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on managing  
the customer  
contact center**

# Customer Service

## NEWSLETTER

### Service Metrics

## Taking the mystery out of mystery shoppers

The mystery shopper — someone who is contracted to call a customer service help desk, dine at a restaurant, or shop at a store and then report back on the experience — has long been used as a way to monitor customer service, especially in retail operations, but often for business-to-business companies as well. It's a way to make sure that your customer service employees are treating customers the way they are supposed to be treating customers. Plus, theoretically, if your employees know that you are using mystery shoppers, then they will treat all customers well, right?

In fact, the concept is so simple, a lot of companies will try to do it themselves — sending a bank manager at one branch to “shop” the branch in the next town, for example, or having a supervisor phone a call center with a made-up product problem to see how it is handled.

### Identifying the right behaviors

What can a mystery shopping company do for you? According to Mickie Albert Caracatsanis, vice president of Satisfaction Services Inc., based in Fort Lauderdale, FL, what a mystery shopping company — or a quality and service evaluation company, as she prefers to call it — will do is “sit down with a client and figure out what their protocol is,

what their service goals are as a concept, whether they are a consumer or a business-to-business company. We determine what they want to accomplish within their service interactions and make sure it's happening by measuring and monitoring it as often as they will allow us.”

Satisfaction Services has templates for a variety of types of customer interactions, including call center contacts. It can also develop an evaluation from customer service training documents and other materials. The evaluation has two basic parts. The first is a series of yes or no questions that takes the evaluator through all of the steps of the contact. A point value is attached to each of the questions, so that points

are totaled and tracked or compared from one mystery shopper visit to the next. Questions related to a phone contact, for instance, might include:

*Was the telephone answered promptly and professionally?*

*Was the telephone answered in a friendly and enthusiastic manner?*

*Were all of your questions answered accurately?*

In addition to the yes/no questions, says Caracatsanis, there is also a summary section to the evaluation reports that provides “a step-by-step narration stating what happened to that evaluator either from the time they dialed the phone number to the time they ended the conversation and hung up or from the time they entered a location to the time they left it.”

### Tying behaviors to rewards

For a call center, Caracatsanis says, an evaluation might look at the

number of rings before the phone is answered, the quality of the initial greeting, whether the rep sounded cheerful or enthusiastic, and whether the rep was knowledgeable. Did the rep express a genuine

interest in the evaluator's questions and needs? If the evaluator was put on hold, why were you put on hold and for how long? If the evaluator was transferred, was the person to whom he was transferred able to answer his question or resolve his issue? If a follow-up call was required, how prompt was the follow-up?

Caracatsanis says that most companies contract for regular mystery

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***Mystery shopping, this vendor says, will give a company a more realistic picture of how the average service employee performs than will customer surveys or call monitoring.***

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shopper evaluations — on a weekly or monthly basis — and that the evaluation forms can be revised and refocused at any time, to reflect changes in a company's customer service protocol or simply to put more emphasis on some service aspect. Regular reports, she says, will give a company a much more realistic and accurate picture of how the average service employee performs on a day-to-day basis than will customer surveys or call monitoring.

But the mystery shopper evaluations are really only one part of what makes a mystery shopper program successful, Caracatsanis says. How companies use the evaluation reports is the other part. She recommends that when managers receive the weekly or monthly reports, they sit down with the reps or staff members identified in the reports or with all staff members to go over the results, and to go over the step-by-step details to look for "improvement opportunities" — areas where extra training or improved communications might result in higher sales or greater customer retention or loyalty.

Caracatsanis also recommends that companies tie reward and recognition into their mystery shopper program. "Whether it's a pat on the back and a round of applause at a staff meeting or a small monetary reward in the form of a gift card, that recognition makes the employee feel good and the behavior that you are reward-

ing sets an example for the rest of the staff," she says. "We have a restaurant business client who gives away a weekend trip for two to the Bahamas, or to someplace like that, every quarter to the server who scores the highest on their mystery shopper evaluation for that quarter."

### **Mystery shopper do's and don'ts**

Caracatsanis believes that today's younger workers — Generation X and younger — need a lot more training and guidance in the "common courtesies" than did past generations of workers. "Businesses these days have to spend a lot more time with employees, teaching them not only basic service protocols, but also teaching them kindness, courtesy, and how to act like they really care about a customer."

Companies will accomplish that task more quickly by focusing on the positive behaviors uncovered by mystery shopping programs rather than the negatives. "You're going to uncover what's going wrong," Caracatsanis says. "And if somebody is not going to learn — you've given them chances and if their reports keep coming in bad, and they're driving customers away — then, yes, you have to handle that situation. But negativity breeds negativity, and focusing exclusively on catching people doing things wrong is only going to breed poor morale and resis-

tance to the program." By focusing on the positive, and adding a reward element, however, "you create an opportunity to improve your customer service to the point where no customer has a bad experience ever."

Caracatsanis also believes that companies are likely to get less-than-accurate results if they use their own managers or employees as mystery shoppers. "In general, people are not going to want to get coworkers into trouble, especially if they too are likely to be 'shopped,' so they are not going to be 100 percent accurate," she says. "And if managers are used to do the mystery shopping, there's a very big difference between the picture of what's important to a manager and what's important to a customer."

Another issue is that once you start to use mystery shopping as a customer service improvement tool, it is necessary to keep the program going for the long term. You can scale it back, from weekly to monthly or monthly to quarterly, "once you've established it and you've gotten your service quality up to a good place," Caracatsanis says. "But once you stop doing evaluations and you let that recognition and positive reinforcement kind of slip, there's a good chance that your customer service is going to go back in the direction that it was in before you started."

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