

# Mystery Shopping Secrets

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[www.MysteryShoppingSecrets.com](http://www.MysteryShoppingSecrets.com)

"There are no bad shopping days, some days are just better than others"



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## **Welcome Mystery Shoppers!**

It is my distinct pleasure to introduce you to Mystery shopping Secrets.

I trust you will receive some valuable information that you can use in your mystery shopping business. You are also welcome to share your own secret information and tips if you choose to do so.

My goal in starting Mystery Shopping Secrets is to provide an overview of mystery shopping as well as accurate information to dispel some of the myths and bogus information and offers that I have been recently seeing online and in the newspapers.

Mystery shopping is easy and fun, and it is a great way to make extra money in your spare time. Most assignments can be completed within a range of days and times, so you have flexibility about when you work.

You decide when and where you will accept assignments, your offers for assignments are usually close to your home or work, so you can do the shops while you are running other errands.

Many folks these days are looking for ways to supplement their income, and especially those who are looking for a part-time opportunity that provides fun and money, are looking into the mystery shopping business.

Mystery shopping is a fun and rewarding business but as with anything else you must take your time and do your homework and make sure that you're not being taken advantage of.

In Mystery Shopping Secrets, I will be sharing some of the tips that have helped me during my mystery shopping career to become successful and to enjoy the experience while making some money.

I will also share some information regarding tools that have helped me to make mystery shopping easier as well as some of those secrets that other folks would rather you did not find out about.

So, let's get started. I hope you have as much fun here learning about mystery shopping secrets as I did in putting it together for you.

Have fun!

*Myrna Marshall*

## Introduction

Do you love to shop?

If so, you may be tempted by unsolicited emails or radio and newspaper ads that claim you can earn a living as a secret or mystery shopper by dining at elegant restaurants, shopping at pricey stores, or checking into luxurious hotels.

But, according to the Federal Trade Commission (FTC), the nation's consumer protection agency, marketers who promise lucrative jobs as mystery shoppers often do not deliver bona fide opportunities.

Before you send your hard earned cash to these hucksters, check out the following information, that way you can make an informed, intelligent decision about becoming a professional mystery shopper.

Professional mystery shopper you say? Yes, if you want to make money as a mystery shopper, you need to treat it as a business. If you do, you will make business money, if you treat mystery shopping as a hobby, you will make hobby money, it's that simple

In *Mystery Shopping Secrets*, I will cover the 'knitty-gritty' details of:

- What makes a good mystery shopper?
- What companies need mystery shoppers?
- How to get jobs as a mystery shopper
- Where and how to apply to the mystery shopping companies.
- Do's and don'ts of report writing.
- Communicating effectively with your schedulers
- How to project a professional image
- How you get paid.
- Strategies to propel you to the top of the industry.

Now, let's get started on the finding out the secrets of mystery shopping...Let's shop!

## What is Mystery Shopping?

Mystery Shopping is a tool used by businesses to make sure that their employees are performing at the levels required to make sure that good customer service and company policies are being followed.

Mystery Shopping is a legitimate industry and mystery shoppers are independent contracted professionals who work for the money they make.

You can earn a good part time and even a full time income as a shopper if you want.

Yes, you can really get paid to shop. In today's extremely competitive business environment, those companies which fail to provide excellent service will surely not survive. Studies have shown that a satisfied customer will tell three other people about his experience. A dis-satisfied customer will tell ten to twelve people.

Not only do companies face loss of business from poor service, the actions of their employees may even cause them to be sued by customers or fined by the government. With so much at stake, you, as a mystery shopper, can provide a valuable and essential service by identifying potential problems which the business owner can correct before they result in a major liability.

The big question that every business needs to have answered is:

**How does a front-line employee  
treat a customer when no one is looking?**

In any business environment, the reality is that employees will put on their best performance when they know they are under the watchful eyes of management.

Unfortunately this is not a perfect world and ownership or management is not always present. The question then becomes, how does any owner/manager know what is happening when they are not present? How do they know if the trained policies and procedures are really being practiced?

The answer to these questions is quite simple, they don't. A business cannot assume that all employees are complying with the Non-Negotiable Standards set forth for that business. This premise is the fundamental building block of mystery shopping...

Mystery Shopping provides insight which is achieved without the bias that can accompany internal self-assessment and provides a clearer, more accurate picture of the customers' experience.

Mystery Shopping is only effective when the information gathered is objective and valid... The mystery shopper reports a factual performance audit that empowers front-line management. There is either compliance or non-compliance with policies, procedures and operations.

Many companies hire marketing research companies to evaluate the quality of service in their stores, on the telephone and use of their website and these companies use mystery shoppers to get the information anonymously.

They assign a mystery shopper to make a particular purchase in a store or restaurant, telephone for customer service or visit their website for customer support, for example, and then report on the experience. Typically, the shopper is reimbursed for required purchases, can keep the product or service, and receives a shopper fee.

Many professionals in the field consider mystery shopping a part-time activity, at best. Opportunities for mystery shopping are generally posted online by mystery shopping or merchandising companies.

Nevertheless, fraudulent mystery shopping promoters are using newspaper ads, TV and emails to create the impression that they're a gateway to lucrative mystery shopper jobs with reputable companies.

These solicitations usually promote a website where consumers can "register" to become mystery shoppers — after they pay a fee for information about a certification program, a directory of mystery shopping companies, or a guarantee of a mystery shopping job.

The truth is that it is unnecessary to pay money to anyone to get into the mystery shopping business. The shopping certification offered in advertising or unsolicited email is almost always worthless.

A list of companies that hire mystery shoppers is available for free; and legitimate mystery shopper jobs are on the Internet for free. Consumers who try to get a refund from promoters of mystery shopping jobs usually are out of luck. Either the business doesn't return the phone calls, or if it does, it's to try another pitch. Guard your money and run away as fast as you can from these bogus offers.

As a mystery shopper, you will be contracted to evaluate an establishment and report your findings to the mystery shopping company or client who hired you.

Your job will be to monitor the sales environment for compliance of corporate standards. These are standards that may include policy, procedure, execution, behavior, customer service, merchandise display, product promotion, and pricing. Non-negotiable standards are extremely important to the success of the client company and therefore cannot be compromised.

Your mystery shopper report must be void of perception, speculation or opinion, or the very same people it is designed to help will challenge the integrity and credibility of your report, and it may be thrown out and, worse, you may not get paid and no one wants to work for free...



This does not mean that perceptions or opinions are not valid. Sometimes you are asked to give your opinion on how you felt, or what you thought, and these observations are relevant to service behaviors and issues that simply fall outside the scope of the standard or non- negotiable questions asked.

These standards establish the behaviors by which performance is measured. There can be no “opinion” or “perception” as to whether the employee complied with business policies and expectations. When behaviors can be observed, they can be measured, which means they can be monitored.

The mystery shopping factual report is a tool used to measure, monitor, and maintain corporate standards of expectation, compliance, and performance.

## Why Use Mystery Shoppers

Although Mystery shopping is both enjoyable and interesting, it is also a very serious business. Being a mystery shopper is your opportunity to impact change for all types of customer service.

Mystery shoppers are used in almost all industries, including department stores, retail specialty stores, convenience stores, grocery stores, fast food restaurants, automotive facilities, high end jewelry stores, high end beauty stores, restaurants and financial institutions.

Companies make important decisions based on the data supplied via your mystery shopping reports and the results are used as vital components in reviewing and assessing employees and management, and can affect the future of an individual and an organization as a whole. Clients use the information received to reward employees who are meeting or exceeding expectations and to coach and encourage employees who are having difficulty complying with expectations.

It is not a spy mechanism designed to catch people doing things wrong.

Mystery shopper reports are also used to point out positive things. Shopper findings are used to help identify store locations and employees who are due rewards for outstanding customer service or store cleanliness. Mystery shoppers are sometimes even allowed to reward employees on the spot for meeting certain criteria.

It is a great feeling for you as a shopper to hand an employee a certificate for a paid day off, or other reward determined by their management for doing a great job!

Because the general shopping population is comprised of all kinds of different people, virtually anyone can be a secret shopper. Shopping can be especially appealing for those individuals who desire to improve customer service and product quality, as their factual reports are taken seriously.

Of course, the idea of getting paid to shop while getting free meals, services and merchandise is also very appealing.

The business world is very competitive and companies are constantly searching for ways to improve their customer service and the quality of their products. Companies that care want to know what their customers think; they want to be informed of things that need improving.

Armed with the right information, businesses can make necessary improvements. Shopper findings are sometimes used in future employee training, to improve business operations, to improve product quality and to compare one location's performance to another.

## How Can You Avoid Mystery Shopping Scams?

The truth is that it is unnecessary to pay money to anyone to get into the mystery shopper business. The shopping certification offered in advertising or unsolicited email is almost always worthless.

A list of companies that hire mystery shoppers is available for free; and legitimate mystery shopper jobs are on the Internet for free. Legitimate mystery shopping for a legitimate company doesn't cost anything. Here's how to do it:

### **How do I know what companies are legitimate**

Search the Internet for mystery shopping companies that are accepting applications. Legitimate companies don't charge an application fee. Most accept applications online. Do some homework about mystery shopping. Check the internet, libraries or bookstores for tips on how to find companies hiring mystery shoppers, and see our tips on how to do the job effectively.

Visit the Mystery Shopping Providers Association (MSPA) website at [www.mysteryshop.org](http://www.mysteryshop.org) for information on how to register to be a mystery shopper with a MSPA-member company, a database of available jobs, and additional information on the industry in general.

In the meantime, the FTC says consumers should be skeptical of mystery shopping promoters who:

- Advertise for mystery shoppers in a newspaper's 'help wanted' section or by email. While it may appear as if these companies are hiring mystery shoppers, it's much more likely that they're pitching unnecessary — and possibly bogus — mystery shopping "services."

- Sell “certification.” Companies that use mystery shoppers generally do not require certification.
- Guarantee a job as a mystery shopper.
- Charge a fee for access to mystery shopping opportunities.
- Sell directories of companies that provide mystery shoppers.

If you think you have encountered a mystery shopping scam, file a complaint with your local consumer protection agency, the Better Business Bureau, your State Attorney General, or the FTC ([www.ftc.gov](http://www.ftc.gov)).

## What Are The Different Types Of Mystery Shops

### How do I find them and determine if it's worth my while

As a mystery shopper you could go shopping, watch a movie for free, have breakfast, lunch or dinner, enjoy a drink or two, or get a free night in a hotel. You'll get paid for your work and have the opportunity to feel that you can make a difference. What a tough life!

As a mystery shopper you are a freelance professional who is contracted to pose as a real shopper in order to evaluate several aspects of commercial retail establishments.

Among other aspects, you may be asked to evaluate customer service, product availability, product pricing, product quality, store cleanliness, website operations and telephone customer service. After evaluating the business, you are then required to report their findings to the companies that contracted them. So where do you find these opportunities?

Your first step should be to log onto the internet and start your search there.

In mystery shopping, 99 percent of the available opportunities are found online. Another source of mystery shopping companies is the Mystery Shopping Providers Association <http://www.mysteryshop.org> They offer an extensive source of mystery shopping tools as well as the opportunity to become certified. Browse their website and get a feel for what they have to offer.

## **How do you apply for the assignments available**

As you browse the listings of the mystery shopping companies, there is a short information paragraph, which advises of the types of shopping scenarios available from that shopping company. Some of these mystery shopping companies specialize in specific industries or type of shops. Based on the type of mystery shop you are looking to perform, you can decide if you want to register with that company or move on to another company which offers the type of shop you are looking to complete. **In order to be successful, you will need to register with dozens of mystery shopping companies to increase your likelihood of receiving shopping opportunities on a regular basis.**

## **Responding To postings**

The majority of mystery shopping assignments are posted online on job boards or offered to the mystery shoppers who have signed up with that company via email. In the posting, you are advised on the type of mystery shopping assignment, as well as all the relevant details such as time frame for completion, general location, type of mystery shopping and the fee to be paid.

It is imperative that before you sign up to accept an assignment that you understand what is required, especially the time frame for completing and submitting your report. Many companies will drop you from their database if you sign up and then cancel a shop repeatedly. If you are uncertain about any of the details of the assignment, including the time frame, you can send an email, or call the company for clarification.

Keep in mind, however, that many of the assignments are very competitive and they go quickly, so by the time you request additional information, the assignment may be already awarded to another shopper. The skill of determining what is required from an initial posting is something that comes with experience and after a while, you will

become expert at determining what assignments you are willing to accept and perform.

### **How Much Time Will Each Shop Take?**

It depends! Some assignments can be completed in just a few minutes; others will take longer, and may even require a couple of hours or more. For instance, dining at a fine restaurant may require a time frame of a couple of hours, in addition to completing and submitting your report.

You will need to determine how much time you are willing to spend to complete an assignment, given the scenario and the pay being offered. For the lower paying assignments, you may decide that since they are so easy and don't take much time, you can complete several of these in a day and still make some good money.

### **How Much Money Will You Make?**

One of my favorite shops is evaluating cell phone companies. The pay is typically \$10.00 to \$15.00 for each one, and they usually don't take more than a few minutes at each location. On a good day, I can complete 10 of these shops, in approximately 5-6 hours allowing 2-3 hours to complete the reports; can make \$100 to \$150 for the day.

Not bad, for just checking out what is new on the cell phone scene. Of course, I make sure that the assignments I accept are in the same vicinity so I'm not driving all over town to complete them.

### **How Are Assignments Paid?**



You will be paid a pre-determined rate, agreed upon by your acceptance of the assignment. On completing the assignment and submitting your report, you will be paid in accordance with the mystery shopping company's pay schedule.

Payment can range anywhere from 7 days to 60 days, so it is important for you to know when you are scheduled to be paid, and to keep accurate records of the assignments and expected pay date.

Some companies are moving to online payments using Paypal, and with this option, you receive your pay even faster. It is a good idea to sign up for a Paypal account to expedite your pay, and eliminate some of the delays in waiting for the check to arrive, or deal with lost or delayed checks. You can get a free paypal account by visiting [www.paypal.com](http://www.paypal.com) .

### **What Is Merchandising And How Is It Different From Mystery Shopping?**

Merchandising can be a lucrative additional source of income for a mystery shopper. Many mystery shopping companies also post listings for merchandising.

A merchandiser is hired or contracted to visit a retail store and is responsible to ensure that the manufacturer's line of products, whether it be clothing, groceries, toys, etc. is well presented.

The merchandiser keeps the displays clean and tidy, takes inventory and restock the products, and in the case of promotions, they are responsible for assembling and setting up the promotional displays, placing coupons, assembling equipment, removing product recalls and keeping the display well stocked.

. Merchandising assignments can take anywhere from 1-2 hours to complete, although depending on the number of products and the display requirements, it can take longer. Some mystery shoppers have decided after doing these assignments that they prefer to do merchandising rather than mystery shopping and do very well

as merchandisers. Others do both merchandising and mystery shopping and enjoy the variety of these assignments.

## **Who Can Be A Mystery Shopper?**

Mystery Shoppers are Independent Contractors and they can be virtually anyone. They can be old, young, slim or overweight, well heeled or strapped for cash.

They are stay at home moms and dads, retirees, students, full and part time employees, people with disabilities; in short, just about anyone, aged eighteen or over can be a mystery shopper.

The reality is that mystery shoppers from all walks of life are needed. Some mystery shopping companies are even now starting to recruit disabled mystery shoppers.

An effective mystery shopper has the ability to blend in with typical customers at the assigned location and be observant and detailed while acting as a normal customer would.

## **What Does It Take To Be A Professional Mystery Shopper**

You may have heard about mystery shopping or secret shopping and are skeptical about it, but did you know that there are new opportunities posted by many companies each and every day? They are looking for people just like you to fill these assignments.

Companies interested in giving the best customer service contract with mystery shoppers to uncover the true behavior of their employees or evaluate the quality of their products and services. Not only are you helping yourself with added income and a fun shopping experience, but by helping to improve service and products of businesses in your community you are making a real difference.

### **Characteristics of a Successful Mystery Shopper**

Mystery shopping is a business and needs to be taken seriously. You do need to possess a few characteristics like being dependable, professional and observant, and

you need to be able to act as a real shopper. No specific experience is required, but you must be anonymous, dependable, detail oriented and accurate in your reporting. Of course, you need to have reliable transportation to conduct your shops and writing well and being able to separate your findings from your opinion are also important.

### **Be anonymous**

Mystery Shoppers must remain anonymous at all times. You must act as a regular customer and be careful not to do anything that would reveal you as a shopper. An inexperienced shopper could tip off the staff to his/her identity by asking for the manager's name for no clear or appropriate reason, just because it is a requirement of their shopping assignment.

You must never bring any of the shopping survey forms or questionnaires onto the premises with you. An employee could spot them or you could misplace them, which would compromise your identity as a shopper.

If you are going to be bringing someone with you on the shop, (if allowed), make sure you educate them about the process as well and what behaviors are expected of them... Beware that even whispers can be overheard by employees.

When on your mystery shopping assignment, always blend in to look like typical customer. Don't do anything to bring attention to yourself, either in word, dress, or actions. Never reveal yourself as a shopper -Always ask "what's that" or something to that effect, if you're asked if you're a mystery shopper. If anyone suspects that you are a shopper, you can bet the word will quickly spread around the establishment and you'll get some of the best customer service in town.

## **Be Accurate**

You must be absolutely accurate and willing to back up any thing that you submit in your report. If you are unsure of something, **do not include it**. If one point is inaccurate, your entire report may not be accepted as valid. It is not unheard of for a report to be disputed by the employees being shopped. Some will try to discredit your report, so you must be 100 percent accurate.

Always back up your answers with facts. . Facts must be supported, with details, especially “no” answers or you won’t get paid, which is a waste of your valuable time. In addition to not getting paid, the assignment must be re-assigned and completed by someone else. If you mark that an employee was not in proper uniform, describe EXACTLY what they were wearing and how it differed from other employees. If you mark that a food item was not served as ordered, describe exactly how the menu described it and what you were actually served.

Submit details for all NO answers and describe many of the important YES answers. Report on any inconsistencies among staff and guests. Be sure your comments do not contradict the answers on your questionnaire.

You must be sure to visit the correct locations – Verify the address on your assignment sheet and on arrival at the location.

## **Be Patient**

Patience – Patience is a definite requirement as you may need to wait to meet with a certain person or persons in order for your shop to be considered valid. You need to allow yourself enough time to complete the assignment correctly.

## **Observe Confidentiality**

All information received in the course of your mystery shopping assignment is confidential – do not any details share with anyone else. As a mystery shopper, you

are under contract and a professional. Treat the information you receive as confidential and proprietary. You must complete the assignment yourself since sending someone else to complete your assignment and submitting it under your name is unethical, unlawful and if you are found out you will be dropped from the companies' database. The word will get around, and soon you will find that it's almost impossible to get assignments as your reputation precedes you.

Never, ever divulge any information regarding a shopping assignment to anyone at any time. This includes what business you shopped and for what shopping company. This is a cornerstone of your mystery shopping business and must be adhered to at all times.

### **Have Great Budgeting Skills**

In addition to budgeting your time, you also need to be able to budget your money wisely and determine what assignments you will take and how they fit your time and budget schedule.

### **Be Comfortable Using the Internet**

The majority of shopping assignments are found, assigned and submitted on line. In order to be a successful shopper, you need to be familiar and comfortable using the internet, and be able to download the assignment details and attach files for submitting your reports.

### **Have Excellent Time Management Skills**

Yes, mystery shopping can be fun and rewarding, however, you need to manage your time wisely so you are not running all over town on many days of the week or month. Determine what assignments you will take, the minimum amount of money

you will accept on an assignment, and plan your schedule so you can schedule assignments in the same area at the same time.

It is imperative that you keep track of when your assignments are due, and avoid, if you can, doing assignments on the last day of the assignment schedule, ( in case of an emergency which prevents you from completing the assignment) since most shopping assignments give you a few days to complete them.

### **Be Detailed Oriented**

You must be observant and detail oriented, noticing and reporting on things the average customer may not notice. You are being paid to perform an assignment and must make every effort to be detailed in your observations and reporting. You must review your paperwork before doing your shop, so you know exactly what is required on the assignment and what you need to report on. You should always be familiar with your form prior to your evaluation.

Remember that a good report (especially the comments or narrative) tells a story about your experience. Whether positive or negative, your report should be able to convey what took place at the location. Your comments should include explanations to backup why you may have given negative responses to certain questions.

### **Be Observant**

Observation is a matter of skill and although it is one of those skills everyone possesses, not everyone is equally perceptive. As professional mystery shopper, you must be a master of observation. Mystery Shoppers must train themselves in the art of detailed observation. Their senses must be acute and their memory sharp. They must be able to understand how to really look at the environment they enter, to absorb information and to mentally record details that may later need to be recalled.

## **Be Organized**

A dis-organized mystery shopper is one who is looking to fail. You must be organized in your time, your assignments and your reporting schedules. Many assignments require that you submit your reports within 12-24 hours after completing the assignment and a sure way to forfeit your pay is to miss the required deadline. Get a calendar, organizer, email calendar or whatever it takes to make sure that you remain organized and on top of your mystery shopping requirements.

Don't become complacent. Sometimes you are performing the same scenario at multiple locations and think that since you are familiar, you do not need to review your assignment details. Avoid this thinking at all costs, since assignment details do change and as a professional mystery shopper, you are responsible for knowing what you are required to observe on each assignment.

Only accept assignments you know you can complete and submit on time. Your shop reports must be entered online within the specified time after the shop has been completed. Any reports received after that time may be denied compensation. If you have any questions or problems with the assignment, or evaluation report, make sure you contact the company immediately.

## **Write Well**

As a professional mystery shopper; you will want to make sure that you submit reports that are not only factual and detailed, but logical, and well written with correct grammar and spelling. It does not need to be a literary masterpiece, but you must commit to producing and submitting detailed and well written reports. There are literally thousands of mystery shoppers, but very few who are dependable and can deliver the detailed and accurate reports which are required. This is one of the qualities that will endear you to the mystery shopping company and put you at the head of the class for other shopping assignments.



## **Be Committed**

Be committed to complete the assignment on time. When you apply for and accept an assignment, the mystery shopping company and the client they are representing are expecting you to complete that assignment on time and in the manner requested. By accepting an assignment, you are committing yourself to perform, and the company which has removed that assignment from others who are interested, are depending on you to keep that commitment.

Of course, there are emergencies which may make it impossible to complete the job in the required time frame and that's understandable, however, it is not acceptable to accept assignments you know you cannot complete on time, or complete marginally. Your reputation will really suffer if you accept assignments and not complete them in the required time. This is also where being organized comes into play, as you will make sure that you do not wait until the last date of the time frame to complete the shop. Always try to complete the assignment early where possible, to give yourself some flexibility in case of an emergency. Your word is your bond; make sure you complete your assignments on time.

## **Be Objective**

Just the facts -- Mystery Shopping is the most accurate and reliable tool a business can use to gather information regarding their actual customer service performance at the "moment of truth". This "moment of truth" is not when the staff is on their best behavior because the boss is around - it is when they interact with customers during their normal daily routines.

This is where you, the Mystery Shopper, come in. You provide feedback of factual and objective observations during your assignment. Don't involve your emotions unless requested.-As a reporter, which you are as a mystery shopper, you report on the facts unless you are specifically asked to give your opinions.

Professional Mystery Shoppers are responsible for reviewing and understanding the scenarios well enough to improvise when necessary during an assignment. A Mystery Shopper role-plays the scenarios according to what they feel is normal behavior. For example, scenario questions should not be stated word-for-word. They should be asked using the personal conversational style of the shopper. If a shopper is found to be out of compliance with a scenario, the evaluation could be rejected, the mystery shopper's rating negatively affected and the shopper's ability to accept future assignment could be jeopardized.

### **Be Professional**

When you, as a professional mystery shopper accept and conduct an assignment, the company you represent expects professional behavior. Regardless of what your feelings may be about the client company and/or the products the company sells, you are required to demonstrate a positive, optimistic and enthusiastic interest in the company as a whole.

Professional mystery shoppers build their professional Image and stand out from the crowd.. Mystery shopping companies and their schedulers like to work with shoppers who take their work seriously and act professionally. All communications with mystery shopping companies should be businesslike with the use of proper grammar, spelling and punctuation. . Save and document all of your work and confirmation submissions, according to the company requirements.

Some companies require that you retain your reports and confirmations for 30, 60 or even 90 days. . Respond promptly when you are contacted. Most importantly, do what you say you will do.

Improve your skills. Consider obtaining certification to become a more educated shopper and to demonstrate your commitment to being a professional. If necessary, take a grammar or business writing course to improve your reporting skills.

## How Do I Get started?

**As mentioned previously, Never pay to sign up or work with a company** –Just like you won't pay to get a job. Visit our website for a listing of the legitimate and reputable mystery shopping companies the MSPA (mystery shopping providers association) website

They offer a range of services from mystery shopping companies listings, tips on becoming a better mystery shopper, assignments available and information on becoming certified as a mystery shopper. [www.mysteryshop.org](http://www.mysteryshop.org)

[www.Volition.com](http://www.Volition.com) also provides a wealth of information for shoppers. They also provide a mystery shopping forum which offers a gold mine of information regarding others who are mystery shoppers, and willingly share their experiences and tips for becoming a successful mystery shopper.

Check with the better business bureau regarding the companies you plan to work with.

### **Guard your personal information**

#### **Get a Tax id number**

As you start applying to mystery shopping companies to be an independent contractor, they will require details so that they can pay you and report your earnings correctly. The most often requested way to do this is by requiring your social security number, (or equivalent for other countries). With the rise of identity theft, many people are understandably reluctant to divulge their social security number.

One way of handling this dilemma is to apply for and receive a Tax ID number. This is very similar to a social security number, but is for business purposes. Contact the IRS to get a tax ID number by calling them or visiting their website at [www.irs.gov](http://www.irs.gov)  
Select a new email address – As a professional mystery shopper, you will convey your professionalism with a suitable email address.

We recommend that you sign up for one of the free email addresses like yahoo, Google, hotmail or gmail and keep this email address exclusively for your mystery shopping business. In addition to having all of your shopping details in one location, if you ever need to access your email while you are away from home, it will be easily available to you rather than a dedicated email on your home or work server.

### **Getting Organized -Basic Business Setup**

After you have applied for and received your Tax ID # (you get it immediately and at no cost), choose an appropriate email address and sign up for a free email account. Get organized by setting up folders to keep your important business papers separate and readily accessible, by having separate folders for each entity.

As you apply to mystery shopping companies and receive your user ID and passwords, store these safely along with folders to keep your assignments after completion, as well as any receipts or other documentation which may be required.

Taxes and business registration – Make sure you keep accurate tax records and check to see what requirements need to be met to conduct business at your location. Some states or counties require that you are registered, so make sure you check to see what you need to do to fulfill these requirements.

Mileage logs and assignment logs are great to keep track of your mileage on your assignments, as well as keeping your assignments organized. [Click here](#) to get a free assignment log.

## **Tools Of The Trade - The Keys To Success**

There are a few tools you need to have to be an effective mystery shopper. Here are some basic tools I recommend to make your mystery shopping experience a little easier and smoother.

### **Fax Machine and/or Scanner**

(Access to internet and email – I recommend a free email service like yahoo or hotmail.

### **Stationery, Business Cards**

You can get these free from Vista Print, you pay shipping and handling only, or make your own.

### **Dictionary, thesaurus**

These can be found free online.

### **PayPal.com**

Sign up for PayPal to get paid easier and faster.

### **Password Management**

Install [www.roboform.com](http://www.roboform.com) to help you in completing those numerous signup forms.

### **Audio Recording**

Cell Phone with record functions or mini recorder

### **Directions**

Direction mapping program like mapquest or yahoo maps

## Choosing And Determining Your Assignments

How much time do you have available and are willing to commit? Determine the time you will spend on a weekly, or monthly basis to be effective and successful at your mystery shopping. Since you are an independent contractor, you determine the number and types of assignments you are willing to complete.

Make sure that when you apply for shops that you take into consideration the distance you may need to travel, the time involved in performing the shop correctly, the time of day, and any expenses you may incur as a part of doing the shop, and the amount of time it will take you to complete and submit a complete and accurate report.

### **How do I get assignments?**

The majority of mystery shopping assignments are offered to shoppers via website postings, job boards, or email. Each posting gives detailed directions on how to apply and what the fees for completing the assignment are.

You must read everything carefully and do not apply for shops you are not certain you can complete. If you have any questions on an assignment, be sure to request additional information, before you commit to complete the shop.

### **What types of assignments will you perform?**

Since there are many types of mystery shops, you need to determine what type of shops you are willing to accept. They can range anywhere from purchasing gas and a stick of gum to a five star restaurant evaluation or overnight hotel stay. Depending on the fee offered and the time involved, you will want to make sure that you allow yourself enough time to go a good job and organize your shops so that you complete

shops in one location or area at one time, instead of driving back and forth to different areas, wasting your time and gas.

## **What Is The Average Pay For Shoppers?**

There is no standard pay in mystery shopping. Each mystery shopping company determines the amount they are willing to pay for the assignment and you decide if you are willing to accept the fee or reject the shop assignment.

As with any other industry, there are some companies that pay better than others, and you will quickly find out who they are as soon as you start reviewing the job boards and visiting the mystery shopping forums.

I've provided the pay ranges below as a guide only, and you will find that depending on the area of the country you shop, the ranges will vary greatly.

You need to decide what is the minimum amount of pay that you will accept for an assignment, given the amount of time involved and make your decision based on that information.

### **Markets Using Mystery Shoppers & Average Pay**

- Restaurants (Free Meal to \$35)
- Retail (\$12 to \$30)
- Banking/Financial Institutions (\$30 - \$70)

## **How Do I Keep Track Of My Assignments?**

- Calendar or assignment log
- Email calendar
- Filing system, rolodex, whatever you will use, not just look pretty
- PDA
- Voice Recorder

Make sure you follow your state or local laws regarding recording conversations. Only use your recorder to capture observations after completing your assignment. Immediately after leaving the establishment and you are sure that you cannot be observed by anyone from that establishment, stop and record your observations to assist you in completing your reports later.

You can also call your telephone voice mail and leave your observations there to be retrieved later.



## Conducting The Mystery Shop

Preparing for your shopping assignment.

In order to be fully prepared for an assignment Professional Mystery Shoppers must:

Thoroughly review the client assignment guidelines and any sample questionnaires before visiting the location. The assignment sheets contain information such the Assignment #, Location name and address, “when to shop” dates, assignment fee, and, if applicable, special assignment notes. You must review the assignment sheet in its entirety, so you know what to observe and report on.

Have all necessary equipment and materials to complete the evaluation. For example, although not common, some shopping assignments require the use of digital cameras or video cameras in order to provide graphic and objective feedback of the shopping experience.

In this situation a pre-check must be done to ensure that you have all the necessary equipment and that the equipment is in working order.

Have a notepad and pencil/pens available, hand-held recorder, cell-phone, PDA or any other related tool, in order to record notes.

Never rely on long-term memory while mystery shopping, but instead note the details of an evaluation while the information is still fresh in his or her mind.

To maintain anonymity, you can use a restroom, fitting room, car, mall, etc., to gain privacy as notes are recorded. Leaving messages on a cell phone, answering machine, handheld recorder, or entering the information into a PDA are other helpful hints for obtaining/recording required information, or in a supermarket, use a shopping list to record your notes.

## **Verify The Store Location**

Some retailers have multiple locations that may be near each other, on the same road, or even in the same mall or retail center. It is so easy to shop the wrong location and end up wasting your time and not getting paid for the shop if you don't verify the store name and location before the shop.

Unless the shop guidelines prohibit you from doing so, it's always best to call the location before performing the shop to ask for directions, to get the nearest cross roads, or to find out what other stores are nearby.

Once near the location, verify the name and address of the store with the name on your form. Or, better yet, write the name and address down on a piece of paper or check your assignment log before arriving at the establishment to avoid anyone seeing your mystery shop form. Make sure you leave all assignment paperwork in your vehicle, and out of sight.

Be knowledgeable about what is required on your assignment, and in addition, as you approach the establishment, begin your observation with the outside of the location. Notice the cleanliness of the parking lot, what is displayed in windows, signage, etc. As you walk into the location, immediately notice how many sales associates/servers and customers are on the floor or at the front desk.

Observe the environment: which includes any displays, cleanliness of establishment, what sales associates/servers are doing, lighting, music, etc, be sure to follow the scenarios from your assignments.

Remember names and details from your interaction such as; was the sales associate or server knowledgeable/trained on details and specifics of products, what did they try to sell you, what did they leave out, how did the interaction make you feel, etc.

It's important to remember times, how long did things take to happen, i.e. how long did it take for your entrée to come out. If a shop allows for a friend or companion to accompany you, then allow them to interact with you and offer their perspective so that all details can be remembered.

Remember the purpose of your visit is to determine the quality of service you receive while shopping/dining/etc. The locations you will be visiting should not know they are being evaluated, so act like a typical customer.

Immediately after you leave the location, sit in your car or on a bench in the mall and dictate or make notes making sure you maintain anonymity.

Try not to take notes or do anything that would identify you as a mystery shopper while inside the establishment... Pretend that you are an ordinary shopper, and act just as you would if you were actually shopping or dining for yourself.

### **Submit Your Reports on Time**

Complete and submit any reports or forms within the assignment reporting requirements. Details are extremely important. Names of managers and employees are also especially important. Look at badges, sales receipts, etc. for the names of employees. If a name badge is not visible or readable and you need it for your report, become creative in finding ways to get their name. You can easily ask their name and say you wanted to refer to them by name instead of ."hey", or on departing the establishment, ask another employee, saying they were so helpful, you wanted to get their name to let the manager know. Become creative in finding ways to get the information you need.

If you cannot get a name try to provide a good physical description such as sex, age, hair/eye color and distinguishing features (facial hair, glasses, etc).

## **Problems with your shop?**

It is your responsibility to complete an assignment during the assigned “when to shop” dates. If a problem arises that prevents you from completing an assignment, you must contact your scheduler or designated person to alert them of the problems. You will find that most schedulers are flexible and willing to assist you to work out any issues to help you get the assignment done on time, but you must communicate with them and not miss deadlines on a regular basis.

If you have any questions about your shop or are confused in any way, the time to get your questions answered is **BEFORE YOU ATTEMPT TO COMPLETE THE SHOP**. Please be professional and responsible enough to ask for help when you need it.

## **Enjoy Yourself.**

Remember it may be work, but it can be fun too! Pretend that you are doing your evaluation just as you would if you had walked into the establishment to shop or dine for yourself.

## **Creating Reports That Stand Out From the Crowd**

It is critical to be observant and take good notes after an evaluation and to submit the results within the specified time period. Information is only useful if it is timely, accurate, actionable, and unbiased.

Take the time to make sure that your reports are not only factual, but well written, including spelling and grammar and where requested, full details are provided. Read the questions carefully and respond to the questions accurately and give details where appropriate. Your report should give the reader a good overview of your visit.

## How And When Do I Get Paid?

You receive payment for your completed assignments in accordance with the agreed upon time frame with the shopping company. Each company has a specific time on when they will pay you and it is your responsibility to make sure you know when and how you will be paid for assignments completed correctly and on time.

There are typically three ways that you will get paid for mystery shopping. First, are shop fees. These are your payment for performing the assignment.

Second, there are reimbursement only fees. These are repayment for merchandise or services you are required to purchase during the course of the assignment.

Third, there are reimbursement plus shop fees. These are a combination of the first two types of shops.

### Shop Fee Assignments

For shop fee assignments, a set fee for performing the shop is paid. These shops usually don't involve having to make a purchase. Usually, these shops only require observation of a shop location and reporting of customer service. You may have to observe how neat and clean the store is, if certain signs or merchandise are displayed and other items related to the facility and the merchandise.

Also, these types of shops may require you to report how long it took to be acknowledged by a sales associate, whether or not you were approached by a sales associate, whether or not the sales associate was knowledgeable about the merchandise or service of the store, and other items related to customer services. Retail store shops typically use this fee structure.

In the case of a shop fee assignment where a purchase is required but no reimbursement is provided, the shop will require a return of the merchandise. This allows the shopper to understand the entire shop process.

## **Reimbursement Only Fee Assignments**

For reimbursement only fee assignments, a fee to cover the cost of products or services is paid. These shops require a purchase and the receipt for the purchase. There is usually a cap on how much can be spent and usually you will only be reimbursed for the amount you spent up to the designated limit. Some shops focus on the entire purchasing cycle including the actual purchase. You are not required to return the merchandise you purchase. Restaurant shops typically use the reimbursement fee only structure.

## **Reimbursement plus Shop Fee Assignments**

For reimbursement plus shop fee assignments, both a fee for performing the shop and a fee to cover the cost of products or services is paid. This is the most common type of shop fee arrangement.

## **Track Payments**

Keep track of what you are owed and when it is due. After you earn your money, make sure that you receive it. Sometimes payment is delayed or made in the wrong amount. Mistakes happen and checks do get lost in the mail. If you track how much you are supposed to receive and when, you will immediately know when there is a problem. Be professional when approaching a company about missing or inaccurate payments, and give them all the necessary information about the assignment, in order to help them locate your payment information quickly.

## **What happens if you don't receive payment?**

First, you need to wait the full amount of time they specify before doing anything to allow enough time for the payment to reach you. If this time has passed, you should contact the company and politely ask about the missing payment. Make sure you

provide any documentation to support your claim and to help them expedite your payment. You may sometimes have to re-submit your information and this is where being organized helps. You will have your receipts, confirmation number or other relevant information available that you can fax or email to speed the process along.

## **Certification, Is It Worth It?**

### **Getting Certified**

There is a wide range of discussion regarding certification in Mystery Shopping. There are those who support certification and those who adamantly state that certification is not required. Both sides present a wide array of reasons to support their decision.

I decided to become certified, as in my mind, it shows those mystery shopping companies who support certification that I want to be treated as a professional, and that I have taken the time and money to educate myself to become the best shopper I can be. It demonstrates that I am serious about my business even if I do mystery shopping on a part time basis.

I have found that since I became a Gold Certified Mystery Shopper, (MSPA) that the scope of my shopping assignments has increased and I have been offered more and better assignments that I did not see posted prior to becoming gold certified. I no longer need to spend time on the job boards searching for assignments. My email inbox is flooded with many offers and I just sift through them and choose the ones I prefer to complete. There are some mystery shopping companies who offer their assignments to their gold shoppers first, then to the silver shoppers, before posting what is available on their job boards. There are however, some excellent mystery shoppers who are not certified and are very happy with their decision. They are receiving more mystery shopping assignments than they can handle.

It all comes down to this; you need to make the decision on what is best for you. Take the time to understand the options available to you so you can make an intelligent and informed decision.



The bottom line is this, when a scheduler is seeking to award an assignment, placing yourself in their shoes, would you award the assignment to someone who has demonstrated their commitment to the mystery shopping business by becoming certified, with all that implies, or will you take a chance on someone you have not worked with before, who is not certified.

As a scheduler, their commitment is to make sure they receive a job well done with a well written report to support the facts. This being said, many schedulers prefer to work with a shopper who has worked with them previously and has demonstrated their professionalism even though they are not certified and will many times award the non certified shopper they have worked with, rather than an unknown certified shopper.

There are two well known organizations for mystery shopper certification, The National Center for Professional Mystery Shoppers & Merchandisers and Mystery Shoppers Professional Association [www.mspa.org](http://www.mspa.org) If you are interested in becoming certified, click here to get additional information regarding the workshops and details on becoming certified.

## **Networking Groups**

Mystery shopping can be a lonely job as most shoppers work alone. There are however, networking groups available where you can interact with other shoppers on forums and in chat rooms.

Volition.com has one of the largest and most vocal mystery shopping forums on the net and I recommend that you take some time and stop in and check the forum out. The shoppers there are savvy and willing to help. They are willing to assist each other and offer a great source of support for your mystery shopping business.

## Tips For Being A Professional Mystery Shopper

- Review all assignment details, including the questionnaire prior to evaluating any location.
- Never disclose the purpose of your visit to anyone, and make notes or record information in the direct view of any employee.
- Communicate with the scheduling department if you are having any problems.
- Create appropriate scenarios enabling the employees to fulfill all categories being evaluated
- Be fair, diplomatic and objective in your commentary.
- Get names and other required information such as receipts or business cards.
- Ensure all questions can be answered. Write clearly and in COMPLETE sentences.
- Use a Thesaurus to come up with descriptive words to describe your situation.
- Be descriptive in your comments. More information is always better than less
- Make sure your scores match the commentary.
- Meet your deadline! People are depending on you to do what you commit to do.

Here are some reasons why your assignment report might be rejected:

- No names were acquired
- The shop was not completed by the due date
- Shopper went at the wrong time
- Shopper went to the wrong location
- Shopper failed to get proof-of-visits (receipts, business card, quotes, promotional materials, etc.)
- The form lacked significant detail or was overly vague enough to question the thoroughness of the visit
- Shopper forgot to evaluate an area
- Scenario was not followed
- Shopper did not respond to the editor's follow up email for questions

## Professional Mystery Shopping Commandments

1. Communicate with your scheduler.

Be realistic about your ability to complete shops, but if there is a problem (on rare occasions) communicate with your scheduler. If you fail to complete your assignment without communicating with them, you will never be used again.

2. Review the details of the assignment immediately. This assures you meet all of the criteria and can fulfill the shop.

3. Remain anonymous. Twenty percent of people evaluated say they know they were shopped. Don't be obvious, think on your feet and act natural. If you need to take notes during your visit, try to use the restroom to privately record information into a small notebook. DO NOT take your forms on any part of your visit.

4. Be neutral. The object of an assignment is not to see how many hoops people can jump through; it is to assess the habits and skills of the associate/location, no more and no less.

5. Never compare visits or locations. Judge each one on its own merit. Some large organizations have many different location types, so make sure your report reflects on the location you are shopping only.

6. Get proof. If a shop requires a purchase and receipt make sure it is either included when faxing a report or attached when doing an online submission. These are usually client requirements, and your shop would not be accepted without a receipt. If you are given paperwork, keep it for the recommended time and at least until you receive your payment... It is important that you are able to prove you were there.

7. Evaluate Correctly. Always pay attention to a company's scoring guideline if a scale of 1 to 5 or 1 to 10 is used. Don't be afraid to score the highest score possible if all components in the question were met. If you do not give the highest score, make sure you explain why you marked the question down.

8. Details are Crucial. Make sure you are aware of your surroundings and other facts; so you want to pay careful attention. If you have a hard time remembering details of a conversation, a digital voice recorder may be helpful to record the details immediately after leaving the establishment.

9. State the facts. Although companies want to know what happened, they just want the facts. For example, they want to know what someone was wearing as opposed to how you thought they looked.

10. Complete the assignment on time. Some companies will immediately cancel your assignment if you don't submit your report within their time frame. Keep accurate records of assignments completed and when payment is due.

11. Have Fun! Success in mystery shopping, just like everything else in life, requires preparation and practice. Prepare, Practice, Perform.

Have fun!

## Resources

Mystery Shopping Providers Association (MSPA)  
<http://www.mysteryshop.org>

List of mystery shopping companies  
<http://www.volition.com>

FTC  
<http://www.ftc.gov>

Mystery Shopping Providers Association  
<http://www.mysteryshop.org>

Professional Mystery Shoppers & Merchandisers  
and Mystery Shoppers Professional Association  
<http://www.mspa.org>

Get a free paypal account  
<http://www.paypal.com>

A wealth of information for mystery shoppers  
<http://www.volition.com/mystery.html>

Contact the IRS to get a tax ID number  
<http://www.irs.gov>

Manage your passwords  
<http://www.roboform.com>

Free email accounts

<http://mail.google.com>  
<http://mail.yahoo.com>  
<http://www.hotmail.com>