

WHAT
IS
MYSTERY
SHOPPING



What is Mystery Shopping?

Mystery shopping is a method for recording and measuring the customer service experiences, sales team performance, or customer-facing business environment through the use of trained and qualified mystery shoppers. Mystery shoppers visit a brand's establishment or contact a business via phone or Internet with clear details on what observations to make or interactions to have with sales staff.

Companies frequently use mystery shopping programs to evaluate and train employees in customer service and to better target training needs for their sales forces. Contrary to what you may read on the Internet, professional mystery shoppers are highly skilled and are not "shoppers," per se, but gatherers of critical data for companies that want to measure and monitor the customer experience, sales performance, and brand compliance standards.

How Does Mystery Shopping Compare to Customer Experience Surveys?

Customer experience surveys, also referred to as customer satisfaction surveys, are increasingly important for understanding your customer's journey to identify the drivers that generate brand loyalty. This data is an integral part of continuous growth in any business, but the results are limited.

A CX survey shouldn't include detailed questions for 2 reasons. It will lengthen the time it takes a customer to complete which results in fewer submissions, and average customers generally won't remember minute details, so results would be skewed and unreliable.

An appropriately designed customer experience survey will capture a customer's emotions related to your brand, product or service based on interactions they had at various touch points. These perceptions uncover patterns and predictions about customer behavior supplying the data needed to create action plans that focus on strengthening commonalities and improving experiences.

Mystery shopping and customer experience management programs are most effective when used simultaneously. CX results can be used to drive mystery shop scenarios probing further into issues. Mystery shopping can help fill the gaps in the story and provide a level of intelligence customer experience surveys won't.

Here are three insights mystery shopping can give you to fully understand if your customers' needs are being met and what your front-line employees are doing (or not doing) to meet them:



Easily uncover your top performers.

A comprehensive mystery shopping report identifies the employee with whom individual customers interacted and provides critical information from that interaction. Customer experience surveys will not ask customers to provide names or distinct details. But with a mystery shop, especially a video mystery shop, you'll be able to tell right away which sales team members are bending over backwards to satisfy and delight customers and which ones need more training.



Gain objective customer insight.

Mystery shopping offers objective reporting on specific areas like store cleanliness, wait times, and the overall customer experience. How long did it take a team member to approach the shopper? Were the shelves organized? Was the store well lit? Customer experience surveys often don't focus on the very specific details to know if all of your stores are meeting brand compliance standards.



Use a targeted approach.

Mystery shoppers have the ability and foresight to target key areas with precision and consistency. Customer experience surveys often cast too wide a net and fail to deliver specific, actionable intelligence. Do you want to know if your sales team is picking up on customer cues for mentioning specific products? Or perhaps it's time to evaluate presentations on providing warranty or financing options?



Use Mystery Shopping to Develop Sales Enthusiasts on Your Team.

Mystery shopping is a common tool for sales training. It's hard to find a better way to get a deep evaluation of a sales team member's performance than watching it in action via a video mystery shop. You can tell pretty quickly whether or not a salesperson has passion about the product or service he or she is selling.

Why is passion so important?

Well, passion is contagious. If a sales representative is smiling and excited about his work, he'll transfer that excitement to the buyer. If you really want to sell homes, professional services, products...then you want a team full of sales enthusiasts who are passionate about what your company has to offer.

Here are five tips for developing a team full of sales enthusiasts:

- **Sales enthusiasts build trust.**

No one is going to buy a home or a car (or anything, honestly) from someone she can't trust. Sales enthusiasts make rapport building their first order of business with new customers. They know people love to talk about themselves, so they make that initial engagement personal: *Where are you from? How long have you been in the area? What do you enjoy doing in your free time?* Asking questions like these will not only break the ice, but you'll likely find you and your new customer share some interests, values, or passions. That's what builds rapport and long-term relationships founded on trust.

- **Sales enthusiasts ask questions.**

They get to know the customer's specific needs and wants, so they can show him or her the best product or service to meet those requirements. If you want a successful sale, then you have to know your customer's pain points and offer real solutions to solve them.

- **Sales enthusiasts are prepared.**

While they're not going to give a canned presentation that comes off as insincere, they will know their product or service intimately and be able to share its history and explain why it's better than anything the competition might offer. They also make use of sales tools to help present options for the customer, whether that's an interactive floor plan of a new home they're selling or it's a video they can share to bring a product offering and its benefits or uses to life.

- **Sales enthusiasts pay attention to buyer signals.**

They know if the buyer is asking a lot of questions, she's probably seriously interested in how the product might make her life easier. Sales enthusiasts also note subtle buyer signals like authentic smiles, leaning in to a conversation, excited tones of voice—all these things point to a customer who is engaged and interested.

- **Sales enthusiasts are ready to address buyer hesitation and objections.**

Instead of letting a customer who says he wants to "think about it" walk out the door, perhaps never to be seen again, sales enthusiasts dig deeper to find the real reason for a prospect's hesitation, and then they are ready with options for overcoming that objection.

If you want to see your salespeople rise to the top of their game, then build them into sales enthusiasts. Show them how to build rapport, use questions to create a needs assessment, prepare for a solid presentation, and understand and address customers' signals and objections.

How To Evaluate Sales Team Performance with Video Mystery Shopping.

When your sales personnel meet or exceed quotas, you know they're doing their job, but what about when they don't, or what about when they're not regularly making an effort to go above and beyond for your customers? How do you go deeper than the numbers to see what's really driving (or depleting) sales performance?

Here are four key ways you can use it to evaluate sales team performance:

- 1. Use mystery shopping as part of your regular performance reviews.**

Performance reviews encourage accountability, particularly if they happen frequently. You should have them with each salesperson at least quarterly, monthly if you're in a fast-paced industry. But to avoid having the performance review be all about sales metrics, a mystery shop can help you uncover "soft" skills that may need refining. Does the sales team member have a good attitude? Is he taking initiative? You can see soft skills in action in a video mystery shop.

- 2. Measure the quality of sales team-customer relationships with mystery shopping.**

Avoid letting your team view sales exclusively as a numbers game. To build a solid customer base for the future and a pipeline of referrals, your sales professionals need to understand the importance of establishing and nurturing relationships with customers. Mystery shopping can help you see if individual sales team members are hitting the mark. Are they asking rapport-building questions? Are they assessing customers' specific needs? How is the customer responding to the salesperson? You can readily see these interactions and discuss them with individual sales agents by watching a video mystery shop together.

3. See your sales team the way your customers do.

How do you know what your team members are doing out on the sales floor...when you're not watching? Customer feedback is one way, but to gain a truly objective picture of how your salespeople perform with customers, hiring an experienced video mystery shopper is the way to go. He or she will be able to show you if team members are asking the right questions, making the right suggestions, providing the right follow-up without the salesperson knowing any evaluation is happening.

4. Watch salespeople develop their skills.

Looking at how a salesperson stacks up against his or her quota or against fellow team members doesn't provide you the whole picture of the person. Video mystery shopping can help you see improving sales techniques and processes in action. If one of your sales team members who has received coaching is improving her rate of closing, watch firsthand what she's doing to grow her technique. Conversely, if her win rates are declining or flat, you can use a video mystery shop to see if she needs to adjust her sales process or where specifically she's losing the customer.



Can Mystery Shopping Help My Business?

Any business that serves customers, whether in person, by phone, via the Internet, or all of the above can benefit from mystery shopping. You likely already know the frightening data that indicates customers will tell three times as many people about a negative customer service experience as they will a good one. And the vast majority of customers don't advise management when they've had an unhappy sales experience. They just go to the competition instead.

If you really want insights on what your customers are experiencing, investing in a mystery shopping program is a key way to get them. Most reputable mystery shopping firms specialize in a few industries. At Clear Evaluations, we focus on the following business sectors:

APARTMENTS

Leasing companies generally operate in a highly competitive industry. Are your leasing agents and sales staff setting the property apart from the competition? A mystery shopper can provide key insights on whether or not your team is showing customers the full list of apartment features, amenities, leasing choices, and confirm they are taking action to close the deal. You may also shop the competition to see what incentives they are offering renters that you can emulate.

HOME BUILDERS

To the average home buyer, one builder's product doesn't necessarily stand out from another. Is your sales team marketing the value of your homes and community sufficiently? Are they asking the right questions to understand the buyer's motivation for the move? Are they attempting to close your prospective buyers, or are they spinning them out the door with a packet? You can find out with the help of a mystery shopper. You can also hire a mystery shopper to check out the options offered by competing homebuilders.

RETAIL

Retail is, of course, the business category that comes to mind when the term "mystery shopping" comes up, and mystery shopping is well-suited to retail. Most storefronts have a complex array of people, products, and environments that shape the customer experience. You can evaluate all three at once with the aid of a customized mystery shopping program.

AUTOMOTIVE

In an industry where brand perceptions are the driving force behind a potential buyer's decision, how important is it to ensure your front line is representing your brand appropriately? From your service department to your sales floor, mystery shopping will determine if your team is meeting expectations.

HOTELS

Are your hospitality staff remembering to tell guests about hotel dining options, the fitness center, pool, and concierge services? What about reminding them to sign up for a reward membership? Get an insider's view of what your guests experience when they check in and every interaction they have with the front desk, concierge, housekeeping, maintenance, dining, and sales and catering with a hotel mystery shop.

RESTAURANTS

Do you want an unbiased view of how your service staff respond to patrons and whether or not they are upselling cocktails, appetizers, and desserts? Are your chef and his staff exceeding culinary expectations? Sure, you'll find out when the local newspaper or lifestyle magazine reviews your restaurant. But that might be too late. Get a leg up on where you need to improve service, selection, and flavor by hiring a restaurant mystery shop.

BANKS

Financial institutions have a host of interactions with customers these days with many offering investment services and credit cards in addition to traditional deposit accounts and loans. Plus, more and more customers are using their computers and mobile phones to bank. How do you keep track of all these points of interaction? And how do you know if representatives are offering customers value-added services or directing them appropriately when they want to apply for a credit card? Mystery shoppers specializing in bank services can provide you a comprehensive evaluation of how well your financial institution is meeting customer needs.



Types of Mystery Shopping Programs.

There are a variety of ways to perform a mystery shop, depending not just on your industry but on your specific goals, whether those are to measure how every location is delivering on your brand promise, to gain insight for sales performance, or to see how the "live chat" feature on your website is working. Clear Evaluations offers a number of mystery shopping programs to meet customer needs and goals.



VIDEO

The video shop is ideal for job performance evaluations. A video mystery shop gives you the opportunity to see a live demonstration of your sales team members' performance. You can quickly evaluate if he is meeting expectations, asking the right questions to determine needs, making customers feel at ease, following policies, and creating an overall friendly and relaxed environment for the sales process. See it all simply by pressing "play."



WRITTEN

Written shops offer a comprehensive view of employee performance and help you quickly identify if brand standards are being met. Mystery shoppers will provide an objective evaluation conveyed in a report designed for your specific goals. Clear Evaluations' shop reporting system offers easy-to-use trending reports to understand exactly what actions to take to increase customer retention.



COMPETITION

Competitive analysis is the key to success in any business. To develop effective strategies, management needs an unbiased appraisal of how their sales force measures up against the competition. Even with expert sales professionals, analyzing the competition is a crucial tool for sustained growth and long-term success.



PHONE

Customer service is just as important over the phone as it is on the sales floor. For businesses that utilize an over-the-phone sales strategy, audio recorded phone shops can be a highly effective tool to evaluate employee performance while handling the typical customer interactions that are critical to your business.



INTERNET

When it comes to online responsiveness, the speed and quality of your business's online response will dictate whether your customer chooses you or the competition. Instantaneous results are expected, and your clients are going online to get them. Businesses must provide excellent online service that advocates for the product's value and provides superior customer service, all delivered with an excellent user experience.



FOLLOW UP

Given the key to closing a sale is often in the follow-up pitch, don't overlook the importance of making sure your sales team is taking this critical step in the sales process. Clear Evaluations offers a follow-up shop service where all voicemails and emails from your sales staff to the mystery shopper go into an easy-to-access web-based survey you can review.



CUSTOMER EXPERIENCE

Customer satisfaction, even more so than price, is often the glue that holds a customer's loyalty to your brand. Make sure that loyalty is unshakeable by consistently analyzing your customer's feedback. Clear Evaluations offers Customer Experience Management programs to help you keep your customers happy and coming back.



EMPLOYEE ENGAGEMENT

Reacting to employee feedback is a requirement in today's competitive environment. Happy employees lead to lower turnover and higher productivity, which ultimately leads to increased customer loyalty. Employee engagement surveys provide real-time insights that show management exactly where to focus efforts to increase employee performance.

See what insights mystery shopping might offer for your business.

Reach out to Clear Evaluations for assistance in determining what kind of shop would work best for your customer service and sales team evaluation needs.

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CLEAR EVALUATIONS