

Similar but different

Mystery shopping isn't customer research

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Mystery shopping can play a key role in the assessment of customer satisfaction levels in your organization. But it does not provide you with true customer feedback. Why? Because mystery shoppers are not true customers. Mystery shoppers are trained to be objective and to report back on what was observed during the time of their visit. They are paid to pay close attention. They are asked to observe a pre-determined number of items and to carry out a specific scenario (dialogue or interaction with the staff). That means they are somewhat detached emotionally from what is really happening during the course of the shop. Hired shoppers do this more effectively than management because they can be anonymous and report without bias.

What mystery shopping does for your organization?

A mystery shopper program should not be designed to seek out mystery shoppers' views or opinions. It should be designed to provide you with feedback on what is happening at the customer level. You will get research from a customer's perspective, which means the mystery shopper has put themselves in your customer's shoes and will tell you how the service delivery looks from the customer's side of the counter.

How does mystery shopping help assess customer satisfaction? The customer satisfaction research cycle begins with finding out what the customer's expectations are. Consumer surveys, exit surveys and focus groups are some of the classic market research methods used to gather this information.

Once the corporation feels confident that it knows what the customer expects, it then has to figure out how it will deliver the products and services to the customer's satisfaction. Specialists and professionals are consulted to determine exactly how this will be accomplished.

Management sets operational and service standards and develops communication materials and training models for staff training. Operation systems are implemented and staff is trained in customer service and sales. They're coached and allowed time to practice.

Mystery shoppers are then sent in to report on service delivery. When results are analyzed in aggregate, mystery shopping determines the strengths and weaknesses in operations and front-line performance. The corporation becomes aware of where it has succeeded or failed. Top performing employees or outlets can be recognized. Weaknesses in communications and training can be identified.

If weaknesses are discovered, further staff training and fine-tuning of operations should take place to improve service delivery, which in turn would elevate customer satisfaction.

The mystery shopper's perspective

To get a better idea of how an actual mystery shopping visit is conducted, let's go through the process with Sally, a fictional mystery shopper.

Sally has been asked to conduct a mystery visit in a sit-down family restaurant. The client has asked that she observe a number of key operational and performance items.

Sally enters the parking lot and observes whether the parking lot and grounds are well-lit and tidy. Then she notes the time (makes a mental note of the observation since mystery shoppers do not write things down as they go) when she enters the front door of the restaurant. She approaches the hostess podium and waits for assistance. Assistance is not immediate so she notes the waiting time. Finally, the hostess arrives! Does she smile and make eye contact? Greet Sally and welcome her to the "ABC Restaurant"? Sally looks for the hostess' name from the name badge. The hostess tells her a table will open up soon. She discreetly checks the time on her watch again so that she can note how long she had to wait for a table.

She takes this opportunity to go to the ladies room to check out the cleanliness and stock. She ducks into a stall to write down on a piece of paper some of the information she has stored in her head. When she gets back, she is escorted to her table. She notes the time she's seated at the table. She carefully makes note of how long it takes for the server to come. Again, she's looking for the welcome, greeting, smile, eye contact. Does he say his name and offer to take her drink order? Did he upsell on the order by suggesting a larger size drink or an appetizer? How long did it take for the drink order to come?

Sally tests the server's product knowledge by asking key questions about the menu items. While she's waiting for her food to arrive, she's discreetly checking for chipped glass, stains on flatware, upholstery and linen, available condiments, dust on lights and window dressings, perhaps even gum under the table. She notes how long it takes for the food to arrive. Was it served at the right temperature? Were the food items fresh? Did the server check back on her within five minutes to ensure that she was satisfied and had everything she needed? As she eats, she's also observing other areas of the restaurant, the staff in general and the other customers and the service they are receiving. Did the server offer her coffee and dessert?

Did he bring the check promptly? Was it for the right amount? Did he give the right change? Did he thank her for her business? Did the hostess say good-bye, thank her and invite her to return?

By the time Sally has completed her mystery visit she has a lot of information to remember and consider. If the question "Did you enjoy your meal?" appeared at the end of the mystery shopper form, her answer would most likely be: "Not particularly. I was kind of busy working."

Fullest picture

Visits like these, which gather data from the front lines, can help you find out if your store is operating to the organization's satisfaction. Again, while mystery shoppers play the part of customers, they are not actual customers. So if you want to find out if you are operating to your customers' satisfaction, ask your customers. But don't forget the value of sending a trained, detached observer to interact with your employees and experience your operations at the retail level. Taken together, mystery shopping and customer research give you the fullest picture possible.