



CENTER FOR APPLIED SALES RESEARCH



Mystery Phone Shop



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CASR Telephone Mystery Shop

Project Phases

- Phase I – Mystery Shop Design
 - Create scripting, identify times, communities, critical components to capture
- Phase II – Information gathering
 - Making the calls, documenting the information, saving the data
- Phase III – Information Analysis
 - Tallying, summarizing, comparing the data to determine key trends
- Phase IV – Report Generation
 - Creating the graphical and text report of the Mystery Shop results
- Phase V – Presentation and Discussion
 - In-person presentation and discussion of Phases I-IV with client senior management

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■ Mystery Shop Design - Key Components

- Gather objective data about the service a customer receives when telephoning a client and 1 or 2 competitive communities for information.
- x Client Locations + 1 or 2 competitors = 2x or 3x communities called
- Call each community 3 times and to ensure all telephone conditions are measured, once during each of the following time periods:
 - Weekday (10 a.m. - 5 p.m, Monday - Friday)
 - Weekday Evening (5 p.m. - 7 p.m, Monday - Friday)
 - Weekend (12 p.m. - 5 p.m, Saturday - Sunday)
- The interviewer will call, requesting information about the facility. The following is a sample explanation given when prompted:*
- *“I have a mother/father in-law who is still driving – but not at night. I am starting to think that in the future they might need to live somewhere where they can get some more help. Could I speak to someone who could help me?”*
- The caller will not offer any information but always wait to be asked questions.

* All language is tailored to individual client needs

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Phase I – Mystery Shop Design – Reporting Details

Reporting Details - 1

- Phone answered in 3 rings or less?
- Person identified themselves by name?
- Telephone answered correctly?*
- Not put on hold at any time for more than 30 seconds during initial phone call?
- Ask who you were calling for?

Reporting Details - 2

- Ask about your loved one's current situation?
- Ask about your personal situation?
- Ask for your name, number, email?
- Use your name in conversation?
- Ask about the nature of your call?
- Were you asked when would be a good time to call you back ?

*Telephone answered correctly: "Good Morning, Afternoon, Evening, thank you for calling (community name, of city). This is (name) _____, how may I direct your call?"

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Phase I – Mystery Shop Design – Reporting Details

Reporting Details - 3

- Asked what you are most interested in?
- Ask when you anticipate making a change?
- Mention specific products or services?
- Ask how you heard about the community?
- Ask what sparked your interest in the community?

Reporting Details - 4

- Salesperson called back at the arranged time?
- Salesperson returned the call?
- Ask about alternatives being considered?
- Offer to make an appointment for a tour?
- Offer to send materials about the community?
- Thank you for calling the community?

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■ **Information Gathering**

- All calls made by Ned Dobner using the agreed-upon pre-designed scripting and three (3) aliases, addresses, local phone numbers etc
- A calling card is used to prevent caller ID from identifying the source of the call
- Both regular mail and emailed information has been accepted and collected
- Calls recorded to confirm accuracy and extend utility
- Return calls to local numbers forwarded to email and logged
- Email responses to separate email addresses also collected

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Key Project Components

- Overall Summary Log
 - Excel listing grouping East – West Communities and Competitors with dates/times/alias
- Call Log
 - Detailed log tally of call responses with exception notations
 - Segmented and Combined summary data and percentages
 - Performance versus Competitor analysis highlights
- EZ-Phone Recorder Call Log with active .wav files
- Telephone Call-Back Message Log with active .wav files
- Email Message Files for each of the three aliases

Key Benefits

- Verification of training results – Identification of training needs
- Understanding of competitive weakness/opportunities