

# Mystery Shopping 4 New Applications

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## Introduction

Like many market research techniques that have recently been undergoing changes, mystery shopping has also been diversifying into new areas of investigation. Up to a few years ago, mystery shopping was limited to two areas: 1) pinpointing gaps in a retailer's sales staff that would contribute to customer dissatisfaction and 2) gathering competitive intelligence by shopping competitor outlets. In both cases mystery shoppers, under the guise of being a customer, would be the ones to carefully observe and feedback how they were treated by retail sales staff.

## Survey

Six months ago we surveyed 25 companies on how they use mystery shopping and the results were as follows:

- 56% - pinpoint sales and service gaps within their own organizations
- 24% - gather competitive intelligence
- 20% - other

When we probed respondents on what they meant by "other", four specific areas were identified. Companies reported that they were:

1. identifying performance gaps amongst corporate sales staff;
2. obtaining customer research at the retail level;
3. determining if sensitive information is inadvertently being leaked by sales and service staff;
4. assessing how well customer service is responding to customer emails.

These issues are addressed below:

1. Identifying performance gaps amongst corporate sales staff refers to assessing professionalism and performance of a sample of your corporate sales (versus retail) staff. Say, for example, you are the market research manager at Bell Mobility. Up to now small businesses had to go to retail stores to buy products or obtain repairs to equipment. Recent focus group results point to the need for corporate sales people to help manage demands of small business customers. You decide to mystery shop a sample of your corporate sales staff to see how well they respond to inquiries from small business customers. Some of the questions you have shoppers answer:

- Did they assess your needs?
- Did they make the effort to explain their product/service features?
- Did they try to close the sale?
- Did they ask if they could follow up with you at a later date?

2. Obtaining customer research at the retail level. As mystery shoppers conduct their work, they may also have the opportunity to intercept some actual shoppers. This could provide valuable feedback. Assume, for example, that you work as a market analyst for a car manufacturer and plan to have mystery shoppers visit outlets in all major cities across Canada. Mystery shoppers can be instructed to not only closely examine dealerships, but also intercept some actual car shoppers. These exit interviews can be used to see if consumers share similar points of satisfaction/dissatisfaction that your mystery shoppers experienced. If a study is well designed, then responses from customers should verify what the mystery shoppers feed back. Some questions to ask customers are:

- Why do they shop here?
- What products do they buy?
- What are their major likes/dislikes?
- How often to they shop here?

3. Determining whether employees are inadvertently leaking sensitive information is becoming an important issue for more and more companies. Mystery shop results invariably help companies set up procedures to discourage employees from leaking information to either the competitor and/or to journalists. Questions to be answered by such an investigation would include:

- Did they ask you for your name and number?
- Did they ask you why you were calling?
- Did they clarify what they can/cannot discuss?
- Did they volunteer information of a sensitive nature?
- Did they offer to have their supervisor speak to you?

4. Assessing how well customer service is responding to customer emails is an obvious new application for mystery shopping. Today's customers are choosing email more frequently to communicate a problem or concern. It is crucial to monitor both the timing and quality of those responses. Questions a mystery shop could answer include:

- Did you get a response within 24 hours?
- Was the response customized to your inquiry?
- Did the email answer your inquiry to your satisfaction?
- Did the email include a name and number for further contact?

## Conclusion

Mystery shopping is becoming more sophisticated and widely used than ever before, as applications of this tool have grown to areas relating to corporate sales performance, customer research, information leakage and handling of email inquiries.