

## The role of mystery shopping in the customer experience space



Mystery shopping originated from the need to observe and [measure customer service](#), product quality and general environments for clients. The assessments range from simple questionnaires to complete audio and video recordings. In neuro-marketing, the assessments explore the subconscious responses in the experience, where biometrics provide very useful data on unfiltered subconscious responses. Today mystery shopping is very successfully used as a methodology to assess customers' experience.

### Customer Experience and Mystery Shopping

We currently use mystery shopping to assess the consistency of the end-to-end experience with a

brand, through the multiple channels consumers use to interact with brands.

From a [customer experience](#) (CX) perspective, an emotional experience is an important measure in addition to other data gathered, and therefore, observation becomes one of the key factors.

Using a CX framework for assessments, elements such as expectations of what will happen at certain touchpoints, artefacts (all forms of communication) and the actual interaction are included. The mystery shoppers would approach a task (buying a product or acquiring a service) as a typical consumer would.

The importance of cross-channel assessments cannot be over-emphasised. This means that the “shopper’s” navigation to find the brand/product online, any telephonic contact, such as calling a call centre, email or web query, for example falls into the realm of customer experience reviews. This is of course in addition to in-store experiences.

Read More: [10 Tips for using mystery shopping for in-store customer experience](#)

Typically the channel review would provide an end-to-end experience and will be presented within a [journey mapping framework](#) . Clients would therefore be able to see the journey through the experience of the various shoppers and channels used. This enables brands to see where critical touch points fail, or where gaps or inconsistencies are.

### **Advantages of mystery shopping in customer experience**

The biggest advantage is that the shoppers’ observations are reported through multiple channels through a designed framework. Using customers may produce an even better, richer and more accurate result, but the process may be more complex and costly. Customers may not be able to recall all experiences at critical touch points, and they’re not always trained to articulate the detailed reviews. Typically, customers’ feedback is used to augment findings of the experience reviews. This data is often accessed through VOC (voice of the customer) programmes, social

media, or [customer service analytics](#).

This framework of the customers' journey (obtained from the mystery shoppers), substantiated by "real" customers' feedback, provide a rich canvas to clients for addressing service failures or need for innovation.

The benefit of the mystery shopping process is a true as-is experience, because the client's staff wouldn't know if it's a customer or not. These authentic insights help clients design training and bring about behavioural change.

### **Disadvantages of mystery shopping in customer experience**

An obvious disadvantage is the element of being "fake", because the tasks are staged. An inexperienced researcher could come across as not being authentic or sincere when they don't act out the role with ease or feels uncomfortable, or subtly reveal they have no intention to buy. People pick up on small nuances and shoppers may not be taken seriously.

### **Choosing the right mystery shoppers**

### **Customer experience evangelists**

Ideally CX mystery shoppers should have a thorough understanding of custom experience elements, elevated **observation** skills and a well-developed **EQ**. This will increase the ability to extract the information required and the identify the gaps and opportunities for the client. Due to the qualitative approach, more in-depth interpretation of the interaction to assess typical CX drivers, such as empathy is essential

- Do they *hear* what your problem is?
- Do they provide suitable responses?
- Are they able to offer a solution?
- Does it feel like the interaction is credible?
- Do you trust the information?
- What is the end result – would you buy the product?)

If a very structured format is used in the brief, the skill level of mystery shoppers is different to a more unstructured (qualitative) approach. In these cases, all that is required is a person who can report on factual elements.

However, if the mystery shopping is assessing customer experience, the researchers clearly need a different set of skills. An understanding of the [fundamentals of customer experience](#) is important, as well as well-developed observation skills and the ability to identify and articulate the emotions experienced. Empathy is also assessed through the tasks designed to measure the ability to respond to queries. Here, the shoppers have to **study and observe the engagement and behaviour**, e.g. do they really understand my problem and can they solve it?

Furthermore, the researchers should have a similar view what acceptable levels of customer experience should be. A researcher who typically avoids conflict or is not an evangelist for customer experience, may report assessments of experience very differently to someone who has a highly developed customer-centricity.

### **Understanding or previous exposure to the category, product**

A very important part of a more qualitative assessment, is the choice individuals that are

- mature enough for that type of product or services
  - either trained in the process and product, or
  - very skilled interviewers of actual customers.
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You have to brief them in a way that fully equips them with all the content they require. Let's take an example of a paint shop: you have to assign them a very specific scenario. It is very important that the mystery shopper must at some point have had some exposure at some point, to buying paint for him or her to do their job well.

When emulating an interaction in the luxury car market environment, it will be impossible for a mystery shopper who has never owned a car to *act* authentically interested. Arriving at a dealership of luxury brand in small, volume-based vehicle may not convince staff of the *bona fides*. That's not to say that that dealership shouldn't be handling every visitor as a potential buyer because people often dress down; however, for the shopper to be credible, they must be incredibly well-versed in the required role.

Another example: if a mystery shopper needs to apply for a pre-authorization for a medical procedure in hospital, they should have a very good picture of what they will be doing, what they present in the scenario, to credibly run with it. Otherwise people pick up it's not real.

### **Biggest challenges in mystery shopping**

The biggest challenge when reviewing customer experience through mystery shopping, is the team's ability to accurately and consistently review the actual experience. They also need to feel comfortable to "act" authentically with highly developed curiosity and observation.

The other challenge using this approach, is the client response to the data. It is not uncommon that staff have been fired as a result of mystery shopping. Prior contracting with a client is therefore essential to stipulate the objectives, intention and outcomes. Data in the form of written material, voice or audio visual material, should not be used as a punitive measure to performance manage staff. The intention needs to be clearly articulated and understood, to avoid a negative impact on staff morale, breaking trust and learning environments.

## Consumer Psychology Lab

Consumer Psychology Lab

<http://www.consumerlab.co.za>

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At the Consumer Psychology Lab we have a [team of research psychologists](#) who will are trained in observation and probing, both essential in extracting experience insights. It is much more challenging to understand the mindset of a customer by relying on after-the-fact self-reporting. Using mystery shopping to assess customer experience along the journey, provides a far more direct “as-is”, through-the-process experience assessment.