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Mystery Shopping Guidelines

This document provides a basic overview of mystery shopping--what it is and what it is not. This is fundamental knowledge for anyone who wants to become a mystery shopper. It provides new shoppers with a perspective of what shopping is all about, and current shoppers a fresh perspective or a good reminder on the fundamentals of the business. It also contains some good ideas on remaining anonymous, and other tips that will be helpful in your career as a mystery shopper.

What is Mystery Shopping?

Mystery shopping is a "snapshot" of a customer's experience.

It is not about finding things wrong, but an objective evaluation of how a company serves the customers.

Mystery Shopping Is...

Careful Observations about:

Surroundings

The environment

People

And...

Active Listening to

What is said

Why would a company want to use mystery shopping?

Companies can see themselves through their customer's eyes.

They get valuable feedback on service, cleanliness, quality, and sales efforts.



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What kinds of companies use mystery shopping?

- Telecom
- Retail stores
- Banks
- Hotels
- Fast food establishments
- Airlines
- Car rental companies
- Insurance companies
- Apartment Communities
- Hospitals
- Airports
- Shopping Malls
- And more! Basically anyone that provides service to customers can and probably does use mystery shopping.

How do companies use mystery shopping?

- To recognize and reward outstanding performance
- To train employees
- To correct problems
- To adjust staffing levels
- To evaluate performance against competitors

Mystery Shopping is Serious Business

While mystery shopping can be fun, it is serious business. Based on information received in mystery shopping reports, employees might receive bonuses or promotions.

Companies rely on mystery shopping reports to make significant decisions regarding marketing, advertising, employment, etc.

Mystery Shopping and employment

- As a mystery shopper you are NOT an employee of RAG Scores or the client or any associates of RAG Score or it's clients
- Shoppers are recruited and assigned work on ad hoc basis only without any commitment or liability for continuity of work
- There exists no employer-employee relationship between a Mystery Shopper and RAG Scores or a Mystery Shopper and client of RAG Scores
- Simply put, the assignments given to a Mystery Shopper are similar to those taken up by free-lancers



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Mystery Shopping Reports

Mystery shopping reports must be many things to be valuable to the companies who hire mystery shoppers:

- Honest
- Fair
- Thorough
- Accurate
- On time
- Well written
- Detailed
- And most importantly, OBJECTIVE

Honest

A shopper's report must first and foremost be truthful.

Be at the right store, bank or company.

Accurately record date, day, time, and names.

Don't even THINK about falsifying a report or making up information that you may have forgotten to obtain. Your integrity is your most valuable asset in this industry! Many businesses today have security cameras that can track your every movement, and the exact dates and times that everything happened from the time you entered the door. It is not unusual for them to review their tapes to validate your shops, so your integrity is crucial.

Fair

A mystery shopper is always fair.

Unless otherwise instructed, give the employee a chance to succeed by being generally cooperative, understanding and friendly.

- Most companies are not looking for mystery shoppers to be angry, upset, disruptive, demanding or unpleasant. They want mystery shoppers to reflect their "typical average" customer.
- Mystery shoppers should "blend in" with other customers that are at the shop location. Don't cause a scene, don't do anything that will make you be "remembered".

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- While you do need to be fair, don't make it too "easy", by leading the employee to say the correct thing. Allow them to do their job (or not) without making it too hard or too easy.

Thorough

Mystery shopping reports "tell the story"

- They are factual, nothing left out.
- Make the reader feel like they were "there" with you during the shop. Your job is to give a clear picture of your visit.
- Most narratives should be a step by step "walk through" of your visit. What happened from the minute you arrived until the time that you left.

Accurate

Facts clearly state the situation, events, time, date, and names. Nothing is left out, and all of it must be truthful and absolutely accurate.

Opinions are not necessary or wanted. You should provide "Just the Facts".

- Example: Don't say "I thought the bathrooms could use a good cleaning." DO SAY: "The garbage can was overflowing and the floor was littered with toilet paper. The bathroom had a strong and offensive odour."

On Time

Businesses rely on mystery shopping reports to be timely. They need data fast!

- Mystery shopping reports must arrive on time. If your report falls outside of the deadline, you can expect that your fee will be reduced, or you may not be paid at all. This is VERY important.
- In general, businesses want their reports 24 to 48 hours after the shopper leaves their establishment. They want to act on the data received while the experience is still fresh in their employee's mind.



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- The mystery shopping company needs time to edit your report and prepare statistical data. Deadlines for submission must be watched and carefully adhered. Read your guidelines!

Well written

Clients must be able to read, understand and comprehend mystery shopping reports. Reports should be:

- Organized and thoughtful
- Spelled correctly (Use spell check!)
- Grammatically correct
- Businesslike and professional (not flowery, poetic, dramatic, overly lengthy, or obtuse)

Detailed

Reports should have enough detail for companies to know what transpired. Just like a reporter, a mystery shopper needs to include: who, what, where, when, why and how. Make sure to include details that make the reader "see" what you saw during your visit. Include names, descriptions and times! If you answer a question with a "no" be prepared to back it up with factual data as to what DID occur. The more specific your details, the better use your report will be to the client company!

Objective

Mystery shopping reports are not reviews or opinions. They are statements of fact. Tell what happened and what you observed, not what you think the client should do. You will observe or take a "snapshot" of your experience, and the business owner will decide the best course of action for his business. Keep your opinions to yourself.

What if your work is not...

Honest, fair, thorough, accurate, on time, well written, objective or detailed?

The mystery shopping company and you are not a credible source of information. Both are at grave risk of losing that client's business. As a mystery shopper, you are likely to be removed from that company's database of mystery shoppers.



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What Equipment is Required?

Shoppers must have access to the following:

- Access to a computer with Internet connection
- Access to an email account on daily basis
- Ability to get to and from assignments
- Reliable public transportation or own vehicle in good working condition
- Telephone, preferably a mobile phone

While not required, shoppers might find the following equipment handy as well:

- Stopwatch/Digital Watch
- Scanner
- Mobile phone (preferably with a camera)
- Digital Camera
- Digital pocket voice / video recorder

Confidentiality

- Most companies will have you sign a confidentiality agreement with them because you will have access to very confidential and proprietary information that would not be available to the general public.
- It is important to take this oath of confidentiality seriously.
- Violating confidentiality agreements that you sign violates the Code of Ethics agreement that you signed on this test and places you in jeopardy of losing your RAG Scores assignment.

What kind of information is considered confidential?

- The name of the client and its locations.
- The questions on the shopper evaluation form or survey.
- The instructions or guidelines given to you about the assignment.
- The amount of pay, reimbursement or compensation you are receiving for conducting the shop.
- The name of the mystery shopping company in conjunction with the shops you perform.
- The results of the shop.

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Skills Required

Mystery shoppers should possess many skills in order to be good at their profession!

- Observant
- Reliable
- Detail-oriented
- Thorough
- Organized
- Flexible
- Honest
- Responsive
- Accurate
- A good writer
- Ability to remember details
- Computer proficient
- Internet, email, word processing, spreadsheet

Remaining Anonymous

A fundamental requirement in most mystery shops is to be anonymous. Be able to go into the location and act like a normal customer without being identified as a shopper.

How do you remain anonymous?

- Dress like real customers in that location.
- Don't ask lots of questions.
- Don't be "too knowledgeable".
- Don't stare at name tags.
- Don't be obvious about taking notes (never use a clipboard, notebook, etc.)
- Be confident.
- Make quick notes as entries on your check book register or PDA.
- Use your "shopping list" to mark down names, time or other quick notes.
- Put your cell phone to your ear and pretend you are writing down directions or a phone number while you write notes.



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- Don't be obvious about timing. Normal customers do not look at their watches slyly every 20 seconds.
- Be familiar with your scenario. Practice it at home so that you are comfortable with it.
- Be prepared for any questions that may come up (i.e., if you are doing a lunch shop, know what are the busy hours in that area, what kind of food to expect etc.)

Shopping alone or with companions?

Planning on taking companions with you on your shop? First:

- Check with RAG Scores.
- There are some shops where taking children is simply NOT acceptable.
- You should never take ANYONE with you that would be a distraction from the job you were hired to complete.
- If completing a dining evaluation, make sure that the reimbursement is for more than one person, and that it is OK to have multiple meals on your receipt.

If you do get approval to take along a companion, it is OK to share information about the shop requirements with your companion to enable them to help with the shop (when appropriate) to meet the requirements of the shop (e.g., not ordering the same items in a restaurant, allowing employees to do their jobs, etc). Companions must understand the need for confidentiality (i.e., they can't discuss the shop or results with anyone).

Mystery Shoppers have these responsibilities:

- Pay all applicable taxes on ALL mystery shopping income
- It is possible that you may need to make estimated tax payments during the year to cover your tax liabilities.
- Keep accurate records of all business expenses such as cost of purchase etc.
- Consult a tax professional for specific advice on taxable income, eligible deductions and liability
- Supply own tools and materials
- Provide your own work space and equipment
- Establish own work patterns and schedules

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- Not to print business cards and stationery mentioning "Mystery Auditor" or something similar
- You are not contracted as "employee", you should never list RAG Scores or any of the business partners company as an "employer"
- Mystery shopping is only per assignment based

Understand the Assignment

Before you accept an assignment, be clear about:

- The location of client facility
- Acceptable time windows to complete your assignment
- Deadlines
- Fees
- Expenses you might incur
- Special requirements or tools that you may need to perform your assignment correctly.

Only accept assignments that work for you!

What Kinds of Shops do Mystery Shopping Companies Have?

Traditional visit to store, restaurant, bank - complete evaluation on service, cleanliness, quality sales skills and other factors

Pricing audit - note prices of items

Reveal shop - if employee meets certain criteria after the shopper delivers a specific scenario, the shopper identifies self and presents award or prize

Telephone shop - complete telephone evaluation

Audio / video shop - records interactions (Note that some states have laws governing the use of recording devices, so be aware of laws in your state)

Internet service - make online purchase or make online inquiry



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Digital photo shop - take photos of products, displays, signs

Best Practices: Be Prepared!

Shopping companies prefer mystery shoppers who adequately prepare for their shops:

- Understand each shop by reading guidelines and evaluation forms BEFORE you perform the shop
- Review all questions on evaluation forms carefully again before entering the facility, so that you don't forget to make important observations
- Plan your day so the shop is given adequate time and attention
- Verify location and hours of operation of business you are shopping
- Bring all necessary tools and equipment with you
- If you have any questions....ASK the shopping company!
- Find out what appropriate attire might be and dress like a real customer

Best Practices: What if the unexpected happens?

If something goes wrong...what do you do?

What if someone accuses you of being a mystery shopper?

- It is generally a good idea to act confused or surprised if you are asked if you are a shopper. Simply say, "I don't understand your question," and let the mystery shopping company know.

What if the store you are shopping has closed?

- If the store is closed, you should contact the mystery shopping company, after double checking the address.



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What if the bank teller you shop turns out to be your next door neighbour?

- If your neighbour turns out to be the bank teller, then complete the transaction and ask the mystery shopping company how to proceed.

Best Practices: Be responsive and responsible

Being responsive and responsible are two key factors in having a successful relationship with mystery shopping companies:

- Submit work on time.
- If asked a question, respond immediately.
- Always check email and voice mail for 24 to 48 hours after completing an assignment in case the editors have questions for you.
- If asked about doing an assignment, confirm or decline it immediately.
- Submit accurate, timely and excellent reports.
- Call immediately if you have a problem or issue in completing a shop.

READ Your Guidelines!

As soon as you are assigned a shop, make sure you print and read all assignment guidelines. Don't wait until the day that you are scheduled to complete a dinner shop, to find out that you were supposed to make a reservation 5 days in advance.

Some companies change their guidelines EVERY month. Even if you have completed the same assignment before, print out a CURRENT copy of the guidelines every single time!

If you have questions, contact the company immediately, so that they have time to respond to you before you plan to do your shop.

Re-read your guidelines again right before you leave for the shop to refresh your memory on shop requirements, etc. As a mystery shopper,

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you will complete many shops for many companies, and it is easy to confuse which companies have which requirements.