

MANAGER'S GUIDE

**3 STEPS**  
**FOR LAUNCHING A**  
**SUCCESSFUL**  
**MYSTERY**  
**SHOPPING**  
**PROGRAM**



IntouchInsight

## Why we wrote this eBook

This guide is for senior managers of large chains looking for a [mystery shopping program](#) to not only measure their services – but also improve them.

We've launched hundreds of mystery shopping programs across North America and have seen great success improving customer experience levels using mystery shopping.

**To accomplish this we remind our customers of one thing:**

*For a mystery shopping program to impact and improve the level of service your employees deliver, your employees need to be on board. Employee trust, adoption and enthusiasm is crucial for results.*

## How this eBook will help

With this fact in mind, this eBook will share three crucial steps for senior managers to ensure their mystery shopping program is launched successfully. Learn how to improve employee adoption, motivate your staff and build lasting programs that promote continuous improvement.

# Three Steps Every Senior Manager Should Take When Launching a Mystery Shopping Program

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## Emphasize a program your staff can trust

- Three tips for fair and accurate mystery shopping

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## Build a communications plan

- Six things a successful communications plan should address
- Mystery shopping, your culture and you
- How to reach frontline staff

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## Use results constructively

- The most successful way to approach your results
- Rewarding positive results
- Learning from negative results

# 1 Emphasize a program your staff can trust

## Why

Building a reputable program that your staff respects is the foundation of a successful mystery shopping program. Without trust or respect, your program impact will diminish and complaints will stream in from employees fighting their scores.

## What to do

Senior managers should work with their mystery shopping company to design a program that:

- ✓ Minimizes potential for errors in results
- ✓ Reduces the chance of shopper identification during evaluations

## Three expert tips for fair and accurate mystery shopping

- ◆ **Keep it simple.** Avoid complex quantitative measurements or broad general statements. Focus on specific observations with yes or no variables. These minimize potential for human error through memory constraints and promote objective responses that are not reliant on shopper perception.
- ◆ **Narrow your focus.** Focus your program on a few key factors that are the most important for your customer conversion and satisfaction (i.e. employee attitude, upselling, cross selling, product knowledge, site cleanliness etc.) Too many measurements can increase error rates and overwhelm your staff with multiple areas of focus.
- ◆ **Think inconspicuous.** Ensure shoppers are not doing anything that is not typical of a regular customer to minimize risk of identification. Avoid things like taking photos, measuring temperature or scanning inventory and save such measurements for [operational audits](#).

# 2 Build a communications plan for your program

## Why

A successful program is one that employees are motivated and enthusiastic to excel in. While material rewards and incentives are great external motivators, communicating the underlying values of your program to develop a strong internal motivation is ideal for long-term, ongoing success.

*For this reason our number one recommendation is to develop an internal communications strategy to support your programs.*

## Six things a successful communications strategy should accomplish

A successful communications strategy should:

- ✓ Emphasize values and build a culture of strong performance
- ✓ Motivate employees by emphasizing their impact on achieving business goals
- ✓ Communicate overall value and goals of the mystery shopping program
- ✓ Educate employees about how program results will be addressed
- ✓ Encourage individuals to offer productive feedback and suggestions for continuous improvement
- ✓ Promote and acknowledge individual and location successes

## Mystery shopping, your culture and you

Remember your mystery shopping program is a tool used to ultimately improve your level of services. Instead of focusing your communications solely on the program, promote the underlying business values driving it.

If you can build a culture that your staff believe in and feel proud to be a part of, motivation and enthusiasm will grow and program results will improve.

## Reaching the front line

As you build your communications plans, be aware that many communication methods usually stop at the one of the levels of management, leaving managers responsible for passing along information to their staff.

To reach front line employees your communications strategy should:

- ✓ Empower managers to promote your ongoing messaging accurately
- ✓ Leverage mediums designed to reach your front line employees.

Try things like:

- ✓ Newsletters
- ✓ Break room posters
- ✓ Team meetings
- ✓ Pay stub inserts

# 3 Use results constructively

## Why

Trust, enthusiasm and morale will falter if employees are worried about how program results will affect them.

## The most successful way to approach your results

To get the most from your results and promote employee buy in, ensure that no matter what kind of results your locations are getting, they will be used to add value to your business. Processes for dealing with both positive and negative results should be administered and communicated to staff.

## Rewarding positive results

Building incentives for positive performance is good way to recognize your employees for positive behavior and motivate them to deliver to your standards. We recommend tying mystery shopping program incentives into other performance indicators as well, to promote an overall positive performance, as opposed to focusing employees on a single metric.

## Learning from negative results

We view negative scores as an opportunity to improve your business. Ultimately these situations are your chance to:

- ◆ Implement new training or coaching procedures to better support your standards
- ◆ Identify and repair operational issues that do not support your services standards
- ◆ Review your mystery shopping survey to ensure its realistic and fair to staff

# Conclusion

While you drive your service standards, your staff drive their delivery.

If your goal is to improve your service delivery using [mystery shopping programs](#), ensure your staff are on board and motivated!

These three steps are a great start to doing so, but every organization is different. If you have questions about the contents of this eBook or need expert insights for your mystery shopping program, please [contact us](#).

Good luck!