of the results can **apply to a real scenario**. However, it is important to notice that since the results are similar, it means clusters are natural and not artificial. The final simulation used **Ward's Method and Binary Euclidean Distance**.<sup>[1] [2]</sup>

#### Verification

[1] More detailed info about these methods can be found in Appendix B 2.1 – Methodology – Cluster Analysis

[2] The dendrogram for the final simulation is represented in Appendix B 2.2 – Methodology – Dendrogram Ward's Method, Binary Euclidean Distance

## Methodology - Analysis – Data Analysis (3/3)

To finalize the data analysis, it is important to adapt the statistical to the real scenario, by selecting relevant journey groups. The following steps include matching Personas and Pain & Pleasure points to said journeys, thus completing the CJM.

### Interpretation of Results

**Objective:** Adapt the statistical results from the cluster analysis to the real scenario and complete the framework previously presented to reach the Customer Journey Map as it is in the moment.

#### A. Define Relevant Customer Journeys

It is important to **build on the results** of the cluster analysis, as they are **purely statistical** and must be taken with caution.

By looking in more detail to the clusters formed, it is important to **subdivide them into groups** with **similar mindsets**, and also **establish a criteria and a hierarchy**, in order to avoid ambiguity when it comes to assigning a case to any of the groups. These groups will be the more relevant and, therefore, the ones to be studied into detail.

#### B. Match Personas to CJ

With the information gathered from the interviews, it is possible to create a **Persona**, that **represents the customer for each journey**.

In this step, not only the **absolute values for the different characteristics** inside the group were taken into consideration, but also the **comparison with the whole sample** to discover significant deviations for these values that translate the relevance of that characteristic inside a group.

#### C. Pain & Pleasure Analysis

Complete the analysis by **identifying the Pain and Pleasure Points** for each of the groups, thus completing the framework of the **Customer Journey Map**.

## Methodology – Recommendations (1/4)

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After building the CJM the next phase is to find initiatives based on it that will be targeting modifications with a strong impact in improving the customer's experience.

### General Methodology

**Objective:** Identify initiatives to optimize the customers' journeys, analyze, select, validate and categorize them.

**Method:** To provide a final list of initiatives a **four-steps action plan** is developed: including initial **brainstorming sessions** to identify possible initiatives, a **decision matrix** to rank and select them, **validation** by the company's involved areas to analyze them, and, finally, a **categorization** depending on their implementation.

### Brainstorming

**Objective:** Find initiatives to suggest to Galp in order to improve customers' experience and improve their journey in the gas stations.

**Method:** The *Metaplan* technique is used to make group discussions more **effective** by **saving time** and by **deeply involving** all the intervenient in the discussion process. The discussion rules are introduced to the participants in the beginning of the discussion, however these rules should be **flexible** in order to facilitate a more fluid and productive discussion. The group members thoughts should be **visible to all**, so it is important to create an organized visual image in order **to stimulate new ideas** and to **establish possible relationships**. The discussion moderators should make questions and expose the created ideas to encourage everyone to explain their point of view and to stimulate curiosity and critical thinking. The moderators should always be **focused in guiding the discussion themes towards their objectives**.<sup>15</sup>

## Methodology – Recommendations (2/4)

It is fundamental to structure the creative thinking process in order to obtain diverse initiatives that might help solving customer journeys problems and that might replicate positive aspects which are already happening.

### Brainstorming sessions

#### Brainstorming with Gas Stations' Managers

- The **most relevant Customer Journey's stages** are selected
- For each of the selected stages are specified the **attributes** that have a **positive influence in the Customers' Journey**
- To each stage are stated the aspects that could **function in a better way**
- To each aspect stated are created **possible solutions** to improve it

	Stage 1	Stage 2
What is functioning well?		
What can be improved?		
How to improve it?		

#### In-group Brainstorming

- **Customers' suggestions** are taken into account
- **The Pain and Pleasure Points** that occur with a higher frequency in each customers' journey stage are selected
- For the selected Pain/Pleasure Points is identified the **reason for their occurrence**
- To each **Pain Point** are created possible **solutions to fix it**
- To each **Pleasure Point** are created possible **ideas to replicate it**

	Stage 1	
	Pain Point 1	Pleasure Point 1
Why it happens?		
How to fix it?		-
How to replicate it?	-	



## Methodology – Recommendations (3/4)

The created initiatives need to be evaluated based on specific criteria in order to assess which ones are more relevant to the Customer Journey improvement.

### Ranking initiatives

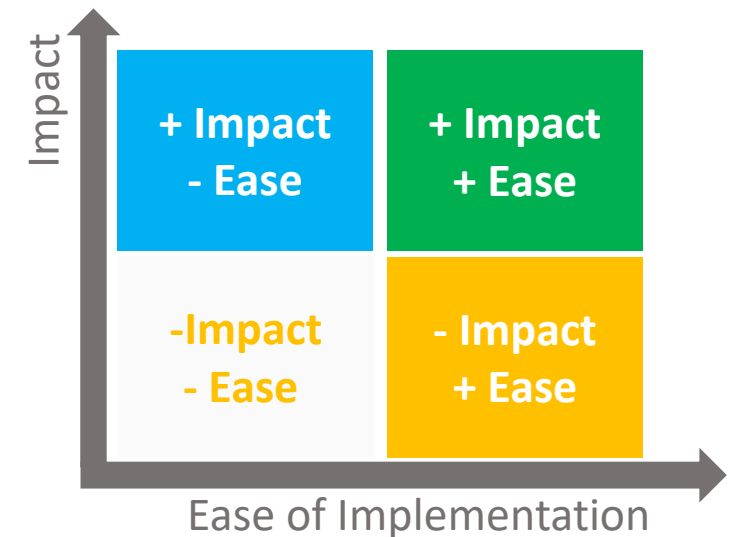
**Objective:** Evaluate and prioritize the list of brainstormed actions according to its impact in the Customer Journey and ease of implementation.

**Method:** A **decision matrix** is useful for **weighting initiatives** based on the criteria that are determined to be relevant.<sup>16</sup>

The **initiatives** created for each Pain and Pleasure Point are **classified** by each group member **according to its impact** in reaching the project's objective **and the ease** of doing it. With the general ranking obtained with the combination of each group member's classification it is possible to allocate in four quadrants (Easy to do/Low impact; Easy to do/High impact; Difficult to do/High impact; Difficult to do/Low impact) all the initiatives created.

The **better classified initiatives** in each of the criteria, or both, **are selected**, and the ones that fit into the Difficult to do/Low impact quadrant are excluded.

### Decision Matrix:



## Methodology – Recommendations (4/4)

Each initiative filtered by the decision matrix needs to have a final analysis and validation with the company's area responsible for its field of action. With the validated initiatives is possible to redesign the Customer Journey Maps.

### Initiatives validation

**Objective:** Analyze and validate the better classified actions obtained with the decision matrix and adjust them, if necessary, according to what Galp already planned or implemented.

**Method:** The **filtered recommendations** are **discussed with the company's responsible areas**, in order to **reexamine** the ease of implementation and to take into account possible limitations that may arise such as cost drivers and the possible implementation timeline. With the objective of aligning the suggested actions with the company's strategy, it is checked which ones are **already being planned** or implemented, or were **executed in the past**. Based on the meetings, the initiatives are adjusted or excluded, if necessary, and categorized as **Quick-win or Challenging** for a more intuitive comprehension and presentation purposes.



### Customers Journey *as it would be*

**Objective:** Redesign the Customer Journey Maps based on the suggested initiatives.

**Method:** The CJMs “as they are now” are **impacted by the suggested initiatives**, meaning that their respective Pain and Pleasure Points are **mitigated and replicated**, respectively. The resulting CJMs are optimized, having Pain Points eliminated and Pleasure Points added, in order to redesign the customers' experience.

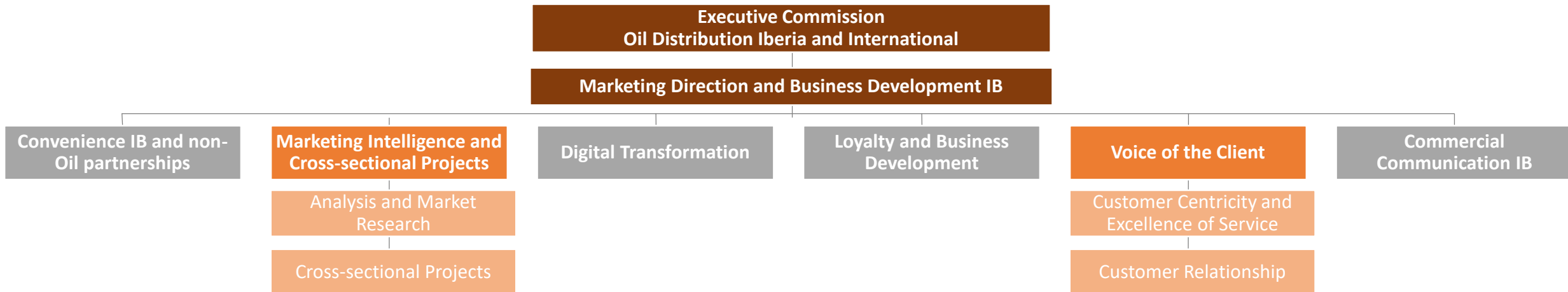
# Internal Analysis

# Internal Analysis – Organization

Galp's resources are described for a better understanding and analysis of its current situation, allowing also a comprehension of how the project is integrated in the company.

## Organizational Resources

The project was developed under the supervision of the Marketing and Business Development unit, in collaboration with the areas of Cross-sectional Projects and Voice of the Client, also impacting other marketing and operational areas.



## Physical Resources

## Reputational Resources<sup>17</sup>

## Financial Resources

	>700 stations	As a fuel retailer Galp is <b>known</b> by practically <b>all the population</b> and is <b>the top player</b> in the market	The fuel business is Galp's core and is the <b>most profitable</b>
	≈250 stations	<b>A significant portion of the population</b> associates <b>Tangerina convenience stores</b> with Galp, and has a <b>higher market share</b> than the fuel business	The <b>margin</b> of convenience stores is <b>significantly lower</b> , partly because it is present in less locations
	≈200 stations	The car wash business has a <b>similar market share</b> to that of the convenience stores	The <b>margin</b> of the car wash is <b>the lowest</b> , intrinsically

## Internal Analysis – Current offer

Galp Stations are categorized as local, metropolitan, road, and long distance; based on location and services associated, which can be convenience stores, car wash, auto services, restaurants and hotels, and other partnerships.

### Fuel

- **Additive fuel, *Evologic***  
Diesel, gasoline 95, gasoline 98
- **Non-additive fuel, *Simples***  
Diesel, gasoline



### Convenience

- **Foodservice**  
Cooler, Cafeteria
- **Grocery**  
Grocery, Wine and hard drinks
- **Impulse**  
Snacks, drinks, frozen goods
- **Tobacco**  
Traffic Builder
- **Press**  
Traffic Builder
- **Auto**
- **Others**



### Car-wash

- **Automatic car-wash**
- **Self-service jet-wash**



### Complementary services

- **Free to use**  
ATM, WC, air and water



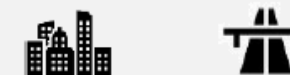
### Auto Services

- *Midas*



### HORECA

- *Ibis*
- *Ibersol*
- *Areas*
- *Eurest*
- *McDonalds*
- *Burger Ranch*
- *Burger King*



Local



Road



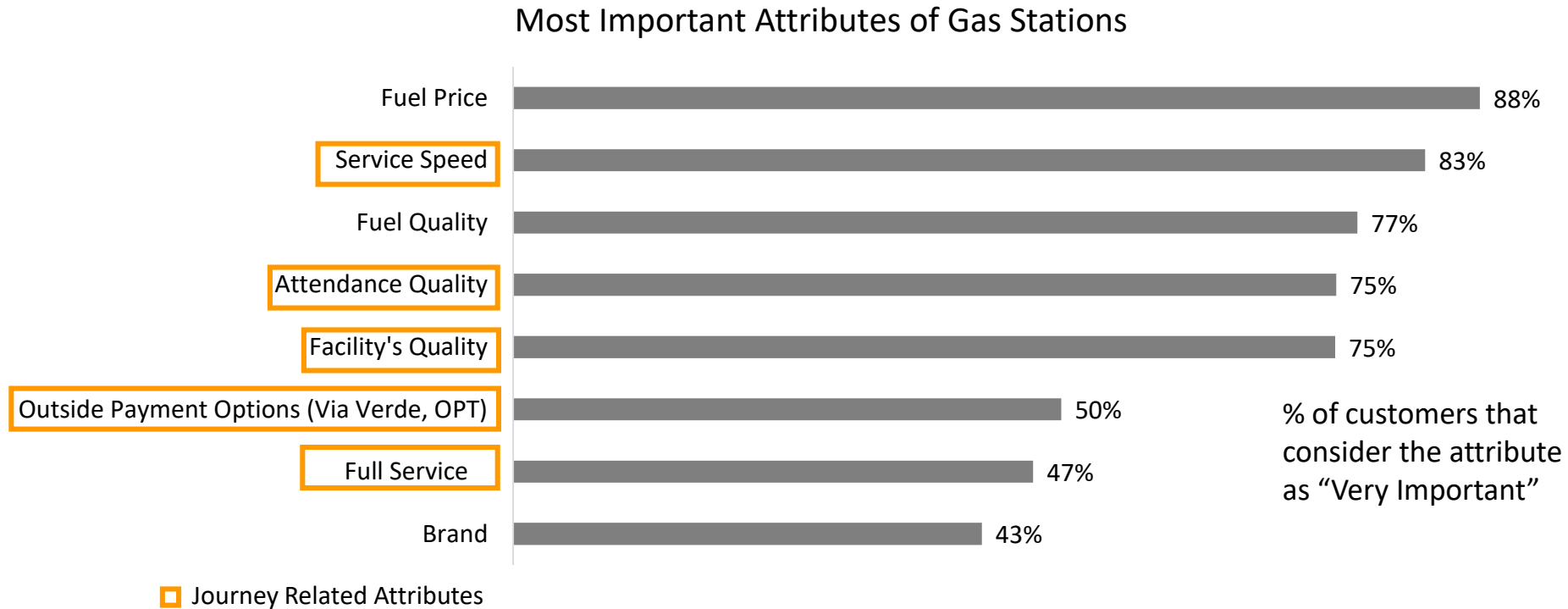
Metropolitan



Long Distance

## Internal Analysis – Customer Metrics (1/3)

In enquiries' opinion, a great part of the most important attributes in gas stations are related to the way their journey is designed.



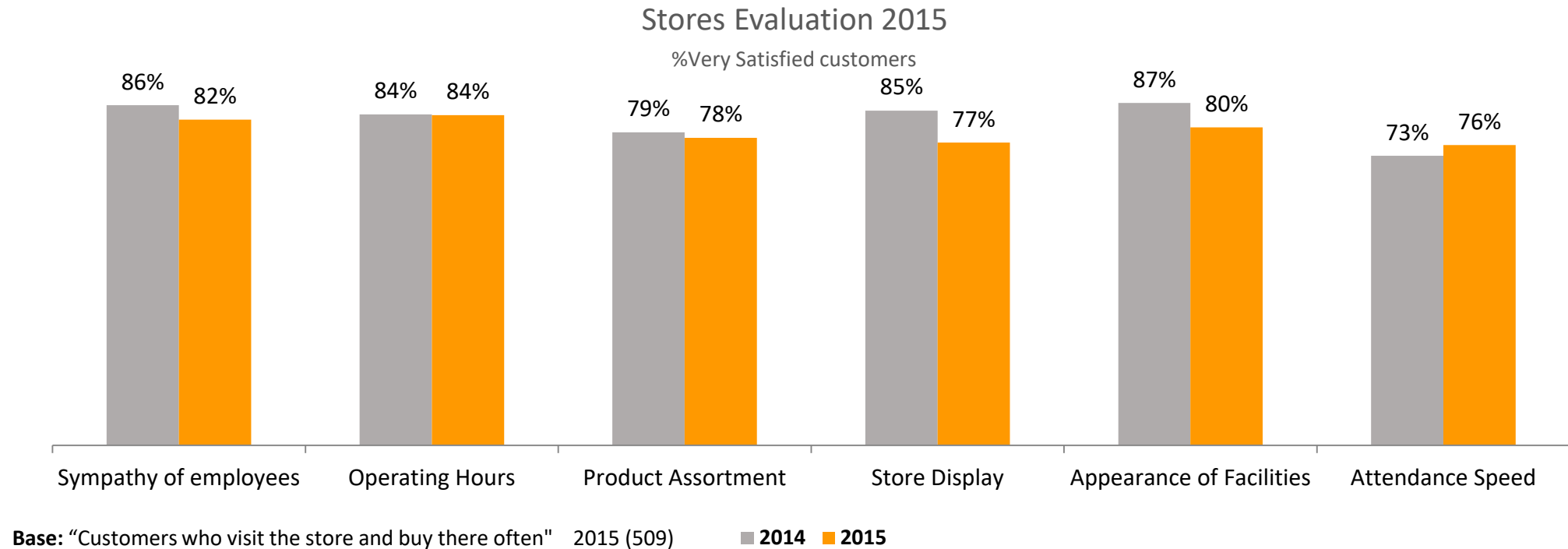
Source: Tracking do Retalho e da Marca, 2015

- 83% of enquiries<sup>[1]</sup> consider Service Speed as a Very Important attribute
- 75% affirm that Quality of Attendance and Facilities is highly important for them
- The last two journey related attributes are the existence of "Outside Payment Option" that a lot of customers are using nowadays to avoid payment in-store and Full-service as some customers still prefer having an employee to refuel the vehicle for them

[1] Information about the survey on Appendix C1.1 - Internal Analysis – Tracking do Retalho e da Marca 2015

## Internal Analysis – Customer Metrics (2/3)

Every year, there is a study for customers who visit and buy in *Tangerina* stores to evaluate its attributes. In 2015, the attribute that more customers were very satisfied with was the operating hours, followed by the sympathy of employees.



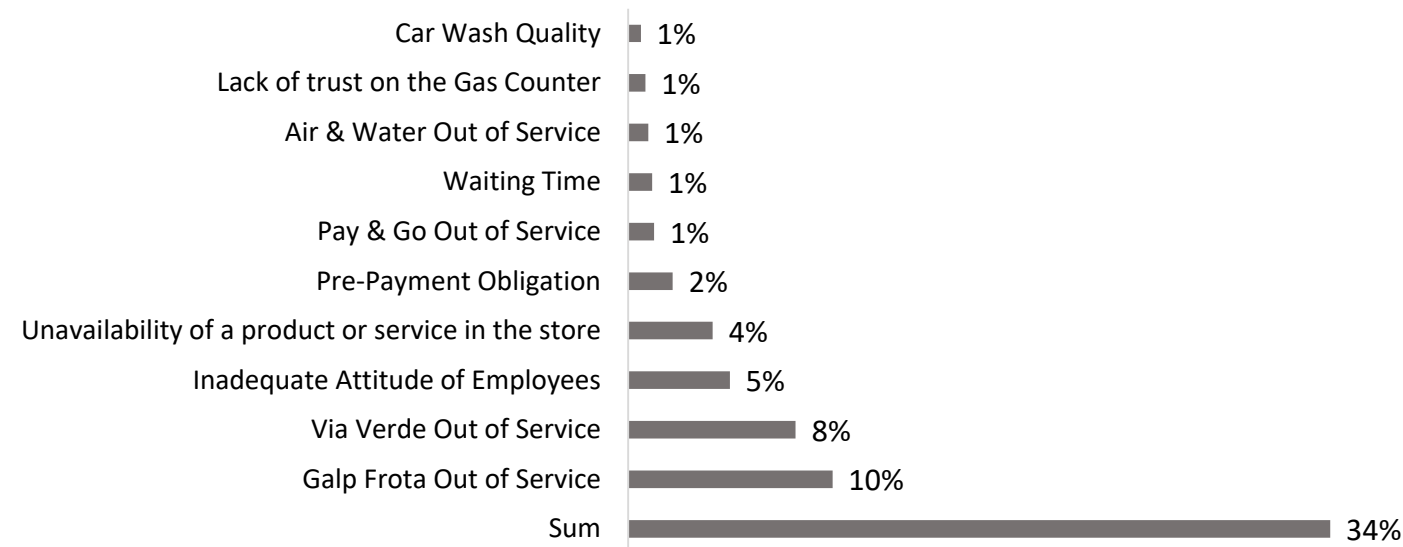
Source: Tracking do Retalho e da Marca, 2015

- In most attributes, customers evaluation decreased from 2014 to 2015. As an example, 87% of customers were very satisfied with the appearance of facilities on the first year of the study while in 2015 those were only 80%
- The biggest decrease (8%) in the percentage of customers very satisfied was related to store display.
- Attendance speed was the only store attribute that registered an increase in terms of customer satisfaction

## Internal Analysis – Customer Metrics (3/3)

By looking at the complaints book of the gas stations one can understand what customers are not satisfied with and what are the drivers of complaints.

Relevant Complaints <sup>[1]</sup> (% Total Complaints)



- Main complaints are due to the unavailability of services
- Inadequate attitude of employees represents 5% of total complaints
- Waiting time represents 1% of complaints and Pre-payment obligation caused 2%

- The team studied last year's complaints book in order to realize what Pain Points are already identified by customers and what to look for on the observations phase.
- From the total complaints, 34% were related to the customers' experience (scope of the project) and those were the ones studied and taken into consideration.
- It is important to enhance that complaints should not be seen as a threat but as an opportunity as for every one customer that complaints, 26 may have had the same issue and remained silent. <sup>1</sup> <sup>[2]</sup>

[1] Relevant complaints are the ones that may be impacted under the scope of the project and have a higher incidence

[2] The "Customer Complaints Iceberg" on Appendix C 1.2 - Internal Analysis – Customer Complaint Iceberg



# External Analysis

## External Analysis – Context

Due to the economic crisis, spending on vehicles and fuel decreased, and regulation imposed the sale of non-additive fuels. The sales of electric vehicles increased due to tax benefits. Moreover, technology has been shaping the retail industry.

### Social/ Demographic

Roughly **30% of the population** lives in the **Lisbon** metropolitan region. The big majority are adults, although the percentage is **decreasing**, while the older population is increasing.<sup>18</sup>

The number of **vehicles sold** in Portugal **decreased significantly** but has been slowly recovering<sup>19</sup>, nonetheless the number of **active vehicles** remains **stable**.<sup>20</sup>

### Economic

Almost **8%** of the **family expenses**<sup>21</sup>, which have been **decreasing**<sup>22</sup>, refer to the **use of personal vehicles**, including fuel. As such, the **consumption of gasoline and diesel decreased sharply**, but is now showing faint evidence of **recovering**.<sup>23</sup>

Roughly **11%** of **family expenses** refer to **food**, and **1,4%** to **tobacco**, which have been **growing**.<sup>24</sup>

Thus, the **sales of food, beverages and tobacco** have **increased**.<sup>25</sup>

### Political/ Legal

From 2015, all gas stations have the legal obligation to **provide non-additive fuels** (diesel and gasoline).<sup>26</sup>

The **tax on fuels** has been **decreasing**<sup>27</sup> as fuel prices increase (21% in diesel, and 13% in gasoline).<sup>28</sup>

**Tax benefits** on the purchase of **electric vehicles** have been in place, and have resulted in a significant **increase of sales**.<sup>29</sup>

### Technological

The **retail industry** has been and will continue to be affected by **technology** as it **facilitates the shopping experience** through robotics, personal recognition, digital wallet, artificial intelligence, consumer analytics, among others.<sup>30</sup>

The **use of smartphones** has been growing among the Portuguese population, reaching **68% of mobile phone users**.<sup>31</sup>

## External Analysis – Market

Galp operates in three markets: fuel, car wash and food retail. The first was shook by new entrants, the second is fragmented into automatic wash, manual wash, and specialized cleaning, and in the third competition is increasing because of new trends.

### Fuel <sup>17</sup>

- This market is divided in **two major strategic groups**: brands that sell **additive fuel**: *Galp, BP, Repsol, Cepsa, and Prio*; and those that sell **non-additive**, at a **lower price**, usually, hypermarket chains.
- Galp remains the preferred brand as it is where customers refuel most of the times, nonetheless considering the hypermarket chains as a whole they come in second.
- Furthermore, customers value price and quality of the fuel, as well as a swift and friendly service.

### Car Wash <sup>17</sup>

- There are basically **three different services** that are provided in the market: **automatic wash, manual wash, and specialized cleaning**.
- Manual wash is the biggest segment: either at home, on specialized providers, or on gas stations; followed by specialized cleaning, involving washing and vacuuming; and then automatic wash, mostly on gas stations.
- Customers that wash their vehicles in gas stations value location and price, and prefer to do it where they also refuel their vehicle.

### Food Retail

- Galp has its own **convenience store**: *Tangerina*, which competes directly with other convenience stores in competitors' stations; and has the **highest percentage of satisfied clients** among them.
- In this case, customers value basic attributes such as WC, ATM, and parking; followed by pharmacy and then cafeteria; all of which provided by Galp. <sup>17</sup>
- Convenience retailers have smaller formats than super and hypermarkets, to serve shoppers that are time constrained. However, there has been a trend in **traditional grocery retailers to approach convenience retailing**, by building smaller store formats, that has been diluting the difference between both. <sup>32</sup>

## External Analysis - Industry Trends (1/2)

Some trends in the market and consumer behaviors must be taken into account by companies when making strategic decisions so as to be market responsive and trend creator.

### Seamless Experience

Consumers look for a fast, fluid and effective buying experience and must find it in every channel of the company

### Service Quality <sup>33</sup>

Together with valuing the quality of the product, customers value the level of service provided

### Social and Ecological Responsibility <sup>34</sup>

Tendency to find solutions that are social and environment-friendly. Retailers must be able to adapt to those ecological solutions

### Sharing Economies <sup>34</sup>

The growth of businesses that have sharing economies as model affects retailers. Car sharing companies directly reduce the quantity of circulating cars

### Client Empowerment <sup>35</sup>

Customers think companies should value them so they should comprehend their influence on business decisions

### Healthy Living <sup>36</sup>

Customers tend to opt for healthy products, such as organic food, and habits, for example riding bicycle as main vehicle

### Big Data <sup>35</sup>

Customers supply a great amount of Data to companies and hope that this information is used in their own benefit to optimize their shopping experience

### Loyalty Programs

Loyalty programs assumed an important role to fuel retailers as biggest players in the market are now associated to influential food retailers

## External Analysis - Industry Trends (2/2)

Some trends in the market and consumer behaviors must be taken into account by companies when making strategic decisions so as to be market responsive and trend creator.

### **Social Influence** <sup>37</sup>

Social networks have changed the paradigm as detractors and promoters have now a stronger influence on other customers or potential customers' decisions

### **Personal Commerce** <sup>37</sup>

People-centric models are having positive results. The idea of developing the experience based on customer's preferences is growing inside the biggest players

### **Design thinking in the Shopping Experience** <sup>38</sup>

Companies are finding ways to understand what is being valued by customers and redesigning the experience in that direction

### **Virtual and Interactive Experience** <sup>37</sup>

Touchpoints should be focused on the customer experience by personalizing and virtualizing it

### **Customizing the Offer** <sup>39</sup>

Companies are personalizing their offer instead of standardizing it. This happens not only in terms of products and services, but also in terms of discounts and loyalty programs

### **Alternative Fuels**

Car producers are now starting to offer suitable substitutes to gas vehicles and fuel retailers must adapt and take special attention to this new customer

### **Internet of Things (IoT)** <sup>40</sup>

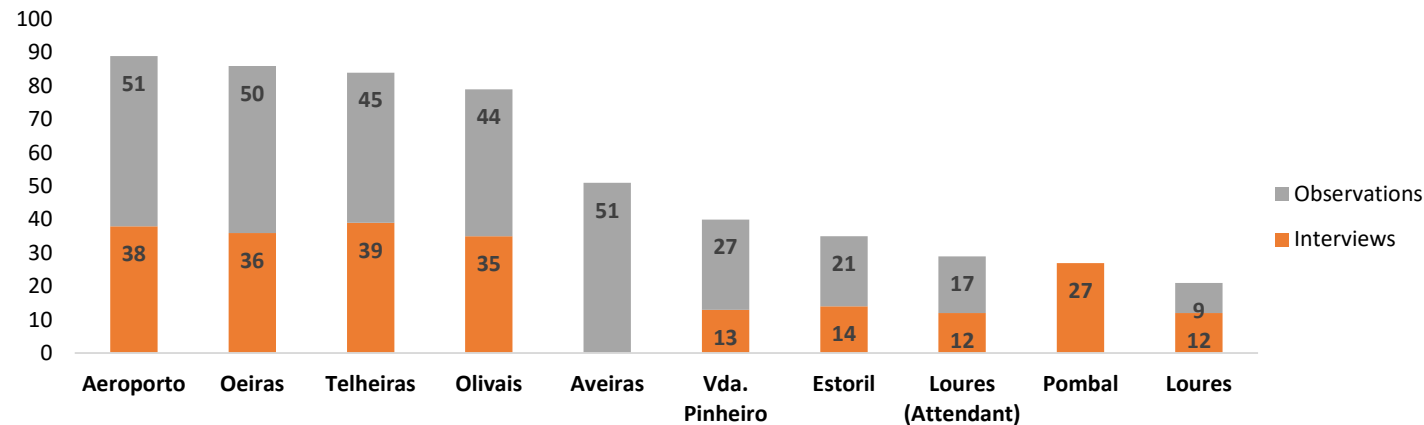
IoT is a market tendency that refers to the connection to internet of devices such as cars, store appliances and many more. This trend is expected to have a great impact on automatizing the shopping experience

# Qualitative Research

## Qualitative Research – Data Gathering Overview [1]

The phase of data gathering was crucial for the project, as the information collected to complete the framework and the full assessment of the current customers' experience was collected here, divided in 315 observations and 226 interviews.

Data gathering numbers by Gas Station



The Gas Stations where the data was gathered show the **focus on the Great Lisbon Region**, with the exception being Pombal – here the goal was to understand long distance gas stations and their customers' experience. These gas stations allowed us to observe and collect data from the different services.

Through this gas stations selection it was possible to study different types, that can have customers with different behaviors.

### Services

Refuel	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Attendant	✗	✗	✗	✗	✗	✗	✗	✓	✗	✗
Car-Wash	✓	✓	✓	✓	✗	✓	✓	✗	✗	✓
Tangerina Store	✓	✓	✓	✓	✓	✗	✓	✗	✓	✓
Tangerina Cafeteria	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓
Air & Water	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ATM	✓	✓	✓	✓	✓	✗	✓	✗	✓	✓

The total numbers were: **315 observations** in the first moment and **226 interviews** in the second moment of data gathering. Therefore, in total, data from **541 customers** was collected, as well as the inputs and suggestions from a significant portion.

## Qualitative Research – Relevant Journeys (1/2)

After performing the cluster analysis and adjusting the results into groups that portray reality in a more accurate way, we got 12 different relevant journeys to be studied.

The **groups are ranked** according to the **hierarchy** defined: **Car-Wash, Refuel, Cafeteria, Convenience Store, Air & Water, ATM, and Tobacco**. This hierarchy has the purpose of ensuring that there is **no ambiguity** as to which group a customer belongs to, according to his or her journey; and that the groups formed have **similar mindsets**.

Not all possible journeys are displayed as they did not have a sufficient number of cases to establish a standalone group. <sup>[1]</sup>

% Total	Relevant Journeys <sup>[2]</sup>	1 <sup>st</sup> Stage	2 <sup>nd</sup> Stage	3 <sup>rd</sup> Stage	4 <sup>th</sup> Stage	5 <sup>th</sup> Stage	% Total	CJM <sup>[3]</sup>
7%	Car-Wash (Mix) (23)	Entrance	Prepayment	Car-Wash	Exit	-----	4,9%	<b>1</b>
41%	Exclusive Refuel (134)	Entrance	Begin OPT transaction	Refuel	Conclude OPT transaction	Exit	12,9%	<b>2</b>
		Entrance	Refuel	Payment to attendant	Exit	-----	2,6%	<b>3</b>
		Entrance	Prepayment	Refuel	Exit	-----	5,8%	<b>4</b>
		Entrance	Refuel	Post Payment	Exit	-----	19,7%	<b>5</b>
14%	Refuel (Mix) (46)	Entrance	Refuel	Payment	Cafeteria	Exit	2,4%	<b>6</b>
		Entrance	Refuel	Convenience Store	Payment	Exit	3,64%	<b>7</b>
		Entrance	Refuel	ATM/Tobacco	Payment	Exit	5,6%	<b>8</b>

[1] The summary of each journey can be found in appendix E 2 – Qualitative Research – Relevant Journeys. The total % of clients that went through each stage can be found in appendix E 3 – Qualitative Research - Stages Detail

[2] The numbers inside the brackets are the absolute number of cases in that group

[3] The relevant groups were selected based on the absolute number of cases and strategic importance to Galp, and numbered according to the defined hierarchy



## Qualitative Research – Relevant Journeys (2/2)

These groups have a defined hierarchy, meaning that it is impossible for one customer to belong to the different groups at the same time.

% Total	Relevant Journeys <sup>[1]</sup> <sup>[2]</sup>	1 <sup>st</sup> Stage	2 <sup>nd</sup> Stage	3 <sup>rd</sup> Stage	4 <sup>th</sup> Stage	5 <sup>th</sup> Stage	% Total	CJM <sup>[3]</sup>
13%	Cafeteria Mix (44)	Entrance	Cafeteria	Payment	Consumption	Exit	6,5%	<b>9</b>
		Entrance	Tobacco	Payment	Cafeteria	Exit	3,5%	<b>10</b>
7%	Convenience Store (Mix) (21) <sup>[4]</sup>	Entrance	Convenience Store	Payment	Exit	-----	4,6%	<b>11</b>
4%	Air & Water (Mix) (13)	-----	-----	-----	-----	-----	-----	
3%	ATM (Mix) (11)	-----	-----	-----	-----	-----	-----	
6%	Exclusive Tobacco (18)	Entrance	Tobacco	Payment	Exit	-----	6%	<b>12</b>
5%	Others (16)	-----	-----	-----	-----	-----	-----	

- As an example, a client who both washes his car and refuels is more similar to a customer who only washes the car than to one who goes to the gas station exclusively to refuel, especially regarding the mindset. Those are willing to spend more time in the gas station, and therefore their experience is different, very distant from the customer who just refuels and wants to be fast.

[1] The summary of each journey can be found in appendix E 2 – Qualitative Research – Relevant Journeys. The total number of clients that visited each stage can be found in Appendix E 3 - Qualitative Research – Stages Detail

[2] The numbers inside the brackets are the absolute number of cases in that group

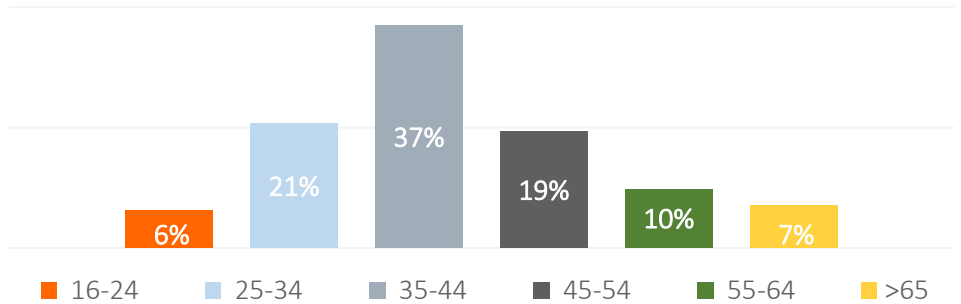
[3] The relevant groups were selected based on the absolute number of cases and strategic importance to Galp, and numbered according to the defined hierarchy

[4] The convenience store sections are described and analyzed in more detail in appendix E 3 – Qualitative Research – Stages Detail

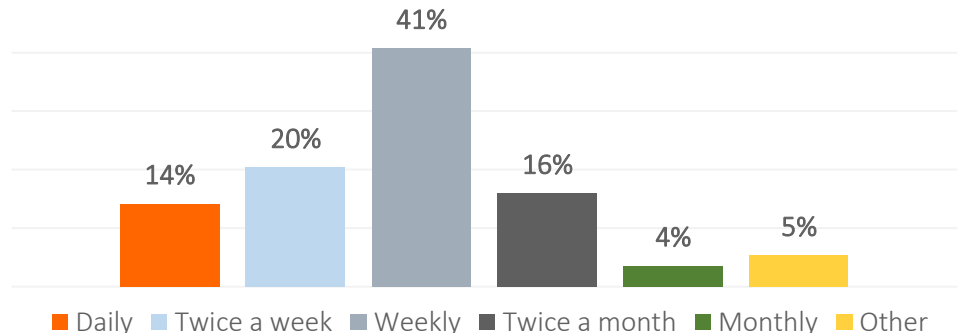
# Qualitative Research – Personas (1/4)

To understand the specific characteristics of the clients in each group (Persona), these were compared to the average results of the sample [1]. The most relevant characteristics were the age, the visited gas station, frequency of visit, and motive.

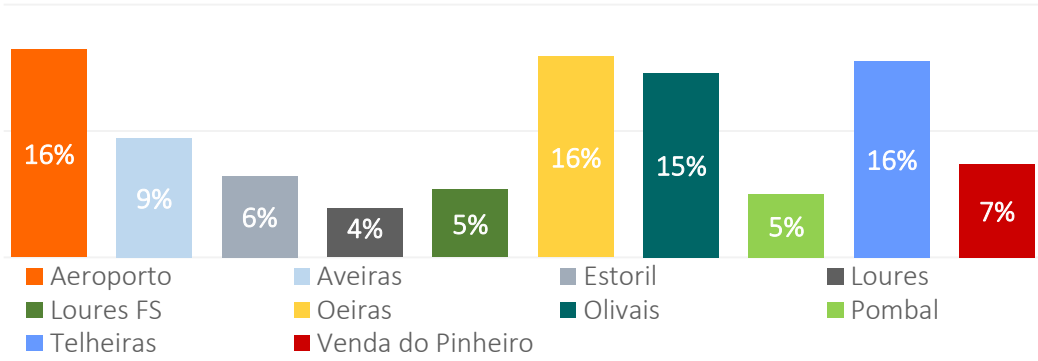
Age Groups



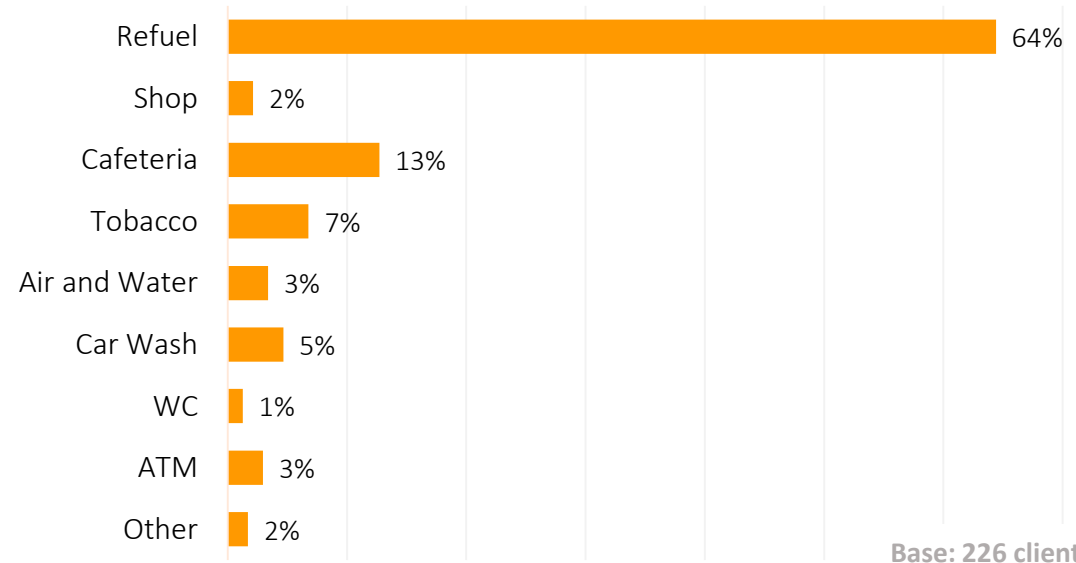
Freq. of Visit



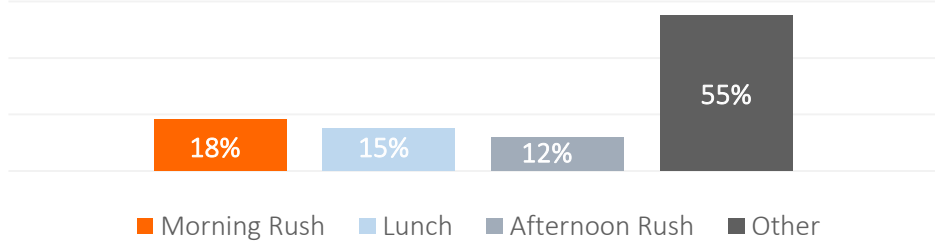
Gas Stations



Main motive



Hours

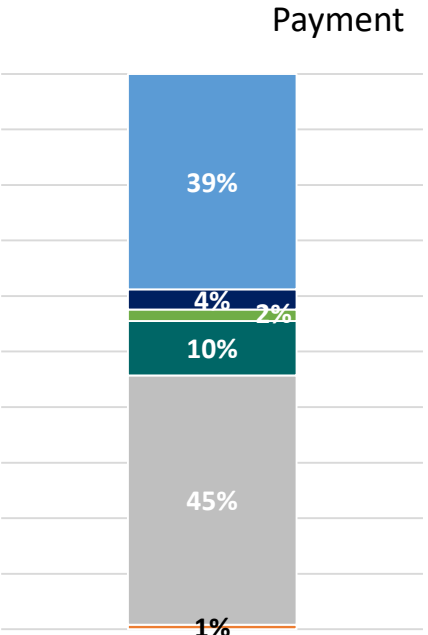


Base: 226 clients

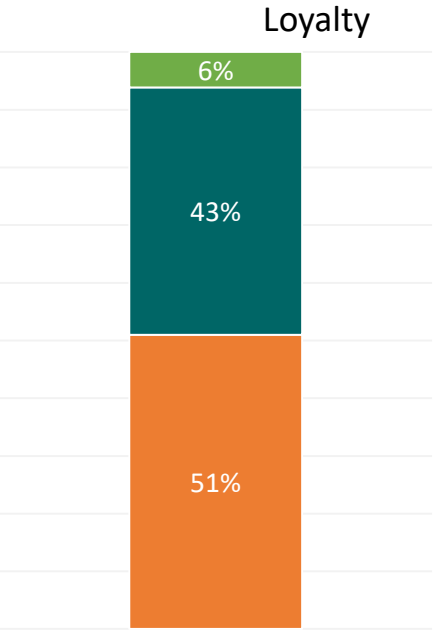
[1] All results can be found in Appendix E 4 – Qualitative Research – Sample Description

# Qualitative Research – Personas (2/4)

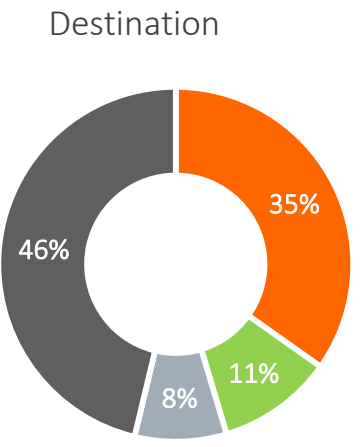
Other useful variables to characterize the personas [1] were the payment type and method, loyalty card, and destination. The vehicle used or using smartphone were not as useful as the responses were very homogeneous.



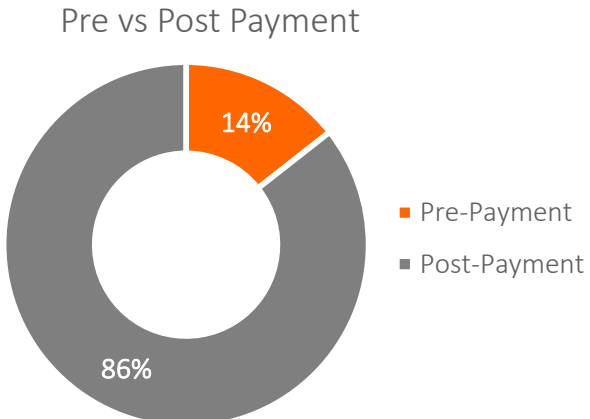
- Money
- Money (Attendent)
- Via Verde
- B2B Credit Card
- Card
- Loyalty Cards



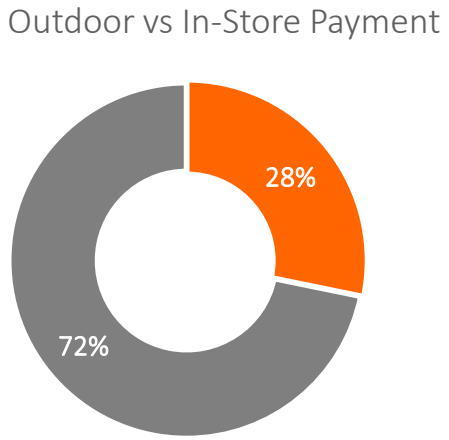
- Via Verde
- B2B Credit Cards
- Loyalty Cards



- Home
- Leisure
- Other
- Work



- Pre-Payment
- Post-Payment



- Outdoor Payment
- In-Store Payment

Base: 226 clients

[1] All results can be found in Appendix E 4 – Qualitative Research – Sample Description

## Qualitative Research – Personas (3/4)

The characteristics of the different personas vary: the car wash client visits the stations monthly and pays in cash, while the “business man” refueling client visits the stations weekly and pays with the corporate loyalty card, outside, for example.

CJM <sup>[1]</sup>	Name	Age Group	Station	Time of Visit	Freq. Visit	Vehicle	Motive	Payment Type	Payment	Loyalty	Smart-phone	Destination
1	<b>Pedro Silva</b>	25-34	Olivais/ Telheiras	Other hours	Monthly	Car	Car wash	Pre	Cash	Car wash loyalty card	Yes	Home
2	<b>João Almeida</b>	35-44	Oeiras	Other hours	Weekly	Car	Refuel	Outdoor	Galp Frota Corporate	Galp Frota Corporate	Yes	Work
3	<b>Lurdes Martins</b>	55-64	Loures FS	Other hours	Twice a week	Car	Refuel	Outdoor	Cash	Continente	Yes	Home
4	<b>José Sequeira</b>	25-34	Olivais	Other hours	Twice a month	Car	Refuel	Pre	Cash	Continente	Yes	Work
5	<b>Jorge Ferreira</b>	35-44	Telheiras		Weekly	Car	Refuel	Post	Card	Continente	Yes	
6	<b>Vítor Matos</b>	45-54	Oeiras	Rush Hour	Weekly	Car	Refuel	Post	Cash/ Galp Frota Corporate	Galp Frota Corporate	Yes	Work
7	<b>Sandra Marques</b>	35-44	Pombal	Rush Hour	Twice a week	Car	Refuel	Post	Card	Continente	Yes	Home
8	<b>Nuno Alves</b>	35-44	Aeroporto	Rush Hour	Everyday	Car	Refuel	Post	Card	Continente	Yes	Work

[1] The relevant groups previously identified are characterized according to the variables that differ the most from average, or occur the most, as explained in the methodology section

## Qualitative Research – Personas (4/4)

The tobacco client visits the stations more often and pays in cash, and so do the cafeteria clients, though they also purchase using loyalty card. The store clients are older, and visit the station in their way home.

CJM <sup>[1]</sup>	Name	Age Group	Station	Time of Visit	Freq. Visit	Vehicle	Motive	Payment Type	Payment	Loyalty	Smart-phone	Destination
9	Ana & Teresa	35-44	Loures	Rush Hour	Daily	On foot	Cafeteria	Post	Cash	Coffee loyalty card	Yes	Work
10	Afonso Lopes	35-44	Aerorporto/ Oeiras	Rush Hour	Twice a week	Car	Cafeteria	Post	Cash	Coffee loyalty card	Yes	Work
11	João & Maria	45-54	Aeroporto	Other hours	Twice a month	Car	Store	Post	Cash		No	Home
12	Rodrigo Santos	25-34	Vda. do Pinheiro	Other hours	Twice a week	Car	Tobacco	Post	Cash		Yes	Work

- **15 groups** were found, however only **12 personas** were **characterized** as the other three were based on few cases and do not represent the bulk of Galp's customers, were influenced by occasional circumstances, or do not show significant resemblance (the case of the "others" group).
- Based on these results, it is possible to understand that young adults (16-24) are not represented in any Persona. As such it is important to analyze the characteristics and journey of this group especially because it is a concern for Galp as well.
- The impact that being accompanied by **children** would have on the clients was also studied, but as there were few clients in that situation it was **not conclusive**. Furthermore, the **fuel** chosen was also studied but as responses were too **inconsistent** within the group it was not possible to find a correlation.

[1] The relevant groups previously identified are characterized according to the variables that differ the most from average, or occur the most, as explained in the methodology section

## Qualitative Research – Pain and Pleasure Points (1/6)

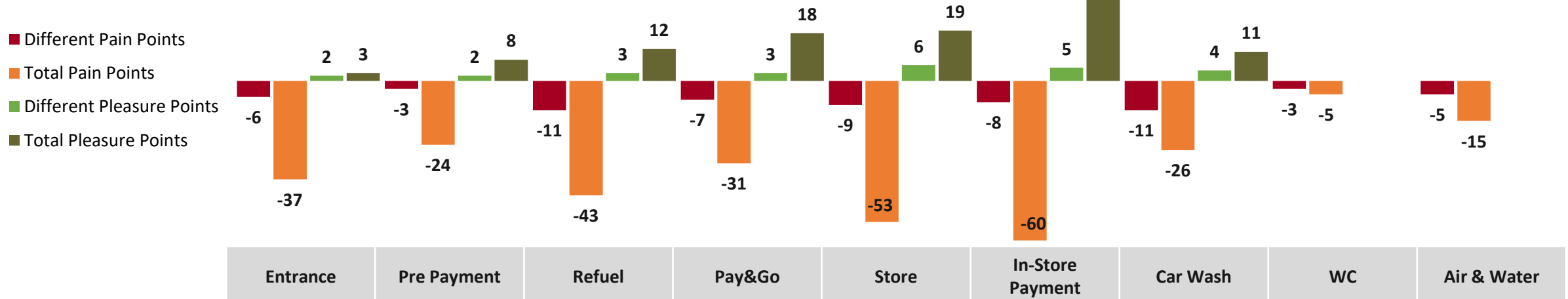
A total of 294 Pain, and 144 Pleasure Points were identified, 63 and 24 of which different among them, respectively; and were organized by stage of the journey, so they could be associated to the identified Personas.

### Pain Points

- The stages with more **Pain Points** were in-store payment, the store, and refuel. Which, along with the car wash, also had the highest number of **different Pain Points**. [1]
- However, naturally, the stages with the highest number of clients tend to have more Pain or Pleasure Points, so taking that into consideration, the stages with the most **Pain Points per client** were the car wash, followed by air & water, and pre-payment. [2]

### Pleasure Points

- The in-store payment also shows the greatest **number of Pleasure Points** by far, as well as, one of the most diverse; followed by the store and Pay&Go. [3]
- Considering the number of clients, the car wash also has more Pleasure points, followed by in-store payment and Pay&Go. [4]



[1] More detailed information can be found in appendices E5 and E6

[2] More detailed information can be found in appendix E7

[3] More detailed information can be found in appendices E8 and E9

[4] More detailed information can be found in appendix E10

## Qualitative Research – Pain and Pleasure Points (2/6)

Most stages have two to three major Pain or Pleasure points categories, that is, that occur more often, that were later analyzed in more detail.<sup>[1]</sup>

	Entrance <sup>[2]</sup>	Pre-Payment <sup>[2]</sup>	Refuel <sup>[2]</sup>	Pay&Go <sup>[2]</sup>	Store <sup>[2]</sup>	In-Store Payment <sup>[2]</sup>	Car Wash <sup>[2]</sup>
Pain Point	<ul style="list-style-type: none"> <li>Difficult to understand the <b>type of fuel available</b> in the pump (23)</li> <li>Waiting for a <b>convenient pump</b> (8)</li> </ul>	<ul style="list-style-type: none"> <li>Difficult to understand if the pump is <b>exclusively for pre-payment</b> (14)</li> <li><b>Dislikes pre-payment</b> (9)</li> </ul>	<ul style="list-style-type: none"> <li>Difficult to <b>handle the fuel hose</b> (9)</li> <li>Too much <b>time to unlock</b> the pump (14)</li> <li><b>Paper or gloves not available</b> (9)</li> </ul>	<ul style="list-style-type: none"> <li><b>OPT is out of service</b> or malfunctioning (16)</li> <li>Difficult to understand the <b>instructions of the OPT</b> (7)</li> <li>Having to <b>insert the card twice</b> (5)</li> </ul>	<ul style="list-style-type: none"> <li>Not enough <b>parking</b> (19)</li> <li>Not enough <b>seating space</b> (6)</li> <li>Inadequate <b>store selection</b> (6)</li> </ul>	<ul style="list-style-type: none"> <li>Too much time in the <b>queue</b> (19)</li> <li>Too much time to complete the <b>payment</b> (15)</li> <li>Difficult to use the <b>Continente Card</b> (9)</li> </ul>	<ul style="list-style-type: none"> <li><b>Vacuum</b> malfunctions (5)</li> <li>Dislikes having to <b>pay</b> for the car wash <b>in-store</b> (4)</li> <li>No <b>change machines</b> (3)</li> </ul>
Pleasure Point	<ul style="list-style-type: none"> <li><b>Extended working hours</b> (2)</li> </ul>	<ul style="list-style-type: none"> <li><b>Employees unlock the pump</b> even when it is mandatory to pay beforehand (8)</li> </ul>	<ul style="list-style-type: none"> <li><b>Gloves and paper</b> in the fuel island (6)</li> <li><b>Convenience</b> of the <b>full-service</b> stations (5)</li> </ul>	<ul style="list-style-type: none"> <li><b>Convenience</b> and quickness of the <b>Pay&amp;Go</b> service (11)</li> </ul>	<ul style="list-style-type: none"> <li><b>Wi-fi</b> in the stores (5)</li> <li>Good price/quality of the <b>coffee loyalty cards</b> (5)</li> </ul>	<ul style="list-style-type: none"> <li><b>Friendly service</b> (51)</li> <li><b>Quickness of payment</b> (14)</li> </ul>	<ul style="list-style-type: none"> <li><b>Quality</b> of the automatic washing machines (6)</li> </ul>

[1] The numbers inside the brackets are the incidence of the Pain or Pleasure point in the sample

[2] More detailed information about the pain and pleasure points in each stage can be found in appendix E11 and E12, respectively

## Qualitative Research – Pain and Pleasure Points (3/6)

Understanding the available fuels per pump, prepayment obligation or the necessary time for unlocking the pumps are relevant Pain Points. However, the extended working hours are considered a Pleasure Point.

ENTRANCE	<p><i>Difficult to understand the type of <b>fuel available</b> in the pump (23)</i></p> <ul style="list-style-type: none"> <li>• Not all pumps have all the types of fuel available</li> <li>• Mupis in front of the island cover the information</li> </ul> <p><i><b>Extended working hours (2)</b></i></p> <ul style="list-style-type: none"> <li>• Particularly important in areas where there are not many alternatives, early in the morning or in the late afternoon</li> </ul>
PREPAYMENT	<p><i>Difficult to understand if the pump is <b>exclusively for pre-payment</b> (14)</i></p> <ul style="list-style-type: none"> <li>• Most times information is only visible in the pump</li> <li>• Information is transmitted in the mupis, that also transmit other information</li> </ul> <p><i><b>Dislikes pre-payment (9)</b> <sup>[1]</sup></i></p> <ul style="list-style-type: none"> <li>• Most clients prefer post-payment, because they want to fill-up the tank, use loyalty cards, or are afraid that something goes wrong while refueling</li> </ul>
REFUEL	<p><i>Too much <b>time to unlock</b> the pump (14)</i></p> <ul style="list-style-type: none"> <li>• Employees must verify the driver meets the safety conditions and unlock the pump, as long as it is not exclusively for pre-payment</li> </ul>

[1] The preference for prepayment or not, and its reasoning can be found in Appendix E 13 – Qualitative Research – Prepayment and postpayment



## Qualitative Research – Pain and Pleasure Points (4/6)

Full-service stations are particularly useful for customers with children. Regarding outdoor payment, it is considered practical and fast, but it is out of service or malfunctioning occasionally and could be more user-friendly.

### REFUEL

#### ***Convenience of the full-service stations (5)***

- Not having to exit the car is appreciated, especially for customers accompanied by children

### PAY&GO [1]

#### ***OPT is out of service or malfunctioning (16)***

- Most clients prefer to pay in-store, because they do not know how the OPT works, do not trust it, or have the perception that it malfunctions often
- An OPT is out-of-service because of “communication errors”, and malfunctions occurs particularly when it runs out of paper or it jams, but also when the cards do not read on first try or because the transaction takes too long

#### ***Difficult to understand the instructions of the OPT (7)***

- New screens are being installed and clients that are used to the older versions are having trouble adjusting, namely to begin the transaction

#### ***Convenience and quickness of the Pay&Go service (11)***

- Customers that pay outside prefer it because they consider it faster, and because it avoids lengthy queues in-store

[1] Pay & Go means paying in the Outside payment terminal. The preference for outside or inside payment, and its reasoning can be found in Appendix E. 14 – Qualitative Research – Outside and Inside Payment

## Qualitative Research – Pain and Pleasure Points (5/6)

In the store, customers with the coffee's coupons value the discount and avoid the queue; however, sometimes there isn't enough seating space; on the other hand, clients complain about the queue and the elevated time of payment.

### STORE

#### *Not enough **seating space** (6)*

- Less tables and counters than necessary
- Employees cannot keep the tables and counters clean due to the high rotation of clients

#### *Good price/quality of the **coffee coupons** (5) <sup>[1]</sup>*

- Customers value the discount
- Customers with the coupons skip the queue directly into the cafeteria

### IN-STORE PAYMENT <sup>[2]</sup>

#### *Too much time in the **queue** (19)*

- The perception customers have of the time they spent in the queue is 26% higher than reality. In reality, on average, the queue time was around one minute

#### *Too much time to complete the **payment** (15)*

- The average time of payment surpasses slightly the queue time
- This occurs mostly for three reasons: scanning the Continente Card and vouchers, accessing and updating the client database, and printing the receipt

[1] The use and preference for coffee coupons, and its reasoning can be found in Appendix E 15. – Qualitative Research – Coffee Coupons

[2] More details about queue and payment times can be found in Appendix E 16 – Qualitative Research – Queue and Payment time

## Qualitative Research – Pain and Pleasure Points (6/6)

Furthermore, it is considered difficult to understand and use the **Continente Card**; but the relationship with the employees is highly valued. Car wash clients dislike the payment process, nonetheless they are satisfied with the quality.

### IN-STORE PAYMENT

*Difficult to use the **Continente Card** (9)* <sup>[1]</sup>

- Customers find the process complicated to understand, do not have vouchers or they are expired, or would rather have direct discounts

***Friendly service** (51)*

- The relationship established between customer and employee is valued by the customer

### CAR WASH <sup>[2]</sup>

*Dislikes having to **pay** for the car wash **in-store** (4)*

- Automatic car wash is activated by chip or code, which has to be paid for and given out in the store, and these customers face the same queue as the others

*No **change machines** (3)*

- Jet wash is paid for in coins, at the machine, however if a client only has a bill he or she has to exchange it at the store

***Quality of the automatic washing machines** (6)*

- Customers perceive the quality of Galp's machines as superior in relation to the competition

[1] The reasons to use, or not, loyalty cards, can be found in Appendix E 17 – Qualitative Research – Loyalty Cards

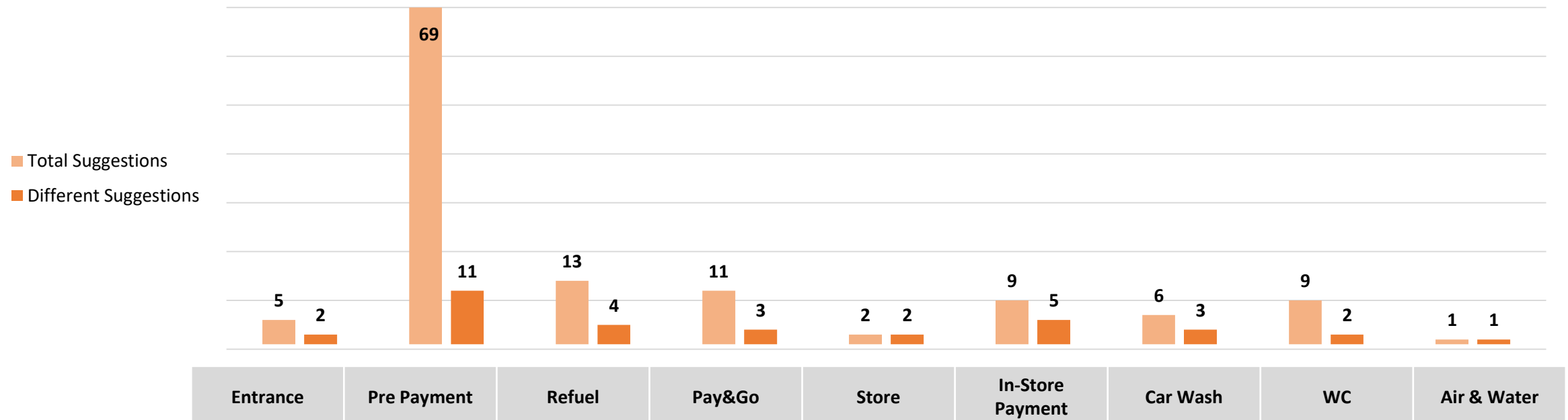
[2] The reasons to use, or not, car wash coupons, can be found in Appendix E 18 – Qualitative Research – Car Wash Coupons

## Qualitative Research – Clients' Suggestions (1/2)

Clients identified 125 suggestions that could improve their journey in Galp's gas stations, in the different services available. Of these, 33 were different from each other.

### Clients' Suggestions

- The stages with more **suggestions** were the prepayment, refuel, and Pay&Go. These along with the in-store payment also had the highest number of different suggestions. Of these, only the refuel and the in-store payment stage correspond to the ones with the most Pain Points. <sup>[1]</sup>
- The stages with the highest number of **suggestions per client** are car-wash, air & water, and refuel. <sup>[2]</sup>



[1] More detailed information can be found in Appendix E 19 – Qualitative Research – Total suggestions by stage and E 20 - Qualitative Research – Different suggestions by stage

[2] More detailed information about the suggestions per client by stage can be found in appendix E 21 – Qualitative Research – Suggestions by client

## Qualitative Research – Clients’ Suggestions (2/2)

Clients made one or two main suggestions per stage, with a higher focus on the improve instructions, simplifying payment and queuing, and better service.<sup>[1]</sup>

	Entrance <sup>[2]</sup>	Refuel <sup>[2]</sup>	Store <sup>[2]</sup>	Cafeteria <sup>[2]</sup>	Tobacco <sup>[2]</sup>	ATM <sup>[2]</sup>	Car Wash <sup>[2]</sup>	Employees <sup>[2]</sup>
Suggestions	<ul style="list-style-type: none"> <li>Improve <b>parking</b> (4)</li> <li>Extend <b>operating hours</b> (1) <sup>[3]</sup></li> </ul>	<ul style="list-style-type: none"> <li><b>Lower prices</b> (23)</li> <li><b>Improve outdoor payment system</b> (16)</li> <li>Improve <b>communications and instructions outside</b> (8)</li> </ul>	<ul style="list-style-type: none"> <li>Decreasing <b>queue time</b> (6)</li> <li>Facilitating <b>payment by integrating fiscal data</b> (3)</li> </ul>	<ul style="list-style-type: none"> <li>Modifying the <b>queuing system</b> (7)</li> <li>More space for <b>consumption</b> (3)</li> </ul>	<ul style="list-style-type: none"> <li>Reducing <b>queues</b> for tobacco clients (1)</li> </ul>	<ul style="list-style-type: none"> <li>Have an <b>ATM</b> in each gas station <sup>[3]</sup></li> </ul>	<ul style="list-style-type: none"> <li>Improving <b>vacuuming</b> (3)</li> <li>Improving <b>instructions</b> for the automatic and jet wash machines (3)</li> </ul>	<ul style="list-style-type: none"> <li>Better <b>treatment</b> (friendlier employees and better script adjustment to the time period of the day) (3)</li> </ul>

[1] The numbers inside the brackets are the incidence of the Pain or Pleasure point in the sample

[2] More detailed information about the suggestions for each stage can be found in appendix E22 – Qualitative Research - Suggestions

[3] Venda do Pinheiro gas station is closed during the evening period and does not have an ATM machine

# Customer Journey As It Is

## Customer Journey Map – “As It Is” (1/12)

Car-washing customers usually go to the gas station only to use that service and do it when they have free time as they know the journey can be longer.

**Pedro Silva**



**Age:** 30

**Gas Station:** Olivais/Telheiras (Metropolitan)

**Visit Frequency:** Monthly

**Smartphone:** Yes

**Storyline:** Pedro opts for a determined washing mode (Jet Wash/Automatic) and maintains it. He pays in cash inside the store, sometimes acquiring the Car wash’s coupon. Usually, the customer avoids the rush hours and goes home after the visit.

Pleasure Points

- “The first time I used this service, I didn’t understand how the payment works and the employee was kind to explain me”

- “I am satisfied with the overall quality of the service ”
- “I am satisfied with the usage of car wash’s promotional coupons”

Pain Points

- “The first time I used the service, I did not comprehend that I had to buy the token in the store”<sup>[1]</sup>
- “I do not like the fact that I have to pay in the store”
- “I waited too much time in the queue inside the store”<sup>[2]</sup>

- “I don’t like the dryer’s performance”<sup>[3]</sup>
- “The Hoover is out of service and there is no information about it”
- “The instructions are hard to comprehend”<sup>[4]</sup>

Entrance

Prepayment

Car Wash

Exit

[1] The majority of automatic washing machines work by inserting a token that must be bought in store.

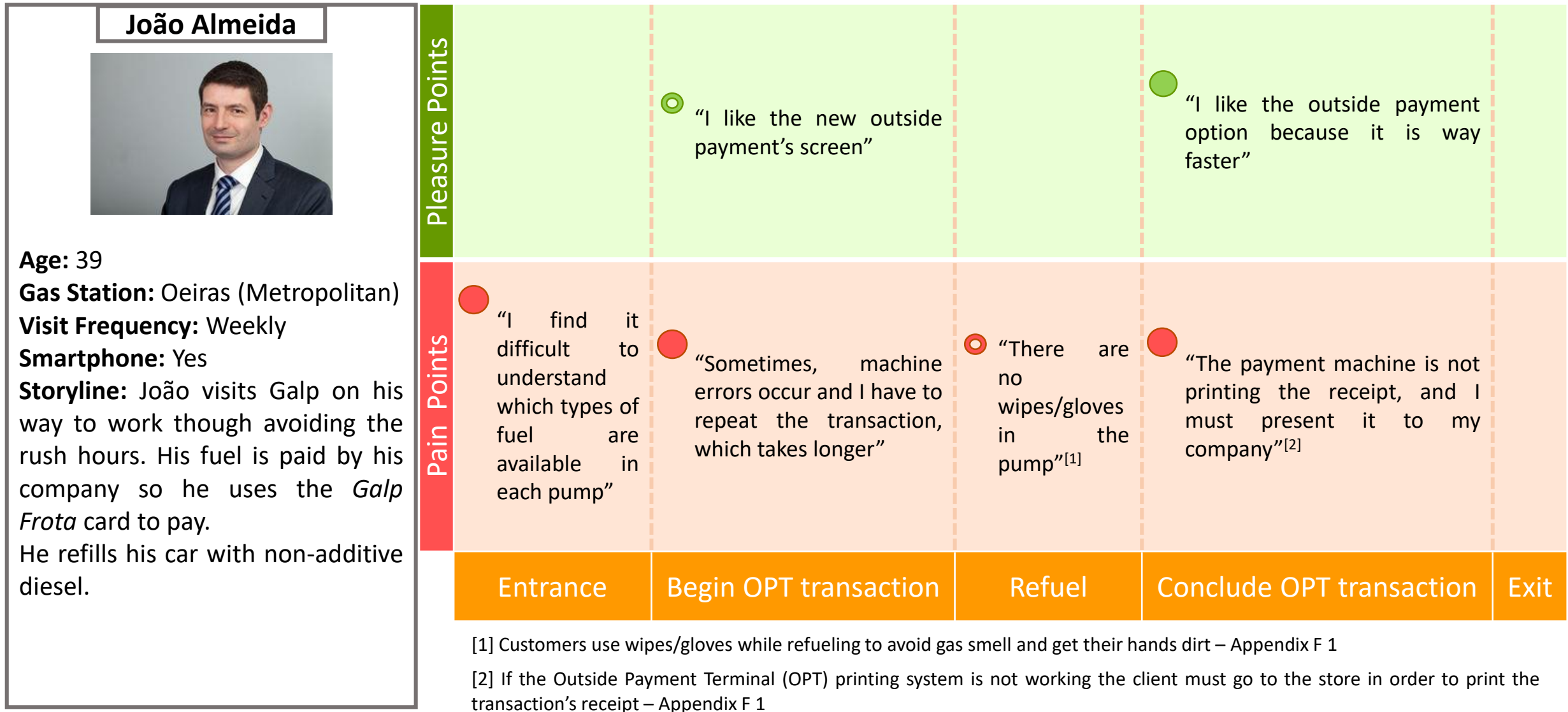
[2] Besides having to pay in store to use the automatic machines, some customers need to change money to use jet-wash machines, and other may have bought the car wash coupons (which work as a loyalty program) and still need to change them for tokens. These customers tend to have a bigger perception of the queue.

[3] Some customers feel the dryer is not good enough and end up drying their car using a cloth.

[4] The instructions are sometimes confusing to customers and are positioned in the entrance of the machine, which means that once the customer enter it becomes impossible to see the guidelines anymore.

## Customer Journey Map – “As It Is” (2/12)

Customers who are time constrained, who do not use the store or any other service and feel comfortable with digital solutions tend to use the Pay&Go to avoid queues and having to walk to the store.





## Customer Journey Map – “As It Is” (3/12)

Even though the number of full serviced gas stations only represent a small percentage of Galp’s total, it is still important to map and comprehend these customers’ journey as it is a very atypical one.

### Lurdes Martins



**Age:** 58

**Gas Station:** Loures Full-service (Local)

**Visit Frequency:** 2x week

**Smartphone:** Yes

**Storyline:** Lurdes pays its own fuel, usually in cash. The customer drives to the gas station by car avoiding the rush hour, while doing her daily tasks. Occasionally, she uses *Continente* card.

	Entrance	Refuel	Post-Payment	Exit
Pleasure Points		<ul style="list-style-type: none"> <li>“Having a pump attendant is more convenient since I don’t need to get out of the car”</li> <li>“With the pump attendant refueling, the process is faster because he is more efficient”</li> <li>“I already know the pump attendant, he is friendly and polite”</li> </ul>	<ul style="list-style-type: none"> <li>“I prefer to pay here in the car than paying outside”</li> <li>“The payment process here in the pump is really quick”</li> </ul>	
Pain Points	<ul style="list-style-type: none"> <li>“It takes to long to enter the gas station during peak times”</li> </ul>	<ul style="list-style-type: none"> <li>“The pump attendant thought I asked for 40 liters of fuel when I was asking for 40 euros”</li> <li>“When I asked for the “standard” fuel the employee thought that I was referring to the “<i>Evologic</i>” fuel”<sup>[1]</sup></li> </ul>	<ul style="list-style-type: none"> <li>“When I pay with credit/debit card I have to leave the car”<sup>[2]</sup></li> <li>“When I pay with debit/credit card the payment might be outside or inside the store, which is confusing”</li> </ul>	

[1] The Evologic fuel has additives in its composition and for that reason its price is higher than non-additive fuel

[2] Some full-service gas stations do not have portable automatic payment machines

## Customer Journey Map – “As It Is” (4/12)

Customers who prepay may have several reasons for it, some of them prefer it because they are afraid of paying more than they wanted or because they think it is faster. Other customers do it because it is mandatory in the pump they will fuel.

**José Sequeira**



**Age:** 27

**Gas Station:** Olivais (Local)

**Visit Frequency:** 2x month

**Smartphone:** Yes

**Storyline:** José pays his own fuel in cash and uses *Continente* card. Visits the gas station during the morning on his way to the office and avoids rush hours.

He chooses the pump based on the availability of non-additive fuels.

	Entrance	Prepayment	Refuel	Exit
Pleasure Points		<ul style="list-style-type: none"> <li>● “The employees are friendly and polite”</li> </ul>	<ul style="list-style-type: none"> <li>● “The new pumps have a cleaner appearance”</li> </ul>	
Pain Points	<ul style="list-style-type: none"> <li>● “It is hard to comprehend if the pump is in Prepayment mode or not”<sup>[1]</sup></li> </ul>	<ul style="list-style-type: none"> <li>● “I don’t know how to use the outside payment terminal (OPT)”<sup>[2]</sup></li> <li>● “The Payment process took too much time”</li> <li>● “I have already registered my tax identification number in other Galp’s gas stations and it is not registered in this one”</li> </ul>	<ul style="list-style-type: none"> <li>● “The pump is locked so it must be in prepayment mode”</li> <li>● “When I asked for the “standard” fuel the employee thought that I was referring to the “Evologic” fuel”<sup>[3]</sup></li> </ul>	

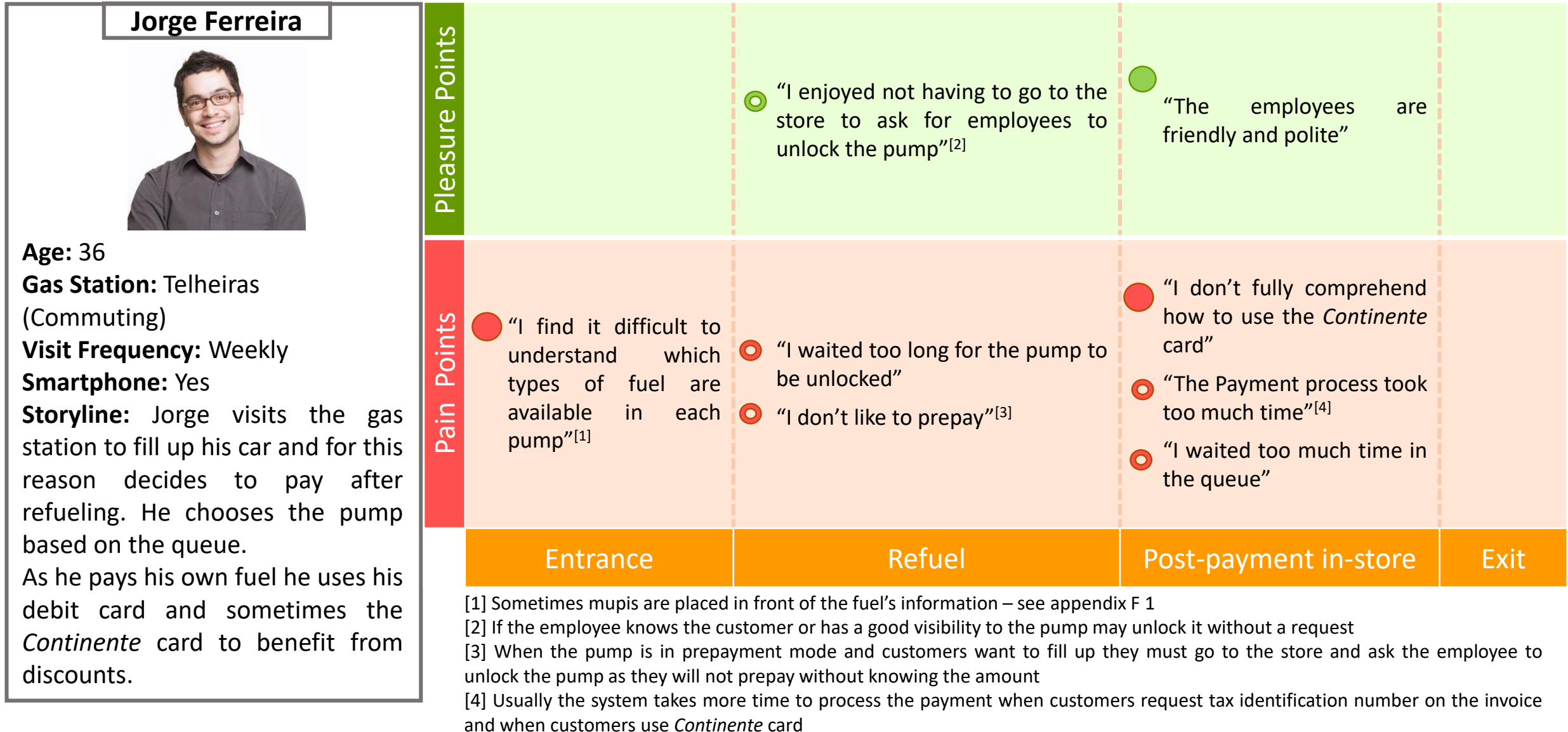
[1] The information of prepayment might not be clear as sometimes it is on the mupis and other on the stand-ups in the pump

[2] In some of Galp’s gas stations the pumps have an integrated system in which customers can make automatic payments there instead of paying inside the store. That system is called Outside Payment Terminal (OPT).

[3] The Evologic fuel has additives in its composition and for that reason its price is higher than non-additive

## Customer Journey Map – “As It Is” (5/12)

Most customers prefer to pay after refueling, especially the ones that fill up their cars as those don't know in advance how much they will have to pay for the fuel or the quantity of liters they will buy.



## Customer Journey Map – “As It Is” (6/12)

The cafeteria is the major driver of customers to the store and some of them, especially during the morning, go to the gas station to refuel and take a coffee or a cafeteria menu before turning back on their way.

**Vitor Matos**



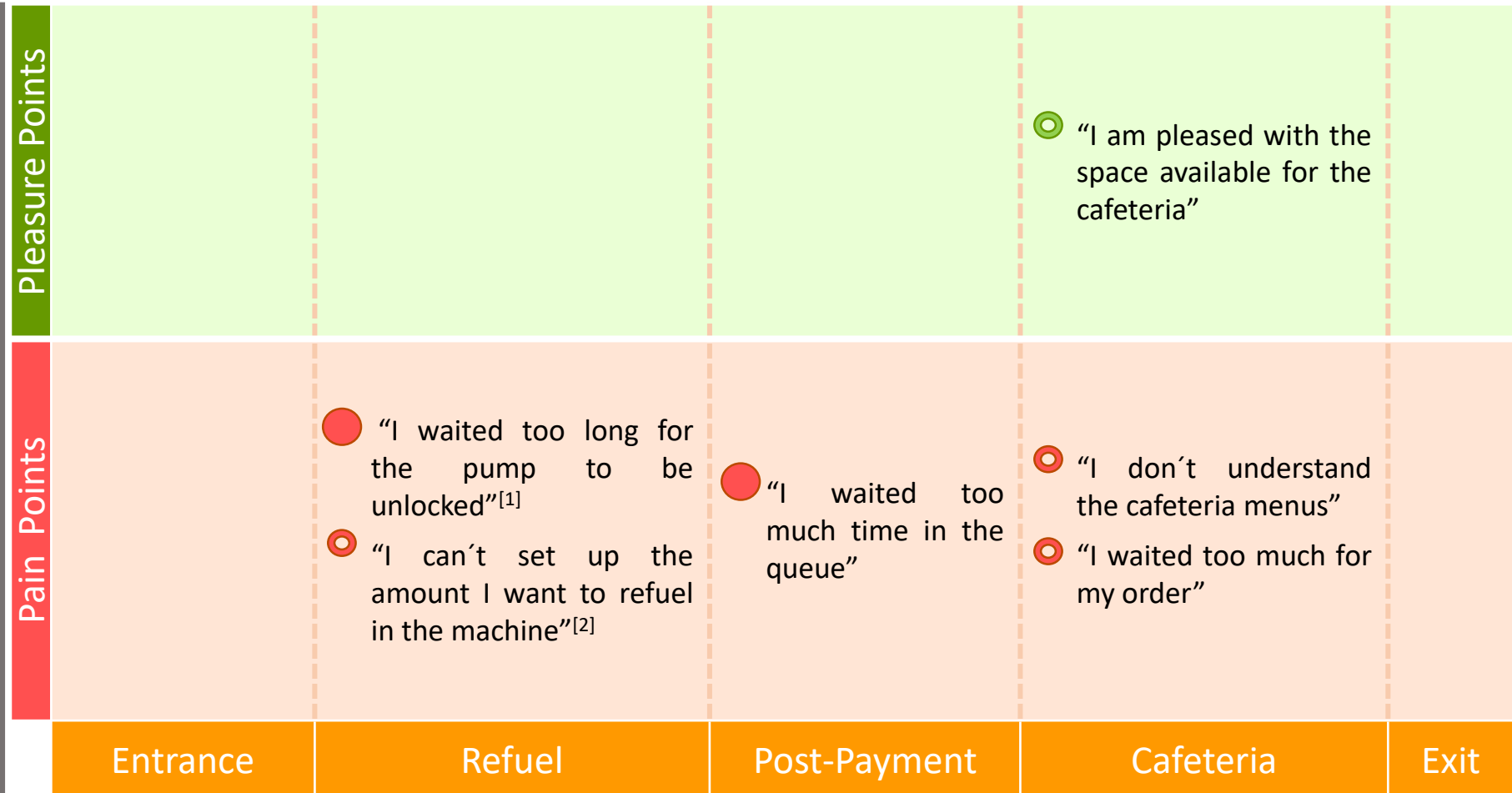
**Age:** 51

**Gas Station:** Oeiras (Commuting)

**Visit Frequency:** 1x week

**Smartphone:** Yes

**Storyline:** Vitor usually visits a gas station before going to work where he refuels his car and drinks coffee. This customer pays the coffee in cash and uses the *Galp Frota* card for the fuel since it is his company that pays it.



[1] Even when the pump is not in prepayment mode, the employees are responsible for looking at the customer that will refuel and to unlock the pump in case he/she is respecting security rules

[2] In the pumps, there is a button for customers who pay after refueling to define the amount they want to pay or the number of gas liters desired

## Customer Journey Map – “As It Is” (7/12)

Customers that refuel and buy products in the store have are less time constrained and usually prefer to go to the store after refueling.

**Sandra Marques**



**Age:** 42

**Gas Station:** Pombal (Long Distance)

**Visit Frequency:** 2x Week

**Smartphone:** Yes

**Storyline:** Sandra pays her own fuel with credit/debit card inside the store, using Continente card.

The customer visits the gas station in the afternoon during a longer trip to her home.

When she enters the gas station she chooses the pump base on the side of the fuel tank.

	Entrance	Refuel	Convenience Store	Post-payment In store	Exit
Pleasure Points		<ul style="list-style-type: none"> <li>“I value the fact that there are wipes/gloves in the pump”<sup>[1]</sup></li> </ul>	<ul style="list-style-type: none"> <li>“I appreciate the fortnightly campaign”<sup>[4]</sup></li> </ul>		
Pain Points	<ul style="list-style-type: none"> <li>“I find it difficult to understand which types of fuel are available in each pump”</li> </ul>	<ul style="list-style-type: none"> <li>“When I want to fill up, I must go to the store and ask the employees to unlock the pump”<sup>[2]</sup></li> <li>“It rains in the pump while I am refueling”<sup>[3]</sup></li> </ul>	<ul style="list-style-type: none"> <li>“I would like the stores to sell more natural and fresh products”</li> <li>“There should be more variety in the stores’ menus”</li> </ul>	<ul style="list-style-type: none"> <li>“I am not satisfied with the usage of Continente card as I am always losing the vouchers”<sup>[5]</sup></li> </ul>	

[1] Customers use wipes/gloves while refueling to avoid gas smell and get their hands dirt

[2] When the pump is in prepayment mode and customers want to fill up they must go to the store and ask the employee to unlock the pump as they will not prepay without knowing the amount

[3] There are no protections for rain on the side pumps of the gas stations

[4] Each and every two weeks there are new promotions in Tangerina stores called fortnightly campaigns(Internally called: “Promoções Quinzenais”)

[5] To obtain discounts on *Continente* card, customers have to shop in Continente and receive physical discount vouchers based on the amount spent. These vouchers have an expiration date and customers often lose them

## Customer Journey Map – “As It Is” (8/12)

Customers who smoke tend to make the most of the refueling moment by buying tobacco in the gas stations thus not having to buy them later on.

### Nuno Alves



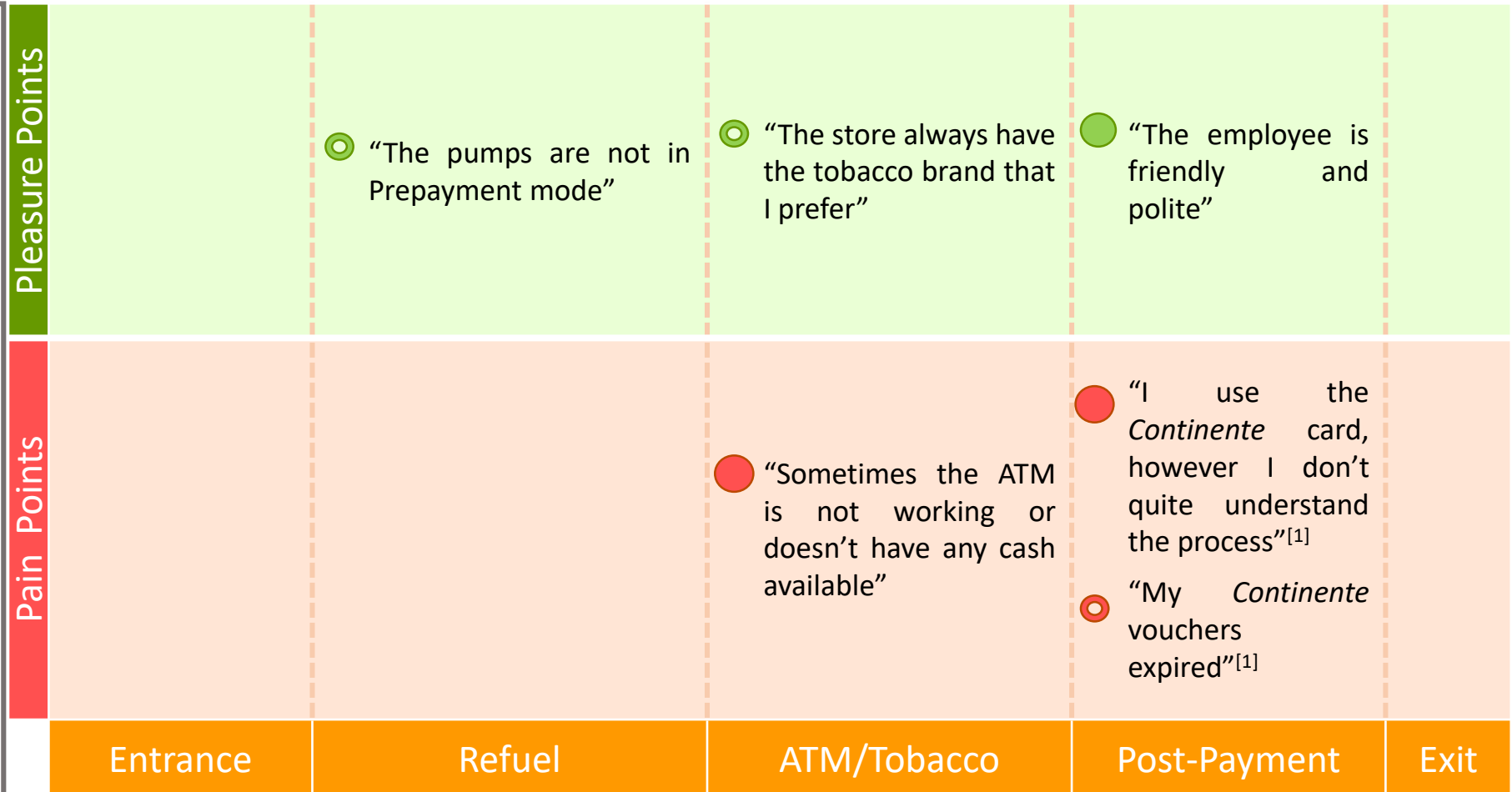
**Age:** 37

**Gas Station:** Aeroporto  
(Commuting)

**Visit Frequency:** Daily

**Smartphone:** Yes

**Storyline:** Nuno pays his own fuel with debit card and uses the *Continente* card for discounts. Usually he chooses the *Evologic* fuel. He goes to the gas station by car during rush hours while going to work or during long trips



[1] To obtain discounts on *Continente* card, customers have to shop in *Continente* and receive physical discount tickets based on the amount spent. These tickets have an expiration date and customers often lose them

## Customer Journey Map – “As It Is” (9/12)

Gas stations in local areas have more traffic in cafeteria than the others as customers sometimes come by foot and in groups (colleagues, family).

### Ana e Teresa



**Age:** 38

**Gas Station:** Loures (Local)

**Visit Frequency:** Daily

**Smartphone:** Yes

**Storyline:** The two colleagues walk to the convenience store as the gas station is close to their office. They visit the station during the morning, before work. On the store, they take the breakfast and use their smartphones to check the morning news and social networks.



[1] Because the cafeteria works in prepayment, it is important for customers to understand the variety of the menus on the moment of payment – appendix F 1

[2] Customers may prefer Coffee's coupons in which they buy 4 coffees and receive the 5<sup>th</sup>. Customers who have the coupons do not need to go to the counter and are not subject to the queue

[3] There is free Wi-Fi in the stores

[4] Due to peak times in cafeteria, employees are not able to maintain the area clean– appendix F 1

## Customer Journey Map – “As It Is” (10/12)

A relatively high percentage of customers who drive to Galp’s gas stations for the cafeteria also buy tobacco. These customers are less time constrained than customers who buy Tobacco exclusively.

### Afonso Lopes



**Age:** 40

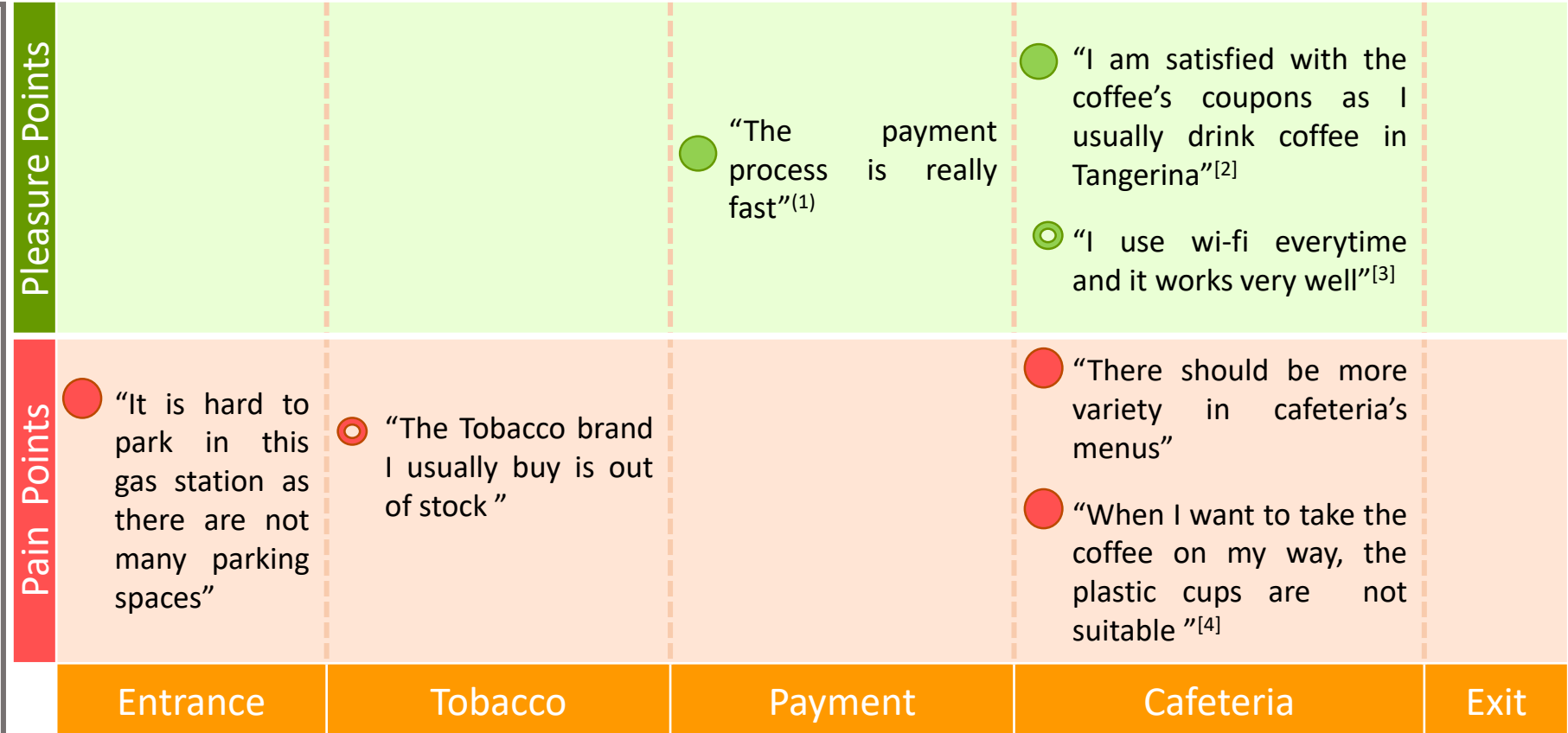
**Gas Station:** Aeroporto ou Oeiras (Metropolitan)

**Visit Frequency:** 2x week

**Smartphone:** Yes

**Storyline:** Afonso visits the gas station during morning rush hours on his way to work. This customer usually pays in cash and does not request tax identification number on the invoice.

The main driver of his visit is the cafeteria but he also buys cigarettes



[1] This Pleasure point usually occurs when the customer pays in cash and does not request tax identification number on the invoice

[2] Customers may prefer Coffee's coupons in which they buy 4 coffees and receive the 5<sup>th</sup>. Customers who have the coupons do not need to go to the counter and are not subject to the queue

[3] There is free Wi-Fi in the stores

[4] The take away cups are small and not thermic. Customers who ask them might burn themselves or spill coffee



## Customer Journey Map – “As It Is” (11/12)

Some customers visit the Gas station just because of the convenience store. The majority of these customers are looking for the stores main drivers like newspapers and magazines but other just want to rest from the trip and buy an impulse product.

### João e Maria



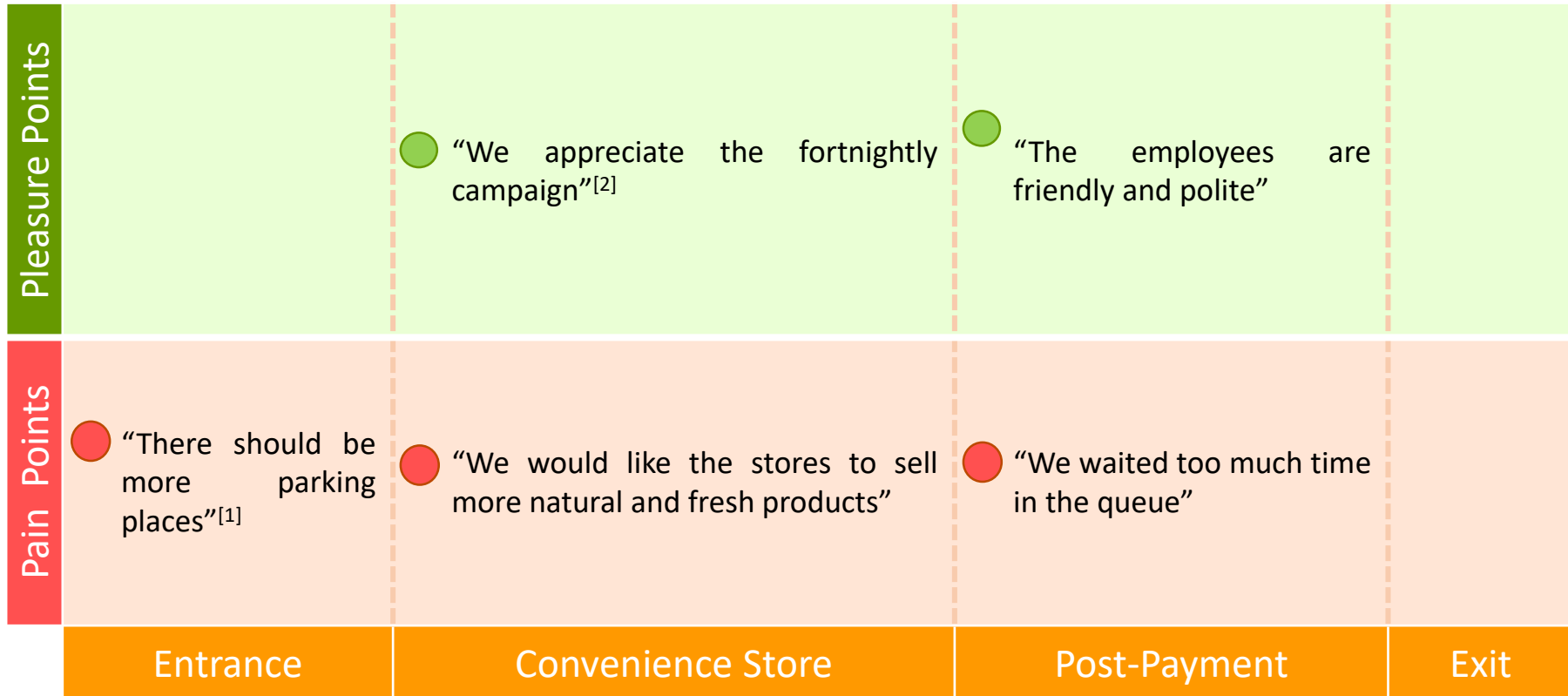
**Age:** 52

**Gas Station:** Aeroporto (Metropolitan)

**Visit Frequency:** 2x Month

**Smartphone:** No

**Storyline:** This couple visits the Galp station by car on their way home to buy newspapers and sometimes another impulse product and pay in cash.



[1] Sometimes customers face difficulties in parking their cars in front of the store as there are not many parking places

[2] Each and every two weeks there are new promotions in Tangerina stores called fortnightly campaigns (Internally called: “Promoções Quinzenais”)

## Customer Journey Map – “As It Is” (12/12)

Customers who buy exclusively Tobacco have a different mindset as they are not sensitive to campaigns and are very sensitive to the speed of the visit.

### Rodrigo Santos



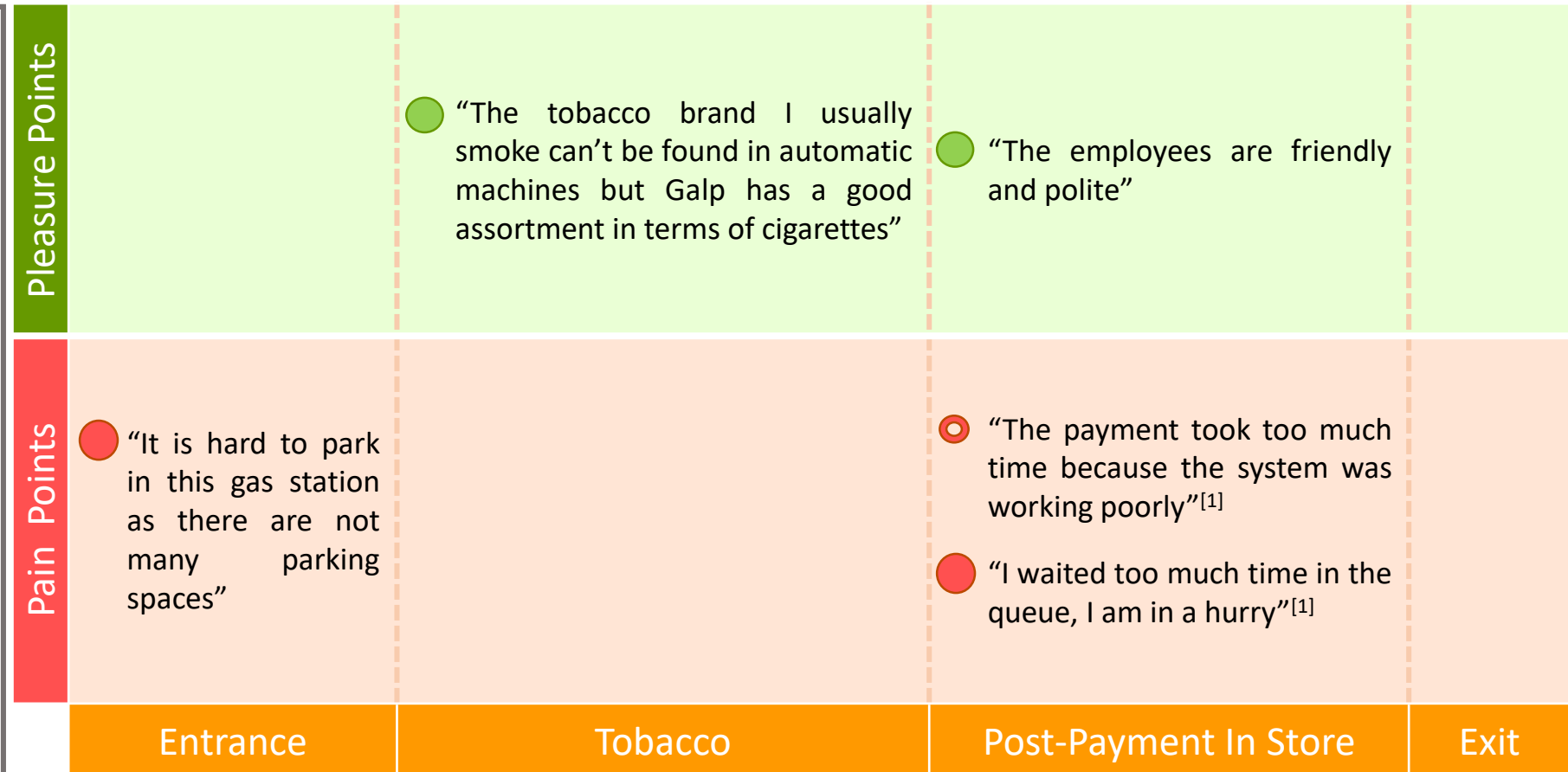
**Age:** 28

**Gas Station:** Venda do Pinheiro (Road)

**Visit Frequency:** 2x week

**Smartphone:** Yes

**Storyline:** Rodrigo visits the gas station exclusively to buy cigarettes, and for that reason he values the quickness of the service above everything else. Usually pays in cash, avoiding rush hours. He frequently buys cigarettes on his way to work and is not available to consume any other product.



[1] Usually, customers that buy exclusively Tobacco perceive the queue as unfair and are more sensitive to time since they are only buying a small product, often payed in cash

# Recommendations

## Recommendations – Categorization (1/9)

The information in the entrance should be clear as the customer must quickly find the needed information in order to take decisions according to his/her preferences.



Pain/Pleasure Point	Quick-Win	Challenging
<p><b>“I find it difficult to understand which types of fuel are available in each pump” (23)</b></p>	<p>1. Remove mupis from their current position (in front of the deltoids) to allow <b>a clear visualization of the information</b> relative to the types of fuels available. To replace the mupis, communicate advertisement in the stand-ups, OPT’s, in-store screen, and trays and communicate pumps out of service using cones .</p>	
<p><b>“It is hard to comprehend if the pump is in Prepayment mode or not” (14)</b></p>	<p>1. Develop a <b>Prepayment symbol</b> easily recognizable by Galp’s clients (similar to <i>Via Verde</i>).</p>	<p>1. Place a Prepayment <b>flat signal</b> on the floor in the front of the pump and in its <b>pillar</b>.</p>
<p><b>“I waited too long for a place in a convenient pump” (8)</b></p>	<p>1. Transform lateral pumps, which are in Prepayment Mode, into <b>Fast pumps</b>. Set up these pumps as <b>exclusive for Pay&amp;Go</b> and advertise them as being destined to the customers who only want to <b>refill and pay quickly</b>. Place an horizontal signal with a <b>symbol easily associated to speed</b> (auto racing).</p>	

## Recommendations – Categorization (2/9)

Fuel is the core of the company and it is the main driver of customer to the gas station, Galp should invest in making these customer journey as pleasant as possible to keep its brand perception as higher quality supplier.



Pain/Pleasure Point	Quick-Win	Challenging
<p><b>“I waited too long for the pump to be unlocked” (14)</b></p>		<ol style="list-style-type: none"> <li>1. Create a <b>client’s identification system</b> which automatically unlocks the pump and integrates clients’ <b>data and transactions record</b>:               <ol style="list-style-type: none"> <li>1. Automatic number plate recognition system</li> <li>2. Clients’ fidelization card recognition system</li> </ol> </li> </ol>
<p><b>“There are no wipes/gloves in the pump” (9)</b></p>	<ol style="list-style-type: none"> <li>1. Place <b>hands sanitizer</b> in the store’s entrance.</li> </ol>	<ol style="list-style-type: none"> <li>1. <b>Place bigger and more functional</b> wipes/gloves’ dispensers in order to reduce the number of inspections needed and to be easier to use without wastes.</li> </ol>
<p><b>“I find it difficult to handle the fuel hose” (9)</b></p>	<ol style="list-style-type: none"> <li>1. Create a <b>“Did you know?” facts campaign</b> to explain issues that might be confusing to the customer, such as safety rules, the reason why the hoses’ trigger does not lock, how to know which is the side of the gas tank, and Galp need for setting pumps in the prepayment mode. This information could be available in <b>the OPT’s screen</b> and in <b>stickers</b> placed in the pump.</li> </ol>	

## Recommendations – Categorization (3/9)

The objective of Pay&Go is to facilitate and accelerate the payment process, offering a suitable option for customers whose main worry is the time spent on the station. For this reason, the system must be as user-friendly as possible.



Pain/Pleasure Point	Quick-Win	Challenging
<p>“The Pay&amp;Go system doesn't work and is not signalled” (12)</p>		<ol style="list-style-type: none"> <li>1. Create automatic alerts to solve OPT's problems:               <ol style="list-style-type: none"> <li>1. <b>Automatic warning from the pump to the maintenance center</b> in case of failure</li> <li>2. <b>Automatic warning to the store system</b> to inform the employees (in project)</li> <li>3. <b>Automatic alert in the screen</b> when the OPT is out of service (in project)</li> </ol> </li> </ol>
<p>“I like the outside payment option because it is way faster” (11)</p>	<ol style="list-style-type: none"> <li>1. Update the OPT system in order to allow <b>Continente card usage</b> (in project)</li> <li>2. Introduce <b>portable automatic payment terminals</b> in Full-Service gas stations to allow in-car payment</li> </ol>	<ol style="list-style-type: none"> <li>1. Develop a <b>payment section in the App</b> - The customer selects <b>the gas station, the pump and the desired fuel</b>. After that a code would be emitted by the App to be inserted in the OPT allowing the beginning of the refuel process. In the end of the process there would be an option to <b>send a virtual invoice via email</b>.</li> </ol>

## Recommendations – Categorization (4/9)

The objective of Pay&Go is to facilitate and accelerate the payment process, offering a suitable option for customers whose main worry is time spent on the station. For this reason, the system must be as user-friendly as possible.



Pain/Pleasure Point	Quick-Win	Challenging
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“It is hard to comprehend the Pay&Go instructions” (7)

1. Develop **campaign with promoters to teach customers** how to use the new OPT's and **to encourage their usage** in gas stations where Pay&Go is not frequently used.

1. Adapt OPTs in order to have a more user-friendly interface to:
  1. Start as soon as when the customer **touches the screen** (in project)
  2. Automatically start when the customer **inserts the payment card**

“The payment machine is not printing the receipt” (3)

1. Develop system to display an option to send **virtual invoices via email.**
2. Change the **receipt printer cut mechanism** in order to make a partial cut, leaving the receipt only connected by a small piece of paper, in order to avoid paper jams.
3. Switch **the type of paper** used to one that does not cause paper jams.

## Recommendations – Categorization (5/9)

In-store payment affects fuel, car wash and store customers. Besides, the payment moment might be stressful so it is imperative for Galp to show customers that their experience is a priority for the company.



Pain/Pleasure Point	Quick-Win	Challenging
<p><b>“The employees are friendly and polite” (51)</b></p>	<ol style="list-style-type: none"> <li>Educate employees to ask <b>“How are you?”</b> when greeting customers. This could not be applied to peak times</li> </ol>	<ol style="list-style-type: none"> <li>Develop a <b>design contest</b> for university students to create <b>new employee’s uniforms</b>. The top five uniforms would be chosen internally and then customers would <b>vote for it in the stores or online</b> (Projected)</li> <li>Develop OPT system so that it shows a <b>message on the screen saying “Good morning/afternoon/evening, Client’s name”</b> as soon as the customer provides any personal information.</li> </ol>
<p><b>“I waited too much time in the queue” (19)</b></p>	<ol style="list-style-type: none"> <li>Remove the <b>sign that informs single queue</b> from all the counters <b>except on the adequate one</b></li> <li>Insert a <b>flat signal</b> on the floor saying <b>“Wait here”</b> to avoid that customers move to the counter when employees go to the cafeteria</li> <li>Manage employees so that they <b>start balancing the cash register in the back office</b> instead of doing it in the counter. This would result on a decrease of the waiting time perceived in the queue</li> </ol>	<ol style="list-style-type: none"> <li>Reduce perception of the queue:             <ol style="list-style-type: none"> <li>Insert a <b>TV in split-screen</b> with informative contents and campaigns on the queuing area</li> <li>Use the station sound system to <b>play music</b> in the pumps and store areas</li> </ol> </li> </ol>



## Recommendations – Categorization (6/9)

In-store payment affects fuel, car wash and store customers. Besides, the payment moment might be stressful so it is imperative for Galp to show customers that their experience is a priority for the company.

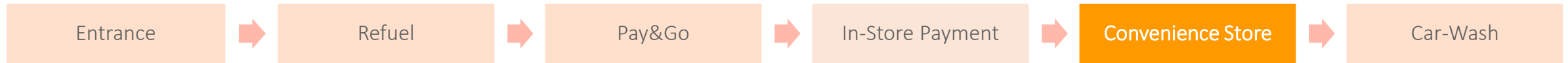


Pain/Pleasure Point	Quick-Win	Challenging
<p><b>“The payment process took too much time” (15)</b></p>		<ol style="list-style-type: none"> <li><b>1. Integrate customer data</b> (Tax Identification number, car plate, name, email, phone number) into a <b>mini-card</b> offered to customers or in the <b>App</b>. Besides, the invoice could be sent by email, easing the payment process.</li> <li><b>2. Update the payment system</b> so that it becomes <b>faster</b>, read the “<i>E Fatura</i>” card of <i>Portal das Finanças</i> and have a common data base among all the gas stations. To do so, the data base must be reviewed and repeated customer references must be deleted. (Projected)</li> </ol>
<p><b>“I am not satisfied with the usage of <i>Continente</i> card” (9)</b></p>	<ol style="list-style-type: none"> <li><b>1. Create “Mais por Menos”</b> <sup>[1]</sup> card to <b>university students</b> (to register students would have to present proof of enrolment), that could be <b>integrated in the app</b>. At the beginning of each school year, introduce <b>reward system</b> so that students <b>invite friends</b> to adhere and both <b>earn more discounts</b> (e.g. Uber).</li> </ol>	<ol style="list-style-type: none"> <li><b>1. Place a voucher printing machine</b> (existent in <i>Continente</i>) in the store entrance so that customers can print them when they need it instead of losing it</li> <li><b>2. Update system</b> so that it becomes possible for customers to tell their <b>phone number instead of the physical card</b> (projected)</li> <li><b>3. Integrate discount vouchers into the app</b>; Send push notifications to remember vouchers expiration date (Projected)</li> </ol>

[1] “Mais por Menos” card is a loyalty program developed for specific targets (e.g. Sporting Members) that allows direct discounts in fuel

## Recommendations – Categorization (7/9)

With the intention of improving the customer experience in the convenience store, the customer must clearly comprehend the products and menus available and the environment must be pleasant and enjoyable.



**“It is hard to park in this gas station as there are not many parking spaces” (19)**

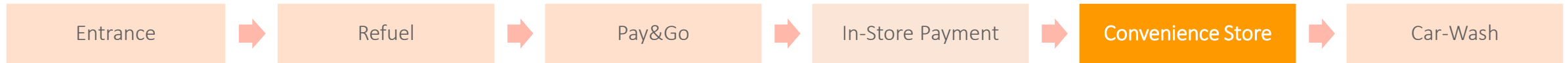
1. Delineate **parallel parking places** in front of the stores whenever it is possible

**“I would like the stores to have a different assortment” (6)**

1. Create a pilot test to **split “Menu Bom Dia”** and reduce the perception of low variability in cafeteria’s menus, this menu might have too many combinations included.
1. Follow **consumption trends** and **increase the assortment** of natural and fresh products (fruit, cereal bars, seeds). To do so, “GoNatural” could be a suitable partnership as this firm was recently acquired by Sonae.
2. Optimize **store display** in order to adapt it to consumption patterns verified, store size and location

## Recommendations – Categorization (8/9)

With the intention of improving the customer experience in the convenience store, the customer must clearly comprehend the products and menus available and the environment must be pleasant and enjoyable.



Pain/Pleasure Point	Quick-Win	Challenging
<p>“There are no seating places available” (6)</p>	<p>1. Promote <b>Grab and Go</b> of cafeteria’s products by selling new SKUs and creating <b>adapted packaging</b> (isothermal cups, for example) and <b>educating employees</b> to always ask if the customer wants to consume in store or take it away (Projected)</p>	<p>1. Optimize store display to <b>increase cafeteria zone</b>. This would be applicable in gas stations where there is <b>high consumption of cafeteria’s products</b>.</p>
<p>“I am happy with coffee’s coupons” (5)</p>	<p>1. Integrate <b>coffee’s coupons into the app</b> (Projected)</p>	<p>1. Create more <b>loyalty mechanisms and integrate them into the app</b>. An example would be coupons (buy 4 get 1 free) for stores’ menus</p>
<p>“The tables are unclean/ have dirty tableware on”(4)</p>	<p>1. Hand <b>products on trays to keep tables clean</b> and insert <b>tray carts</b> on the stores so that customers can return the dirty tableware they have used.</p>	

## Recommendations – Categorization (9/9)

Car washing customers value the quality and efficiency of the service. It should be a priority to guarantee the proper functioning of washing instruments and to facilitate the payment process.



“The Hoover is out of service”  
(5)

1. Establish technical requisite for future Hoover acquisitions that assure an **automatic mechanism to retract the hose**

“I do not like the fact that I  
have to go to the store” (4)

1. Place a **change machine on washing area**, allowing jet wash and Hoover customers to exchange bills for coins **without going to the store**
2. Communicate (on car wash coupons and on the screens in the queueing area) that customers who have the **car washing coupons have the right to skip the queue**

1. Create **payment section on the app**. The customer would choose the **desired washing service** in the app and it would emit a code that by being inserted on the washing machine would initiate the process.
2. Implement **code reader system** in the automatic machines to replace the actual token's system
3. Install **outside payment terminals** on the washing machines to allow the payment there (in cash or card) and allow customers to **define the exact amount**. (Projected)
4. Integrate **car washing coupons into the app** (Projected)



## Recommendations – Action Plan (1/4)


To turn prepayment lateral pumps into fast ones the costs are low and it could be implemented in less than one year. By the end of 2018, customers might be identified automatically and the need for prepayment will decrease significantly.

### Turn Prepayment Lateral Pumps into Fast Pumps

**Objectives:** Reduce the customer’s waiting time for a convenient pump during peak times in busy gas stations and decrease the number of prepayment pumps. Besides, it has the objective to help customers make a fast decision on what pump to refuel

#### Cost Driver:

- 
**Communication**
  - Develop communication tools for customers to perceive as faster (auto racing symbols)
  - Print and roll out the tools
- 
**Promotion**
  - On a first stage, develop and action with promoters to instruct customers about the new pumps

 **Areas:** Commercial Communications, Operations



#### Timeline:




### Client’s Identification System

**Objectives:** Identifying clients could be useful to customize the experience (if customer data is integrated<sup>[1]</sup>); simplify refueling (unlocking the pump), or even revolutionize automatic payment. License plate identifiers are already present in some of the busiest stations, and the grid is expanding. Loyalty cards would be identified on the payment terminals.

#### Cost Driver:

- 
**Scanning loyalty cards**
  - Transactional process needs to be reversed: loyalty cards should be scanned first.
- 
**Integrating transaction history**
  - Back-office system: record and store the client’s transaction history, to establish the client as “trustworthy” and unlock the pump; and associate it to the name, which the license plate identifier already does.

 **Areas:** Technical Direction, Voice of the Client, Loyalty

#### Timeline:



[1] For further details, see the action plan for the recommendation “Integrate Customer Data”



## Recommendations – Action Plan (2/4)


To develop the payment in App option it would take approximately two years as it requires the investment in the local systems and on the app development. Inserting TVs would be faster as the company already had this equipment in the stores.

### Refuel – Payment in App

**Objectives:** Trying to improve the feature of paying outside, by creating a seamless experience, with a different payment method. To be implemented in gas stations where the new OPTs are installed, as they will connect to the app more easily, meaning that it will be in those with more movement.

#### Cost Driver:

	<b>App development</b>	<ul style="list-style-type: none"> <li>The app already exists, requiring the creation of this section.</li> <li>Can be done fast, after the initial planning.</li> </ul>
	<b>Local system improvement</b>	<ul style="list-style-type: none"> <li>The real-time, online integration of the local systems is the biggest challenge.</li> <li>Developing the system to accept this type of payment.</li> </ul>

 **Areas:** Digital Transformation; Technical Direction




#### Timeline:




### Insert a TV in Split screen and play music in the station

**Objectives:** Reduce the waiting time perceived in the queue, communicate campaigns and relevant information for the customer journey and create a better environment in the gas station and convenience store.

#### Cost Driver:

	<b>Equipment</b>	<ul style="list-style-type: none"> <li>Cost of acquiring and installing the screens</li> </ul>
	<b>Content Development</b>	<ul style="list-style-type: none"> <li>Define and develop contents for the TV to make it can be relevant for customers</li> </ul>
	<b>License to play music</b>	<ul style="list-style-type: none"> <li>In Portugal, to play music in a commercial space, a company must pay a license.</li> </ul>

 **Areas:** Commercial Communications, Convenience, Operations

#### Timeline:






## Recommendations – Action Plan (3/4)


In order to integrate customer data on the app or in a card the main cost drivers are the development of the app and the card as well as the adaptation of the systems. To make the partnership with “GoNatural” it will take approximately 2 years.

### Integrate Customer Data in the App/card

**Objectives:** Integrating customer data on the app or into a mini-card would simplify client registration, as it could be done in-store or online; ease the payment process, and allow for the invoices to be sent by mail.

#### Cost Driver:

- |  |                                |   |
|--|--------------------------------|---|
|    | <b>App Development</b>         | <ul style="list-style-type: none"> <li>Allow for a section of the app to collect relevant information</li> <li>Generate a bar code to scan this information</li> </ul>                    |
|    | <b>Card Design</b>             | <ul style="list-style-type: none"> <li>Print physical card to store the information, with a bar code associated</li> </ul>  |
|  | <b>Local System Adaptation</b> | <ul style="list-style-type: none"> <li>Allow for collection of information</li> <li>Scan bar codes and associate the information</li> <li>Allow for invoice to be sent by mail</li> </ul> |

 **Areas:** Technical Direction, Voice of the Client, Loyalty




#### Timeline:



### Follow consumption trends – GoNatural Partnership

**Objectives:** Increase stores' sales, customer satisfaction with the assortment, improve brand loyalty and customer engagement. Establish a solid partnership in order to benefit from GoNatural's know-how and brand recognition.

#### Cost Driver:

- |  |                               |  |
|--|-------------------------------|--|
|   | <b>Partnership</b>            | <ul style="list-style-type: none"> <li>Payment to the Partner for supplying the products</li> </ul>  |
|   | <b>Communication</b>          | <ul style="list-style-type: none"> <li>Advertisement campaign to create customer's awareness and association between the two brands</li> </ul> |
|  | <b>Storing and displaying</b> | <ul style="list-style-type: none"> <li>Products' integrity/handling control</li> <li>Appropriate temperature maintenance</li> </ul>            |

 **Areas:** Convenience; Commercial Communication;

#### Timeline:





## Recommendations – Action Plan (4/4)

Grab&Go in cafeteria would create more spaces available and satisfy customers that want consume their products inside or outside the store. An app payment option would simplify the car-wash customers' journey increasing their satisfaction.

### Promote Grab&Go in Cafeteria

**Objectives:** Increase the satisfaction of customers that do not want or do not have time to consume their products in-store, by offering a faster service and a more convenient packaging. Create more space available to customers that might want to consume their products inside the store.

#### Cost Driver:

- 
**Packaging**
  - Creation of a special packaging for the pastry and isothermal cups for drinks
  - Development of an appealing design
- 
**Communication**
  - Informative campaign to raise awareness of new Grab&Go alternative
  - Employees education in order to mention this option when the customer is ordering

 **Areas:** Convenience; Commercial Communication



#### Timeline:




### Car-wash – Payment in App

**Objectives:** Remove the restriction of customers needing to go to the store to pay for their car-wash or to make change for the vacuum or the jet-wash. This will contribute to a better experience for the customer that wants to wash his car, but also will reduce the number of clients in the store, reducing queue time for others.

#### Cost Driver:

- 
**App development**
  - The app already exists, requiring the creation of this section.
  - Can be done fast, after the initial planning.
- 
**Local system improvement**
  - The real-time, online integration of the local systems is the biggest challenge.
  - Develop new system that lets activation machine work as a paying machine.

 **Areas:** Convenience Department; Digital Transformation; Technical Direction

#### Timeline:





# Customer Journey “as it would be”

## Customer Journey Map – “As it would be” (1/13) <sup>[1]</sup>

Car washing customers prefer not to go to the store to make the payment or change bills for coins and recommendations have been settled according to this preference.

**Pedro Silva**



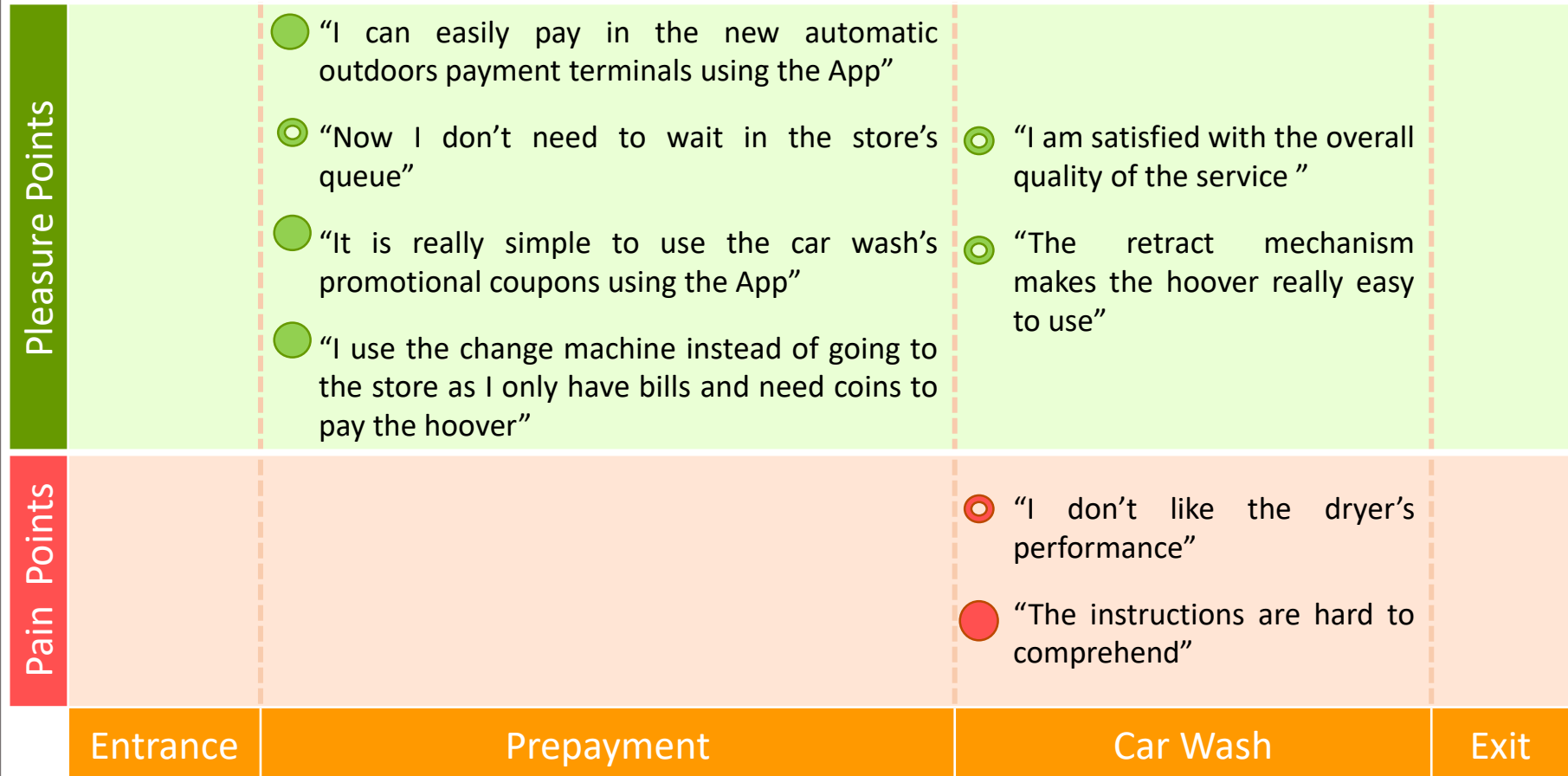
**Age:** 30

**Gas Station:** Olivais/Telheiras (Metropolitan)

**Visit Frequency:** Monthly

**Smartphone:** Yes

**Storyline:** Pedro opts for a determined washing mode (Jet Wash/Automatic) and maintains it. He pays in cash inside the store, sometimes acquiring the Car wash's coupon. Usually, the customer avoids the rush hours and goes home after the visit.



[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization

## Customer Journey Map – “As it would be” (2/13) [1]

Current Pay & Go customers will benefit from digital related recommendations that improve the process of the OPT and others that might reduce the total time spent in the gas station.

**João Almeida**



**Age:** 39

**Gas Station:** Oeiras (Metropolitan)

**Visit Frequency:** Weekly

**Smartphone:** Yes

**Storyline:** João visits Galp on his way to work though avoiding the rush hours. His fuel is paid by his company so he uses the *Galp Frota* card to pay. He refills his car with non-additive diesel.

Pleasure Points	<ul style="list-style-type: none"> <li>“When I enter the gas station I can easily identify the pumps that have the fuel I want”</li> </ul>	<ul style="list-style-type: none"> <li>“When I do not have the App, the operation begins as soon as I insert the card”</li> </ul>	<ul style="list-style-type: none"> <li>“There are wipes/ gloves in the pump thanks to the new dispensers”</li> </ul>	<ul style="list-style-type: none"> <li>“By paying through the app, I can receive the invoice by email.”</li> </ul>	
	<ul style="list-style-type: none"> <li>“I always use the fast pumps because in those ones I am sure I will not have to wait for the previous customer”</li> </ul>	<ul style="list-style-type: none"> <li>“I like to use the App to pay as I just need to insert the code on the OPT and I can see all my information on the App”</li> </ul>		<ul style="list-style-type: none"> <li>“When I want to print the receipt, usually there is paper and it is easy to take it off”</li> </ul>	
Pain Points					
	Entrance	Begin OPT transaction	Refuel	Conclude OPT transaction	Exit

[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization

## Customer Journey Map – “As it would be” (3/13) [1]

Customers in full-service value comfort and an hands-off service. For this reason, they are impacted by recommendations that aim to simplify customers’ tasks.

### Lurdes Martins



**Age:** 58

**Gas Station:** Loures Full-service (Local)

**Visit Frequency:** 2x week

**Smartphone:** Yes

**Storyline:** Lurdes pays its own fuel, usually in cash. The customer drives to the gas station by car avoiding the rush hour, while doing her daily tasks. Occasionally, she uses *Continente* card.

Pleasure Points	<ul style="list-style-type: none"> <li>“Having a pump attendant is more convenient since I don’t need to get out of the car”</li> <li>“With the pump attendant refueling, the process is faster because he is more efficient”</li> <li>“I already know the pump attendant, he is friendly and polite”</li> </ul>	<ul style="list-style-type: none"> <li>“The payment process here in the pump is really quick”</li> <li>“Now, either I pay in cash or with the automatic payment machine I don’t need to leave my car”</li> </ul>		
	Entrance	Refuel	Post-Payment	Exit
Pain Points	<ul style="list-style-type: none"> <li>“It takes to long to enter the gas station during peak times”</li> </ul>	<ul style="list-style-type: none"> <li>“The pump attendant thought I asked for 40 liters of fuel when I was asking for 40 euros”</li> <li>“When I asked for the “standard” fuel the employee thought that I was referring to the “<i>Evologic</i>” fuel”</li> </ul>		

[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization

## Customer Journey Map – “As it would be” (4/13) [1]

Customer who prepay will mainly benefit from recommendations that improve the payment process and replicate the good attendance of employees.

**José Sequeira**



**Age:** 27

**Gas Station:** Olivais (Local)

**Visit Frequency:** 2x month

**Smartphone:** Yes

**Storyline:** José pays his own fuel in cash and uses *Continente* card. Visits the gas station during the morning on his way to the office and avoids rush hours.

He chooses the pump based on the availability of non-additive fuels.

Pleasure Points	<ul style="list-style-type: none"> <li>“When I enter the gas station it is easy to comprehend which pumps are in prepayment mode”</li> </ul>	<ul style="list-style-type: none"> <li>I like to use the App instead of saying my personal data for the invoice and it is great to receive it on the email.</li> <li>I voted for the employees’ uniform and we talked about it. He was polite and friendly.</li> </ul>		
	Pain Points		<ul style="list-style-type: none"> <li>“When I asked for the “standard” fuel the employee thought I was referring to the “Evologic” fuel”</li> </ul>	
	Entrance	Prepayment	Refuel	Exit

[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization

## Customer Journey Map – “As it would be” (5/13) <sup>[1]</sup>

Some customers who pay after refueling, having Pain points related to prepayment mode and time spent, might shift to Pay & Go option as they would be able to comprehend how to use it and to benefit from the same discounts.

### Jorge Ferreira



**Age:** 36

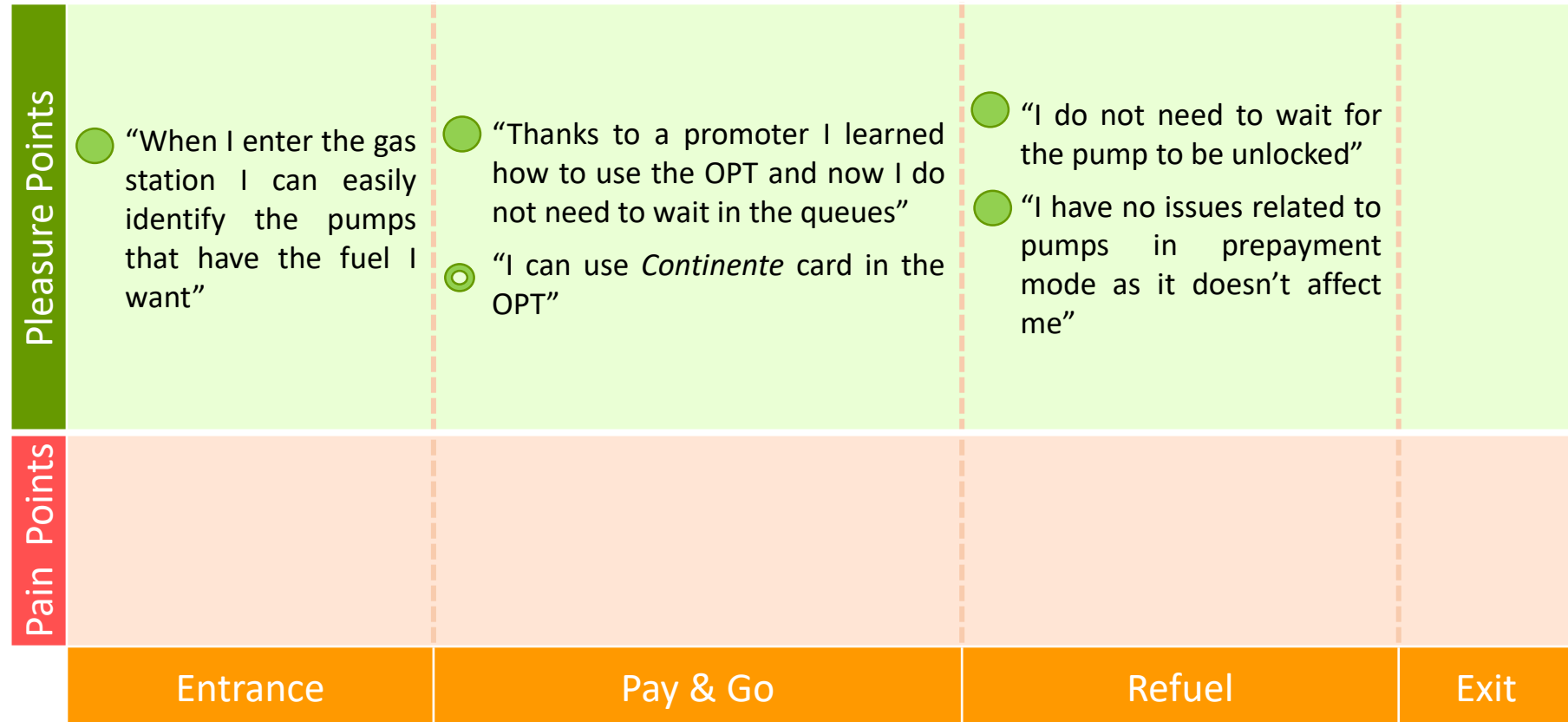
**Gas Station:** Telheiras  
(Commuting)

**Visit Frequency:** Weekly

**Smartphone:** Yes

**Storyline:** Jorge visits the gas station to fill up his car and for this reason decides to pay after refueling. He chooses the pump based on the queue.

As he pays his own fuel he uses his debit card and sometimes the *Continente* card to benefit from discounts.



[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization

## Customer Journey Map – “As it would be” (6/13) <sup>[1]</sup>

Customers who use services of fuel and cafeteria, give importance to the refuel process and store environment. To these customers, it is important to reduce their perception of the queue and to meliorate their experience in-store.

### Vtor Matos



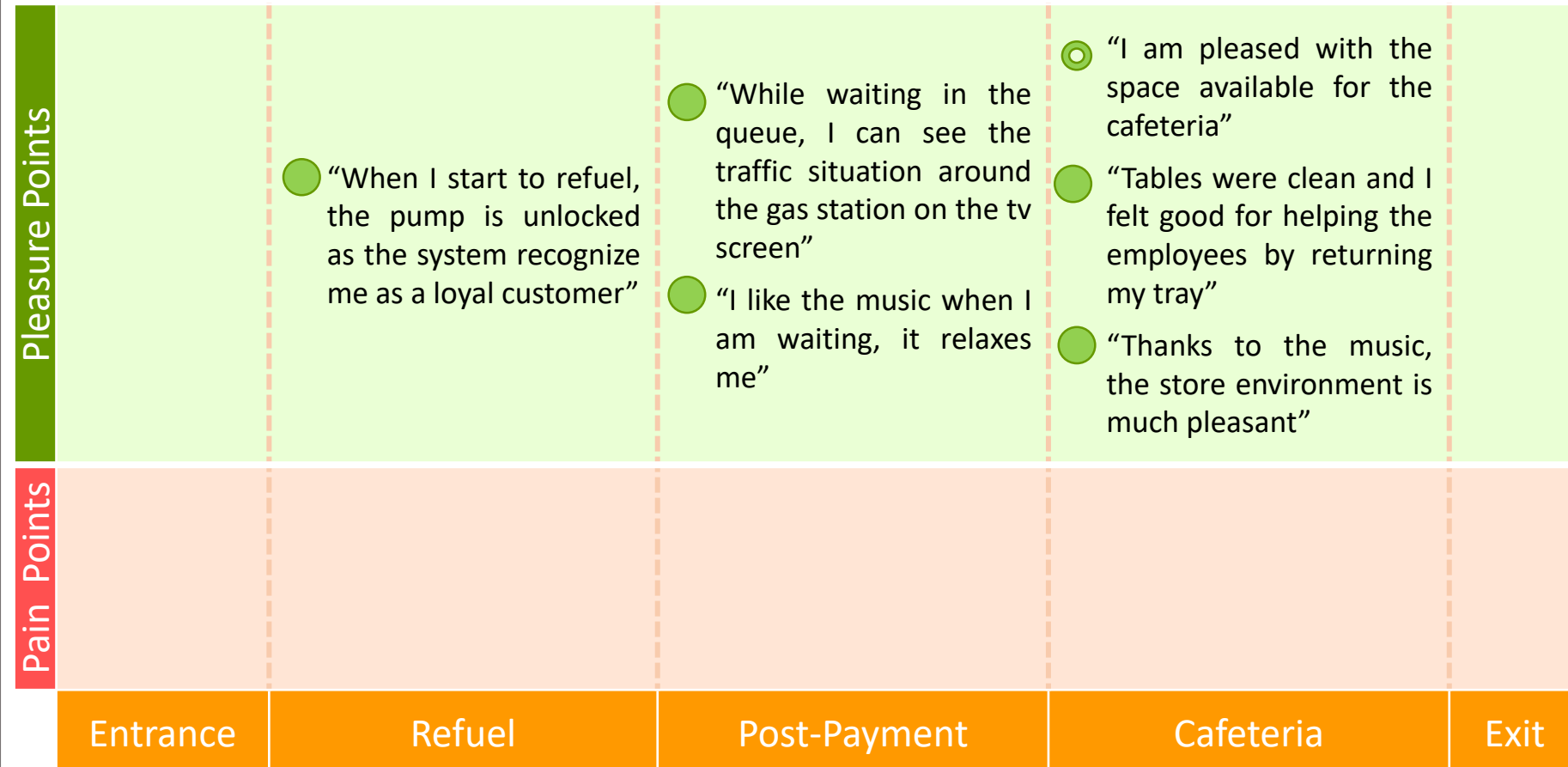
**Age:** 51

**Gas Station:** Oeiras (Commuting)

**Visit Frequency:** 1x week

**Smartphone:** Yes

**Storyline:** Vitor usually visits a gas station before going to work. He refuels his car and drinks coffee. This customer pays the coffee in cash and uses the *Galp Frota* card for the fuel since it is his company that pays it.



[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization

## Customer Journey Map – “As it would be” (7/13) <sup>[1]</sup>

The journey of customers who refuel and buy in the convenience store is impacted by several recommendations in order to decrease the refuel inconveniences, adapt store supply and optimize in-store payment process.

### Sandra Marques



**Age:** 42

**Gas Station:** Pombal (Long Distance)

**Visit Frequency:** 2x Week

**Smartphone:** Yes

**Storyline:** Sandra pays her own fuel with credit/debit card inside the store, using *Continente* card.

The customer visits the gas station in the afternoon during a longer trip to her home.

When she enters the gas station she chooses the pump base on the side of the fuel tank.

Pleasure Points	<ul style="list-style-type: none"> <li>“When I enter the gas station, I can easily identify the pumps that have the fuel I want”</li> </ul>	<ul style="list-style-type: none"> <li>“I value the fact that there are wipes/gloves in the pump and I use the hands sanitizer in the store’s entrance”</li> <li>“I do not need to ask the employees to unlock the pump when I want to fill up because the system identifies me as a trusted customer”</li> </ul>	<ul style="list-style-type: none"> <li>“I appreciate the fortnightly campaign”</li> <li>“I am fan of “Go Natural” partnership and opt for fresh products”</li> <li>“We have the new menus’ coupons available in the App which are really good and easy to use”</li> </ul>	<ul style="list-style-type: none"> <li>“I am able to print my <i>Continente</i> vouchers on the store’s entrance and the process of printing is easy”</li> <li>“When I do not have the <i>Continente</i> card with me, I can tell my phone number”</li> </ul>	
	Pain Points		<ul style="list-style-type: none"> <li>“It rains in the pump while I am refueling”</li> </ul>		
	Entrance	Refuel	Convenience Store	Post-payment In store	Exit

[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization



## Customer Journey Map – “As it would be” (8/13) [1]

The customer journey that includes refuel and Tobacco has major incidence of Pain points on the payment stage, for this reason these customers are also impacted by recommendations connected to the usage of *Continente* card and its vouchers.

### Nuno Alves



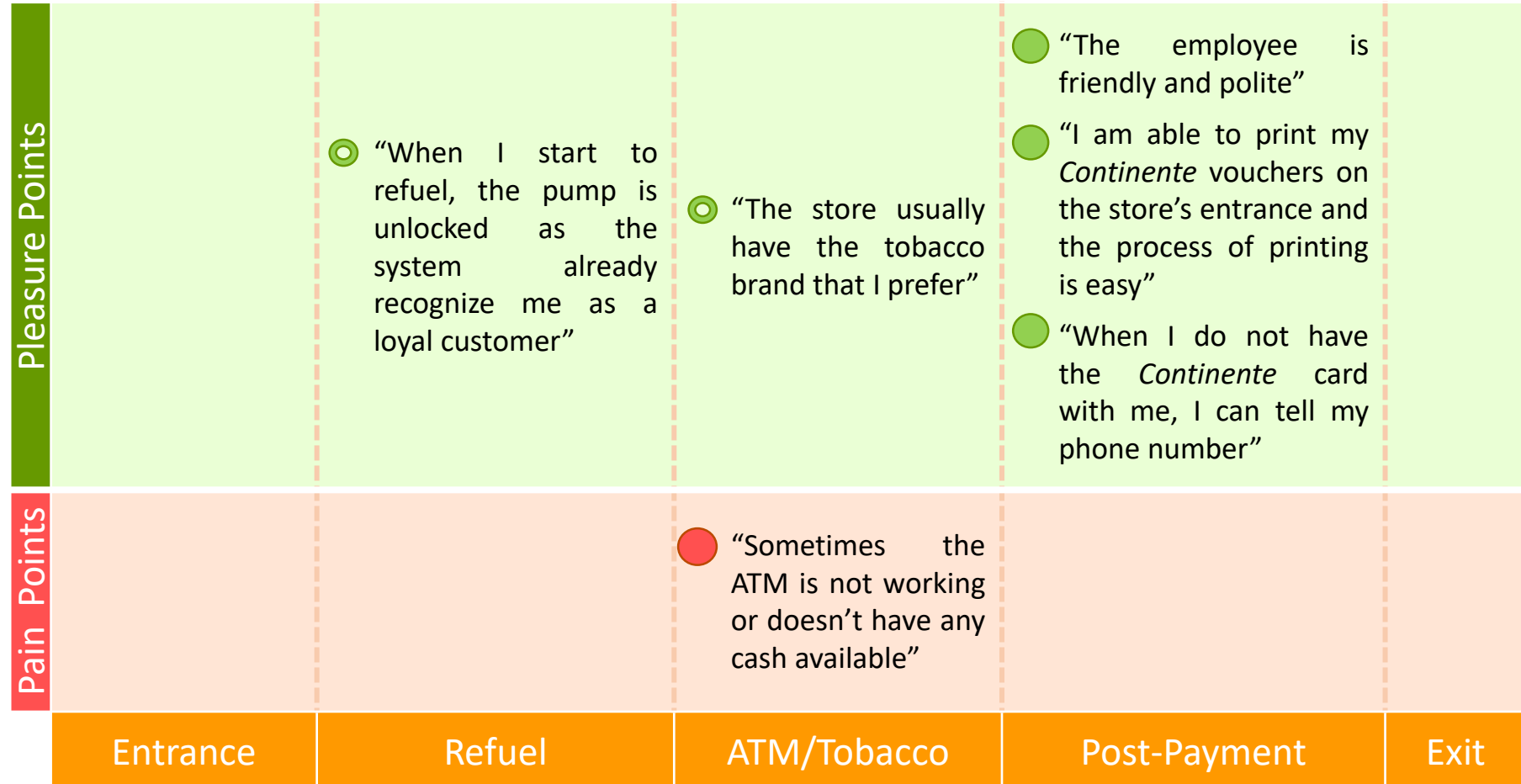
**Age:** 37

**Gas Station:** Aeroporto (Commuting)

**Visit Frequency:** Daily

**Smartphone:** Yes

**Storyline:** Nuno pays his own fuel with debit card and uses the *Continente* card for discounts. Usually he chooses the *Evologic* fuel. He goes to the gas station by car during rush hours while going to work or during long trips



[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization

## Customer Journey Map – “As it would be” (9/13) [1]

Customers who visit Tangerina’s cafeteria in groups, value having seats available and clean places to consume their products comfortably.

### Ana e Teresa



**Age:** 38

**Gas Station:** Loures (Local)

**Visit Frequency:** Daily

**Smartphone:** Yes

**Storyline:** The two colleagues walk to the convenience store as the gas station is close to their office. They visit the station during the morning, before work. On the store, they take the breakfast and use their smartphones to check the morning news and social networks.



[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization

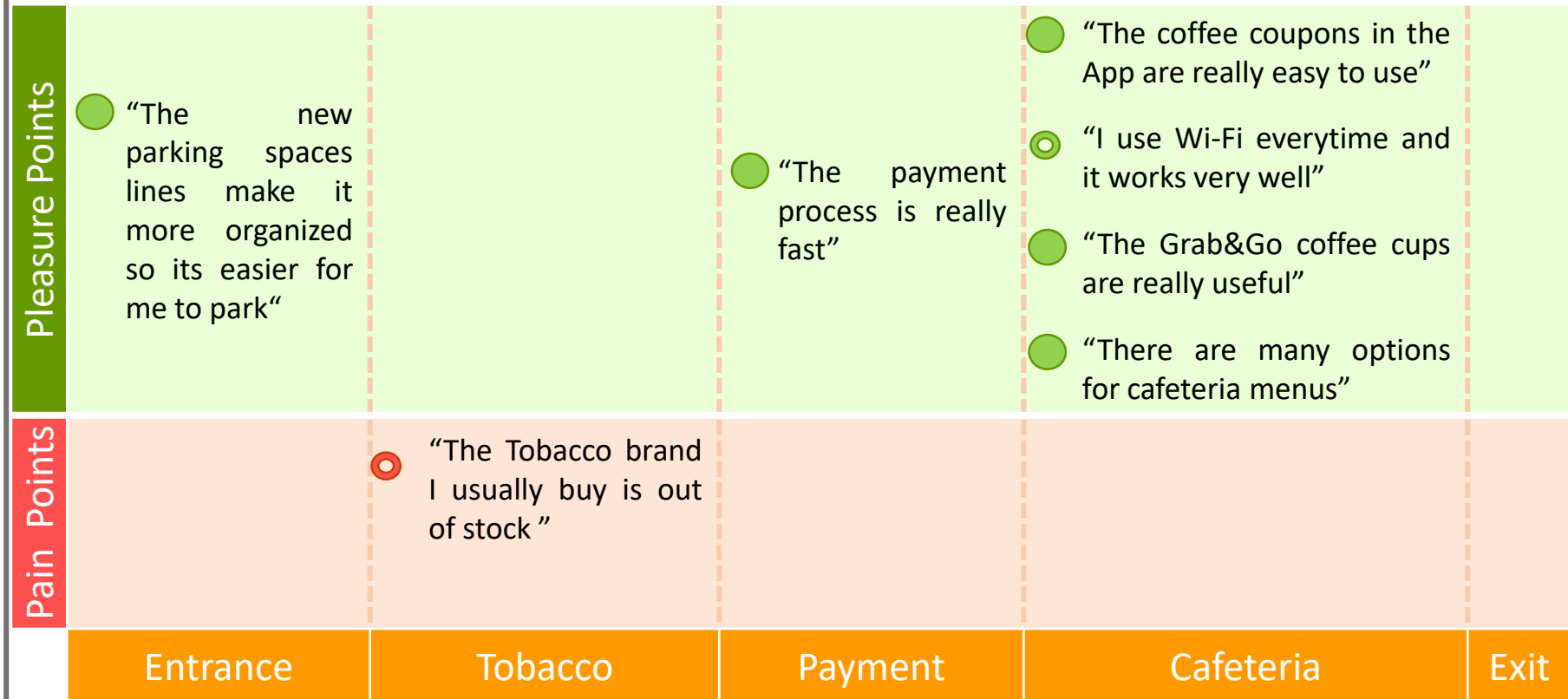
## Customer Journey Map – “As it would be” (10/13) [1]

Customers who visit Galp for the cafeteria and to buy Tobacco appreciate a good assortment of cafeteria. Besides they usually visit the station their way to work meaning they would possibly value Grab&Go options.

**Afonso Lopes**



**Age:** 40  
**Gas Station:** Aeroporto ou Oeiras (Metropolitan)  
**Visit Frequency:** 2x week  
**Smartphone:** Yes  
**Storyline:** Afonso visits the gas station during morning rush hours on his way to work. This customer usually pays in cash and does not request tax identification number on the invoice. The main driver of his visit is the cafeteria but he also buys cigarettes



[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization

## Customer Journey Map – “As it would be” (11/13) <sup>[1]</sup>

Customers who only visit the convenience store assess the assortment and value healthy products. These customers usually know the employees and enjoy a friendly conversation.

### João e Maria



**Age:** 52

**Gas Station:** Aeroporto (Metropolitan)

**Visit Frequency:** 2x Month

**Smartphone:** No

**Storyline:** This couple visits the Galp station by car on their way home to buy newspapers and sometimes another impulse product and pay in cash.

Pleasure Points	<ul style="list-style-type: none"> <li>“The new parking spaces available make it more organized and easier for us to park“</li> </ul>	<ul style="list-style-type: none"> <li>“We appreciate the fortnightly campaign“</li> <li>“We like the new healthy and fresh products“</li> </ul>	<ul style="list-style-type: none"> <li>“We voted for the employees uniform and we talked about it with him. The employees are friendly and polite“</li> <li>“While we were in the line we listened to some good music“</li> </ul>	
	Pain Points			
	Entrance	Convenience Store	Post-Payment	Exit

[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization

## Customer Journey Map – “As it would be” (12/13) <sup>[1]</sup>

Customers who buy exclusively Tobacco will value modifications in the payment process to make it faster or reduce their perceived time of the queue.

### Rodrigo Santos



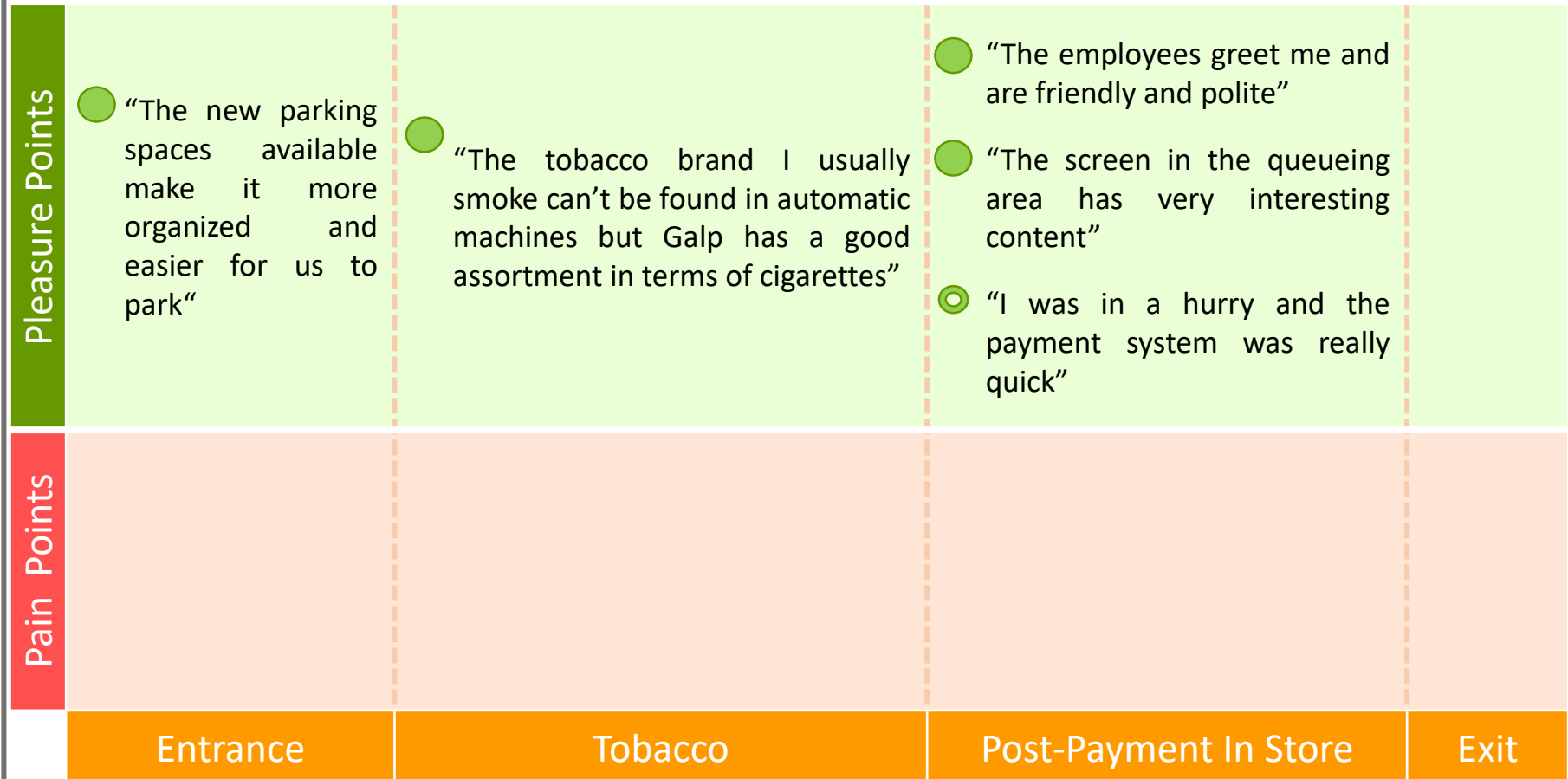
**Age:** 28

**Gas Station:** Venda do Pinheiro (Road)

**Visit Frequency:** 2x week

**Smartphone:** Yes

**Storyline:** Rodrigo visits the gas station exclusively to buy cigarettes, and for that reason he values the quickness of the service above everything else. Usually pays in cash, avoiding rush hours. He frequently buys cigarettes on his way to work and is not available to consume any other product.



[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization

## Customer Journey Map – “As it would be” (13/13) [1]

Young customers will benefit from a targeted loyalty program and will probably integrate the card in the App. Those customers prefer to pay after refueling and do not usually fill up.

**David Neves**



**Age:** 21

**Gas Station:** Oeiras L-C

**Visit Frequency:** Weekly

**Smartphone:** Yes

**Storyline:** David pays his own fuel in cash and do not use loyalty cards as there is no suitable for him. He visits the gas station avoiding the rush hours on his way home. He prefers to define the amount in the pump before refueling.

Pleasure Points		<ul style="list-style-type: none"> <li>“When I start to refuel, the pump is unlocked as the system already recognize me as a loyal customer”</li> </ul>	<ul style="list-style-type: none"> <li>“I prefer Galp because I can use my discount card”</li> <li>“The screen in the queueing area has very interesting content”</li> <li>“The employee was nice and greeted me”</li> <li>“The payment with the App is much faster as it already has my loyalty card integrated”</li> </ul>	
	Pain Points			
	Entrance	Refuel	Post-Payment In Store	Exit

[1] The detailed correspondent decision matrix can be found, with a description of each recommendation in Appendix G 1 – Recommendations - Categorization

## Limitations and Further Research

## Limitations and Further Research

The limited time period of the project imposed limitations on the scope and sample of the project, which prevented the study from having the necessary significance to extrapolate the data collected to the general population of Galp clients.



**Scope:** Different geographical region and timetables of research may contribute to obtain more information about clients with different needs and wants, services utilized, journeys and satisfaction and dissatisfaction points; resulting in different personas than those identified.

### Geography

- Collect data across the country taking into account the sales volume of different regions.

### Time Frame

- Visit the stations all weekdays and weekends, at the same time, throughout the day and night, across all seasons, to avoid seasonality effects, particularly felt in the car-wash and bottled GPL businesses.

### Customer

- Track the consumer interactions with the brand at every moment of the consumer decision journey, from the moment he ponders refueling, to the time he returns; as to understand what drives him to Galp, and what were is difficulties through the whole process; as well as the satisfaction level with the purchased services or products.

### Services

- Some of the services provided by Galp registered few cases, as WC, Air and Water, ATM, or bottled GPL.



**Sample size:** Despite collecting data from more than 500 customers, for a company the dimension of Galp this is not enough to be representative, which is necessary to be able to infer to the rest of the customer base the conclusions of the study. This is why it proved difficult to accurately measure the impact the recommendations proposed would have on all the customers.



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