

Cracking the mystery

Seeing your organisation from a fresh and independent perspective is the basic principle behind mystery shopping. It is the process of measuring and reporting covertly on customer service standards at the moment of purchase or service delivery. Leading proponents use mystery customers both as an intrinsic part of their staff motivation programme and to measure customer service standards against a standardised benchmark across their business.

Mystery shopping is used to:

- measure, independently, service delivery standards against an SLA
- create management focus
- encourage staff involvement
- analyse and evaluate training needs
- reward staff.

Mystery shopping has traditionally been carried out in the retail environment and in the business-to-consumer environment, but its use is now being valued across a much wider spectrum of customer service situations, including business-to-business.

Hotels and hospitality organisation have been using mystery customer programmes for a number of years as a long-term quality management system, and as an objective and independent feedback on the level of service being offered from the guests' perspective. Larger operators in this industry use the system primarily to reinforce brand and core organisational standards, whilst independent hotels use mystery customer programmes to manage their own quality systems, whilst also receiving valuable independent and fresh feedback.

Facilities management professionals have only recently started to use mystery customer programmes and, owing to the specialist needs of facilities management, the mystery customers used need to be profiled specifically to fulfil the role of monitoring all aspects of a site (see Case Study p.18). The customers are usually profiled as 'internal customers' and as such need to have a reasonable knowledge of the facility. Most programmes need to evaluate every aspect of the 'internal' and 'external' customer experience, which may include everything from the staff restaurant to the helpdesk and even issues such as maintenance requests. Most facilities management programmes evaluate between 20 and 30 different sectors or customer experiences.

IN THE BEGINNING

Before you can measure anything you have to know the type of information you want. How do you know where you are going if you do not know where you are at in

the first place? A good mystery shopping programme provides an analysis of training and development needs, as well as an incentive and deterrent to all of the front-line service team. Each programme must be bespoke, written around the specific requirements of each company, site or organisation.

All mystery customer projects start by looking at the various quality standards and factors that the client, who may belong to a quite different organisations, is working towards. In facilities management these are usually:

- SLAs
- quality initiatives such as BS5750 or ISO standards, Total Quality Mangement etc.
- Investors in People
- Hospitality-assured or AA/RAC standards.

There are also unwritten standards that are used within most organisations that are considered as custom and practice. These should be written into the programme. It is necessary to bring all of these standards together, and agree upon the key performance indicators that relate to the service being offered.

There are both 'hard' standards, such as number of rings before the telephone is answered, response times or adherence to uniform standards, and assessments identifying 'soft skills', such as customer interaction and friendliness of staff members, and which might include a 'smile' report, evaluating first contact and welcoming of customers.

Standards used within the programme must be aspirational; they must be at the highest end of the achievable scale in order that programme does not measure against a median standard of service, but assesses up to the highest optimum standard possible. This allows superior performing members of the team to be recognised, as well as identifying training and development needs for weaker members of the team.

Most service providers have Standards of Performance (SOP) Manuals. They tend to stay on the shelf until such time as there is a change in management; they are not working and living documents. The mystery customer programme becomes the organisation's working SOP document, using all the criteria that it is looking to achieve and measuring the effectiveness of its ability on a continual basis.

SUCCESS CRITERIA

Vital to the success of a programme is agreement with the client and all of its operational team that the questions asked by the programme, in each of the assessments, are relevant. From the senior management down to those people working at 'the sharp end', the very people who are delivering the service, there has to be a consensus that these are the standards that everyone is working towards. The measurement criteria used within every programme has to be fair, and seen to be so, to have validity when the reports start to appear.

When all of a team is involved in the writing of the standards to be used within a mystery customer programme, almost invariably there is a common agreement that the organisation should be aiming at a higher level than is presently contained within documents such as SLAs.

A mystery shopping programme should be an ongoing programme with an annual agreement, with a predetermined number of customer visits. Most facilities management sites have either six to nine visits per year, but no-one within the organisation will know when the visits will take place.

Each report usually highlights any retraining needs, either on an individual or group basis. Certain aspects of initiatives in facilities management can also be highlighted, for example, with regard to name badges, are they worn throughout the staff list and do you include guests? Certain initiatives tend to lose their freshness over time and become difficult to sustain. Regular assessments allow them to be monitored and corrected accordingly.

The statistical analysis will report on each service provider separately, even in areas where there may be more than one service provider responsible for different parts of the overall service experience. For example, in a conference room, the service may include five separate contracted service providers: a booking service; a cleaning contractor; an audiovisual provider; a food and beverage facility; and a maintenance contractor.

Most clients, when they receive the report, will look initially at the statistical analysis to ascertain an improvement or a decline in service standards. But the commentary is equally important. Each issue identified is backed up with significant explanation and observations to justify marks awarded and to provide management with sufficient information to allow them to take corrective action if appropriate.

Although organisations look at their ability to offer the highest level of service, their primary objective should be to provide a consistent level of service. This is how you will be judged and quality invariably follows when consistency is achieved (see Figure 1).

ENSURING ANONYMITY

The lead partner writing any programme must have a detailed knowledge of the site or facility that the programme is designed to assess. The assessments need to be invisible to everyone within the organisation, so the lead partner must ensure that mystery customers can blend into the organisation. The guidelines written for use by the mystery customers ensure they have a detailed

knowledge and background of the organisation that they are assessing prior to their arrival. The lead partner will also be responsible for updating the standards used within the programme on a regular basis, so that the mystery customer programme follows the evolution of service delivery.

The anonymity of the mystery customer is obviously pivotal to the service he/she receives. A site director or manager rarely receives typical service in, say, the restaurant. The welcome may be friendlier, the portion size larger, the service highly efficient. However, the mystery customer can identify the 'real' service level that customers are receiving.

The benefit of an objective independent analysis is that it provides a conduit for senior management to communicate with the team members 'at the sharp end' more effectively, as the use of an outside source lends impartiality. So rather than have senior management identify a weakness, the independent analysis allows them to highlight this weakness through the outside source.

The regular assessment of service levels within any site provides a trend of performance. This enables a benchmark of service to be set as a direct measurement for use as an objective goal, or it can even be used within a performance incentive scheme for service providers or individual staff members.

The assessments also highlight key service indicators, such as language skills, service response times and the effective communication of those times to customers. A mystery customer programme can highlight all of these and provide much more detail to allow management to effect change.

A good programme will often highlight as many positives as there are negatives. It will illuminate the team member who quietly provides good service in his/her chosen role. The sharing of the report, both positive and negative, allows teams to help in the overall evaluation process and also with the solutions.

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Figure 1: Inconsistent performance

