

How to Mess Up A Mystery Shop

by *David Lithwick*

"Mystery Shopper" conjures up detective work – spying on customers, uncovering dirt. Yet many companies use Mystery Shoppers to verify marketing research findings and motivate staff selling.

CLARIFICATION

A Mystery Shopper either calls a company or visits retail outlets; pretending to be an interested customer.

Their purpose is two-fold. They're hired by competitors to flush out insights on your marketing efforts. They're also used to evaluate staff performance, usually by determining a winner for a contest.

Scoring ranges from whether POP was up and customers given coupons, to product knowledge, speed in returning calls, and selling other products besides the one you're interested in.

Questionnaires are filled after visits. Scores are tabulated, winners awarded.

MESSING UP

You'll know you're messing up when your phone line lights up, all lines, all the time. Reasons include:

1. Staff is not advised before the shop begins. Human Resources calls. (We prefer to advise ahead of time to give everyone a fair chance to perform.)
2. Shoppers are not briefed. They visit banks to evaluate an RRIF promotion without understanding what an RRIF is. Your sales reps are suspicious and disinterested because the shoppers are lightweights. The VP calls.
3. Shoppers visit stores during lunch when traffic is at a peak. Operations are upset. They fax a complaint.
4. You use one shopper per outlet instead of two. Marketing department complains that the Quebec shopper is not asking the same questions as the Ontario shopper. The Quebec shopper visits stores during the week. Why is the Ontario shopper going on weekends when the staff is only temps?

SAFEGUARDS

Nobody comes out completely clean. The key is to identify potential problems and minimize incidents before the shop begins. Think contingency.

Here are some guidelines to follow:

1. Shoppers should be sensitive and caring. They are goodwill ambassadors, not pit bulls.

Staff is being audited. Some feel their jobs are on the line. Hire sensible shoppers who recognize the delicateness of their role.

2. Control is critical. Limit the number of shoppers. The more shoppers, the more problems. It's a simple corollary.

Every shopper should call daily to go over findings. You can reshop a store to avoid problems.

3. Choose shoppers according to task. They should represent real buyers in age, income, product knowledge, and need.
4. Meet the shoppers before they visit. Have a mock interview to flush out problem shoppers.
5. Review the questionnaire and scoring with regional managers before going in field. Anxiety is offset. Their reaction could otherwise be to cry "foul".
6. Complete the shop quickly. Shops that are dragged out encourage complaints.
7. Explain how scores are determined and reps classified. We favour "TOP GUN", A, B, C ratings. We'll agree up front with companies on how each score is defined.

8. If four questions are asked:

- A. Did they ask you your name, address?
- B. Did they explain why you should buy from them?
- C. Did they try to sell you on other products?
- D. Did they sell you on our company, as a whole?

Assign a weight to each question. A "yes" for A means 10 points. B and C each get 15. This removes some subjectivity.

9. Table scores. Results can also be broken out by region and specific questions.
10. Be wary of counterintelligence. We shopped clothing stores and noticed the last eight stores performed much better than the others. Why? Someone in the main office leaked who we were, describing us specifically. They were advised that a mystery-shopper would visit, and knew our exact descriptions and the questions to be asked.

CONCLUSION

Mystery Shops are tricky. Good intentions will turn sour if the shop is not executed carefully. A measure of non-success is getting calls throughout the day ●