



# A Retailer's Guide to GoSpotCheck

How GoSpotCheck's task management & image recognition solution revolutionizes in-store operations, boosts revenue, and maximizes retail potential.

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### The State of Retail in 2024

Since the turn of the decade, the retail industry has navigated significant turbulence. Years marked by inflation, global unrest, and supply chain disruptions tested—and affirmed—the sector’s ability to be resilient and adaptable. Moreover, retailers are contending with a rapidly evolving and competitive environment in addition to systemic challenges. Influenced by technological integration, evolving consumer preferences, and the necessity to enhance employee skills, the industry is undergoing a profound transformation, particularly to align with the demands of a technology-driven market.

Despite these obstacles, many retailers are optimistic about the future. Guided by emerging AI solutions, they are enhancing workforce sustainability, crafting omnichannel experiences, and developing innovative strategies to capitalize on evolving market dynamics.

### Driving Revenue in the Future

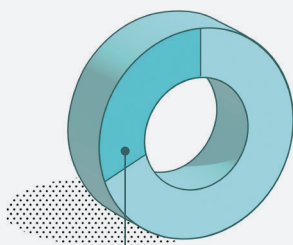
To achieve sustainable profitability, retailers must strategically invest in long-term growth drivers. While each organization has its unique priorities, several trends have gained traction in recent years. Many retailers are increasingly focused on enhancing revenue streams by leveraging Retail Media, integrating Buy Online, Pick Up In-Store (BOPIS) programs, and exploring new partnerships

and supply chain efficiencies to manage costs and expand market access. Once again, this multifaceted approach to revenue growth exemplifies the industry’s ability and desire to quickly adapt and seize new opportunities.

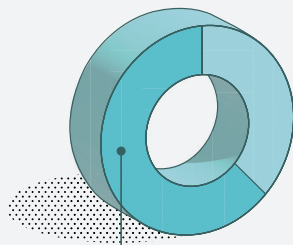
### Technology Trends Shaping Retail

Technology, in particular AI, has been a driving force behind the retail industry’s transformation in recent years. As AI solutions have become more accessible, they’ve been embraced by nearly every team in the workplace — from frontline associates and back-of-house managers to office and work-from-home employees.

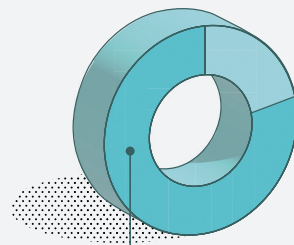
Product detection technologies are leveraged for shelf monitoring and inventory management, while generative AI is transforming personalized marketing strategies. AI-driven analytics can enhance demand forecasting, and automated purchasing can result in reduced time and error. Additionally, other image recognition solutions are gaining prominence, offering real-time insights into stock levels and demand patterns, facilitating smarter supply chain decisions, and optimizing the overall shopping experience. Regardless of the technology an organization prioritizes, it’s evident that using AI to automate processes has become the new normal.



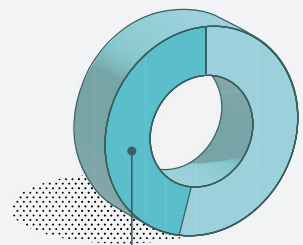
**30%**  
of companies  
number one priority is reducing  
cost



**62%**  
of retailers  
plan to invest in retaining  
future-proofing their workforce



**79%**  
of business leaders  
expect AI to transform their  
organizations within the next 3 years



**46%**  
of retailers  
plan to prioritize AI to enhance end-  
to-end supply chain visibility

### Our Company

GoSpotCheck was founded in 2011 in Denver, Colorado. In 2020, it was acquired by the private equity-backed company, FORM. FORM operates a suite of products designed to help frontline workers do their jobs more easily and effectively, including mobile data collection and field insights, survey tools, and image recognition AI. Today, FORM is a global organization with over 350 team members and Centers of Excellence in Denver, Boston, Chicago, Krakow, London, & Kyiv.

### Our Mission

We are dedicated to empowering the world's 2 billion mobile workers as they change companies and industries for good, with a mobile app that improves execution and efficiency from the frontline. Our digital assistant for teams guides daily tasks, boosts communication, and provides leaders with real-time data insights to drive faster actions and better decisions. FORM activates and connects teams in the field—with leaders, missions, and each other—so they can drive success in the enterprise.

### Our Customers

For over a decade, GoSpotCheck has helped companies of all sizes in Retail and Consumer Goods improve market execution, save time, and drive sales. Kroger, Ahold Delhaize, PepsiCo, Amazon, Keurig Dr Pepper, and other Fortune 500 companies use GoSpotCheck to drive value at scale, and our solution has received numerous accolades from G2, Capterra, Forbes, and Forrester.

### Our Future

We are dedicated to providing top-tier products that empower users to seamlessly enhance operational efficiency, optimize inventory management, and elevate the overall retail experience. Our team is steadfast in its commitment to innovation, continually developing cutting-edge solutions and advanced technologies tailored to meet the evolving needs of the Retail industry.



**FORRESTER**

TOP FIVE APP  
STORE ASSOCIATE  
ENABLEMENT TECHNOLOGY

**Forbes**

TOP FIVE APP  
STORE ASSOCIATE TECHNOLOGY

**Gartner**

RETAIL OPTIMIZATION  
GUIDE

**built in**

BEST PLACES TO WORK

**The Org**

MOST TRANSPARENT  
TECHNOLOGY COMPANIES



1

## Design & Distribute Work

Create and assign dynamic tasks with a no-code process-building engine on desktop.

2

## Keep Teams on Track

Guide task completion on mobile with context and prioritization for teams.



3

## Confirm Execution & Gain Insights

Reach conclusions at a glance about the right action to take next with real-time operational reporting.





### MOBILE APP



Field teams use mobile devices to capture valuable and actionable in-store data—even in areas of low connectivity.

### ADVANCED INSIGHTS



View and share real-time reporting dashboards with custom filters to make smarter and faster decisions.

### TASK ENGINE



Use our intuitive, drag-and-drop task builder with 12 task types to create efficient and effective audits.

### ON-DEVICE REPORTING



Teams receive SKU-level insights on-device within minutes so they can spot and resolve issues while on-site.

### SMART LOGIC



Conditional and advanced logic saves teams time by showing, hiding, or triggering certain actions based on specific criteria.

### BLUETOOTH THERMOMETER INTEGRATION



Verify food safety standards with our easy-to-use bluetooth thermometer integration that instantly reads temperatures on mobile.

### IMAGE RECOGNITION



Native AI instantly identifies and tags products on mobile to collect the critical field data you need to move forward.

### OPEN API & INTEGRATIONS

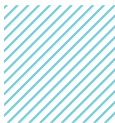


Seamlessly integrate with other systems of record to extend the value of your tech stack.

### PHOTO REPORTING



Visually confirm execution and easily find, sort, and filter images per location, user, account, SKU, and more.



### Key Features

GoSpotCheck's no-code task management engine natively includes our proprietary product detection AI, ensuring optimized data capture and execution in diverse retail environments. Our image recognition solution automatically identifies and analyzes items at a SKU level with exceptional accuracy and simplicity, enhancing overall productivity and providing unparalleled visibility in the field. Equipped with on-device reporting capabilities, our solution empowers users with real-time insights, including automated planogram tracking and scoring to guarantee increased efficiency and compliance.

### The GoSpotCheck Difference

Our image recognition solution distinguishes itself in the market as a retailer-focused solution that relies on mobile devices instead of stationary cameras. Our user-friendly mobile app offers flexibility, ease of use, and seamless implementation and integration. Additionally, what sets GoSpotCheck apart is our unmatched visibility into a broader range of display types than any solution available, spanning both retail and hospitality environments.

With on-screen guides and automatic photo stitching, teams can capture entire aisles within seconds for a comprehensive view of any set size. On-device insights are available within minutes, not months, empowering teams to promptly address issues and ensure execution.



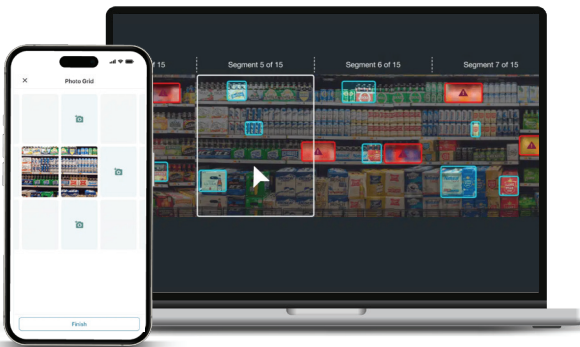
### What We Can Detect:

 SHELVES	 COOLERS	 BACK BARS	 BEER TAPS
 OFF-SHELF, FLOOR, & ENDCAP DISPLAYS	 PRICE & PROMO PRICE	 COCKTAIL, BEER, & WINE MENU	 SODA FOUNTAIN TAPS

# Planogram Compliance

## Overview

Streamline execution and create the perfect store with GoSpotCheck's mobile AI for retail that's fully integrated with task management, photo reporting, and business intelligence.



### Improve Planogram Compliance

Automatically identify placement opportunities and get SKU-level data reported on mobile.

### Meet Commitments to Suppliers and Distributors

Get insights into promos, prices, and assortment to get visibility into how trade agreements are being executed in every location.

### Hit Your Margin Targets

Confirm compliance of product positioning and adjacencies to drive sales and meet your margin goals.

### Reduce Shrink

Identify trends and opportunities in supply chain and in-store execution alignment to improve purchasing accuracy across locations.

### Confirm Seasonal and Promotional Compliance

Quickly execute and confirm compliance on seasonal and promotional displays to drive sales.

### Track Stockouts and Voids

Instantly spot out-of-stocks and fill voids faster to increase basket size and customer loyalty.







## 1. Planogram Compliance

Create a perfect store with our mobile AI that automatically detects and analyzes every item and delivers real-time, custom scoring to your planogram.

## 2. Merchandising Execution

Quickly, easily, and accurately capture data on assortment, cycle counts, and merchandising compliance.

## 3. Price Monitoring

Track regular and promotional price points of owned and competitive SKUs at every account to ensure consistency and compliance.

## 4. Daily Operations & Store Walks

Cut store audits by 75% with GoSpotCheck's easy-to-use mobile task management platform powered by AI.

## 5. On-Shelf Availability

Identify stockouts & voids on every shelf, cooler, and display. Use SKU-level photo reporting to monitor on-shelf availability and fill holes in real time.

## 6. Marketing & Signage Execution

Ensure consistency and execution of point-of-sale materials for brand standards and pricing compliance across locations.

## 7. Food & Occupational Safety

Exceed all OSHA, health department, and food safety standards with mobile temperature tasks and Bluetooth thermometer IoT integration.

## 8. Facilities Management

Digitize site surveys and use real-time photo reporting to ensure compliance and excellence in every location.

## 9. Team Member Training & Education

Keep team members—both new and long-standing—engaged and informed with in-app content sharing and product knowledge.

## 10. Back-of-House Operations

Increase productivity and efficiency with smart and flexible mobile task lists that optimize every back-of-house SOP.

# Who Uses GoSpotCheck?

GoSpotCheck caters to the entire retail enterprise — from frontline associates to C-level executives. Our platform offers comprehensive data capture, analysis, and reporting capabilities tailored to the needs of every role within the organization.



## Supply Chain Leaders

Optimize supply chain operations with real-time insights into on-shelf availability across locations. View trends over time to identify opportunities in supply chain and in-store execution alignment.



## Purchasing Leaders

Get full visibility into shelf activity to align purchasing initiatives with in-store execution, reduce shrink, drive sales velocity, and provide a better customer experience.



## Category Managers

Capture photos of sets using image recognition and compare SKU-level realograms to uploaded planogram files to get instant compliance reporting.



## Store & Facilities Operators

Manage in-store execution and follow merchandising guides with mobile task management and photo reporting for field teams.



## Marketing Leaders

Verify that all point-of-sale and marketing materials, including in-store events and sample promotions, are properly executed and compliant to standards.



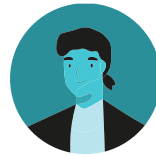
## Supplier Relationship Managers

Meet commitments to suppliers & distributors with instant visibility into how your trade agreements are being executed in every location.



## New Store Development

Manage operations for new store openings, including departmental punch lists, team member training, and display execution—all within a single app.



## Pricing Strategists

Make stronger, data-driven decisions that lead to sustainable profitability with automatic price tracking and analysis.



## Data Analysts

View thousands of data points from one picture. Get instant visibility into the KPIs that matter most to drive execution and strategy everywhere.



## Operations Leaders

Meet gross margin goals by optimizing product mix and assortment and executing on-shelf and display blended margin strategies



69%

Execution  
Improvement

70%

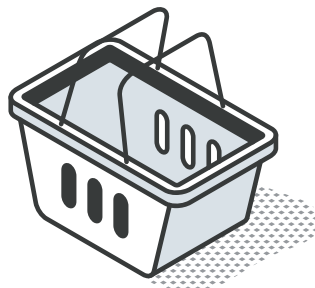
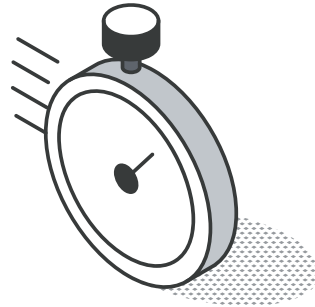
Faster Store  
Audits

53%

Compliance  
Improvement

25%

Reduction in  
Out-of-Stocks



## Adding Value for Retailers

### Operating Expenses

#### LABOR COSTS

Save time for store and leadership teams through digitized task management and automated reporting.

#### REDUCE LIABILITY

Reduce legal claims by enhancing compliance with occupational and food safety practices.

#### ASSET MAINTENANCE

Extend the life of CapEx assets with digitized asset audits for preventative maintenance.

### Top Line Revenue

#### IN-STOCK PERFORMANCE

Decrease stockouts and voids with AI-powered product availability tracking.

#### VELOCITY OPTIMIZATION

Track planogram compliance to confirm product positioning across sets, ensuring optimum placement for high-velocity sellers.

#### PROMOTIONAL COMPLIANCE

Ensure proper execution of promotional programs across all locations.

### Bottom Line Revenue

#### GROSS MARGIN

Reduce shrink with AI-powered planogram compliance and digitized processes for BOH operations.

#### COST OF GOODS

Leverage advanced insights from shelf execution data to negotiate pricing with suppliers.

#### Trade Marketing

Monitor trade marketing programs compliance, and resell store execution data to suppliers.

GoSpotCheck seamlessly integrates with your existing technology stack, enhancing the value of your investments and fostering a unified, transparent experience for your teams.

## Inputs

### ERM / CRM / Asset Management



### HCM



### Mobile Workforce Mgmt.



## Outputs

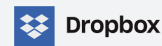
### BI / Analytics



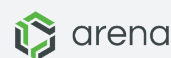
### Data Warehousing & Data Lakes



### Archiving



### PLM / Other Mgmt. Solutions



# Data Overview

## What You Can Expect



GoSpotCheck's product detection AI stands out in the retail sector with its unmatched capabilities, offering real-time insights across a wider array of data types than any other solution. Explore the extensive data capture abilities of our AI, and discover its scope and the transformative impact it delivers to the retail landscape.

### Planogram Compliance Scoring by Store

Get custom scoring of every set to your planogram, with recommended action items to increase compliance across locations.

### Out-of-Stock Rates by Category

See stockout and void rates by category, including weighted out-of-stocks, to enhance on-shelf availability and sales of high-margin products.

### Shelf Share by Brand

Understand assortment by brand and ensure private label brands are represented with the positioning and number of facings expected in each store.

### Operational Task Attainment

Monitor task completion across teams and locations at a glance and identify opportunities for operational improvement.

### Merchandising Execution

Track the execution of planned displays in real time and identify discrepancies for swift resolution.

### Store Performance Rollup

Easily aggregate and condense data across all locations to see store performance and scoring across your key metrics.

### Data Model Configurability

Tailor data models to meet your organization's unique needs and integrate with internal data sources to create bespoke reporting solutions that align with your goals, size, and priority KPIs.



# Digital Maturity

## Your Journey with GoSpotCheck

Understanding your organization's digital maturity is the first step in creating sustainable growth. By evaluating your existing technological infrastructure, workforce capabilities, and adaptability, you can embrace digital transformation to drive business impact. Here, we outline several foundational stages of digital maturity and offer insights into what you can expect as you progress through technological advancements and innovation alongside a strategic partnership with GoSpotCheck.

### 1 Foundational Efficiency

**Recommended Starting Point:** GoSpotCheck Task Management

**Your Goal:** You want to adopt digital replacements for underperforming processes and achieve short-term operational efficiencies while building architecture for long-term growth.

**Growth Architecture:** You'll establish team and account structure within the GoSpotCheck platform, build a product catalog with owned SKUs, and aggregate shelf photos for our proprietary machine learning model training.

### 2 Strategic Integration

**Recommended Starting Point:** GoSpotCheck Task Management + PhotoWorks + Insights

**Your Goal:** You want to capitalize on operational efficiencies and strengthen processes with advanced analytics. You want to leverage the new data to improve strategic decisions and win market share.

**Growth Architecture:** You'll build a custom data model for insights while laying the groundwork for existing reporting to be enriched with image recognition data.

### 3 Cross-Functional Expansion

**Recommended Starting Point:** GoSpotCheck + PhotoWorks + Insights

**Your Goal:** You want to showcase the value and flexibility of GoSpotCheck internally, expanding its use across teams or regions for a streamlined operational model. By implementing a shared cost model, you can reduce software costs and reach efficiencies of scale to further drive down expenses.

**Growth Architecture:** You'll further expand your utilization of GoSpotCheck, onboarding additional users, locations, and SKUs. Our team will begin training our image recognition model on your SKUs.

### 4 Data-Driven Optimization

**Recommended Starting Point:** GoSpotCheck + PhotoWorks + Insights + Image Recognition

**Your Goal:** You want to amplify the breadth and precision of reporting with SKU-Level image recognition data. You want to increase and improve internal reporting while reducing time spent surveying accounts. With this new data, you can win market share that gives you a tangible competitive advantage.

**Growth Architecture:** Your advanced insights reporting dashboards will now reflect SKU-level product detection data from each of your accounts. You can establish a new trend line in market execution.

### 5 Innovative Operational Excellence

**Recommended Starting Point:**

GoSpotCheck + PhotoWorks + Insights + Image Recognition + Planogram Compliance

**Your Goal:** You want to maintain category leadership and create strategic and incremental growth through faster operations, digitized planogram compliance, and a refined approach to analytics.

**Growth Architecture:** You'll host a library of planogram files within GoSpotCheck that will be used in creating custom compliance scores and tailored recommendations.

## Partnering with GoSpotCheck



### PROFESSIONAL SERVICES



Our Professional Services team will provide tailored product configuration to match your specific requirements and objectives, ensuring GoSpotCheck aligns seamlessly with your workflow.

### ACCOUNT MANAGEMENT



Your Account Manager is your strategic advisor for all things FORM. They can help you identify new areas where FORM can help and support you in scaling your FORM implementation to get the most out of your subscription.

### CUSTOMER SUCCESS



Your Customer Success Manager ensures efficient and easy onboarding and ongoing support for training and implementation.

### HELP CENTER



Teams in training can get answers to questions quickly with GoSpotCheck's Help Center, with how-to articles and videos for each capability.

### SUPPORT



Get award-winning support from GoSpotCheck's 24/5 team that has maintained a 99% CSAT score.



Explore our library of resources to deepen your understanding of GoSpotCheck's cutting-edge recognition AI, as well as insightful industry trends and thought leadership pieces from our team of experts. Gain valuable knowledge and stay ahead of the curve with our comprehensive collection.

**Image Recognition On-Premise Overview:**

<https://www.form.com/ir-on-premise/>

**Image Recognition Off-Premise Overview:**

<https://www.form.com/ir-off-premise/>

**Planogram Compliance Overview:**

<https://www.form.com/ir-planogram-compliance/>

**Interactive Product Tours:**

<https://www.form.com/gospotcheck-product-tours/>

**Case Studies:**

<https://www.form.com/case-studies/>

**ROI Calculator:**

<https://www.form.com/ir/roi-calculator/>

**White Papers:**

<https://www.form.com/white-papers/>

**GoSpotCheck News:**

<https://www.form.com/newsroom/>

**GoSpotCheck Blog:**

<https://www.form.com/resources/>

