



# The Premier Mystery Shopper Provider



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# Mystery Shopper Services

Because there are so many approaches that can be taken when conducting on-site mystery shops, BES first consults with each client to gain a better understanding of their current operations and their non-negotiable standards for doing business. Additionally, we try and understand what each client has been doing for the past few years to gauge their customers perception of their services and what they have been doing to make improvements. (*i.e. other shopper programs, customer surveys, IVR services, corporate trainers, new hire training etc.*) More importantly, what their goals are for growth and improvement once the information is in their hands, and do they have a structured plan to roll the training out to the stores to affect change.

From this information, we are in a better position to consult with each client and provide a customized plan and solution that is specific to their needs, rather than just proposing a service, collecting information and hoping it makes a difference.

As a general overview to our approach in conducting on-site mystery shops, the first step as mentioned above is to roll up our sleeves and learn what you have been doing, and then develop a plan for moving forward. Once everyone is comfortable with the plan and we are all on the same page, we begin to develop the customized shopper forms for auditing the stores. As we develop the forms, we take a very objective approach to ensure that when the shoppers are in the field auditing each store, the information they are reporting is un-bias and not subjective.

Once these forms have been developed and everyone is on-board that each question is representative, fair, and weighted properly, we then code them into our on-line dynamic reporting system. Once this has been completed, we then begin to develop the shopper training instructions and internal documentation for program management. After these items are checked off and we have appointed a dedicated project manager to your team, we then import the location information into our system and setup the various levels, ensuring each manager receives the correct reports for his or her locations, regions or territories etc. (*if applicable*) From that point we are ready to begin recruiting and training the shoppers.

One element that is important to note is that we will also work with you to ensure that the proper demographics are in place so that when we are recruiting shoppers, we are only utilizing shoppers that fit the profile of a typical customer.



# Mystery Shopper Services

Before the shoppers are deployed, they must first go through the instructions and shop notes to ensure they know exactly what is required of them as well as the specific details they are to pay attention to during their visit. Additionally, they are required to also be familiar with each question that is on their forms so they do not miss any critical information.

Upon arrival to the stores, they begin their evaluation at curbside auditing the outside conditions of the stores including signage and any noted repairs that may be discovered. Once they enter the store, they begin evaluating each area of their experience including the initial greeting, friendliness, professionalism and overall sales skills of the associates. Additionally, they are auditing the internal conditions of the store including any noted safety or trip hazards.

As part of our on-site service, we would also require each shopper to bring either a digital camera or have a cell phone with a high resolution camera to take inconspicuous photos. This may include the outside of the store, signage, food, merchandising etc. These photos are then uploaded and embedded into their reports for easy viewing. This ensures the shoppers were there as scheduled, and that you are able to see first hand any critical conditions that may have been present, rather than just reading about them.

We will also create a “*smart phone*” enabled version of the forms so that shoppers with web-enabled phones can actually complete all, or a portion of their reports from their cars as they leave the store. In many cases the shoppers can complete and submit their entire report to our office for quality review before they even leave the parking lot. This level of reporting means lighting fast results for our clients.

The way the reports work once they are completed, is that they are submitted to our office and our quality review team reads each and every report submitted to our office for QC. Once the reports have been reviewed for accuracy, content, grammar and spelling and have been approved, they are instantly sent to the client by way of automated email in a PDF format with the embedded pictures and wave files. *(if recorded calls are a portion of the shops)*

In addition to the reports being sent instantly as they are received and approved, we can create triggers that direct each report, or sets of reports to specific managers or supervisors. This ensures that only reports that pertain to them are received. Additionally, we have a host of other reporting tools available on-line for further analysis and trending. *(more about this in the reporting section)*



# Live Guest Satisfaction Surveys

Another option of service we discussed was conducting “*live guest satisfaction surveys*” with your customers after they have visited your properties.

We have a call center located in Jupiter Florida. Within this call center we conduct a variety of market research projects including live guest interviews. Our call center reps will call your customers to interview them about their guest experience during their visit.

The surveys are custom scripted to ask the specific questions you would like to ask your customers. Most importantly, the calls are handled as if you were calling the guests yourself. Our survey representatives conduct their interviews as if they were a representative of your company inquiring about their satisfaction of the service they received. By taking this approach the customers are generally appreciative of the call unlike traditional telemarketing calls, exit surveys, and market research studies.

Most surveys consist of approximately 15 to 20 questions and take 6 to 8 minutes per-survey on the average to complete. Therefore they are not lengthy or intrusive, and the participation levels are generally very high.

For each wave of guest satisfaction surveys, BES will have your company submit an excel sheet containing contact information for the guests that have visited one of your locations within a specific time frame. BES will run the list through the database to ensure there are no duplicates and that the customers on the list have not recently been contacted or surveyed.

Once the list is ready, the survey associates will attempt to contact each individual on the list until the quota for each location for the current wave has been reached. Once the survey quotas for an individual location have been achieved, BES will notify you that no additional customer information is needed.

As a portion of the survey process, BES records 100% of the calls for quality assurance purposes. As a portion of the reporting tools, a wave file of each call will be made available on the survey dashboard along with the completed survey.

Additionally, the dashboard will include key measures derived from the rating questions (*including an overall rating for each location*), and a net promoter score, all broken out by location, by region and for the combined locations. The key measures include charts of the summaries, in addition to the tables which can be shown as mean scores or percentages. Additionally, the data will be grouped by each wave allowing you to compare each wave to one-another as well as track your on-going progress.



# Smart Phone Surveys

As technology has advanced, we now offer a new and exciting service. The latest generation of cell phones are now termed “*smart phones*” which are simply web-enabled, and/or have the ability to run various applications such as the iPhone and Androids.

This new technology allows your “*real customers*” that are using smart phones the option of providing instant feedback relating to their experience while in your stores. The way it works is that we work with you to design a table tent, flyer etc. that you put in public view which recruits your customers to provide instant feedback on their guest experience.

All of the questions are custom to what you want to learn, and the best part about this feature is that the costs are set at one low-monthly fee per-month, per-location, or area of service for unlimited surveys.

This feature allows you to capture a great deal more information than traditional card surveys or web-surveys, as they can complete them while they are still in your store, and the best part is that all of the data is provided to you real-time, and in a summarized format on our on-line dashboard along with all of the other reporting tools.

This feature is also very flexible as you can change surveys or promotions on a monthly basis if you choose, and can be used for other market research such as introducing new concepts , products or promotions that you would like to receive feedback on from your guests, similar to a focus group. (*i.e. merchandise, food items, marketing promotions etc. that you want to test before committing to a full implementation*)

As with the mystery shop reports, we can segment the data between various areas of service.

If you choose to also utilize the web-surveys, this data will be loaded on the same dash board allowing you to compare the results between each different type of survey. (*i.e. on-site surveys, web-surveys, promotional surveys etc.*)

The best part is that the costs are simple; they are based on a per-location fee, and at one monthly set price allowing you to receive unlimited surveys.

Another exciting element of the smart phone surveys is that we can also work with you to code a “give away coupon” to every customer that takes part in the survey. This can be an instant coupon they receive on their phones and can be redeem for a future visit ensuring you of repeat business. Each of the coupons are GPS tagged, tracing the point of origin and can be voided after use to avoid being reused multiple times. Or, they can be open ended to be reused or shared if you prefer.





# Web- Surveys

Like the “smart phone” surveys, the web surveys can also be customized to each market or promotion and divided between the various areas of service.

There are a couple basic options when administering these surveys, they can either be re-active or pro-active. The main difference is in how the customers are recruited to take the survey.

A reactive measure would be a customer completing a survey based on a recruitment they would receive requesting them to complete a survey. This could be by a live operator conducting the surveys, or by way of an email or text message they might receive requesting them to take part in the survey.

As a pro-active measure, it is based on the customer initiating the survey by seeing the survey option posted somewhere such as a table tent within the store like the smart phone application, or by having a web-link printed on the receipt which asks the customer to take part in your survey.

Following is an outline of the options available for the web-based surveys for each option you may choose:

## **Email Solicited Web-Surveys**

If you are collecting the customer’s email information, we can create a custom email campaign that mirror’s your branding to appear all solicitation is coming from your company. We would then send each of the customer’s this customized email recruiting them to take part in the guest satisfaction survey. The email will include an embedded link that would take them to the survey. The survey would also be branded to mirror your company brand for consistency. They would then complete the survey, and all information would be captured on-line, as well as sent to you by way of an automated email in a PDF format for immediate viewing. Also, we can create an automatic reward for each person completing the survey, by pushing them a special coupon (*i.e. free item, buy 1 get 1 free, ½ off item etc.*) through email for them to print off and take with them.

We would recommend making it an offer you would not mind them re-using, or sharing with friends etc. to drive more business.





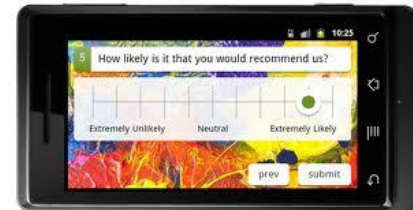
# Web Surveys Cont.

## Cash Receipt Solicited Surveys

As a second option that can be ran independently or collectively with the email-surveys, we can work with you to print a web-address on the back of your cash receipts that your guests can use to log-on and take a survey. This would be the same link that we would use for the email solicited surveys and would work exactly the same.

## Web-Link

Another option that we can provide, is to work with your web-developer to place a link on your website that directs your guests to take part in a survey. This link would take them straight to the survey and would also work like the other options mentioned. The surveys would be completed and then sent to you by automated email in a PDF as well as being available on your on-line dash board along with the other surveys and mystery shop results.



# Competition Shopping/Price Audits

In addition to shopping your own stores or products, BES can also conduct competitive mystery shops.

There are typically several reasons companies chose to do competitive mystery shops. This ranges from understanding how their services and products compare to that of their competitors, what their competitors have to say about them when they know they are in a direct competitive bid, or how their prices compare for similar items.

Most commonly, companies are interested in learning how their services and/or products compare to their direct competitors., allowing them to better understand how their services , products , and pricing is perceived and/or compares that of their competition.

For this approach we recommend shopping your competitors utilizing the exact same criteria and forms as you use for shopping your own locations. This allows you to have a side-by-side comparison of how each area of service compares to your competitors.

When conducting these types of shops we generally recommend that the shoppers are not made aware they are doing a competitive study, but rather just shopping another client of BES. By taking this approach, you eliminate any potential bias that may exist with the shoppers knowing who the client is.

When the data comes in, you can then analyze the data and compare each area of service /product/pricing to determine what opportunities may exist for improvements or changes, as well as what some of the best practices are of your competitors so you can take advantage of these practices and improve your own services.

Whatever your reasons, BES will work with you to customize an application to ensure you are receiving the information you need to make actionable decisions.



# Ethnographic Research/Focus Groups

Ethnographic research is simply taking a deeper look at what drives your customers thinking, their behaviors, and influences their decisions.

This type of in-depth research is recommended when a company is either struggling with growth, they are experiencing service issues that are difficult to correct, or simply trying to introduce new products to the market and want to know if they will be successful before a major investment is made.

Ethnographic mystery shopping involves “living in the shoes” of the customer. Using an online journal, or diary keeping process consumers will share their emotions, behaviors, and decision factors as they visit your place of business , search your website, make phone calls , or try your products. This online journal process is simply an online bulletin board focus group. (*i.e. BBFG*)

This can include a wide range of information gathering such as what they purchased, why they chose to purchase what they did, how they felt about the services they received, their perception of the quality of products etc. and /or how each of these elements contrasts with their visits to your competitors. This can also include their perception of new items you are introducing to the market and how successful these products may be.

This form of market research gives you greater geographic reach and longer, more in-depth transcripts than any other qualitative methodology, and allows you to conduct more research in less time. BBFG’s are highly involved discussions that unfold over extended time frames. Participants love the convenience and clients love the depth of information they receive.

With traditional face-to-face focus groups, participants are limited to specific geographic areas – with BBFG’s, consumers and clients can participate from anywhere around the world. BBFG’s take advantage of threaded ‘Bulletin Board’ technology that is commonly used in online discussion groups. Bulletin Board participants log in at various times and from locations that are convenient to them, answering questions posted by the moderator while reading and responding to the other participants’ comments. All of the discussion is visible onscreen to the client observers in a “virtual backroom”. A BBFG typically takes place over a 3-5 day period – with respondents participating 2-3 times each day.

Projects take on a whole new level of interactivity with BBFG’s. With the ability to embed video and other multimedia with the click of a button, this media allows researchers to tap into the rich world of user-generated content and self-ethnographic activities. Projects can include a vast array of multimedia stimuli that keep participants engaged throughout the study.



# In-Depth Consulting & Service Analysis

## Would You Knowingly Give Your Competitors 15% to 30% of Your Business?

I know that sounds like a silly question; however, from all of my years of experience within this industry I see a lot of companies simply giving away as much as 30% of their revenue to their competitors simply because of unrealized, and un-met expectations from their customers. As an additional service to our mystery shopping programs, we can meet with your team, review the service standards within your stores, and do an in-depth analysis of how your typical customer feels about doing business with your company. From this consultation we can provide you with enough clear direction to increase your sales by as much as 30% within a short period of time.

When it comes to customer service, there are several challenges business's face today. First, is gaining an understanding of what service expectations their customers have. Second, is recognizing those expectations once discovered, and third, how to begin to train their sales staff to consistently meet those expectations. By discovering "What" your customer's expectations are, and training your staff to meet those expectations, you can begin to grow your business. What we have found is that more often than not, when a store provides poor service, it is not typically the fault of the sales staff, but the managers. If your employees are left to their own and do not receive continuous coaching, training and support from your management, they will more than likely service your customers based on their own perceptions rather than catering to your customer's needs.

The key to providing "Outstanding Customer Service" is discovering who your typical customers are, how they would like to be served, and what you can do to "Exceed" their expectations. One of the options is to employ the service of a "Mystery Shopper Company" to help you discover how your typical customers perceive the service they are receiving as well as look for deficiencies that may be present within your stores. There are four primary elements to having a successful shopper program. The first is setting the proper expectations for service, second is creating accountability for the results, third is putting a training program in place to correct issues that are discovered as well as incentives for positive behavior, and fourth which is crucial, is consistency. One of the traps that company's fall into when starting a program is that when the mystery shop reports come in and they review the information, they tend to "React" rather than to "Act" on the information.

The typical reaction is to immediately look for a way of fixing the problem rather than discovering why the problem exists in the first place. When this approach is taken, the problem generally continues to surface and changes are minimal if at all. The solution lies in discovering "Why" the problem exists, and then you can begin to implement the necessary changes to correct the problem.

A great deal of the time, managers simply fall into the routine of daily tasks and overlook the foundation of service that was once in place. Therefore, it is just as important to continuously coach and train your managers on a regular basis as it is your sales staff.



# Reporting Methods

One of the most important aspects of choosing a "Mystery Shopper Company" is determining how that company will be providing you the information once it has been collected, and more importantly, the timeliness of this information.

BES offers one of the most robust and dynamic reporting systems in our industry. As a quick overview of the reporting process, the shoppers enter their reports into the chosen BES on-line reporting system immediately upon visiting your stores. The systems are designed to require the shoppers to answer each of the questions in their entirety, and provide a great deal of commentary; communicating their overall experience aside of the Yes/No answers.

Once the assignments have been completed and submitted, they are then reviewed by our internal quality review team to ensure the shops were done correctly, the information is accurate, and have proper grammar, spelling and good content.

Once the reports are approved, you (*or any number of other managers*) instantly receive a copy of the completed audit reports in a PDF format by email. Additionally, we have a host of other on-line reports available which help you further analyze your data. Following is just an example of benefits of our reporting system:

- Robust yet user-friendly dynamic on-line functions
- Automated email delivery of mystery shop reports in a PDF format to designated management
- Photo's, videos and wave files can be up-loaded and attached to the reports
- Customized email messaging based on the overall score of an individual shop
- Ad-hoc reporting with the ability to drill all the way down to a single location and report
- Ability to export data for further internal analysis
- Results over various periods of time; reporting by question and by category
- Overall YTD analysis by location separated by various channels, levels, or in ascending order
- Monthly graphical executive summary reports detailing what areas of service need addressed
- Customizable email distribution list by restricted access
- Multiple sorting options on both drill down and mystery shop reports
- Ability to order new customized reports and features

## Dynamic Reporting System



## Customized Reports

## Secret Shop Report

For your reporting, you may want to view your report in PDF format.

Report Info

Report ID: 101

Report Name: Secret Shop Report

Report Date: 10/10/2010

Report Time: 10:10:10 AM

Report User: John Doe

Report Location: 10101 Main Street, Suite 100, San Francisco, CA 94101

Report Status: Pending

Report Type: Secret Shop

Report Category: Service Quality

Report Subcategory: Staff Attitude

Report Subcategory: Product Quality

Report Subcategory: Overall Satisfaction

Report Subcategory: Value for Money

Report Subcategory: Overall Experience

Report Subcategory: Overall Satisfaction

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## Upload Pictures or Videos



# Reporting Methods Cont.

**Real-time Graphic Dashboard** – with gauges, charts, executive summaries, trend graphs and so much more. Clients can view their data their way.

**Five-Level, Custom Hierarchies** – Corporate, Division, Region, District, Location (and all combinations thereof) plus custom tiers for unique client needs.

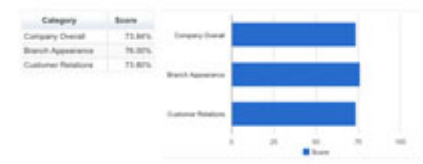
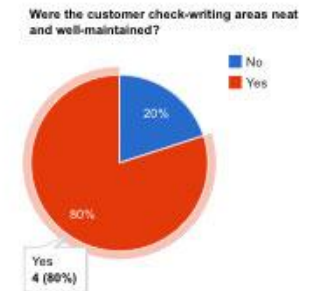
**Drill Down Reporting** – Drill from the corporate level, all the way to individual location reports complete with all attachments (images, audio files and more).

**Advanced Filtering** – Clients can filter by date, date range, shop type, campaign, top and bottom performers and more. They can run detailed, question-by-question analyses, compare data across the entire platform (shops, price audits, digital comment cards, etc.).

**Co-Branded Dashboard** – When the clients log in, they see their logo on every page.

**Data Portability & Flexibility** – within the dashboard, clients may compile pdfs, email reports directly to anyone and export their raw data to Excel so they can manipulate and review their results in-house, any way they want.

**The Bottom Line:** It's all about the client. So BES has deployed a Reporting & Analytics Dashboard with our client's needs foremost in mind.





# Partial List of Clients

- Tommy Hilfiger
- Banner Mattress
- Provident Bank
- Microsoft
- Dupont
- Capezio
- Pier 39
- Capital Motors
- Blitz USA
- Fox Rent A Car
- AT&T Wireless Services
- BJ Express Marts
- John's Incredible Pizza Restaurants
- Corner Stores
- GE Wireless
- Cellular One Wireless
- Alfa Smart Parks (theme parks)
- Banner Mattress Galleries
- Payless Shoes
- Hair Club For Men & Women
- Omaha Steak Houses
- KnechtsAuto
- Century Bank
- YMCA
- ICON
- Hardees
- Pyramid Brewery & Restaurants
- Navarro Pharmacies
- AMDM International Products
- Big Lots
- Smith's Bakeries
- Primeco PCS
- Crown Motors
- Enovo Financial
- Lifetime Products
- US Cellular
- Metro PCS
- Wells Fargo Bank
- Ralph's Credit Union
- La-Z-Boy Furniture Galleries
- Simmons Mattress Galleries
- Pacific Monarch Resorts
- Milano Restaurant Group
- Linder's Furniture Stores
- World Floor Covering Association
- National Home Furnishings Association
- La Z Boy Stores
- Car Wash Of America
- On The Border Restaurants
- California Restaurant Association
- Pacific Bell Wireless
- Southern Auto Supply
- ITZ Pizza USA
- Western Home Furnishings
- Celebrity Resorts
- Nichols Restaurant
- Destination Shuttle Services
- Zoom Eyewear
- Walt Disney World
- Honda, Toyota, Mercedes, Lexus, BMW
- Dynaco Restaurant Group
- Jerome's Furnishings
- Golden West Casinos
- A&M Carpet
- Advanced Parking
- Yakety Yak Wireless
- Sprint PCS
- PCS Mobile Solutions
- Spencer's Restaurants
- Amana Wireless
- California Pizza Kitchen
- Capezio
- Alley Indoor Entertainment
- Ventura's Restaurants
- Nadeau
- Los Hermanos Restaurants
- Catalina Hotel & Restaurants
- Avalon Bay Group
- Angelo's Spaghetti & Pizza
- Trump ICON
- Jacob's Entertainment & Casino's
- C28 Christian Stores
- La Curacao
- Andy On Call
- Midway Car Rentals
- Rip Curl
- Talon Energy Drinks



# Benefits of Partnering With BES

- **Competitive Rates**
- **National Experience Since 1996**
- **Prompt, Friendly & Personalized Service**
- **Individual Consultation**
- **Experience in Most Industries**
- **Service & Performance Guarantees**
- **Dedicated Account Managers**
- **One of The Largest Mystery Shopper Databases in The Industry**
- **Call Center Services**
- **Dynamic, On-line, 24 hour Reporting**
- **Graphical Analysis of Data & Executive Summary Reports**



# Why Choose BES

- **BES Will Save You Time**
- **BES Will Save You Money**
- **BES Will Save You Sanity**
- **BES Offers Security**
- **BES Believes In Being Easy To Work With**



# BES Will Save You Time

BES has been serving the mystery shopping industry on a national basis since 1996 and serves a variety of industries including manufacturing.

Because of this experience, we have a clear understanding of what is generally important with today's consumers and how to measure the information in the most effective ways. The result of our experience, is actionable data that you can rely on as well as incorporate into your daily service training.

Another benefit of our experience is that you will save a great deal of time by not having to go through the same learning curve you may have with another less experienced provider.



# BES Will Save You Money

Another element that must be considered is the “actual cost” of a program beyond the visible and measurable costs.

Too often companies will send out for an RFP and simply look at the bottom line, the setup fees, and the per-shop costs and fail to consider the high costs a vendor with little experience may cost them in the long run.

When selecting a vendor, it is very important to consider more than just the bottom line pricing. The costs of restructuring an entire program can take a great deal of time, energy and unexpected costs.

There have been many occasions when companies have approached us with a request for information indicating that they wish to change their current provider because they are not getting useful information.

After reviewing their forms and how they have used the program, it is often clear that their provider never took the time to make sure they were auditing for the right items in the first place, making the information of little value.



# BES Will Save You Sanity

With all of the “time saving” technology available to us today we are able to work faster and get more things accomplished in a single day than ever before. However, I believe everyone has come to a realization that all of the time saving devices we have incorporated into our daily lives do not come without a price tag.

Being able to work at a faster pace can be a double edged sword, as it also requires us to accomplish more and more each day, and as a result we are left with less time.

Any area of our lives that can be either automated or simplified helps to restore some of the sanity that is lost while trying to keep pace.

Our company has developed leading edge technology making our reporting fast and efficient. We have our own in-house results database system that offers solutions that BES clients love; such as on-line reporting, the ability to email selected results to specific people, and dynamic graphical analysis on the fly.

In addition to our reporting capabilities, we also ensure our customers are receiving their data in the fastest and most efficient manner available, and that the data they receive is accurate, actionable and relative.



# BES Offers Security

One of the elements that are always a concern is having the security of knowing the data you are receiving is not only actionable, but accurate. We understand the importance of accurate information and that it must be as reliable and detailed as possible, as you are making daily decisions based on the information we provide. Therefore, we have a solid process in place to monitor each and every report that is received in our office.

Before a shop is scheduled, the shopper's ratings, history and profile are checked to make sure they are qualified and/or eligible for the assignment. If their ratings are high enough and they qualify for the assignment they then receive the training information they need from our account managers. After the shops are conducted and the reports are received, they are reviewed for accuracy, grammar, spelling, and content before they are sent to our clients.

If a shop is missing detail or the commentary raises additional questions that need answered, the account managers will contact the shoppers to get the additional details. If for any reason the shop is done incorrectly, or there are inaccuracies, the shops are rejected and rescheduled to a new shopper at BES's expense. Because of the quality control we have in Place, you can have the security of knowing the information you are receiving is reliable.



# BES Is Easy To Work With

In addition to choosing a company that is fast, efficient and reliable, it is also important to enjoy communicating with the company you have partnered with.

We believe being available and having open communication is vital to the continued success of any relationship. With this in mind, our staff is all cross trained on each account so that someone at all times is available, and familiar with the status of your account.

We also believe in having a fun, friendly and efficient staff in place so that if a need arises, you will get the answers you need, and will have a pleasant experience each time you call our office.





# Presidents Background

## **Charles Stiles, Founder & President Business Evaluation Services**

Charles comes from a background in retail; owning a number of retail gift stores in national malls for over 8 years. Quickly realizing the only way to really differentiate his stores and stand out from the competition was to develop a consistent service culture and create a process for measuring the success of the training that was implemented. Through this process in 1996, Business Evaluation Services was created. Today, BES is a National mystery shopper company with over 16 years' experience, serving a variety of industries.

BES has always had the goal and mission of developing partnerships with each and every customer they serve, ensuring the data they receive is accurate, actionable and reflective, with the overall goal of providing its customer with the information they need to drive sales and develop a strong service culture within their organizations.

BES has been an active member of the Mystery Shopper Providers Association (MSPA) since 2001. Currently Charles sits on the board of directors of the MSPA serving as a director for the membership benefits committee. Additionally, BES supports a number of MSPA initiatives including the Gold and Silver Certification courses for shopper training.

BES currently has two offices; the main office is located in Bakersfield California, with the second office located on the Central Coast in Pismo Beach.



# Reasons For Mystery Shopping

- Creating National consistency by monitoring service standards and best practices.
- Being certain your services and products remain fluid, up-to-date with current trends, and are always improving.
- Ensuring your associates are delivering the “Ideal Customer Experience” and meeting your non-negotiable standards for service.
- Growing competition requires companies to be proactive in ensuring they are providing the best possible service as consumers begin to have more choices.
- As the economy slows, and as competition increases, retailers in general begin to add programs such as mystery shopper services rather than cutting them from their budget. The reason for this is that as buying slows; it is harder for companies to earn each dollar and to remain profitable. Therefore, it is imperative that they fully understand their customer’s needs in order to be more competitive. Without measuring and monitoring this you will never know; you will be simply guessing.
- As your competitors are striving to offer better service, and utilizing services such as mystery shopper programs, it is critical that you remain ahead of the curve and actually offer the service your customers expect rather than what you believe you are providing. If you are not using a similar service and are not proactive in implementing changes to “Exceed Your Customers Expectations” you will be left behind.
- Understanding the customers perspective helps to create better marketing strategies and gear products and promotions around the consumers’ actual needs rather than just your perception of their needs.
- The theme song from “Cheers” says it best. “You want to go where everybody knows your name”. Simply put, everyone wants to be recognized and to be made to feel valuable, welcomed, and wanted. If your customers are not feeling this, they will spend their money where they will.
- Not only is it important to monitor and measure your own employees Customer Service and Sales Skills, but it is equally important to periodically shop your competitors. This will help you stay current with the consumer’s perspective of their service and sales skills as well as provide you with the information you need to understand their strengths and weaknesses.



# Developing A Service Culture

When considering implementing a customer service program, you have to first determine what level of impact you wish to make and how long you wish the changes to remain. One of the vital keys to success and having a lasting impact is making whatever changes you implement part of your “Service Culture” rather than just another “Program”. What I mean by just another program, is that the tendency of most companies is to constantly try new programs and change them every three or four months. The problem with this strategy is that employees get conditioned to the “new program of the month” and do not buy into them. They see it as just something that will go away in three or four months and then there will be something new to replace it.

The key to change and lasting results is consistency and accountability. You have to make firm decisions on what you want your service culture to look like, and then create a plan to make it a permanent part of your non-negotiable standards for doing business. Your employees have to know that it is not just another program of the month and is simply something that is going to go away.

What we have discovered over the years is that most companies will spend a great deal of money advertising each month to bring new customer’s through the door and very little on quality assurance programs to ensure that when new sales leads are generated, the employees are making the most out of every sales opportunity by offering the customers the best possible experience. The end result is lower sales and higher costs per-lead.

By incorporating a service program and making it part of your “Service Culture” through consistency and accountability, you will ensure a higher return on your advertising investment. Another element to having a successful program is to make sure you have the right expectations, and that you are auditing for the right things, as well as implementing the necessary training to correct the areas that are determined to be non-compliant with your company standards and procedures.

As an additional approach, you may want to consider shopping your competition to see how your stores overall level of service compare to that of your primary competitors. By doing competitive shops you will learn how your employees compare to your competitors through the eyes of your customers. This can be an invaluable service by helping you to see opportunities that could give you a competitive edge by adjusting your service environment to provide the “Ideal Customer Experience” on a more consistent basis.



Service culture  
is not for retail  
only. It's for you.



# Using Mystery Shopping Effectively

The term “Mystery Shopper” brings many different ideas and thoughts to mind. For some, they think of it as a way of spying on their employees, or a way of catching them at their worst. For others it is a way of simply checking up on them when the boss is not around.

There are many reasons to utilize a shopper service. However, the most effective and “Profitable” way to use a mystery shopping service, is to use it for the purpose of understating how your typical customers are being treated and the level of service your employees are providing them.

By utilizing a mystery shopper program in this manner, you can begin to use it as a tool to train your sales staff to better serve your customer’s needs. By taking this approach, you may also discover other potential areas that may need to be improved upon such as your employee’s current sales techniques or the customer’s perception of your employee’s level of product knowledge.

By discovering areas of deficiency through your customer’s eyes, you then have the knowledge you need to equip your staff with the necessary tools to provide the level of service your customers expect. After all, if you are not servicing your customers the way they believe you should, your competitor just might be.



# Using Mystery Shopping Effectively

During the past few years we have discovered each company's individual approach to customer service, sales techniques and employee expectations are unique to their company regardless of the similarities within their industry.

Therefore, we encourage all new customers to first detail their service expectations and decide on what areas of their service culture is non-negotiable. By doing this you are able to objectively measure how your employees are meeting those standards. As the program progresses and your service standards or best practices evolve it is to periodically review your forms to make sure they reflect your current expectations.

One of the other obstacles we have found for many companies that are considering the use of a mystery shopper program start with the mindset of not really knowing what they want to accomplish or discover. The natural thought is to say, "Let's try the program for a couple months and see what happens". The problem with this approach is that there is no clear objective. Therefore, it is difficult to see the actual benefit. When you take the time to clearly identify your goals and purposes for using a mystery shopper service, you will be able to effectively determine the benefits of the service by the data that is received.

What we recommend is that you first determine your goals, clearly communicate them to the service provider and then commit to a minimum of six months to a year of consecutive monthly shops. By doing this, you will have a more realistic look at the current levels of service being offered within your stores as well as the information you will need to train and coach your employees to "Exceeding" your customer's expectations.



# Company Information

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