

10 Tips using Mystery Shopping for In-store Customer Experience



Mystery shopping is very successfully used as a methodology to assess customers' experience.

10 Tips when using Mystery Shoppers

Here are 10 tips for using mystery shopping effectively.

Briefing team of shoppers

1. Provide a detailed documented brief of the task at hand so that all the mystery shoppers have a reference point of what needs to be done, how they should perform the task and relevant guidelines.

2. Include any visuals (photos or pictorials) to illustrate the journey they need to undertake. Help the shoppers visualize the journey that they must follow so that they all follow a similar flow, unless this is not part of the scope. In some cases, the lack of structure will provide insight into how consumers will actually navigate their shopping. This is often used in conjunction with eye-tracking to observe navigation approaches.
3. Provide the team with any props or materials the shoppers may need. For instance, cash for an actual purchase, samples, documents, etc. Let's say they need to select a matching shirt for specific trousers – they would either need the trousers or a picture to take with.
4. Enable the mystery shoppers with the full context of what they are required to do (this can be conveyed in a visual way). If you're for instance assessing a car buying experience, the shopper will need a very clear idea beforehand of all the exact steps that need to be taken (e.g. up until a test drive). They might not be familiar with the products, in which case you would show them images and they could also take the information with them (physically or stored digitally in a way that they can access easily during the shopping experience). Similarly, let's say you want them to simulate the shopping experience of someone needing to decorate a room: everyone must have the same picture of what the room looks like, so that when they start browsing for office furniture, they have the dimensions of the environment they want to decorate. This ensures that everybody will be following almost the same 'script' of the shopping journey.
5. Brief all the participating mystery shoppers at the same time with the same message, to ensure all information is shared consistently.
6. Role-play so that all the mystery shoppers can visually understand what is required of them.
7. Be very clear on what the required task involves, including if the experience is to extend across other channels (apart from in-store encounters).
8. When it would be suitable to not dictate the steps in the process, such as an online experience, a more open structure (or none at all) will be used. This will provide insight into the diverging ways the shoppers browse and how they eventually get to the information.

Profile requirements for shoppers

9. Ensure your mystery shoppers have the appropriate training. As mystery shopping requires subtler emotional interpretation, it can be unproductive to use mystery shoppers who are used to quantitative mystery shopping experiences (with a very structured format, typically around a product/placement/merchandising). They would not necessarily know how to translate the engagement, and so you need to make sure that you have the right individuals.

10. Choose your mystery shoppers according to their exposure and experience, they must be able to relate to the product. For example, mystery shopping for a very exclusive high-end jewellery brand: it would be tricky if the mystery shopper never wears jewellery or does not have any appreciation or concept of the value of jewellery (and prefers flea market or costume jewellery). Should that mystery shopper be sent to a Cartier or Bulgari store to “buy” the products, they will have no understanding of the space nor the dynamics. If this is the case, you will need to be sure that they have the ability to act out the role with credibility, by training or exposing them to similar experiences or products.

Read More: [Customer Experience and Mystery Shopping](#)

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