

Mystery Shopping



Clear EVALUATIONS

Enhancing Employee PerformanceSM

WHAT IS MYSTERY SHOPPING?

Mystery shopping is a method for recording and measuring the customer service experiences, sales team performance, or customer-facing business environment through the use of trained and qualified mystery shoppers. Mystery shoppers visit a business establishment or contact a business via phone or Internet with clear details on what observations to make or interactions to have with sales staff.

Companies frequently use mystery shopping programs to evaluate and train employees in customer service and to better target training needs for their sales forces. Contrary to what you may read on the Internet, professional mystery shoppers are highly trained and are not “shoppers,” *per se*, but gatherers of critical data for companies that want to evaluate customer experiences and sales performance.



USE MYSTERY SHOPPING TO DEVELOP SALES ENTHUSIASTS ON YOUR TEAM



Mystery shopping is a common tool for sales training. It's hard to find a better way to get a deep evaluation of a sales team member's performance than watching it in action via a video mystery shop. You can tell pretty quickly whether or not a salesperson has passion about the product or service he or she is selling.

WHY IS PASSION SO IMPORTANT?

Well, passion is contagious. If a sales agent is smiling and excited about his work, he'll transfer that excitement to the buyer. If you really want to sell homes, professional services, products...then you want a team full of sales enthusiasts who are passionate about what your company has to offer.

Here are 5 tips for developing a team full of sales enthusiasts:

SALES ENTHUSIASTS BUILD TRUST

No one is going to buy a home or a car (or anything, honestly) from someone she can't trust. Sales enthusiasts make rapport building their first order of business with new clients.

They know people love to talk about themselves, so they make that initial engagement personal: Where are you from? How long have you been in the area? What do you enjoy doing in your free time? Asking questions like these will not only break the ice, but you'll likely find you and your new customer share some interests, values, or passions. That's what builds rapport and long-term relationships founded on trust.

SALES ENTHUSIASTS ASK QUESTIONS

They get to know the client's specific needs and wants, so they can show him or her the best product or service to meet those requirements. If you want a successful sale, then you have to know your customer's pain points and offer real solutions to solve them.

SALES ENTHUSIASTS ARE PREPARED

While they're not going to give a canned presentation that comes off as insincere, they will know their product or service intimately and be able to share its history and explain why it's better than anything the competition might offer. They also make use of sales tools to help

present options for the customer, whether that's an interactive floor plan of a new home they're selling or it's a video they can share to bring a product offering and its benefits or uses to life.

SALES ENTHUSIASTS PAY ATTENTION TO BUYER SIGNALS

They know if the buyer is asking a lot of questions, she's probably seriously interested in how the product might make her life easier. Sales enthusiasts also note subtle buyer signals like authentic smiles, leaning in to a

conversation, excited tones of voice—all these things point to a customer who is engaged and interested.

SALES ENTHUSIASTS ARE READY TO ADDRESS BUYER HESITATION AND OBJECTIONS

Instead of letting a customer who says he wants to “think about it” walk out the door, perhaps never to be seen again, sales enthusiasts dig deeper to find the real reason for a prospect's hesitation, and then they are ready with options for overcoming that objection.

If you want to see your salespeople rise to the top of their game, then build them into sales enthusiasts. Show them how to build rapport, use questions to create a needs assessment, prepare for a solid presentation, and understand and address customers signals and objections.

HOW DOES MYSTERY SHOPPING COMPARE TO CUSTOMER SATISFACTION SURVEYS?



Customer satisfaction surveys are increasingly important for benchmarking your business' customer experience, but the story they tell is limited. Mystery shopping can help you fill the gaps in the story and provide a level of intelligence that online or written surveys won't.

Here are three insights mystery shopping can give you when you're trying to really understand if your customers' needs are being met and what your sales team is doing (or not doing) to meet them:

1. You can more easily uncover your top performers.

A comprehensive mystery shopping report identifies the employee with whom individual customers interacted and provides critical information from that interaction. Customer satisfaction surveys may not ask customers to provide names or distinct and useful details. But with a mystery shop, especially a video mystery shop, you'll be able to tell right away which sales team members are bending over backwards to satisfy and delight customers and which ones need more sales training.

2. You can gain real customer insights.

Mystery shopping offers objective reporting on specific areas like store cleanliness, wait times, and the overall customer experience. How long did it take a team member to approach the shopper? Were the shelves organized? Was the store well lit? Customer satisfaction surveys often don't focus on the very specific details of the customer experience in which you are most interested. In a video mystery shop, in particular, you can see exactly what your customers are seeing.



3. You can use a targeted approach.

Mystery shoppers have the ability and foresight to target key customer experience areas. Customer satisfaction surveys often cast too wide a net and fail to deliver specific, actionable intelligence. Do you want to know if your sales agent is picking up on customer cues for delivering more information or mentioning specific products that might address that customer's pain points? For example, if you want to know if your sales agent is selling the amenities of your second-home community, a video mystery shopper can talk about how much she loves tennis or wants a private space where she can hold a weekly bridge game with her friends. Then you can see if the sales agent takes those opportunities to talk about the on-site tennis pro or the clubhouse meeting rooms owners can rent.

HOW TO EVALUATE SALES TEAM PERFORMANCE WITH MYSTERY SHOPPING

When your sales personnel meet or exceed quotas, you know they're doing their job, but what about when they don't, or what about when they're not regularly making an effort to go above and beyond for your customers? How do you go deeper than the numbers to see what's really driving (or depleting) sales performance?

MYSTERY SHOPPING CAN HELP. HERE ARE FIVE KEY WAYS YOU CAN USE IT TO EVALUATE SALES TEAM PERFORMANCE:



1. Use mystery shopping as part of your regular performance reviews.

Performance reviews encourage accountability, particularly if they happen frequently. You should have them with each salesperson at least quarterly, monthly if you're in a fast-paced industry. But to avoid having the performance review be all about sales metrics, a mystery shop can help you uncover "soft" skills that may need refining. Does the sales team member have a good attitude? Is he taking initiative? You can see soft skills in action in a video mystery shop.

2. Measure the quality of sales team-customer relationships with mystery shopping.

Avoid letting your team view sales exclusively as a numbers game. To build a solid customer base for the future and a pipeline of referrals, your sales professionals need to understand the importance of establishing and nurturing relationships with customers. Mystery shopping can help you see if individual sales team members are hitting the mark. Are they asking rapport-building questions? Are they assessing customers' specific needs? How is the customer responding to the salesperson? You can readily see these interactions and discuss them with individual sales agents by watching a video mystery shop together. [See our article, "Should you try mystery shopping?" for more on this.]

3. See your sales team the way your customers do.

How do you know what your team members are doing out on the sales floor...when you're not watching? Customer feedback is one way, but to gain a truly objective picture of how your salespeople perform with customers, hiring a trained mystery shopper is the way to go. He or she will be able to tell you if team members are asking the right questions, making the right suggestions, providing the right follow-up...without the salesperson knowing any evaluation is happening.

4. Watch salespeople develop their skills.

Looking at how a salesperson stacks up against his or her quota or against fellow team members doesn't provide you the whole picture of the person. Mystery shopping can help you see improving sales techniques and processes in action. If one of your sales team members who has received coaching is improving her rate of closing, watch firsthand what she's doing to grow her technique. Conversely, if her win rates are declining or flat, you can use a video mystery shop to see if she needs to adjust her sales process or where specifically she's losing the customer.

CAN MYSTERY SHOPPING HELP MY BUSINESS?

Any business that serves customers, whether in person, by phone, via the Internet, or all of the above can benefit from mystery shopping. You likely already know the frightening data that indicates customers will tell three times as many people about a negative customer service experience as they will a good one. And the vast majority of customers don't advise management when they've had an unhappy sales experience. They just go to the competition instead.

If you really want insights on what your customers are experiencing, investing in a mystery shopping program is a key way to get them. Most reputable mystery shopping firms specialize in a few industries. At Clear Evaluations, we focus on the following business sectors:



Apartments Leasing companies generally operate in a highly competitive industry. Are your leasing agents and sales staff setting the property apart from the competition? A mystery shopper can provide key insights on whether or not your sales team is showing customers the full list of apartment features, amenities, leasing choices, and confirm they are taking action to close the deal. You may also shop the competition to see what incentives they are offering renters that you can emulate.



Home Builders To the average homebuyer, one builder's product doesn't necessarily stand out from another. Is your sales team marketing the value of your homes and community sufficiently? Are they asking the right questions to understand the buyer's motivation for the move? Are they attempting to close your prospective buyers, or are they spinning them out the door with a packet? You can find out with the help of a mystery shopper. You can also hire a mystery shopper to check out the options offered by competing home builders.



Retail is, of course, the business category that comes to mind when the term “mystery shopping” comes up, and mystery shopping is well-suited to retail. Most storefronts have a complex array of people, products, and environments that shape the customer experience. You can evaluate all three at once with the aid of a customized mystery shopping program.



Automotive Service and Sales In an industry where brand perceptions are the driving force behind a potential buyer’s decision, how important is it to ensure your front line is representing your brand appropriately? From your service department to your sales floor, mystery shopping will determine if your team is meeting expectations.



Hotels Are your hospitality staff remembering to tell guests about hotel dining options, the fitness center, pool, and concierge services? What about reminding them to sign up for a reward membership? Get an insider’s view of what your guests experience when they check in and every interaction they have with the front desk, concierge, housekeeping, maintenance, dining, and sales and catering with a hotel mystery shop.



Restaurants Do you want an unbiased view of how your service staff respond to patrons and whether or not they are upselling cocktails, appetizers, and desserts? Are your chef and his staff exceeding culinary expectations? Sure, you’ll find out when the local newspaper or lifestyle magazine reviews your restaurant. But that might be too late. Get a leg up on where you need to improve service, selection, and flavor by hiring a restaurant mystery shop.



Banks Financial institutions have a host of interactions with customers these days with many offering investment services and credit cards in addition to traditional deposit accounts and loans. Plus, more and more customers are using their computers and mobile phones to bank. How do you keep track of all these points of interaction? And how do you know if bank staff are offering customers value-added services or directing them appropriately when they want to apply for a credit card? Mystery shoppers specializing in bank services can provide you a comprehensive evaluation of how well your financial institution is meeting customer needs.

DOES MYSTERY SHOPPING IMPROVE EMPLOYEE PERFORMANCE?

Given that excellent customer service is the driving force behind brand loyalty and returning and referring customers (think Zappos and its free shipping and returns or Amazon with its next-day-at-your-front-door deliveries), businesses need to give critical care to customers. That’s the job of your sales and customer services teams. If their performance is strong, customer satisfaction will likely be strong as well.

Use mystery shopping to inspire, track, and build employee performance on the sales floor or in the online chat room. You can not only share the video mystery shops of top-performing employees with those in training, but you can use mystery shopping to gauge a salesperson's or customer service representative's current performance, ongoing improvement and/or training needs, and as a play-by-play coaching tool.

Among the many sales approaches and customer service behaviors you can track are:

- Does the sales associate offer a warm and friendly greeting to customers?
- Does he or she work to build rapport with clients?
- Ask questions to better understand and serve customers' needs?
- Offer solutions to meet those needs?
- Follow protocols and standards?
- Sell value and quality?
- Ask for the business?
- Where are the weak points in my sales training program?



TYPES OF MYSTERY SHOPPING PROGRAMS



There are a variety of ways to perform a mystery shop, depending not just on your industry but on your specific goals, whether those are to gain insight for a sales performance evaluation for an employee or to see how the “live chat” feature on your website is working. Clear Evaluations offers a number of mystery shopping programs to meet customer needs and goals.

VIDEO

This is ideal for job performance evaluations. A video mystery shop gives you the opportunity to see a live demonstration of your sales team members’ performance on the floor or in the field. You can quickly evaluate if he is meeting expectations, asking the right questions to determine needs, making customers feel at ease, following policies, and creating an overall friendly and relaxed environment for the sales process. See it all simply by pressing “play.”

Video shops also give you the opportunity to make a play-by-play evaluation of sales

techniques with your employee and point out where she excelled and where she needs improvement. A video shop eliminates concerns about subjectivity to provide a real-life view of what’s happening on the sales floor.

Clear Evaluations’ video mystery shoppers undergo extensive training to learn how to conduct themselves as everyday customers and allow your sales team the opportunities to show their best presentation. They must also complete industry-specific certifications before serving as mystery shoppers in the industries in which we specialize.

WRITTEN

Written shops offer a snapshot of employee performance to help you quickly identify deficient areas in sales training and promptly resolve shortfalls in sales techniques. Clear Evaluations’ highly trained mystery shoppers can prepare customized reports tailored to your industry and specific evaluation needs. You can also choose from a selection of detailed

trending reports in our own comprehensive reporting system.

COMPETITION

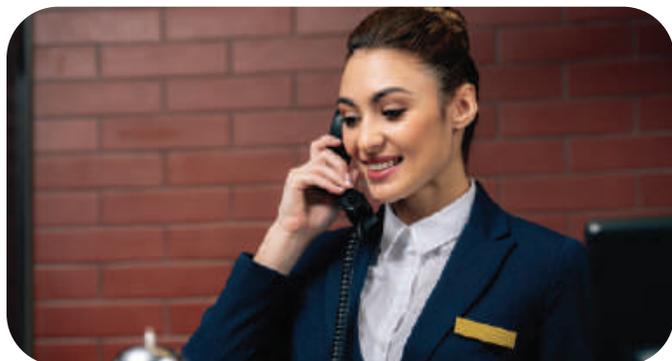
While you may already have an effective and highly trained sales force, it's always good to know how they stack up against the competition. Find out what that competing company's sales team is doing that yours isn't. A few competition video shops can be one of the quickest routes to observing a competitor's sales team in action and observing the special sauce they use to get customers interested and buying. Maybe they have a low-pressure sales approach that helps relax customers, or maybe the sales team has a special method for getting clients to closing. Are they offering special incentives or unique products that you could replicate? Whatever it is, you can probably find it with a few video mystery shops.

NEW HIRE

Are you doing a little head hunting for additions to your sales team? If a prospective salesperson currently works for a competitor or even in another industry, you can use a new hire mystery shop to get an insider's view of his performance before you commit to this investment.

PHONE

Excellent customer service isn't just important on the sales floor. Most businesses do a fair amount of business over the phone. A phone mystery shop can help you evaluate how your



employees handle these customer interactions. Are they professional, friendly, and helpful? Are they trying to sell value-adds, scheduling on-site appointments, or inviting customers to visit retail locations? And, critically, are they getting customers' names and contact information for follow-up?

INTERNET

In a world where customers expect immediate attention, particularly if they're making inquiries using features on your website (like customer service queries or live chat), quick and effective responsiveness is critical to maintaining a competitive edge in your business. An Internet mystery shop lets you see how deftly your customer service team responds to web-based form submissions and live chats. An instantaneous and accurate response to an internet inquiry could mean the difference between winning new customers and losing them to the competition.

FOLLOW UP

Given the key to closing a sale is often in the follow-up pitch, don't overlook the importance of making sure your sales team is taking this critical step in the sales process. Clear Evaluations offers a follow-up shop service where all voicemails and emails from your sales staff to the mystery shopper go into an easy-to-access web-based survey you can review.

CUSTOMER EXPERIENCE

Customer satisfaction, even more so than price, is often the glue that holds a customer's loyalty to your brand, product, or service. Make sure that loyalty is unshakeable by consistently reviewing your customer's feedback. Clear Evaluations offers a Customer Experience Reporting system that allows for ongoing customer satisfaction surveys as well as data collection, delivery, and reporting.

MYSTERY SHOPPING TESTIMONIALS AND DATA

As you consider the possible benefits of mystery shopping to your sales, retail, or professional services business, see what some of Clear Evaluations' current clients have to say about their experiences:

We have been using Clear Evaluations for years, and we could not be happier with the results of their service. We are able to see exactly what goes on in the sales office and identify areas of improvement as well as areas of strength. Each mystery shop brings the opportunity for growth and improvement for our sales team.

Leslie Jeter and Clear Evaluations have been a true partner and have been extremely responsive with our needs. Leslie answers my calls and returns my e-mails within minutes. I cannot praise Clear Evaluations enough for their professionalism and responsiveness to our needs. They are truly the industry leader in mystery shopping services.

VP-Sales/Marketing
DR Horton Homes
drhorton.com

We have worked with video shopping companies all across the country for many years, and Leslie and her team at Clear Evaluations are by far the best. Leslie works with the managers before the shoppers go in to make sure the shoppers are believable. The quality of the videos is exceptional, and they are always delivered in a timely manner.

Our managers are very happy with Clear Evaluations, and many have come back many times, which is a great sign. Thank you for the great job and keep up the great work.

Vice President Training & Development
Bob Schultz & The New Home
Specialists



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See what insights mystery shopping might offer for your business. Check out a few sample video shops, and then reach out to Clear Evaluations for assistance in determining what kind of shop would work best for your customer service and sales team evaluation needs.