



Advanced Feedback Guidelines for High Quality Mystery Shopping

Prior To Your Site Visit:

1. **SKIM & COMMIT.** Skim through the requirements and questionnaire to be certain you will be able to complete everything prior to making a commitment to the scheduler.
2. **PRE-READ REPORT.** Read the assignment and report requirements well before your visit. If you wait to read the details of the assignment, there is the possibility that you will have a question on the requirements and you will not be able to reach your scheduler in time.
3. **BACKGROUND.** Establish a background story before your site visit. Simple routine consumer activities (e.g. gas, groceries, coffee) may not require this, but you'll need to concoct a story when customer information is expected during a sales process (e.g. dealership, jewelry).
4. **LOCATION.** If shopping a business with multiple locations, double-check the address to ensure you are in the right spot.
5. **TIME.** Double-check the date and time requirements before you perform the site visit.
6. **PRE-VISIT REVIEW.** Read through your requirements a second time right before your visit to refresh your memory if necessary.
7. **MENTAL WALK THROUGH.** Specific instructions may require a specific action (or inaction on your part), for example, how long you wait patiently for a salesperson to approach on their own, what food or beverage to order, the need for a full perimeter check, restroom inspections, selecting a seat that affords observation of certain employee activities, etc. If you fail to perform the site visit as instructed, you may not be able to answer some of the questions in your report, which will render it incomplete.

During Your Site Visit:

1. **PAY ATTENTION.** Mystery shopping done right requires a great deal of attention to detail. When reviewing your requirements prior to the visit, pay attention to what you need to accomplish during the visit. Visualize completing each of the requirements. This way, when you are onsite you can give the assignment your undivided attention and get fully immersed in your job. Make all of the mental notes you need to based on the assignment requirements.
2. **KEEP COOL AND REMAIN UNDERCOVER.** Remind yourself to act outwardly as a regular customer would, adopt normal shopping mannerisms, and avoid suspicious behavior. Before entering the site, think about how you can accomplish your assignment in a way that

will not stand out from the crowd, such as prolonged suspicious browsing or unusual questions/behavior. Take any necessary pictures discretely. DO NOT be seen taking pictures of receipts or checks.

3. **SIMPLE COVER STORY.** Keep your cover story as simple as possible. Avoiding overly elaborate stories will help prevent getting tripped up by unexpected sales questions.
4. **TAKE NOTES.** For concrete details such as names, times and specific items, you can retreat to a bathroom or fitting room to jot down a few notes. You can call your own voicemail a couple of times to leave yourself details, text yourself, or use a smart phone notepad, if such behavior is common in your situation.

After Your Site Visit:

1. **STICK TO THE QUESTION.** Stick to the question being asked, do not get side tracked with unrelated fact or opinion. Review the question to make sure you are specifically answering it and not providing unrelated information. Review all entries when finished, asking yourself “Does this answer the specific question with as much detail as possible?” Avoid providing information on items that were not asked for. There is typically a section at the end of the report where you can rate your overall experience and provide details on anything not specifically asked for in the report that you feel is important. When you report the facts and remove emotion or tinted facts from your report, you have done your job. What happens afterwards cannot be controlled or swayed by how you answer the report. So stick to the facts and you will be fine.
2. **DON'T LEAVE BLANKS.** Provide a written answer to fill all blanks unless instructed otherwise. Even objective questions answered affirmatively have more value with the addition of a brief statement to this affect. Questions with a negative or failed response require a more comprehensive explanation of your experience, as the reader will want to know the details of how they failed. If your survey has an optional comment field after every question, be certain to use it for every NO or NA response (these are not really optional), and elaborate/affirm 40-50% of all YES responses.
3. **BLACK AND WHITE.** Answer clear-cut questions, such as “How long did you wait?” and “Who served you?” as honestly and succinctly as possible.
4. **OPEN-ENDED.** Open-ended questions such as “Please describe how clean the bathroom was”, or “Describe in detail the interaction you had with the salesperson”, require a longer narrative-style response. To keep your summary reasonable, pick out the key details and forgo all of the minute details unless specifically requested. Occasionally a word-for-word account of certain interaction is required, but unless the report specifically asks for this you should be okay with a summary of your experience.
5. **THERE IS NO “I” IN MYSTERY SHOPPING.** Mystery shopping is an unbiased reporting of factual events and observations. The report is the only way to convey your observations. When answering the questions, keep your personal feelings and impressions aside. Rather than saying, “The bathroom was filthy,” you need to actually explain what you saw. “There were paper towels scattered on the sink and toilet paper in various locations on the floor.

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Three of the four toilets had dirty bowls and seats.” This provides factual observations of your visit, and clearly conveys your overall impression of a dirty bathroom rather than simply stating an opinion. To take the “I” of your report, you need to write out the events and observations step-by-step, stating the facts only.

6. **FIND THE TRUTH.** If there is some gray area in some of the facts pertaining to your site visit, take a moment and think about your site visit in the larger picture. Overall, was the site visit positive or negative? As a shopper, did you enjoy your experience and your interaction with the staff? These may not be questions that are specifically asked for in the report, but they can lead you to the right way to formulate your answers to the questions in the report.

Keep in mind that, although you may be kind-hearted and don't want to get someone fired, it is your job to report the facts. Your client is the venue's owner, and by requesting the site to be “shopped”, they are trying to improve the overall customer experience. If there is a weak link in one of the store's staff members, the owner needs to know about it. Also, simply because you file a negative report on a specific store or store's staff does not mean that someone at the store will get fired. There are plenty of other alternatives that can take place, such as additional staff training, managerial training, and reprimand. By filing a report that is positive when your experience at the store was anything but positive, you are not helping anyone.

References: some statements are excerpts from articles at The Mystery Shop Maven.