



How to **Win** RFPs with Customer Insight

A repeatable way to turn buyer research into a response that could only be written for this customer.

WHAT YOU WILL LEAVE WITH

- 1 End to end showcase of a Customer Insight workflow
- 2 Examples of sources you can pull from
- 3 How to turn good research into insightful responses that win

Housekeeping



01

Recording and slides

The replay and slide deck will be added to the event page after the webinar.



02

Downloadable resources

Everything you see today, including:

- All Agent Skills
- Customer Insight Workflow
- Customer Brief



03

Live Q&A

Enter questions into the Q&A panel as we go.

Share team tips, practices that worked for you, or your own customer research examples.

Webinar Agenda



Case Example

A example RFP Scenario with the Real Research



Internal research

How to leverage what already exists in your CRM



External research

Diving deeper than the competition into Research



The Customer Brief

How to Create a detailed account of the Customer



From insight to action

Turn the research into reviewed work



Q&A + Next Steps

Resources, next webinar, and discussion

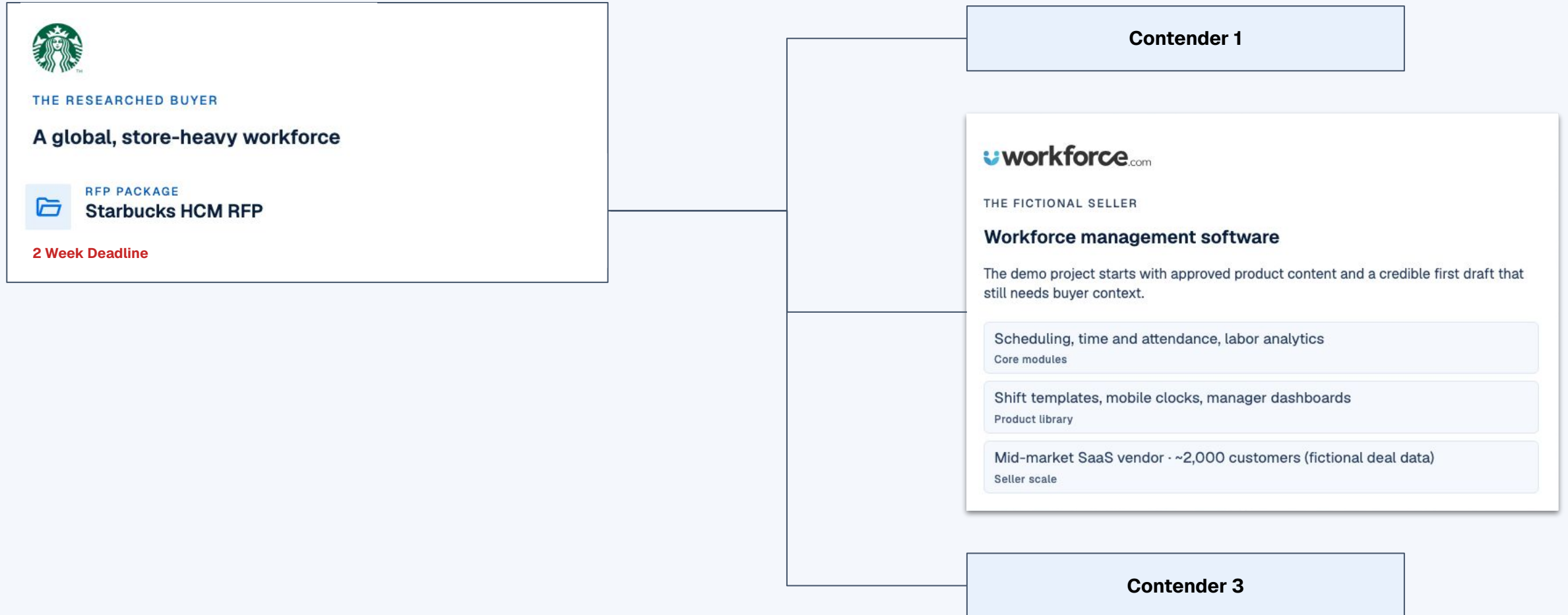
The background of the slide is a dark, blue-tinted photograph of a Starbucks store interior. The words "STARBUCKS COFFEE" are visible in large, white, sans-serif capital letters on a dark surface, likely a menu board or wall sign. The interior shows shelves with various coffee products and a person working behind a counter.

STARBUCKS COFFEE

Today's Case:

Starbucks Coffee RFP

Starbucks going out to Global RFP



The Context Stack

Internal Context



INTERNAL NOTES

CRM, discovery, call summaries

DEMO: "District managers lose Mondays reconciling last-minute roster changes." · 14 Jan discovery call
Seller note

Opportunity stage: evaluation · owner: M. Chen · next gate: security review
CRM snapshot

Open gap: who signs off on Partner Resources API changes?
Bid manager flag

External Context



OPEN INTERNET

Filings, careers, privacy, news

FY2025 Form 10-K · partner strategy and workforce scale
SEC filing

Careers site · "partner" language, store roles, scheduling FAQs
Public site

Privacy notice · workforce data retention and mobile app disclosures
Compliance

2026 shareholder letter · Back to Starbucks · smarter staffing
Investor materials

Project Context



RFP PACKAGE

Starbucks HCM RFP · fictional issuance



RFP_Instructions_v3.pdf

Submission deadline, evaluation criteria, coffeehouse scope, Partner Resources integration asks.



Functional_Requirements.docx

Partner scheduling, mobile clocks, manager dashboards, preferred availability, 14-day roster publish.



Technical_Schedule.xlsx

Store count by region, API endpoints, SSO matrix, data retention and audit log requirements.

The 50 Billion Dollar Question

“How do you Differentiate and Win in Highly Competitive Market like HCM Software?”

The background of the slide features a dark blue gradient with a series of horizontal white lines, resembling a running track. Silhouettes of several runners in various stages of their stride are scattered across the right side of the image, creating a sense of motion and competition.

Win with:

Customer Insight

The Data behind **Customer Insight** driving **Wins**

88%

of high-win teams
run a defined
customer-insight
process



Define: Customer Insight

**A deep understanding of your
customers behaviour, data
and needs.**

The teams with the highest win rate not only have the highest automation rates but they are able to invest the time in Customer Research and Tailored Writing.

Most teams today don't.

What does it take to be **Insightful**?

The maturity curve goes from Generic to Responsive to Insightful. But what differentiates each?



Foundation

Trustworthy Research

Dependable sources that allow your responses to speak directly to their real pains, not generic industry trends.



Foundation

Buyer Language

Speak as a peer, already working with them, rather than an outsider.



Foundation

Falsifiable Facts and Stats

Share real facts and figures both their own and yours. Trust is built in the details not in generalities.

Competitive edge

Knowing this buyer beats a theme template

Many teams define win rates based on “Where they win” rather than where the customer is looking to win.

Win these might as well be Lose themes if they aren’t focused on the customers objectives.

Later layer

Win themes stack on this foundation

You can only know how to Win once you know the game your playing and how it's scored. Research first, win themes later.

Reviewing the **Average Response**

Templated Library Response

How does the system improve scheduling?

Workforce.com improves your scheduling by giving managers the leading platform for creating, publishing, and adjusting rosters.

The system uses demand forecasts and availability data to generate recommended schedules, supports shift swaps, and tracks time and attendance so labour stays aligned to store volume.

This helps organisations standardise scheduling, reduce last-minute changes, and improve operational efficiency across locations.



Buyer language missing

Vendor jargon, not the buyer's nouns, localization



Unverifiable marketing claim

Superlatives with no proof on the page



Generic Slop

Logo swap still works for any competitor



Assumes generic efficiency

Assumes cost cuts when research shows partner retention and shift preferences drive the deal

Same product, **with Insight** applied

Response with Customer Insight

How does the system improve scheduling?

First, AI builds each coffeehouses schedule from partner availability, fits it to forecasted volume, and publishes it 14 days out.

Once it is posted, partners trade leftover shifts on their phones. The system blocks a swap that would leave the morning peak uncovered, skip a meal break, or create a clopen: close tonight, open tomorrow, with under eight hours' rest.

Partners keep the hours they asked for, and the morning rush is better staffed while more effectively using partner hours.

This approach drove a 3.2% decrease in Labor Cost percentage across McCafe and we estimate if deployed at Starbucks could drive up to \$2 billion in efficiency gains while increasing internal NPS.



Buyer language

Public buyer nouns on the page



Falsifiable Fact

Statement tied to a source, specific to them



Verified Insight based on real stats

Account-specific detail a generic vendor cannot copy



Aligns with true strategy

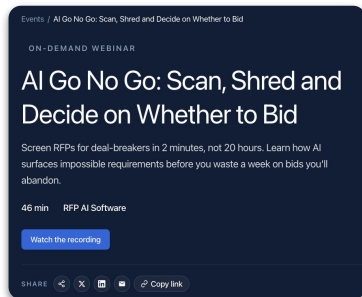
Targets partner satisfaction and preferred-hours coverage, not just generic efficiency

But, but, but

“How am I supposed to have time to write that?”

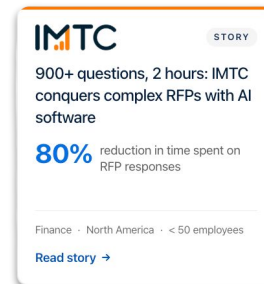
Focus your Time

Establish Go/No-Go



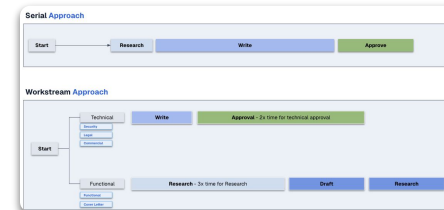
Automate the Basics

Achieve High Automation



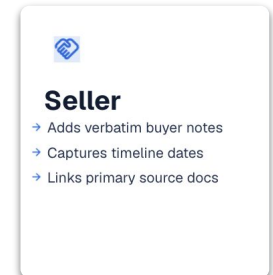
Work in Parallel

Optimize Workflow



Delegate More

Split the Workload





Establishing the:

Research Workflow

Establishing your **Customer Research Workflow**

Start by establishing the process manually, so you can run it every proposal from there

1



Set up Ownership of Insight

Seller, bid manager, SME, and executive sign-off.

2



Map your Research Sources

Internal CRM data, public filings, and buyer evaluators.

3



Establish Access & Process to Collect Info

Collect verifiable evidence and separate fact from inference.

4



Establish a Customer Brief Format

Standardize narrative, core nouns, facts, flags, and open gaps.

1. Setup Ownership of Insight

Illustrative bid-team roles for this fictional HCM scenario. Before anyone drafts, set clear expectations for who owns notes, sources, and buyer language across each proposal. That is the process, not a side comment.

Owns on insight



Seller

- Adds verbatim buyer notes
- Captures timeline dates
- Links primary source docs



Bid Manager

- Locks approved nouns
- Validates facts before drafting
- Guards the bid timeline



SME

- Supplies technical method
- Provides concrete exhibits
- Signs off section answers



Exec

- Approves the buyer story
- Reviews commercial terms
- Resolves unmitigated risks



Agents

- Compiles and cites answers
- Applies verified sources
- Routes unsupported claims

2. Map Sources

Illustrative bid-team roles for this fictional HCM scenario. Before anyone drafts, set clear expectations for who owns notes, sources, and buyer language across each proposal. That is the process, not a side comment.



Customer record

CRM Notes

Contacts, stage, commitments, objections, and open actions.



Buyer conversations

Calls, emails, meetings

Their exact words, stated drivers, and contradictions.



Team memory

Kick-Off

Context that never made it into the opportunity record.

3. Establish Access

Ensure connectivity to your different systems, whether it's connecting it to your RFP software or your chat agent via API or MCP.



Customer record

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4. Create a Customer Brief Template



Sales Owner

Sales Contribution

Identified Pain

Competition

Quantifiable Success Metrics

Decision Criteria



Executive

Relationships

Existing Relationships

Relevant References



Bid Team

Key Statistics

Annual Labour Spend

Workforce Growth Trend

Customer Brief Setup

- Fills contacts, language, drivers, gaps, and buyer story from authorised facts
- Marks a field blank when the source is missing
- Routes who owns the next gaps before research starts



Install the Skill

autorfp.ai/skills/customer-brief-setup

Pro Tip: Create a Customer Canvas Manually

Qualitative Frame

Low Glassdoor

Low Glassdoor score indicates a company's reputation is low, which can lead to higher employee turnover and lower productivity. This is a key area for improvement.

Key Metrics:

- Low Glassdoor score
- High employee turnover
- Low productivity

Impact:

- Increased recruitment costs
- Decreased employee loyalty
- Reduced overall performance

Cost Increases

Operating Expenses

Operating Expenses	2021	2022	2023
Salaries and benefits	\$1,234.5	\$1,345.6	\$1,456.7
Compensation	\$1,234.5	\$1,345.6	\$1,456.7
Other expenses	\$1,234.5	\$1,345.6	\$1,456.7
Total operating expenses	\$3,713.6	\$4,036.9	\$4,369.8

Revenue

Revenue	2021	2022	2023
Operating revenue	\$1,234.5	\$1,345.6	\$1,456.7
Other revenue	\$1,234.5	\$1,345.6	\$1,456.7
Total revenue	\$2,469.0	\$2,691.2	\$2,913.4

Profit

Profit	2021	2022	2023
Operating profit	\$1,234.5	\$1,345.6	\$1,456.7
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CEO New Direction

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Scheduling

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Culture & Values

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Terminology

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Your customer-insight process

- 1

Customer Insight Process

Label owners, map sources, collect research, fill the brief.
- 2

Three research movements

Internal research, external research, evaluator review.
- 3

One controlled handoff

Circulate the filled brief, route gaps, approve response edits.

autorfp.ai/downloads/customer-insight-brief

Customer Insight Brief

A defined customer-insight process



High-win teams do not win because they write more. They win because they run a **defined** customer-insight process before anyone drafts.

The 2026 Proposal Win Rate Report surveyed 97 bid professionals (90 with verified win-rate data). High-win teams (51%+) rank customer insight as a top win driver at nearly four times the rate of low-win teams. 88% of high-win teams have a defined customer-insight process, against 67% of low-win teams. 71% do formal customer research, against 50%.

Presumed relationship strength showed no meaningful correlation with win rate.

Relationships help you win access. Insight helps you win. Content determines what you say; insight determines why it matters.

A generic response can still be competent. It still fails when the marker looks for their nouns, their pressures, and a fact they can check. This page is the process. Page 2 is the brief you fill for one bid.

Source: 2026 Proposal Win Rate Report (autorfp.ai/win-rate-report). High win 51%+. Low win 0-25%.

WHO OWNS INSIGHT

Seller What the buyer said. Source drops.	Bid manager Locks language and facts into the response.	SME Method and proof in their box. Does not overwrite locked nouns.	Exec Reads the storyboard, not a brochure.	Agent Compiles, cites, routes gaps. Does not invent.
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WHERE INSIGHT LIVES

Internal (1st party)
CRM, calls, internal discussions, seller notes, lost-deal notes

External (3rd party)
Filings, IR, careers, privacy notices, statutory packs, public-file search

Firmographic and evaluator
Legal entity, headcount growth, job posts, geography, size
Who marks, and what they score

HOW YOU USE THIS

1 Label owners	2 Map where insight lives	3 Collect from those buckets (do not invent)	4 Fill the brief on page 2
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Downloadable resource

A dark blue-tinted photograph of a laboratory setting. In the foreground, a microscope is visible, with its eyepieces and objective lenses clearly shown. The background is slightly blurred, showing other laboratory equipment and shelves. The overall tone is professional and scientific.

Doing the: **Internal Research**

Unearth **Insight** only you have **access** to

You must **find** and **use** information your **competitors won't**:

- Find what generic Agent search won't
- Only research what you will use
- Speed up Research time 10x with AI

Deal-contact research from CRM and calls.

Map what your team already knows into four brief fields. The same structure works from CRM exports and call notes without an agent.

Contact so far

Who you have spoken to, stage, owner, chronology from CRM and call records.

Language they use

“Our district managers lose Mondays reconciling last-minute roster changes.” Keep the words, date, and speaker.

Drivers and pain

Good note: stated problem + speaker + meeting date. Weak note: “buyer wants better scheduling.”

Gaps

Missing from contact history. Not a score.

Internal Research

- First-party CRM, email, meetings, notes, and call recordings
- Stakeholder map, contact chronology, drivers, language, and gaps
- Marks Missing when the records do not cover a field



Install the Skill

autorfp.ai/skills/internal-research



Doing the:

External Research

External Sources

Common Sources

Website

- Company Values
- History
- Scale

Investor Center

- Annual Reports
- Investor Presentations
- Statistics

Job Ads

- Objectives
- Areas of Focus
- Locations of Focus

News

- Legal & Financial Issues
- Brand Damage
- Initiatives

Solution Specific Sources (sources with Alpha)

Employment Court Cases

- Underpayments
- Specific Legal Risks
- Penalties or Enforcements

Wage Equality Reporting

- Employee Type Breakdown
- Headcount Growth
- Wage Cost Details

Glassdoor Reviews

- Key Employee Issues
- Opportunities
- What is already working

Employee Handbooks

- Day to day workflow
- Systems & processes
- Values, Communication Channels

Employment Agreements

- Applicable processes & laws
- Complexities
- Risks

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Public Marketing Website

Company Values

Craft

We learn and teach in the pursuit of growth

We delight in the rigor of the details—no matter what our job is

We deliver excellence with passion and creativity

Courage

We embrace the difficult conversations, with respect, to make us better

We pursue audacious ideas beyond our comfort zone

We do the right thing, even when it's hard

Results

We consistently achieve our goals with focus, integrity, and drive

We continuously innovate to stay ahead

We exceed the expectations of the people we serve

Belonging

We actively listen and connect with warmth and transparency

We recognize every person for who they are

We treat each other with dignity and care

Joy

We take pride in our work and have fun while doing it

We celebrate each other and our wins

We create great vibes to bring the best out of others

Investor Center

Investor Relations Site



Investor Presentations



Annual Reports



Investor Presentation

Strategic Vision

WE'RE GETTING BACK TO STARBUCKS

So that everyone can experience the best of Starbucks



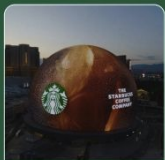
Be the world's
greatest
customer
service
company



Offer the best
job in retail



Be the
community
coffeehouse



Be visible,
relevant
and loved
everywhere



Accelerate
growth
around the
world



Deliver on our
commitments
to create
shareholder
value

THE BEST JOB IN RETAIL

Lowest turnover in the industry

1988

Health care benefits
for part time workers

1991

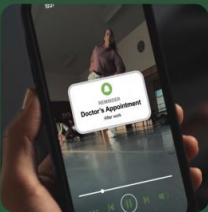
Launched
Bean Stock

2014

Starbucks College
Achievement Plan

2025

Doubled paid
parental leave



Investor Annual Report

Actions Taken to Implement Vision

These reports and recommendations to the Board and its committees are part of the broader framework that guides how Starbucks should attract, retain, and develop a skilled workforce that aligns with our values and strategies.

We regularly conduct anonymous surveys to seek feedback from our partners on a variety of topics, including confidence in company leadership, competitiveness of our compensation and benefits package, career growth opportunities, and recommendations on how we can remain an employer of choice. The results are shared with our partners and reviewed by senior leadership, who analyze areas of progress or deterioration and prioritize actions and activities in response to this feedback to drive meaningful improvements in partner engagement. Our management and cross-functional teams also work closely to evaluate human capital management issues such as partner retention, workplace safety, harassment, and bullying, as well as to implement measures to mitigate these issues.

EXACT WORDS IN THE FILING

“We regularly conduct anonymous surveys to seek feedback from our partners ... The results are shared with our partners and reviewed by senior leadership ...”

BID QUESTION · OUR INFERENCE

Can the response show how workforce feedback becomes a visible action for leaders, managers, and frontline partners?

☑ Starbucks FY2025 Form 10-K · printed page 4

Role-based Support

To help our partners succeed in their roles, we emphasize ongoing training and development opportunities. These include, but are not limited to, role-based training for our retail hourly partners, safety and security protocols, updates on new products and service offerings, and deployment of technologies. We periodically address a wide variety of topics such as achievable goal setting, giving and receiving constructive feedback, and effective engagement with communities and customers through the rollout of the Green Apron Service Model, a new foundational operating model that establishes repeatable, consistent, and scalable standards, across U.S. company-operated coffeehouses. It is designed to create deeper connections between partners and customers by enabling partners to deliver consistent, high-quality experiences with warmth and care. The model includes new routines and tools that give partners more time to focus on craft and connection, supported by technology that improves order flow and speed of service.

EXACT WORDS IN THE FILING

“... new routines and tools that give partners more time to focus on craft and connection, supported by technology that improves order flow and speed of service.”

BID QUESTION · OUR INFERENCE

Which HCM workflows give coffeehouse leaders time back while reinforcing the operating standards Starbucks already names?

☑ Starbucks FY2025 Form 10-K · printed page 5

Investor Annual Report

Business Case & ROI Drivers

Store Operating Expenses

	Year Ended		
	Sep 28, 2025	Sep 29, 2024	Oct 1, 2023
Wages and benefits	\$ 9,862.4	\$ 8,828.6	\$ 8,733.4
Occupancy costs	3,318.6	3,050.6	2,871.0
Other expenses	3,877.9	3,407.3	3,115.9
Total store operating expenses	<u>\$ 17,058.9</u>	<u>\$ 15,286.5</u>	<u>\$ 14,720.3</u>

St... / Starbucks Annual Report - Insight ...

Starbucks-C...
I-Report.pdf

PDF

/pdf-insight-finder

Ran 14 commands, viewed 6 files, and 4 more tools

Reading the pdf-insight-finder skill instructions SKILL.md

Ran a command ls -la /mnt/skills/plugins/pdf-insight-finder/ ...

Ran a command pip install pymupdf --break-system-packag...

Good, PyMuPDF installed. Let me look at the annotation scrip...

Review annotation script interface annotate_pdf.py

Ran a command cd /home/claude && python3 -c "import fitz...

Ran a command cd /home/claude && python3 -c "import py...

Sifted document for relevant business operations and labor ...

Ran a command cd /home/claude && python3 -c "import py...

Let's pull the full text of the most concentrated pages: 7-13, 1...

↓

Ran a command cd /home/claude && python3 -c "import py...

Write a message...

+ Sonnet 5 Medium

Claude is AI and can make mistakes. Please double-check responses.

Test starbucks annual report annotated PDF

Download as PDF

extra 14th Month Pay initiative, giving retail partners an additional month's salary as a bonus on top of the 13th month pay that is customary in China, as well as a monthly housing subsidy for full-time Starbucks baristas and shift supervisors, and comprehensive health insurance coverage for parents of partners.

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Skill: <https://autorfp.ai/skills/pdf-insight-finder>

To be an employer of choice and maintain the strength of our workforce, we consistently assess the current business environment and labor market to refine our compensation and benefits programs and other resources available to our partners.

Starbucks is committed to fair pay principles to ensure partners are paid appropriately and equitably for their roles and the work they do, regardless of race, gender, or other protected categories. Further, we have formulated pay-equity principles, which provide equal footing, transparency, and accountability as best practices that help address known, systemic barriers to global pay equity.

As of September 28, 2025, Starbucks employed approximately 381,000 people worldwide. In the U.S., Starbucks employed approximately 223,000 people, with approximately 214,000 in company-operated stores and the remainder in corporate support, store development, roasting, manufacturing, warehousing, and distribution operations. Approximately 158,000 employees were employed outside of the U.S., with approximately 153,000 in company-operated stores and the remainder in regional support operations. Partners in approximately 6% of Starbucks U.S. company-operated stores are represented by unions. We believe our efforts in managing our workforce have been effective, evidenced by low turnover, a strong culture, and active employee participation.

Information about our Executive Officers

Employer Reviews on Glassdoor

3.0 ★★★★★

Aug 23, 2026 ...

Great perks but overwhelming workload and low staffing

 Barista

Former employee

 Columbus, OH

☐ Recommend ☐ CEO approval ☐ Business Outlook

Pros

Fast paced. Good perks like Spotify, free food and coffee.

Cons

Getting enough hours to qualify for healthcare benefits is nearly impossible. You are expected to juggle 3 to 5 different tasks at the same time - not reasonable to do well with that level of shifting focus. I see lots of drinks going out not well made due to low staffing levels and unreasonable pressure.

Advice to Management

Make sure staff levels are high enough to deliver the quality you expect. 3 people on a shift is not enough.

glassdoor®

Search with Google Dorks

Google

site:starbucks.com "Scheduling"

AI Mode All Images Shopping Videos News Forums More Tools

 Starbucks
https://about.starbucks.com › press › our-continued-com...

Our Continued Commitment to Partner-Centric Scheduling ...

May 28, 2024 — Our partner-centric model for **scheduling** is designed around partners' preferences in hours and shifts, while meeting our store business needs. [Read more](#)

 Starbucks Careers
https://careers.starbucks.com › discover-opportunities

Coffeehouses - Starbucks Careers

Flexible **Scheduling**. Here, flexibility means more than picking up or offering a shift. It means we understand that we are people first. Whether you're ... [Read more](#)

 Starbucks
https://about.starbucks.com › People & Impact

Partners (employees) - About Starbucks

Shift completion rates are at all-time highs, and our improved **scheduling** app, Shift Marketplace, is helping partners pick up 30,000 shifts a week. Because ... [Read more](#)

Google

site:starbucks.com "UKG"

AI Mode All Images Videos Shopping Forums News More Tools

 Starbucks
https://apply.starbucks.com › careers › job

dir engineering - Careers at Starbucks Coffee Company

UKG (Kronos), Blue Yonder (JDA), Or comparable large-scale labor, scheduling, or workforce optimization platforms. Strong understanding of labor forecasting ... [Read more](#)

 Starbucks
https://apply.starbucks.com › careers › job

technical product manager sr | Starbucks Coffee Company

3+ years of experience working with a SaaS Workforce Management platform - (i.e UKG, Ceridian, Kronos, Blue Yonder WFM, etc.) - UKG Preferred; 3+ years ... [Read more](#)

 Starbucks
https://apply.starbucks.com › careers › job

senior systems analyst - Careers at Starbucks Coffee Company

Minimum of 2 years of experience in a Workforce Management solution (i.e UKG, Ceridian, Kronos, Blue Yonder WFM, etc.) - UKG Preferred; Minimum of 2 years ... [Read more](#)

Search with Google Dorks

site:ukg.com filetype:ppt | filetype:pptx | filetype:pdf | filetype:doc | filetype:docx "ROI"

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UKG

https://www.ukg.com › sites › default › files › U...

PDF

How Modern Time and Pay Drive Business Performance

The adoption of AI and machine learning (ML) to drive operational innovation promises a significant return on investment (ROI). Pairing these innovations.

UKG

https://www.ukg.com › kronos › resources › pdf

PDF

Five Time and Labor Data Trends

By employing future-built, modern technology to plug leaks in time and labor data collection, many companies have realized ROI within two years — and many ... [Read more](#)

2 pages

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Productivity Transformed

Employee experience ROI. Connect engagement efforts directly to performance and profit. Productivity metrics for small to midsize businesses. Small to midsize ...

UKG

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2024 Industry Insights Report

by GPT Work — clinical outcomes and creating return on investment (ROI). Baptist Health reported a 26% reduction in falls as well as noteworthy impacts to ... [Read more](#)

UKG

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High-volume hiring for healthcare

• High ROI, lower hiring costs and improved productivity. Up to 90% of manual hiring tasks automated. Time-to-hire reduced from 15 days to 5 days at a long ...

Search with Google Dorks

("CalSTRS") ("manager search" OR "investment committee" OR "request for proposal") site:c

AI Mode All News Images Forums Videos Short videos More Tools

 CalSTRS

<http://www.calstrs.com/files/INV+2026-05+Ite...> PDF

TEACHERS' RETIREMENT BOARD INVESTMENT ...

May 27, 2026 — **INVESTMENT COMMITTEE** CHARTER. INTRODUCTION. The **Investment Committee** has been established by the Teachers' Retirement Board to oversee all. [Read more](#)

2 pages

 CalSTRS

<http://www.calstrs.com/files/IND934~1> PDF

Annual Review of Investment Discretion(s) Delegated to Staff

Sep 3, 2025 — **CalSTRS** existing Private Equity, Inflation Sensitive, and. Real ... **Investment Committee** if requested. Eligible Ownership Vehicles. [Read more](#)

4 pages

 CalSTRS

<https://www.calstrs.com/files> PDF

INV 2026-03 Item 05b.00

Mar 4, 2026 — While the report includes one-year returns, the **Investment Committee** is encouraged to focus on the ten, five, and three-year results due to the ... [Read more](#)

 CalSTRS

<https://www.calstrs.com/files/2026-03+ARM+I...> PDF

Audits and Risk Management Committee - Item number 2

Mar 5, 2026 — **Request for Proposal** (RFP) solicitation. The ARM Committee has the ... Board Policy linkage: Board Governance Manual (calstrs.com) [Read more](#)

2 pages

 CalSTRS

<https://www.calstrs.com/files/INV+2025-05+It...> PDF

Input on the FY 2025-26 Committee Work Plan

May 7, 2025 — The **Investment Committee** Chair and the Chief Investment Officer recommend that the. Committee approve the proposed Work Plan and allow the Chair ... [Read more](#)

Search with Google Dorks

site:ukg.com

Filters to a specific website

filetype:ppt | filetype:pptx | filetype:pdf | filetype:doc | filetype:docx

Filters down to just certain file formats

"ROI"

Allows exact Keyword Matches on Websites or within Files

Find any historical underpayments

("Starbucks") (underpayment OR "wage theft" OR "back pay" OR "underpaid wages" OR payroll OR remuneration) (site:gov.au OR site:fairwork.gov.au OR site:ato.gov.au OR site:gov.uk OR site:acas.org.uk) (filetype:pdf OR filetype:doc OR filetype:docx OR filetype:xlsx)

Get Gender Equality Reports from UK and AU Government

("Starbucks") ("gender pay gap" OR "gender equality report") (site:gov.uk OR site:wgea.gov.au OR site:data.wgea.gov.au) (filetype:pdf OR filetype:xlsx OR filetype:csv)

AutoRFP Research Skill
/Google Dork

External Research

- Learns high-signal sources for that offering instead of assuming a list
- One run produces the full report, not a source catalogue
- Buyer language, falsifiable facts, and strategic priorities



Install the Skill

autorfp.ai/skills/external-research

The background of the slide is a dark blue-grey color, overlaid with a pattern of numerous small, overlapping, and slightly faded newspaper clippings or document pages. These clippings are arranged in a way that suggests a collage or a collection of research, with some text visible but mostly illegible due to the low opacity and dark color.

Building the: **Customer Brief**

What the **Customer Insight brief** contains

Buyer Story

Today → pressure → Back to Starbucks direction.

Coffeehouse-led workforce, partner experience, smarter staffing and scheduling (public language only).

Language Rules

Partner not employee. **Coffeehouse** not site. Evidence labeled on the page.

Falsifiable Facts & Sources

- **381,000 partners** worldwide (FY 2025 Form 10-K)
- **“Smarter staffing & scheduling”** (2026 shareholder letter)

Evaluator Flags (CEO Lens)

- Turnaround nouns from sourced plan on the page
- Logo swap still works (generic retail HCM)

Customer Brief Research

- First-party CRM, notes, and authorised records where supplied
- Public sources across filings, IR, news, and official sites
- Logs Claim IDs, URLs, and gaps labeled Needs evidence



Install the Skill

autorfp.ai/skills/completed-insight-brief

Customer Brief Built

Customer insight brief

▲ AutoRFP.ai

Circulation: Seller, bid manager, SMEs, exec reviewer - Insight for the bid team. Not the response.

BUYER	Starbucks Coffee Company	DATE	3 Sep 2026
OPPORTUNITY	Starbucks - US company-operated WFM / HCM		

CONTACT SO FAR

NAME	Starbucks - US company-operated WFM / HCM	STAGE	Pre-POC	OWNER	Jasper Cooper	CLOSE DATE	25 Sep 2026
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Who we have spoken to

NAME	TITLE	SOURCE	DATE	TITLE <i>Meeting title, date</i>	ONE LINE FROM THE RECORD
Maya Chen	Partner Resources Program Manager	4 meetings, 27 Jan-13 Aug 2026	27 Jan 2026	Discovery	We are not asking you to invent a new vocabulary. We are asking you to use ours. - Maya Chen
Derek Alvarez	District Operations Manager	3 meetings, 14 May-13 Aug 2026	16 Jul 2026	Ops workshop	Pathfinders in company-operated US coffeehouses are on a ten-day publish window. - Mike Grams ...
Jordan Hale	IT Business Systems Analyst	3 meetings, 27 Jan-13 Aug 2026	13 Aug ...	RFP-prep workshop	Scorers you will be written against: Niccol, Kelly, Grams, Varadarajan. - Maya Chen

Chronology

LANGUAGE THEY USE

Must use

Partner (never employee); coffeehouse (also ...

Partner Resources (Organization) - buyer ...

Green Apron Service Model - buyer CRM and ...

Do not introduce

employee(s) as sole term - CRM says Partner; ...

HR portal, headcount, labor spreadsheet

"twelve days" - no split-the-difference number

Only words that appear in CRM or the RFP. If silent, write Silent.

DRIVERS AND PAIN

Insight + source (meeting title and date)

- Manager-only draft with no Partner-facing publish stops Partners planning their lives - Partner Resources working session, 12 Mar 2026
- Headcount view hides the gap that breaks service at the peak - Product demo, 14 May 2026
- 14-day lock is too slow for pathfinders that rebalance mid-week; window must reopen - Ops workshop, 16 Jul 2026
- Green Apron is a live, funded strategic bet (\$500M+ labor-hours, larger rosters), not a cost-cutting ask - Starbucks FY2025 10-K / CNBC, 29 Jul 2025
- Active nationwide labor dispute names scheduling/staffing among union asks - Labor Notes, 25-26 Aug 2026 (context only, not for citation in the response)

No product claims.

For the bid team. Not the response.

(cont.)

The background of the slide is a dark blue overlay on a collage of numerous newspaper clippings. The clippings are of various sizes and are arranged in a dense, overlapping manner, creating a textured, information-rich background. The text is centered over this background.

Implementing the: **Insights**

Reviewing the **Average Response**

Templated Library Response

How does the system improve scheduling?

Workforce.com improves your scheduling by giving managers the leading platform for creating, publishing, and adjusting rosters.

The system uses demand forecasts and availability data to generate recommended schedules, supports shift swaps, and tracks time and attendance so labour stays aligned to store volume.

This helps organisations standardise scheduling, reduce last-minute changes, and improve operational efficiency across locations.



Buyer language missing

Vendor jargon, not the buyer's nouns, localization



Unverifiable marketing claim

Superlatives with no proof on the page



Generic Slop

Logo swap still works for any competitor



Assumes generic efficiency

Assumes cost cuts when research shows partner retention and shift preferences drive the deal

Same product, **with Insight** applied

Response with Customer Insight

How does the system improve scheduling?

First, AI builds each **coffeehouses** schedule from **partner** availability, fits it to forecasted volume, and **publishes** it 14 days out.

Once it is posted, **partners** trade leftover shifts on their phones. The system blocks a swap that would **leave the morning peak uncovered**, skip a meal break, or create a **clopen: close tonight, open tomorrow, with under eight hours' rest.**

Partners keep the hours they asked for, and the morning rush is better staffed while more effectively using **partner** hours.

This approach drove a 3.2% decrease in Labor Cost percentage across McCafe and we estimate if deployed at Starbucks could drive up to \$2 billion in efficiency gains while increasing internal NPS.



Buyer language

Public buyer nouns on the page



Falsifiable evidence

Claims tied to a source on the page



Verified insight facts

Account-specific detail a generic vendor cannot copy



Aligns with true strategy

Targets partner satisfaction and preferred-hours coverage, not just generic efficiency



Take it with you:

Resources

Key Takeaways

Research first, win themes later

- You cannot know how to win until you know how it is scored. Themes built before research are loose themes.

Insights beat relationships

- 88% of high-win teams run a defined customer-insight process. Presumed relationship strength showed no meaningful correlation with win rate.

Run it Manually First, then Automate

- Ownership, sources, access, brief format. The process is the asset, not any single response.

Dedicated Research Brief

- Internal research, external research. Everything lands in one customer insight brief before anyone drafts, that can be shared wide.

Use their words, not yours

- Partner not employee. Coffeehouse not site. If a logo swap still works, it is not an answer, it is a template.

Use Falsifiable Facts, not generalities

- Falsifiable facts and their own numbers. Trust is built in the details, not in generalities.

Continue the series

Skills Library

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Customer Stories

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Agent Skills

Download or copy for AutoRFP.ai, Claude, ChatGPT, Copilot, and Grok.

AutoRFP.ai

Claude

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Search skills

Packs

PACK

v1.0

Customer Insights Skills

Seven customer-research workflows in one Agent Skills package.

Open →

Individual

PACK MEMBER

v1.0

PDF Insight Finder

Find and colour-highlight evidence in supplied PDFs.

Open →

PACK MEMBER

v1.0

Customer Brief Setup

Create a shared customer brief from authorised facts only.

Open →

PACK MEMBER

v1.0

External Sources

Discover the right public sources for this offering and write a full trust-classified research report in one run.

Open →

PACK MEMBER

v1.0

Customer Brief Research

Research and source the customer brief from public or authorised material.

PACK MEMBER

v1.0

Build Google Dork

Produce precise, public-source Google search queries.

PACK MEMBER

v1.0

Response Insight Enricher

Rewrite a response with verified customer insight.

Have a skill to share?

Submit your Skills to the Library →

Contribute Skills

Submit your own skills to share with the community.

Have a skill to share?

Submit your Skills to the Library

Product Release: Skills

Skills
Add a SKILL.md file that agents can use when a user turns the skill on.

+

my-skill

When to use this skill

+

Add skill

Now Live in AutoRFP.ai

Continue the series

The SME Bottleneck: How to Win RFPs Without Chasing Experts

How bid teams eliminate SME delays, capture technical knowledge asynchronously, and lock approved exhibits.

Stop chasing SMEs across Teams/Slack and email. Build a repeatable system that turns subject-matter expertise into verified, reusable answers.

Registration: autorfp.ai/events/

Save the Date

15

October
Thursday

[Later Session](#)

Open Floor

Q&A

Ask about the workflow, prompts, research setup, or how this applies to your next bid. Share what worked for your team.



Event Hub & Resources

autorfp.ai/events/how-to-win-rfps