

## Module Four:

### The Mystery Shopping Visit

#### *Remaining Anonymous*

A fundamental requirement in most mystery shops is to be anonymous, being able to go into the location and act like a normal customer without being identified as a shopper.

#### *How do you remain anonymous?*

- Dress like normal customers in that location.
- Don't ask lots of questions.
- Don't be "too knowledgeable".
- Don't stare at name tags.
- Don't be obvious about taking notes (never use a clipboard, notebook, or the questionnaire at the point of mystery shop etc.).
- Be confident.
- If necessary and if agreed with your mystery shopping agency, make quick notes as entries on your check book or PDA. Call your home phone and leave a message on your answering machine. Use your "shopping list" to mark down names, time or other quick notes. Put your mobile phone to your ear and pretend you are writing down directions or a phone number while you write notes.
- Don't be obvious about timing. Normal customers do not look at their watches furtively every 20 seconds.
- Be familiar with your scenario. Practice it at home so that you are comfortable with it.
- Be prepared for any questions that may come up (i.e., if you are doing a bridal shop, know when your wedding date will be, and what colour your bridesmaids are wearing).
- Be prepared!

### **Mystery shopping with a companion?**

Planning on taking companions with you on your shop?

- First: be sure it is OK with the mystery shopping agency.
- There are some shops where taking children is simply NOT acceptable.
- You should never take ANYONE with you who would be a distraction from the job you were hired to complete.

If you do get approval from the Mystery Shopping agency to take along a companion, it is OK to share information about the shop requirements with your companion to enable them to help with the shop (when appropriate) to meet the requirements of the shop (e.g., not ordering the same items in a restaurant, allowing employees to do their jobs, etc). Companions must understand the need for confidentiality (i.e., they can't discuss the shop or results with anyone). They will be bound by the terms of your confidentiality agreement.

### **Best Practices: What if the unexpected happens?**

If something goes wrong - what do you do?

- ***What if someone accuses you of being a mystery shopper?***

It is generally a good idea to act confused or surprised if you are asked if you are a shopper. Simply say, "I don't understand your question," can I just buy the -----, and carry on with your scenario if at all possible. Be sure to let the mystery shopping agency know immediately what has happened.

- ***What if the store you are about to mystery shop has closed?***

If the store is closed, you should contact the mystery shopping agency, after double checking that you are the correct address first.

- ***What if the bank teller you shop turns out to be your next door neighbour?***

If your neighbour turns out to be the bank teller, then complete the transaction and ask the mystery shopping agency how to proceed. Remember, if you know beforehand that your neighbour works there, ask the mystery shopping agency to get another mystery shopper to do the assignment.

**Best Practices: Be responsive and responsible**

Being responsive and responsible are two key factors in having a successful relationship with mystery shopping agencies:

- Submit work on time.
- If asked a question, respond immediately.
- Always check email and voice mail for 24 to 48 hours after completing an assignment in case the agency has questions for you.
- If asked about doing an assignment, confirm or decline it immediately.
- Submit accurate, timely and excellent reports.
- Call immediately if you have a problem or issue in completing a mystery shop.