

Introduction

Local authorities provide a range of customer services, but unlike private sector suppliers, residents are not normally in the position of being able to choose an alternative provider. However, poor levels of service can still damage customer satisfaction and anyone who has had a bad experience will often tell others about it, thereby spreading negative perceptions. Using mystery shopping to monitor satisfaction can provide evidence that the council is engaging with service users and can demonstrate how engagement can make a difference in practice.

What is mystery shopping?

The terms 'mystery shopping' and 'mystery customer research' refer to the same activity and are defined by the Market Research Society as follows:

“The use of individuals trained to experience and measure any customer service process, by acting as potential customers and in some way reporting back on their experiences in a detailed and objective way”.

Mystery shopping is different from customer satisfaction surveys in that it explores the actual customer experience at a snapshot in time (rather asking customers for their views retrospectively) and records specific details of that particular experience. As such, it can be a very powerful tool for service managers and help to highlight clear action points for improving service delivery.

The table below provides a summary of what mystery shopping is as well as highlighting what it isn't:

Mystery shopping is...	Mystery shopping <u>isn't</u> ...
<ul style="list-style-type: none"> • a method for exploring everyday experiences • one person's view at a snapshot in time • carried out in a variety of ways (in person, by telephone, by letter/email, by surfing the web) • a way of identifying strengths and weaknesses in dealing with customers • a method of measuring your performance against set customer service standards • a useful aid for identifying training needs 	<ul style="list-style-type: none"> • a method for testing exceptional circumstances • a completely objective assessment of customer service - some subjective opinion is always involved (but the aim should be to make it as factual as possible) • a replacement for customer satisfaction research (but it is a useful complement to it)

How does it work in practice?

Mystery shoppers contact the council either face-to-face, via telephone, in writing or via email in order to experience the service through the eyes of customers. The 'shoppers' test out genuine everyday scenarios and/or measure performance against set quality standards, for example, was the telephone answered within five rings? Simple tests of the speed and content of the initial response are sometimes referred to as 'speed and greet' checks. Shoppers must always be fully briefed on the scenarios they are asked to test and have sufficient knowledge of the area and/or service involved to be credible.



Key principles of mystery shopping

According to the Market Research Society, the validity of a mystery shopping exercise depends upon the scenarios involved being relevant, credible, practical, safe and objective.

Relevant

- do the scenarios test what staff have actually been trained to do?
- is performance being measured against specific customer service standards?

Credible

- are the scenarios realistic and convincing, not too slick or over-rehearsed?
- do the 'shoppers' match the profile of customers as far as possible?

Practical

- are the scenarios relatively brief and straightforward, not unduly complex?
- are the scenarios simple enough to ensure accurate recording after the event?

Safe

- have steps been taken to ensure that 'shoppers' are not put in situations which compromise their personal safety?
- would you be prepared to do what you are asking the 'shoppers' to do?

❗ further information on safety can be found in the 'Researcher safety' guideline.

Objective

- is the primary focus is on collecting factual information on observable behaviours (to ensure consistency) rather than how the mystery shopper feels?
- are shoppers being asked specific questions about what happened at the point of contact?

❗ some subjective ratings and verbatim comments may be useful when interpreting the results.

Ethical issues

As with all research it is also important to ensure that mystery shopping is undertaken in an ethical manner. This means that:

- staff must be informed that mystery shopping may take place to monitor service delivery and how it will work
- staff must be made aware of the aims and objectives of the project to reassure them of its purpose
- members of staff must not be identified and should remain anonymous in any reporting
- the findings of a mystery shopping exercise must not be used as the basis for any disciplinary action

It is also recommended that trade unions are consulted before any mystery shopping is undertaken and that there is transparency in terms of what the shopping will cover, how 'shoppers' are recruited and trained, and what the council will do with the results.

❗ further information on ethical issues can be found in the 'Ethical issues in research' guideline.

Mystery Shopping

a 'how to...' guide

Who should carry out mystery shopping?

A large number of market research agencies offer professional mystery shopping services. For example:

C&R Associates have experience of undertaking mystery shopping for local authorities using professional mystery shoppers using a variety of methods including face to face, phone calls, emails, letters and web shops to get an all-round picture of service provision. Visit www.candrassociates.co.uk for more information.

The Market Research Society's Research Buyer's Guide (www.rbg.org.uk) provides details of organisations who undertake mystery shopping.

As an alternative to being contracted out to an external agency, mystery shopping could be conducted in-house or via a reciprocal arrangement with a neighbouring local authority. However, there is a risk that internal shoppers may be known and it is important to ensure that the turnover is adequate to avoid them becoming too practised or recognisable. The time taken to recruit and train suitable 'shoppers' and report on the findings is also worth considering, as is the perceived impartiality of external assessment.

It is also possible for mystery shopping to be undertaken by local people. Once again, however, the time and resources necessary for their recruitment and training would need to be carefully considered.

Further sources of information on mystery shopping

- Market Research Society (2011) [Guidelines on mystery customer research](#)

What next?

If you would like to know more about this topic please get in touch:

The Council's Research and Intelligence Team		01481 221000 consultation@kirklees.gov.uk
---	---	--