

FROM THE CX CAFÉ BLOG:

<https://www.maritzcx.com/blog/customer-side-mystery-shopping/>

The Customer Side of Mystery Shopping

By Al Goldsmith | Vice President and Account Director, MaritzCX

How does your company compare against your competitors on the things that matter most to your consumers? Mystery shopping continues to evolve, and today we are finding valuable information to help you know where you stand.

One example of this is Experiential Mystery Shopping (EMS). Companies use EMS to provide a base for designing their mystery shopping program as well as a tool to obtain competitive benchmarking data and best practices for their unique industry. So how does EMS work?

Retailers are always interested in how they compare to their major competitors and how they can gain future market share. An EMS study can show how a company compares to key competitors on measures that reflect what is most important to consumers—both within their individual niche and across the entire retail industry. An EMS study can be designed to provide a comparative assessment of both hard, objective activity (i.e., did certain things occur – e.g., greetings) as well as softer, more subjective performance measures (i.e., how did certain things occur – e.g., cordiality of greeting).

An Example of How a Major Retailer Used an EMS Study

The mystery shop was designed to focus on the retailer's key drivers of positive consumer satisfaction, which are the following general areas:

- The greeting and friendliness of store associates
- The availability and helpfulness of store associates

- The store layout and ease of navigation

The mystery shop protocol and the necessary training for the mystery shopper revolved around these drivers. Mystery shoppers were asked to use ratings to assess three types of information:

- **Factual**, objective situations such as
 - “Did you receive a greeting?”
 - “Did the associates ask questions to identify what you needed?”
- **Semi-subjective**, such as:
 - “Did the greeting you received make you feel welcomed/valued?”
 - “Did you feel the associate fully understood your situation?”
- **Subjective** elements that relate to store/brand such as:
 - “Did you feel you were in a self-service environment or a consultative environment?”
 - “Did the store convey a sense of upscale or low-end products?”

In addition to rating, the mystery shop protocol asked shoppers to take note of store components that support or work against the image needed to attract customers. They were asked to assess how well signage, store layout, associate behaviors, etc. support/detract from that image so that best/worst practices can be documented.

Retailers are always interested in how they compare to their major competitors and how they can gain future market share.

In the final analysis, best practices in sales and environmental experiences were identified and presented as a means of creating both an awareness of—and a shift in—store culture.

Mystery Shopping Best Practices

Best practices identified from the EMS project:

- Have an associate greeting customers at the door and point them (or walk them) to the needed area.
- Associates should say, “Hello,” and ask shoppers how they are before inquiring about their situation.
- Acknowledge a shopper’s presence before they have to ask for help.
- Smiling, eye-contact, and enthusiasm are key – associates should convey they are excited to help the shopper and not that it is a bother or interruption.
- Make enough time to thoroughly assist a shopper.
- Make the customer feel valued and do not patronize or make the customer feel stupid for asking questions.
- Display active listening skills – restate problem or responses to show that associate fully understands the shopper’s situation.
- When possible, physically assist shoppers by walking them to the products.

- Ensure there is adequate associate coverage of areas or provide an “on-call” button.
- Ensure associates in areas are fully knowledgeable about the products. If associate is not, then he/she should find another associate to answer shoppers’ questions.

In the final analysis, best practices in sales and environmental experiences were identified and presented as a means of creating both an awareness of—and a shift in—store culture. They had to dramatically improve the in-store experience for their customers. They implemented a retraining process for their store personnel to focus more on customer service – how they interacted with each customer. This change ultimately enabled them to improve the customer experience, leading to higher sales volume and improved profitability.

This is just one example of the powerful insights that organizations gain by conducting mystery shops.

ABOUT THE AUTHOR



Al Goldsmith

Vice President and Account Director, MaritzCX

Al is the Vice President and Account Director for MaritzCX’s Virtual Customers Research Services Group. He has over 39 years of experience in developing, implementing, and supervising market research services.

For more information, contact: Gregory Links | Sales Director, MaritzCX Mystery Shopping
419.367.1094 | Gregory.links@maritzcx.com

To demo a product or to contact MaritzCX call

North America +1 385.695.2800 | maritzcx.com | **Asia Pacific** +61 (2) 8397 8131 | maritzcx.com/au | **UK & Ireland** +44 (0)1494 590 600 | maritzcx.co.uk | **Germany** +49 (0)40 369 833 0 | maritzcx.de

MaritzCX believes organizations should be able to see, sense and act on the experiences and desires of every customer, at every touch point, as it happens. We help organizations increase customer retention, conversion and lifetime value by ingraining customer experience intelligence and action systems into the DNA of business operations. **For more information, visit www.maritzcx.com.**