

21st century mystery shopping

Integrated, total-customer-experience evaluations that measure what happens at every possible touchpoint. Automated, fast report distribution via e-mail. Web-based reporting. Digitally-recorded phone call evaluations. Hidden-video captures. High-resolution digital photos, embedded directly in online reports. Reports, call recordings and photos burned onto CDs. Rewards presented on-the-spot to client employees who perform well. Palm Pilots and laptop computers. Certified professional evaluators. Same-day report turn-around. Instantaneous, online summary capabilities presenting over 40 different formats, for true, real-time reporting. These are just some of the latest advances in the business tool known as mysteryshopping.

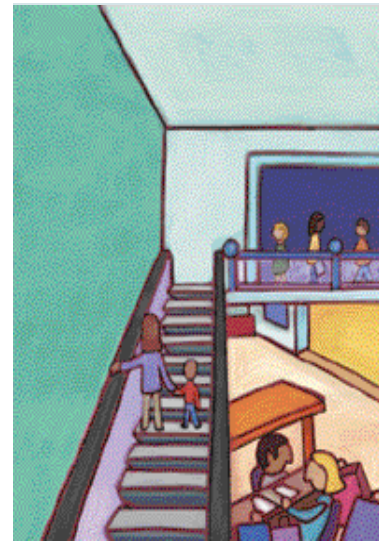
Mystery shopping gives clients fact-based information from people thoroughly educated on what to look for in advance of conducting an evaluation. In the last few years, the technological advances in mysteryshopping have been truly astounding. The difference between today's services and those of even the recent past is like that between instant messaging and the Pony Express. Some of you may recall the "old days" (actually just a few years ago) when paper-based reports were sent to clients via snail mail or faxed, often two weeks or more after the onsite visit. Many were in the shoppers' own handwriting and difficult to read. Cassette recordings of mysteryshopper phone calls (if any recording was even made) arrived two to four weeks after the call was placed. Requests for summaries, allowing managers to track historical performance, compare locations against each other, view results question-by-question across management levels, etc., required special requests to providers' IT departments, also took two weeks or more, and often had to be cut-and-pasted together.

Perhaps the greatest benefit of the recent advancements is that they have freed up mysteryshopping companies from the systemic aspects of producing reams of paper reports and let them focus more on meeting their customers' needs. Other important benefits include:

- improved reporting turnaround times, from as much as three or four weeks to just 24-72 hours;
- more accurate report validation and verification capabilities;
- integrated reporting for multiple customer touchpoints, such as on-site, telephone and Web-based evaluations.

Digitally-recorded phone calls

One of the more interesting developments for clients in the realm of mystery shopping is the use of digitally-recorded phone call evaluations. Many companies rely on the phone for sales and service, and as the old saying goes, "You don't get a second chance to make a first impression." Mystery shopping providers can actually help clients evaluate their business way beyond the first



By Ron Welty

**New technologies
give technique a
boost**

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impression; they can evaluate sales processes, ordering, issue resolution, and so on.

While some providers continue to make recordings and supply analog tapes to their clients, there can be delays in the time between the call and receipt of the tape – up to two weeks, if not more. Faster delivery usually requires overnight-mail charges. By then, possibly hundreds of other prospective customers, or upset current customers, have phoned a client location or call center. How many were actually converted to customers? How many could have been handled better and decided to go with the competition instead? Receiving a digitally-recorded call of the conversation, accompanied by a detailed evaluation report, helps clients understand what is happening in their business faster and lets them make better decisions on how to run their business to acquire and keep more customers. Another aspect many clients find helpful is having their calls buffered to CDs, by management level (division, region, etc.), for use in training sessions, reviews, etc.

Links to Web-based call reports can be added to the digitally-recorded phone calls that allow clients to click on a link and listen to the actual call, start to finish, while viewing a written account of that call by the person who placed it. Virtually any scenario that a business experiences over their telephones can be simulated. Employees “caught” taking great care of and appropriately handling a caller can be rewarded very quickly by their manager. If they do not handle a call appropriately, managers have an almost-immediate opportunity to review it with them, and retrain them on skills, processes and/or expectations. Doing so before they handle any more callers in the same, inappropriate manner is invaluable.

These calls also let managers hear the tone and emotion in the employee’s voice, as well as exactly what was said. Often, a person’s normal conversational voice is much different than their “telephone voice.” For both manager and employee, these can be a helpful coaching technique when utilized properly. It also lets clients verify that the mystery shoppers are doing their jobs correctly, because they hear exactly what was said during the entire call. (Note: Each state has its own laws regarding recording of employee calls. Your mystery shopping provider should be able to readily educate

you on the details to ensure your compliance with them.)

Digital photos

Digital photo evaluations are becoming increasingly popular facets of the mystery shopping process. Evaluations are usually not announced to the location until the evaluator arrives, at which point they introduce themselves to the store manager and inform them that they are there at their company’s request to conduct a site evaluation that will include digital photos. Following a pre-established checklist of what to audit, including descriptions of specifically-scripted shots that the evaluators are provided before their visit, they then conduct the audit and take several digital photos. These photos:

- verify that expensive point-of-purchase materials make it to the sales floor, remain in good condition, and are displayed correctly;
- assure that areas within stores that are leased by manufacturers follow company guidelines;
- let manufacturers know that retailers are getting their products to the floor, and displaying them correctly;
- provide deeper understanding about sight-lines and other marketing/sales opportunities within stores;
- replace valuable field employee time by outsourcing audit functions to mystery shopping companies;
- can be linked directly within an evaluation report, allowing clients to view the report and the photos simultaneously.

You’ve got mail

E-mail has advanced the speed of reporting in the mystery shopping industry dramatically. In the not-too-distant past, providers would mail out assignments to their shoppers, who would hand-write their reports and mail or fax them back. The reports would be given a quick scan by a proofreader, sometimes hand-corrected, and forwarded to the client – again, usually via mail or fax. A span of three to four weeks between the shop and the report was not uncommon.

Some providers eventually developed databases into which the reports were entered by a data entry team. At the end of the month, if any roll-up/summary reporting was provided at all, it may have been cut-and-pasted.

Today, fully integrated solutions, marrying back-office functions such as a

shopper database, screening and scheduling of shoppers, and accounting, are used by some providers. Web-based reports, ready for the client to view the same day of the visit or within about 48 hours, are always a main benefit of such systems. Some systems allow for reports to be sent automatically via e-mail, simultaneously to multiple people, such as the owner, regional managers and each site manager. Viewers can compare locations, management levels, even drill down to a question-by-question analysis, over the entire history of their mystery shopping program and/or for specific date ranges.

Shopper certification takes off

In late 2002, an industry-wide effort to help improve overall skills and assist members in improving the quality of reporting was undertaken by the Mystery Shopping Providers Association (MSPA), which began offering a certification process for interested mystery shoppers. There are currently two certifications available: silver and gold.

Silver certification requires a shopper to attend an online educational program, followed by a comprehensive test about general mystery shopping skills. If they pass, they are awarded silver certification. Gold certification is open only to shoppers with silver certification, and requires shoppers to attend a one-day seminar, held in approximately 25 locations annually throughout the United States. These seminars cover the issues shoppers are required to know and comply with in the course of their duties. As of this writing, almost 22,000 shoppers were awarded silver certification, and more than 2,000 were awarded gold certification, so over 24,000 shoppers have been certified by MSPA in just two years!

Clear advantage

Today’s mystery shopping programs are sophisticated, proven business tools that, executed and used properly, provide clients with a clear strategic advantage over their competition. Using the latest technologies, certified shoppers, advanced analytical tools and other professional methodologies, mystery shopping providers have assisted their clients in improving how customers and potential customers are assisted on-site, on the phone, and online; and helped improve customers’ overall experiences, with the aim of generating greater customer loyalty. **IQ**