

Module Three:

Acceptance and preparation for the visit

Working with mystery shopping agencies is easy as long as you remain professional, responsible and deliver your contractual obligations. This next section discusses how to get assignments and the kind of assignments available.

How to Get Assignments

- Register with the mystery shopping agency you want to work with.
- Monitor available assignments on their job posting boards.
- Be responsive and prompt when accepting an assignment.
- Deliver outstanding work every time.
- Live by the Code of Ethics.
- Be flexible and expand your geographic horizons.

Understand the Assignment

Before you accept an assignment, be clear about:

- The location of client facility.
- Acceptable time windows to complete your assignment.
- Access to the agency's reporting facilities.
- Deadlines
- Fees
- Expenses you might incur
- Any purchase instructions
- Special requirements or tools that you may need to perform your assignment correctly.

Only accept assignments that work for you.

What kinds of Mystery Shops do mystery shopping agencies carry out?

There are many kinds of mystery shop visits.

- Traditional visits to stores, restaurants, banks and all kinds of other locations.
- Complete evaluations of service, cleanliness, quality sales skills and other factors.

- Pricing audits - noting prices of items.
- Reveal mystery shops, where if the employee meets certain criteria after the shopper delivers a specific scenario, the shopper identifies his/herself and presents an award or prize.
- Telephone mystery shops, where sales, service and other elements are evaluated via a phone call.
- Audio / video shops, where the whole interaction with the member of staff is recorded by the mystery shopper using specialised equipment supplied by the mystery shopping agency. Please note that some states and countries have laws governing the use of recording devices, so be aware of these laws.
- Internet service mystery shopping, where we may make online purchase or make online inquiries.
- Digital photo mystery shops, taking photos of products, displays, signs etc.

Best Practices: Be Prepared!

Mystery shopping agencies want mystery shoppers who adequately prepare for their mystery shopping assignments.

- You must ensure that you understand each mystery shopping requirement by reading guidelines and evaluation forms BEFORE you perform the mystery shopping visits.
- Review all questions on evaluation forms carefully again before entering the facility, so that you don't forget to make important observations.
- Plan your day so the shop is given adequate time and attention.
- Verify location and hours of operation of business you are mystery shopping.
- Bring all necessary tools and equipment with you.
- Find out what appropriate attire might be and dress like a normal customer.
- If you have any questions ASK the mystery shopping agency before you set out to do the work!

READ your Guidelines!

As soon as you are assigned a mystery shop, make sure you print and read all assignment guidelines. E.g. don't wait until the day that you are scheduled to complete a dinner shop, to find out that you were supposed to make a reservation 5 days in advance.

Some companies change their guidelines EVERY month. Even if you have completed the same assignment before, print out a CURRENT copy of the guidelines every single time!

Re-read your guidelines again right before you leave to do your mystery shopping to refresh your memory on the specific mystery shopping requirements, etc.

BE CAREFUL because as a mystery shopper, you might complete mystery shops for different agencies and it is easy to confuse which companies have which requirements.

What Equipment is required to do mystery shopping?

A professional mystery shopper will have access to the following:

- Access to a computer with Internet connection.
- Access to an email account on daily basis.
- Ability to get to and from assignments, normally by car in good working condition or by public transportation.
- Telephone and answering machine
- A mobile phone.

While not required, mystery shoppers might find the following equipment handy as well: stopwatch/digital watch, scanner, fax, PDA, digital camera, digital or micro recorder.

Confidentiality

Most mystery shopping agencies require that you sign a confidentiality agreement with them because you will have access to very confidential and proprietary information that would not be available to the general public. It is important to take this oath of confidentiality seriously. Violating confidentiality agreements that you sign with individual mystery shopping agencies violates the Code of Ethics agreement that you signed on this test and places you in jeopardy of losing your MSPA certification. You may also be prosecutable under the laws of your state or country.

What kind of information is considered confidential?

- The name of the client and the details of its locations.
- The questions on the mystery shop evaluation form or survey.
- The instructions or guidelines given to you about the assignment.
- The amount of pay, reimbursement or compensation you are receiving for conducting the mystery shopping.

- The name of the mystery shopping company in conjunction with the shops you perform.
- The results of the mystery shopping you perform, in summary; or anything or any detail to do with any assignment

In short, anything to do with the assignment, the work, the mystery shopping agency, the mystery shopping clients, is confidential and must not be revealed in any way to anyone other than the mystery shopping agency, with whom you are contracted for the assignment.

Skills Required to do Mystery Shopping

Mystery shoppers should possess many skills in order to be good at their profession! These include being: Observant, reliable, detail oriented, thorough, organized, flexible, honest, responsive, accurate, a good writer, able to remember details, and computer proficient including: Internet, email, word processing.

Your Mystery Shopping Business.

The rules and legislation regarding setting up and running a mystery shopping business, or any other business, will vary from state to state and country to country across Europe. You must take expert professional advice on how your own business is set up and run as a legal entity where you are. You may need to contact both an accountant or auditor, and a lawyer. It is your responsibility to ensure that you do this properly and that you comply with all commercial and other legislation, and that you pay all appropriate taxes in your location.

Some states and countries allow you to trade as an independent contractor while others expect you to act effectively as an employee of the mystery shopping agency. And there are other possibilities too. You must find out for yourself the best way to do this where you are. It is your responsibility.

Is this important? Yes it is. It affects how you pay your taxes, social security and medicare payments and benefits, how you file your taxes, your eligibility for benefits, your general tax responsibilities, and your commercial relationship with mystery shopping agencies.

Almost invariably, if it is available to you in your location, your best option is to be able to trade as an independent business contracted to the Mystery shopping agencies that will provide you with mystery shopping assignments.

Whichever way your mystery shopping business is set up and trading mystery shopping agencies will hire you to obtain useful and unbiased information from a reliable professional observer.