

Q. Why use ... Mystery Shopping

A. This tool gives information about the experience of the service user. It can be used for measuring the effectiveness of employee training, detecting symptoms of ineffective management, monitoring new initiatives and checking consistency of standards across an organisation. Mystery shopping can be applied to face-to-face, telephone-based, correspondence-based and internet-based services.

How to do it...

- Trained evaluators pose as service users. They must not give themselves away by taking notes or otherwise being unlike a normal service user.
- These mystery shoppers record the details of their experiences, e.g. time taken for their presence to be acknowledged; staff friendliness, attentiveness and knowledge of the service; condition of the premises.

Preparation

- Mystery shopping requires trained 'shoppers' with retentive memory and good visual and aural observation who are able to behave unobtrusively and should match as closely as possible the typical patient/carer/member of the public.
- Selection of appropriate mystery shoppers is therefore vital, as is training.
- It is possible to employ mystery shoppers, to recruit local volunteers or to use a specialist firm.
- The Market Research Society has issued guidelines for mystery shopping. A major point is that all employees should be advised in advance that mystery shopping is to take place, although they are not told when. They should also be told, among other things, about the objectives of the project, the elements to be evaluated and whether any employees will be identified.

Developing Questions

- It is essential to be clear about what the mystery shopping exercise is intended to find out (e.g. availability of particular information in clinics; experience at an out-patient reception desk; quality of hospital food; the environment in the accident and emergency department at night; whether a translation service is offered to those who do not speak English). The mystery shoppers should then be chosen and briefed accordingly.

Immediately after the Session

- The mystery shopper's experience must be recorded on score sheets immediately after leaving the service so that no detail is lost.

Pros

- This tool is less expensive than other forms of market research.
- Because experiences are recorded immediately there is less recall error than with interview surveys.
- The results may point immediately to practical ways of rectifying mistakes.

Cons

- Where the appropriate organisational culture does not exist, there may be employee resistance. Alternatively, knowledge that the exercise is to take place may affect staff behaviour. It may be possible to address this by 'taking the staff with you', explaining the purpose of the exercise and responding to concerns expressed.
- The exercise may need to be repeated several times, in a wide cross-section of situations, to obtain representative results.

Resources

- Costs of employing mystery shoppers, using a specialist firm or training volunteers.
- Staff time in designing the project, analysing the results and, if appropriate, training volunteers.

Top Tips

- Mystery shopping is a well developed field of expertise and is the subject of whole documents in its own right. Proper background reading should therefore be done before embarking on it.
- The Market Research Society guidelines for mystery shopping, including principles for appropriate behaviour, must be adhered to.

Sources and further information

Some of this information was first published in:

- COSLA (1998) *Focusing on Citizens: A guide to approaches and methods* COSLA: Edinburgh
- Market Research Society's advice on best practice
www.mrs.org.uk/standards/qual.htm
- Market Research Society (2011) *Guidelines for Mystery Shopping Research* <http://bit.ly/mystery-shopping-guidelines>