

No Surprises: Best Practices in Mystery Shop Program Launch



Introduction

When mystery shopping initiatives fail to meet their potential, it is often because the people who are accountable for the results — front-line employees, supervisors, store managers, and regional managers — were never properly introduced to the program. As a result, there may be internal resistance, creating an unnecessary distraction from realizing the brand’s customer experience goals. It is, therefore, critical to ensure employees throughout the organization are fully informed and have bought into the program before it is launched. Pre-launch communication should include: definition of the brand, the employees’ role in animating the brand, specific behaviors expected of customer-facing employees, a copy of the mystery shop questionnaire, procedural questions of how to communicate program related issues, training on how to read mystery shopping reports, how to use the information effectively, and how to set goals for improvement.

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mystery shopping

Key to launching a successful mystery shopping program is communication, positive communication: communication of expectations, communication of program administration, and how to use the results to improve performance. There should be no surprises in mystery shopping, surprises create resistance, and kills buy-in.

Position mystery shopping as a win-win. Position it that mystery shopping is designed to help the employee, by making them better at their jobs. Employees want to succeed. They want to be good at their jobs. Leverage this desire to succeed in obtaining buy-in from the frontline.

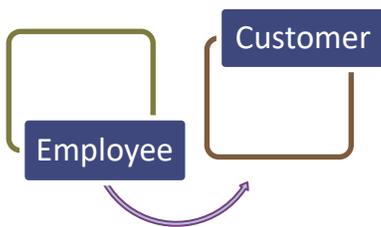
Communication of Expectations

Start the program launch by communicating your desired brand personality.

Brands have personality. Start the program launch by communicating your desired brand personality. Brand personality is a set of characteristics associated with the positioning, products, price and service mix offered by a company. While branding is a complicated mix of these four, it often falls on the frontline employees to animate the brand – to make it real in the perception of the customers. It is, therefore, critical that employees’ service behaviors be aligned with the brand personality. Start the mystery shop program launch with a clear description of your desired brand personality.

Once the brand personality has been communicated, the next logical step is to define what specific service behaviors you want to animate the brand. These are your behavioral expectations from frontline employees. Create a list of behavioral expectations by asking yourself the following questions:

- What specific service behaviors do we expect?
- When greeting a customer, what specific behaviors do we expect from staff?
- When meeting with customers after the greeting, what specific behaviors do we expect?
- If a phone interaction, what specific hold/transfer procedures do we expect (for example asking to be placed on hold, informing customer of the destination of the transfer)?
- Are there specific profiling questions we expect to be asked? – If so, what are they?
- What closing behaviors do you expect? How do you want employees to ask for the business?
- At the conclusion of the interaction, how do you want the employee to conclude the conversation or say goodbye?
- Are there specific follow-up behaviors that you expect, such as getting contact information, suggesting another appointment, or offering to call the customer?
- What other specific behaviors do we expect?



Note, each behavior should support the end result of employees animating the brand and motivating the desired attitude and ultimately the desired behaviors of customers. This is the key – influencing customer behaviors through the customer experience. Every time a customer and brand interact, the customer learns something good or bad and adjusts their behavior as a result of what they learn. So by managing employee behaviors one can influence customer behaviors. Behaviors such as:

- Initiating a relationship
- Buying more
- Complaining less
- Using more efficient channels
- Telling others

Ultimately, in communicating expectations and gaining buy-in from frontline employees, a best practice in mystery shop program launch is to give employees a copy of the actual questionnaire and shopper guidelines.

Best in class mystery shop questionnaires are composed of a mixture of objective behavioral observations and subjective impressions and comments.

The objective observations of behaviors form the backbone of best in class mystery shops. They identify what specific sales and service behaviors were observed. Subjective impressions are primarily captured through rating scales that determine how the shopper felt about the experience. Rating scales add both a quantitative and qualitative perspective to the empirical behaviors observed and provide a basis for interpreting their importance.

Open-ended comments capture why shoppers felt the way they did about the experience. While empirical behaviors are the backbone of the shop, many of Kinēsis' clients consider these comments the heart of the shop. They reveal valuable insight into understanding exactly how the shopper felt about the experience. Most mystery shopping programs score shops according to some scoring methodology, typically where each question is assigned a point value based on its importance.

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There should be no surprises among your customer-facing employees with respect to exactly what behaviors are being measured, how shoppers are to interpret these behaviors in terms of completing the questionnaire, and how each of these behaviors are weighted in terms of scoring the mystery shop.

Communication: Program Administration

Best in class mystery shop programs provide a central point of internal administration to oversee the relationship with the mystery shop provider, including: program design, shop distribution, coordination with other stakeholders (such as training and human resources) and mystery shop disputes.

A best practice in launching a mystery shop program is to identify, to all stakeholders, the main contact for internal administration, and how to communicate with them. Along with identifying the internal administrator, in most cases, it is a best practice to also identify the mystery shopping provider.

Disputed shops are part of the mystery shop process. Mystery shops are simply a snap shot in time, and measure complex service interactions. As a result, there may be extenuating circumstances that need to be addressed, or questions about the quality of the shopper's performance that require both a fair and firm process to resolve.

Communication: How to Read Reports

Reading and interpreting research reports is a specialized skill. To maximize the value of the mystery shopping program, it is a best practice to provide frontline personnel with instruction into the basic skills of interpreting a basic research report. Some interpretation skills are easy, such as reading a data table which compares results across units of hierarchy (such as one store compared to another), or over specific time periods (such as one quarter to another). Others may be a little more intimidating such as a cross-tabulation of purchase intent, where the comparison is between how the shopper rated their purchase intent as a result of the shop. But in reality, reading them is the same as the comparisons of stores or quarters. All that is needed is just an understanding of how shops are grouped for the comparisons.

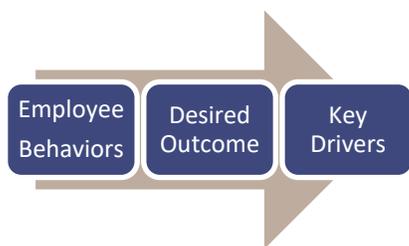
Communication: How to Act on Results

Beyond instructing the frontline how to read reports, they should also be given a primer on how to take action on the results.

The most common way managers of frontline employees take action on the results is coaching. Best in class mystery shop programs identify employees in need of coaching as a result of the shop. Event-triggered reports should identify employees who failed to perform targeted behaviors, and managers should be instructed on how to use the results to coach employees. For example, if it is an objective to measure and motivate cross-selling, a Coaching Report should be designed to identify coaching opportunities where employees failed to cross-sell.

For each such coaching opportunity, frontline managers should be given guidance on how to coach improvement, as well as online tools to log coaching, making both the employee and the manager accountable for coaching.

Additionally, frontline managers need to understand the analytical framework for maximizing the value of the program. Research without action may be interesting but not very valuable. Best in class mystery shop programs build in call to action components designed to identify key sales and service behaviors - behaviors which correlate to a desired customer experience outcome. We call this Key Driver Analysis. Key Driver Analysis identifies the relationship between specific sales and service behaviors and a desired outcome. It identifies which behaviors are key drivers of this desired outcome. For most brands and industries, the desired outcomes are purchase intent or return intent (customer loyalty). Building these call to action elements into the program helps brands identify and motivate the sales and service behaviors that matter – those which drive sales and loyalty.



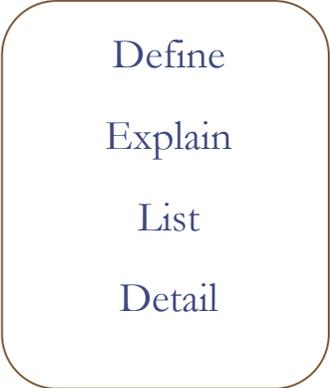
Communication Tools

There are a variety of tools for program launch communication, each with a different purpose, but often reinforcing the same message.

Kickoff Letter/ E-mail

The first communication tool is the kickoff letter - most often in e-mail form. This e-mail is sent prior to the start of shopping. The purpose of this e-mail is to introduce frontline employees to the program, explain its purpose in a positive way, make sure the subjects of the shopping are aware of what is expected of them, and link shopping to their best interests, by reinforcing it is designed to make them more successful.

Drawing on the communication themes above, the kickoff e-mail should:



Define
Explain
List
Detail

- Define the brand and emphasize that they, the frontline employees, animate the brand. They are the physical embodiment of the brand.
- Explain that specific sales and service behaviors are expected from them in their role as the physical embodiment of the brand.
- List the specific sales and service behaviors that shoppers are asked to observe. Stress that management wants every representative to score well, no one is being set up, if they perform these behaviors they will get 100%. Again, we do not believe there should be any surprises in a mystery shop program.
- Detail the incentive and rewards structures in place as a result of the mystery shop program.

Kickoff Call/ Presentation

As a supplement to, or in place of, the kickoff e-mail, a presentation, conference call, or WebEx is an excellent tool to kick off a mystery shop program. Again, there should be no surprises with mystery shopping. All stakeholders in the process should understand their role and what is expected of them, both in terms of the customer-facing behaviors, and what their role is in the mystery shop process itself.

As with the kickoff letter or e-mail, the presentation should define the brand, stress that employees are the physical embodiment of the brand, and identify the specific sales and service behaviors expected from the customer-facing employees.

In fact, Kinēsis believes in sharing a copy of the mystery shop questionnaire, as well as shopper guidelines which inform the shoppers on how they are to

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conduct the shop. This reminds employees not only of the behaviors expected, but how the evaluation will be conducted, including the scoring of difference behaviors – again, there should be no surprises in mystery shopping.

This presentation should identify, and probably be conducted by the internal administrator of the program, communicate the dispute process, discuss incentives and rewards earned through positive mystery shops, as well as introduce the concept of coaching as a result of the shop - making sure that managers and customer-facing personnel understand their role in the coaching process.

Finally, this presentation should introduce employees to self-help resources available for taking positive action as a result of the shop.

Self-Help Resources

Self-help resources typically take the form of a webpage housed on the mystery shop provider's website or on an internal resource page. These resources provide a tutorial in the form of either a PowerPoint or video, reinforcing to stakeholders many of the subjects already discussed: definition of the brand, behavioral service expectations, and a copy of the questionnaire.

These self-help resources are also an excellent opportunity to introduce the mystery shop reports and how to read them (both on an individual shop basis and on an analytical level), and introduce concepts designed to identify the relative importance of specific sales and service behaviors which drive desired outcomes like purchase intent and customer loyalty.

Shop Results E-mail

Upon distribution of the first shop, it is a best practice in launching a mystery shop program to send an e-mail to the supervisor of the employee shopped advising them of a completed shop, and containing either a PDF shop report or access to the shop via an online reporting tool.

The content of this e-mail should be dependent on the performance of the individuals shopped. If a shop is perfect, the e-mail should congratulate the employees on a perfect shop. If a shop is below expectations, it should inform the employees, in as positive way as possible, that their performance was below expectations and set the stage for coaching. It should remind employees that it is not the performance of this first shop that counts, but subsequent improvement as a result of the shops.

Depending on the timing of shop e-mails, some clients prefer the shop to be sent as soon as it clears the provider's quality control process, others prefer shops be held and released in mass at the end of a given shopping period (typically monthly). If the e-mail is sent at the end of a given period, this is an excellent opportunity to identify top performers who received perfect shops as a means of both recognizing superior performance, and motivating other employees to seek similar achievement.

Finally, this e-mail should reinforce superior shop performance by reminding front-line employees and managers of the rewards earned by successful shop performance.

This e-mail should be modified for all subsequent waves of shopping and be used as a cover letter for distribution of all future shops.

Additional e-mails may be sent to notify employees and their managers of specific events, such as: perfect shops, failed shops, shops within a specific score range, or shops which identify a specific behavior of an employee like a cross-sell effort.

Post Shop Call/ Presentation

Similar to the kickoff presentation, after the first wave of shopping, it is a best practice to conduct a post shop presentation, again by conference call or WebEx. The purpose of this presentation is to present the reports available, discuss how to read them, and – most importantly - take action on the results through coaching and interpreting call to action elements built into the program. Call to action elements designed to identify which behaviors are most important in terms of driving purchase intent or loyalty.

Conclusion

Proper launching of a mystery shop program is critical to its success. Starting on the right foot positions mystery shopping in the minds of customer-facing personnel as a positive tool to help them become better at their jobs – and offers real benefits to them both in terms of rewards as a result of the shop, but also intrinsically as it reinforces sales and service behaviors that will benefit them throughout their career.

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Communication is key – again, there should be no surprises in a mystery shop program.

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