















## Guide to Mystery Shopping

Examples developed for our pilot are shown on the following pages with some handy tips to help you deliver a quality project. Follow this easy step by step guide, which covers the recruitment, training and field monitoring of resident Mystery Shoppers.

-  1. Work programme
-  2. Flyers
-  3. An Introduction to Mystery Shopping
-  4. Application form
-  5. Monitoring form
-  6. Scenarios
-  7. Questionnaires
-  8. Training course outline
-  9. Training feedback form
-  10. Expenses form
-  11. Work programme for shops
-  12. Monitoring information



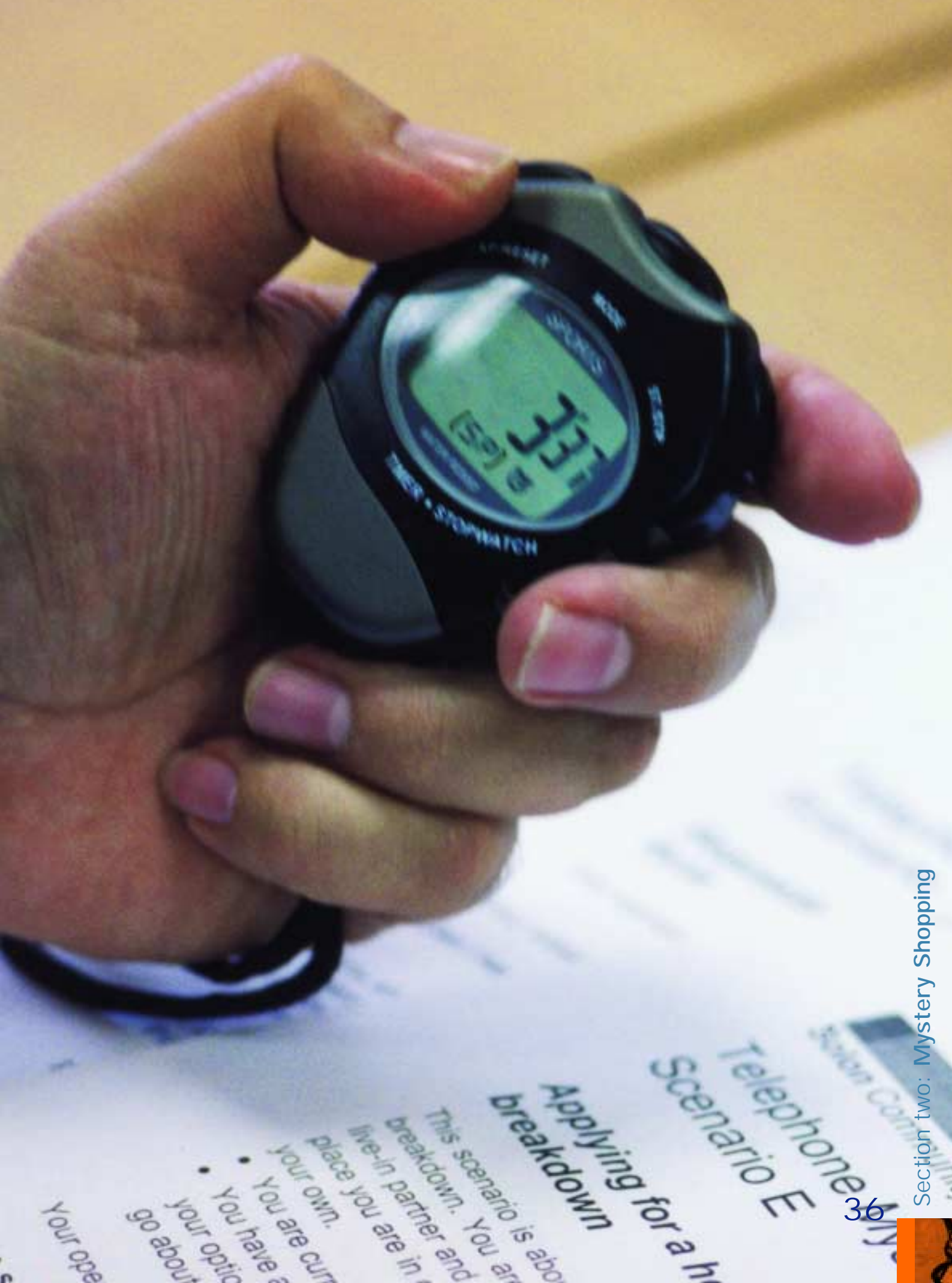
## Remember!

Make sure you have agreed your scenarios and questionnaires, drafted your introduction pack and organised dates and venues for training before you start recruiting residents.

# 1. Work Programme

Putting together a work programme at the start of the project will give you target dates and timescales. A draft outline programme is shown here.

Item	Action	Timescale date
1.	Agree outline timetable for project, key target dates and draft work programme similar to this	1 day
2.	Advise staff they will be mystery shopped	1 day
3.	Senior staff team to: <ul style="list-style-type: none"> <li>• agree scenarios and questionnaires</li> <li>• agree number of shops</li> </ul>	2 weeks
4.	Decide monitoring information required by association and sign off application form and monitoring form	1 week
5.	Agree Introductory pack	1 week
6.	Agree training dates and book venues	1 week
7.	Design flyer to go out to residents to advertise project, agree mail out date (could go out with rent statements) and get flyers printed	1 week
8.	Mail our flyers	1 day
9.	Sign up residents by phone and through completed forms, to a training session. Send out introductory pack and keep in constant contact to maintain enthusiasm	3 weeks
10.	Run 1st training session, agree calendar for shops with residents and carry out shops over following week	1 –2 weeks
12.	Run 2nd training session, agree calendar for shops with residents and carry out shops over following week	1 –2 weeks
13.	Continue training sessions etc until all the shops are completed	As above for each session
14.	All completed questionnaires to be sent back. Residents given vouchers when their completed questionnaires are returned.	As soon as possible after shops completed
15.	Questionnaires are checked and sent for data inputting and analysis.	3 weeks
16.	Final report is written	1 week
17.	<ul style="list-style-type: none"> <li>• Article and report findings written up in resident's newsletter</li> <li>• Recommendations to improve customer care set out clearly for residents to see</li> <li>• See if a resident mystery shopper would be a guest speaker at resident conference</li> </ul>	As soon as possible after project finishes



# Scenario E Telephone Mystery Shopping

## Applying for a h breakdown

This scenario is about  
breakdown. You are  
live-in partner and  
place you are in r  
your own.  
• You are curr  
• You have a  
• You have a  
your optic  
go about

Your ope

## 2. Flyers

The flyer is key to initially motivating and recruiting residents to sign up for the project and should list the skills needed and any incentives being offered (eg shopping vouchers).



We are recruiting tenants of Stadium Housing Association  
to attend a  
**FREE one-day Training Session**

**YOU can**  
**Develop Market Research Skills**  
**Work From Home**  
**Receive £50 (Shopping Vouchers)**

**YOU could become a**  
**MYSTERY SHOPPER**

We can help you to develop the Market Research skills and confidence to work flexibly from home as a Mystery Shopper.  
Make anonymous telephone calls to Stadium's offices, record your experiences and evaluate the quality of your landlord's customer service.  
This project will help Stadium Housing Association to improve their service to you.

- The flyer needs to be bright and attractive to catch people’s attention
- Use visual images and minimise text
- Tell tenants what’s in it for them
- Give a contact name and number
- Give dates for training if possible
- Be careful about using the term ‘mystery shopper’ as a headline, as many residents may not know what Mystery Shopping is

**+ + Solon Community Network + +**

**Yes, I am interested in finding out more about your offer of FREE Mystery Shopper training**  
**Please send an Information Pack & Application Form to:**

Name:  
Address:

Telephone Number (Day-time):  
Telephone Number (Mobile):  
Email Address:

**FREE one-day training sessions will be held at a local venue from 9.00am – 5.00pm**  
**FREE Lunch and refreshments will be provided**  
**Your travel and childcare expenses will be reimbursed**

**Yes, I would like to attend Mystery Shopper training on** (please tick a box)

**Friday 19 July**       **Friday 2 August**

**Please complete this form and return it to us by Friday 28th February, 2003:**

Judy Phillips  
Solon Community Network  
FREEPOST  
LONDON 18436  
London  
E1 5BR

(no stamp required - postage has been paid)

**For more information please telephone us on our Freephone Helpline number 0800 169 4406**  
**or register by Email: [jphillips@solonchs.org.uk](mailto:jphillips@solonchs.org.uk)**  
**and you can visit our website: [www.solontp.org.uk](http://www.solontp.org.uk)**

**Solon Community Network** is an independent tenant participation consultancy. We have extensive experience of providing capacity building and training to empower residents

**FREEPHONE 0800 169 4406**

## 3. An Introduction to Mystery Shopping

**This document will give you a brief introduction to Mystery Shopping and the role of the Mystery Shopper...**

### **What is Mystery Shopping?**

Mystery Shopping is a form of Market Research where individuals are trained to observe, experience and evaluate the customer service process of an organisation.

### **What does a Mystery Shopper do?**

A Mystery Shopper acts as a customer and undertakes a series of agreed tasks, which monitor the quality of customer service. They then report back on their experiences in a detailed and objective way.

For example, a tenant Mystery Shopper may be asked to phone their landlord and request a repair. They would have to monitor how long it took staff to answer, how they were greeted, and how professionally their request was handled – was the member of staff polite and informative?

The Mystery Shopper would then have to report back accurately and objectively by completing a questionnaire.

### **What is the purpose of the Mystery Customer research?**

The purpose of mystery customer research is to provide management

information to the organisation. This is intended to assist the organisation to focus on customer service improvements by providing them with information on the quality of their current service.

### **What happens to the information?**

All the completed questionnaires are fed into a database. A report is produced for the organisation giving feedback on their customer service. Mystery Shoppers are not identified and neither are individual members of staff.

### **How long will it take?**

We expect tenants to take 10 minutes to carry out each mystery shop and 20 minutes to complete the questionnaire, making a total of half an hour to complete one mystery shop.

We will agree specific times with each tenant when they would carry out their mystery shops. This is normally done over a few days, making one mystery shop a day, so as not to attract attention.

### **Will staff know that a Mystery Shop is taking place?**

All staff should have been informed that their organisation intends to undertake mystery customer research, but they will not be told when or by whom.

### **Will Housing Association staff be able to identify me?**

Mystery Shoppers should carry out their

shops without identifying themselves. Solon will train you to ensure that you have the skills to maintain your anonymity. Neither Mystery Shoppers nor individual members of staff are identified.

### **How does Solon ensure quality control?**

We will continually monitor and evaluate our recruitment and screening processes.

We will make every effort to assess the level of training required by each individual mystery shopper prior to starting on a project.

- We will provide specific training for specific projects
- We will provide ongoing support and a freephone helpline

### **What skills do I need?**

You will need to:

- Be able to use the phone
- Be able to read and follow the questionnaire and fill it in clearly
- Be available to attend a one day training event

### **How much will I earn?**

Each mystery shopper will be asked to complete the training and carry out 5 mystery shops.

When those shops have been completed you will receive £40 worth of shopping vouchers and £10 to cover the cost of phone calls.

Due to Inland Revenue rules, we are not paying Mystery Shoppers in cash, as this would have tax implications and might prejudice some people's entitlement to benefits.

Any additional expenses incurred, such as travel and childcare, will be reimbursed.

### **How do I become a mystery shopper?**

If you are interested in becoming a mystery shopper, please complete the application form and return it to us. When you are accepted for training you will then complete a more detailed questionnaire, which assists us to develop your skills and use your experience.

Applicants will need to complete a one day training course before they can conduct their first shop.

### **Future career development**

We believe that the training, support and experience you receive working as a mystery shopper will help you develop skills which could assist you in your future career development and will:

- Build confidence
- Develop organisational skills
- Improve communication skills
- Develop interviewing techniques



## 4. Application Form

**Completion and return of the application form provides the first assessment of an applicant's commitment and suitability for training.**

- Consider any information you might require in order to run the project successfully
- Consider any key information the organisation may require to monitor the project and develop Mystery Shopping in the future
- Ensure the form is easy to fill in
- Keep the form as short as possible



# Application Form

**Please note: All information is strictly confidential**

I confirm that I will be able to attend the one-day training session on

**YES**

**NO**

Mr / Mrs / Miss / Ms. (circle / delete as appropriate)

Surname \_\_\_\_\_

First name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Post Code \_\_\_\_\_

Telephone Number (Home) \_\_\_\_\_

Telephone Number (Mobile) \_\_\_\_\_

Email Address \_\_\_\_\_

**Male / Female** (please circle / delete as appropriate)

**Age Group** (please circle / delete)

16 – 24      25 – 34      35 – 44      45 – 54      55 – 64      65 +

**How would you describe your ethnic origin?**

White

British / Irish / Other white (please state) \_\_\_\_\_

Mixed

White & Black Caribbean / White & Black African / White & Asian /

Other mixed background (please state) \_\_\_\_\_

Asian or Asian British

Indian / Pakistani / Bangladeshi / Other (please state) \_\_\_\_\_

Black or Black British

Caribbean / African / Somalian / Other (please state) \_\_\_\_\_

**How would you describe your household?**

Black     Asian     White     Mixed     Other

**Type of household** (please circle / delete)

Single person  
 Couple  
 Family

**Are you working?**                       Yes                       No

**If yes, what are you doing?**     Part time             Full time

**Do you or have you ever worked for Stadium HA?**     Yes             No

**If yes,** please give details \_\_\_\_\_

**Do you consider yourself to be disabled?**     Yes             No

**If yes,** please tell us how we can help you.  
 \_\_\_\_\_

**Will you need help with childcare costs?**     Yes             No

**Please Note:**            We will reimburse all reasonable childcare costs  
                                   We will reimburse all reasonable travel costs

**Do you have any special dietary requirements?**     Yes             No

**If yes, what are they?** \_\_\_\_\_

**How did you find filling out this form?**

Easy  
 OK  
 Difficult

## 5. Monitoring Form

**This form can be tailored to meet the needs of individual associations and will assist in monitoring the profile of residents taking part in the project.**

**This information could be helpful in developing future mystery shopper programmes and in progressing tenant participation and housing plus initiatives.**

- Keep the form as short as possible
- It is important to ascertain what relationship the resident has with the landlord. For example have they previously made a complaint? If so, was it resolved satisfactorily?
- Consider what monitoring information would be useful to the organisation to authenticate the project and develop mystery shopper programmes in the future

## Further Information

**Please note: All information is strictly confidential**

Mr/Mrs/Miss/Ms (circle/delete as appropriate)

Surname \_\_\_\_\_

First Name \_\_\_\_\_

**Are you currently employed?**

- Full-time
- Part-time
- Housewife/husband
- Student
- Unemployed
- Retired
- Other

**Which best describes your main job and your partner's main job:**

- |                                              |                                        |
|----------------------------------------------|----------------------------------------|
| <input type="checkbox"/> Crafts/Tradesperson | <input type="checkbox"/> Professional  |
| <input type="checkbox"/> Factory/Manual      | <input type="checkbox"/> Leisure       |
| <input type="checkbox"/> Housewife/Husband   | <input type="checkbox"/> Public Sector |
| <input type="checkbox"/> Nursing/Medical     | <input type="checkbox"/> Retired       |
| <input type="checkbox"/> Office/Clerical     | <input type="checkbox"/> Unemployed    |
| <input type="checkbox"/> Retail              | <input type="checkbox"/> Student       |
| <input type="checkbox"/> Teacher             | <input type="checkbox"/> Other         |
| <input type="checkbox"/> Supervisor/Manager  | _____                                  |

**Do you drive?**  Yes  No

**Do you have access to a car?**  Yes  No

**What languages do you speak and how well?**

\_\_\_\_\_

\_\_\_\_\_

- Fluent
- Intermediate
- Basic

**How would you describe the area in which you live?**

- Urban (town/city)       Suburban       Rural (country/village)

**Taking everything into account, how satisfied are you with the service you receive from Stadium HA?**

- Very satisfied  
 Fairly satisfied  
 Neither satisfied nor dissatisfied  
 Fairly dissatisfied  
 Very dissatisfied  
 Comments

**Have you had any contact with Stadium HA over the past 12 months? (other than to pay rent)**

- Yes  
 No  
 Can't remember

**Why did you make contact?**

- Repairs  
 Rent/Housing Benefit  
 Transfer/Exchange  
 Neighbours  
 Other

**Did you find the staff**

- Helpful  
 Unhelpful  
 Neither  
 Can't remember

**Were you satisfied with the final outcome?**

- Satisfied  
 Dissatisfied  
 Neither  
 Can't remember

**Have you ever made an official written complaint to Stadium HA?**

Yes     No

**If yes,** please give details \_\_\_\_\_

**Do you own/have access to a computer at home?**     Yes     No

**Which of the following best describes how experienced you are in using a computer?**

- Very experienced
- I use a computer most days for a variety of tasks
- Quite experienced
- I use a computer often for specific tasks
- Not very experienced
- I use a computer occasionally
- No experience
- I never use a computer

**Do you have access to the Internet at home?**     Yes     No

**How often do you 'log on' to the Internet in an average week?**

- Every day
- Several times each week
- Once a week
- Once a fortnight
- Less often

**How comfortable are you using the Internet?**

- Very
- Fairly
- Not at all

**Do you have an email account?**     Yes     No

**What is your email address?** \_\_\_\_\_

# Telephone Mystery Shop

## Scenario D

### Reporting a neighbour nuisance problem

This scenario is about reporting a neighbour nuisance issue. You are calling about the loud music that they are playing at all hours of the day and/or night.

Explain that you don't want to identify yourself because you're worried that your neighbours will know that it's you complaining, and that you fear of possible repercussions.

You want to find out what the landlord can do to resolve the situation. If the member of staff asks for your details, politely decline saying that you want some basic information about the housing association's policies and procedures at the moment.

Your initial question is:

"I'm being kept up because I'm fed up with my neighbours playing loud music all hours. What can you do to help me?"

You may be asked for details about the issue of noise that is being played.

You may be asked if you have called to complain about the noise before.

They may suggest a meeting to sort out the situation, or offer to send you some information on noise and vibrations, or offer to send you diary sheets, to help you log when the noise is being played, or they may offer to take full details of the situation and the noise.

Please record all of the questions asked and your answers.

Please ensure you have written the names of the staff members you speak to and the date and time of the call.

## 6. Scenarios

The scenario sets out the scene that the mystery shopper will enact and gives the mystery shopper an initial question to ask. The scenario should be realistic and straightforward, making it easy for the mystery shopper to follow.

If possible scenarios should echo routine, everyday enquiries received from tenants of most housing associations and are familiar to experienced staff members.

Scenarios should be:

- Simple
- Relevant
- Credible
- Practical
- Safe

Develop scenarios to test typical and accepted customer service standards, and which range in difficulty.

The examples shown here cover:

- a. Enquiring about office opening times
- b. Making a complaint on behalf of someone else
- c. Requesting a repair on behalf of someone else
- d. Reporting a neighbour nuisance problem
- e. Applying for a home after a relationship breakdown
- f. Requesting a transfer to another property

# Telephone Mystery Shop Scenario **A**

## Enquiring about office opening times

This scenario is about asking for the office opening times. You are calling the housing association's main office number and want to find out what times their office is open, as you wish to hand in a letter personally.

Your initial question is:

**"What are your office opening times?"**

Please record all of the questions asked and offers of help made.

**Please ensure you have read the Scenario and Questionnaire before you make the telephone call.**

## Telephone Mystery Shop Scenario B

### Making a complaint on behalf of someone else

This scenario is about getting information on the housing association's Complaints Procedure.

You are NOT a tenant of Stadium HA, but you need to make a complaint on behalf of another family member, about an aspect of the service they have received that was not acceptable.

For example: You are calling because your (elderly) mother is not happy with the service she received (English is not her first language?). Explain that you feel that she has not received a satisfactory service from the association, but don't want to go into detail at this stage.

You will need to find out:

1. the different ways that you can make a complaint on her behalf;
2. who would be dealing with the complaint;
3. how long it will be before you receive a response; and
4. how long before the matter is investigated and resolved.

If the member of staff asks for your contact details, politely decline saying that you just want some basic information on the organisation's procedures at this stage.

Your initial question is:

**"I'm phoning up on behalf of my elderly mum. I want to find out how I can make a complaint on her behalf?"**

The housing officer may ask you why you want to make the complaint.

They may ask if you have called to complain about this before. They may ask for further details about the complaint.

They may suggest a meeting to sort out the situation, offer to send you some information or take details of the complaint over the telephone.

Please record all of the questions asked by the officer and what offers of help are made.

**Please ensure you have re-read the Scenario and Questionnaire before you make the telephone call.**

# Telephone Mystery Shop

## Scenario C

### Requesting a repair on behalf of someone else

This scenario is about requesting a repair on behalf of someone else who is a tenant of Stadium HA (perhaps a neighbour or relative).

You are calling the main office number and need to find out what the Repair Line Number is. Ask if you can be transferred direct to the Repair Line.

In this scenario you are asking for a repair that the landlord does not carry out, because it is actually the responsibility of the tenant. You are to ask the housing association to fit a new toilet seat, to replace the one that is broken.

The staff member should explain that these types of repairs are the tenants' responsibility and may offer some advice about how to go about fixing it yourself.

Because they can't actually carry out your repair you shouldn't be asked for your name or address, but if you are asked for these details say that you are asking on behalf of a family member / neighbour and that you will do the repair for them if the association can't help.

Your initial question is:

**"The toilet seat is broken, can you fix it for us?"**

During the conversation, suggest that you'll pay for it if they fix it.

Please record all of the questions asked by the member of staff and any suggestions or offers of help made.

Please ensure you have re-read the scenario and questionnaire before you make the telephone.

## Telephone Mystery Shop Scenario **D**

### Reporting a neighbour nuisance problem

This scenario is about reporting a neighbour nuisance issue.

You are calling about the loud music that they are playing at all hours of the day and/or night.

Explain that you don't want to identify yourself because you're scared that your neighbours will know that it's you complaining, and that you fear of possible repercussions.

You want to find out what the landlord can do to resolve the situation.

If the member of staff asks for your details, politely decline saying that you just want some basic information about the housing association's policies and procedures at the moment.

#### Your initial question is:

**"I'm phoning up because I'm fed up with my neighbours blasting their music at all hours. What can you do to help me?"**

You may be asked for details about the level of noise and the hours at which it is being played.

You may be asked if you have called to complain about this problem before.

They may:

suggest a meeting to sort out the situation, or

offer to send you some information on policies and procedures, or offer to send you diary sheets, to help you log when these unacceptable levels of noise are taking place, or

they may offer to take full details of the complaint over the telephone.

Please record all of the questions asked and offers of help made.

Please ensure you have re-read the scenario and questionnaire before you make the telephone call.

# Telephone Mystery Shop

## Scenario E

### Applying for a home after a relationship breakdown

This scenario is about applying for a property after a relationship breakdown. You are calling because you have split up with your live-in partner and need to find out if you can continue to rent the place you are in or if you need to apply for a separate property of your own.

You are currently renting from the housing association.

You have a Joint Tenancy Agreement and need to find out what your options are: Can you remain where you are? How do you go about applying for a new home?

Your opening line is:

**"I've split up with my partner and need to find out what will happen to my place as a result."**

You will probably be asked whether you are a "sole" or "joint" tenant. You may be asked what happened; did your partner walk out? Are you still in touch with him / her? Is there a history of abuse / violence? Have the police become involved?

The housing officer may suggest a meeting to sort out the situation. They may offer to send you some information.

Please record all of the questions asked and / or offers of help made and try to keep the conversation going with your answers.

**IF THE MEMBER OF STAFF ASKS FOR YOUR DETAILS, POLITELY DECLINE, STATING THAT YOU JUST WANT SOME BASIC INFORMATION AT THE MOMENT.**

Please ensure you have read the scenario and questionnaire before you make the telephone call.

## Telephone Mystery Shop Scenario F

### Requesting a transfer to another property

This scenario is about requesting information about a transfer or exchange to another property.

Say you currently live in ..... (Leeds?) and have been renting your 2/3-bedroom house / flat for a number of years and need to move to London, as you / your husband / wife have been offered a job.

You are calling various housing associations in the area to find out whether you are able to do this and what is involved.

If the member of staff asks for your details, politely decline saying that you are just exploring your options at the moment.

The staff member should advise you that the housing association:

1. Does not have a Waiting List
2. Takes nominations from the Local Authority only
3. Will refer you to your current local authority so that you can find out if you are eligible for a transfer or mutual exchange or whether you can apply for the H.O.M.E.S. Scheme (Housing Organisations Mobility and Exchange Services).

The staff member should ask you a number of questions to see whether you have a chance of being eligible for any of these options.

These questions could be about: the type of property you are currently in; the number of people in your household; the area you wish to move to; and details of your current social landlord (council or housing association).

Please record all of the questions that you were asked and try to keep the conversation going with your answers.

#### Your initial question is:

1. **"I'm a housing association tenant currently living in ..... (Leeds, Bradford, Swindon etc) and want to move to London, can you re-house me and my family?"**
2. **"I'm renting a 2/3-bedroom place/house/flat and my husband/wife/partner has been offered a new job in an area covered by your housing association. Can I transfer to one of your properties?"**

Please ensure you have re-read the scenario and questionnaire before you make the telephone call.

# Mystery Shopper check list

1. Get organised: set out your phone, stopwatch, notepad, scenario and questionnaire.
2. Read through the scenario and the questionnaire you are going to use.
3. Make sure there are no distractions.
4. Read through the scenario again. Imagine you are on the phone and speak your part out loud.
5. Phone Solon before your first shop.
6. Record the time, have your stop watch ready and make your mystery shop telephone call.
7. Complete the questionnaire immediately after the phone call. Record your observations accurately. If in doubt phone Solon.
8. If you were unable to carry out the shop or to complete your questionnaire, phone Solon.
9. Repeat this procedure before every shop. If you are confident you do not need to call Solon after the first shop.
10. As soon as you have completed all your 5 shops, put all 5 completed questionnaires in the freepost envelope provided and post the envelope to Solon.
11. When Solon receives all your completed questionnaires, you will be sent your vouchers and a certificate.

## 7. Questionnaires

**The purpose of the questionnaire is to ensure an objective and consistent approach by Mystery Shoppers.**

- The questionnaire must be simple and easy to follow and be capable of accurately reflecting a range of responses from a variety of staff
- The questions should seek to establish if accepted good practice within the organisation is being followed in day to day transactions with tenants
- If you develop a new scenario and questionnaire, test them before you use them in a training session or study



# Telephone Mystery Shop Questionnaire

## Scenario A

Please complete immediately after undertaking this Telephone Mystery Shop

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date of Mystery Shop \_\_\_\_\_

Time of Mystery Shop \_\_\_\_\_

Name of Project \_\_\_\_\_

## Section 1: Date and time of call

### Please Remember:

- You will need to record the number of attempts it takes before you get to speak with a staff member **(please tick the appropriate box)**
- You must leave at least fifteen minutes between attempts
- If you are unsuccessful after **three** attempts, you must abort your call and contact your supervisor on 0800 169 4406

### 1. When did you make the call? (Please record date / time below)

	Attempt 1	Attempt 2	Attempt 3
Date of call			
Time of call			

**2. How quickly was the call answered?** (Please tick the appropriate box)

	Attempt 1	Attempt 2	Attempt 3
0-5 Secs			
6-10 Secs			
11-20 Secs			
20-60 Secs			
No reply after 1 minute			
No reply after 2			
Answerphone			
Engaged			

NOTE - FOR ATTEMPTS 1, 2, 3 ABORT THE CALL IF NOT ANSWERED AFTER 2 MINUTES

**Section 2: The initial greeting**

**1. Who answered your call?** (Please tick one box only)

- (i) Receptionist
- (ii) Housing Officer
- (iii) Other (which staff member was it?)

**2. How were you greeted?** (Please tick all that apply)

- (i) They said, "Hello" / "good morning" / "good afternoon"
- (ii) They mentioned Stadium HA
- (iii) They gave their own name
- (iv) They said, "How can I help you?"
- (v) None of the above

### 3. If you marked (V) 'none of the above'

Please tell us what the staff member said...

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### 4. After you asked your question or after you had explained what information you required...

#### What did the staff member do?

(Please tick either YES or NO for each question)

	YES	NO
(i) Did they deal with your enquiry themselves?	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Did they explain that they could not answer your enquiry?	<input type="checkbox"/>	<input type="checkbox"/>
(iii) Did they put you on hold?	<input type="checkbox"/>	<input type="checkbox"/>
(iv) Did they transfer you to another staff member who dealt with your enquiry?	<input type="checkbox"/>	<input type="checkbox"/>
(vi) Did they ask you to call back later?	<input type="checkbox"/>	<input type="checkbox"/>
(v) Did they offer to call you back? ( <i>Politely reject this offer!</i> )	<input type="checkbox"/>	<input type="checkbox"/>

#### If you ticked "NO" to all the above

Please explain what the member of staff said on opposite page

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**5. If your call was transferred,**

**Did the member of staff do any of the following?**

(Please tick either YES or NO for each question)

	YES	NO
(i) Did they explain the reason for transferring your call?	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Did they give you the name of the staff member and / or department that you were being transferred to?	<input type="checkbox"/>	<input type="checkbox"/>

**6. Whilst your call was on hold,**

**Did any of the following occur?**

(Please tick either YES or NO for each question)

	YES	NO
(i) They informed me that my call would be dealt with soon	<input type="checkbox"/>	<input type="checkbox"/>
(ii) They gave me the name of the person prior to transfer	<input type="checkbox"/>	<input type="checkbox"/>
(iii) They asked if I would like to leave a message	<input type="checkbox"/>	<input type="checkbox"/>
(iv) They diverted my call straight to voicemail	<input type="checkbox"/>	<input type="checkbox"/>
(v) I felt that I was put on hold for a long time	<input type="checkbox"/>	<input type="checkbox"/>



**Section 3: Handling the enquiry**

**9. Only if your call was transferred to another member of staff...**

**How were you greeted by the second staff member?**

	YES	NO
(i) They said "Hello" / "good morning" / "good afternoon"	<input type="checkbox"/>	<input type="checkbox"/>
(ii) They mentioned Stadium HA	<input type="checkbox"/>	<input type="checkbox"/>
(iii) They gave their name, job title or the name of the department	<input type="checkbox"/>	<input type="checkbox"/>
(iv) They said, "How can I help you?"	<input type="checkbox"/>	<input type="checkbox"/>

**If you ticked "NO" to all the above**

Please explain what the member of staff said

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**10. What was the result of your enquiry?**

(Please tick either YES or NO for each question – but do not contradict yourself)

	YES	NO
(i) They gave the office opening and closing times immediately	<input type="checkbox"/>	<input type="checkbox"/>
(ii) They gave times that the office would be closed for staff training	<input type="checkbox"/>	<input type="checkbox"/>
(iii) They suggested going to the office and noting the times on the front door	<input type="checkbox"/>	<input type="checkbox"/>
(iv) I was told to call the Repairs Helpline	<input type="checkbox"/>	<input type="checkbox"/>
(v) None of the above	<input type="checkbox"/>	<input type="checkbox"/>

**11. At any time during the call,**

**Did the staff member ask any questions relating to the enquiry?**

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

**12. If you answered 'yes',** (Please list the questions that were asked)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**13. Did they offer to send you any information?** (Politely reject this offer!)

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

**Section 4: Overall impression**

**14. What was your overall impression of the way in which the staff member dealt with your call?**

(Tick YES or NO as appropriate but do not give contradictory answers)

	YES	NO
(i) They appeared to be disinterested in me / my enquiry	<input type="checkbox"/>	<input type="checkbox"/>
(ii) They genuinely wanted to help me	<input type="checkbox"/>	<input type="checkbox"/>
(iii) They came across as mechanical – as though I was 'just another customer'	<input type="checkbox"/>	<input type="checkbox"/>
(iv) They came across as professional	<input type="checkbox"/>	<input type="checkbox"/>
(v) They did all that was necessary to answer my enquiry	<input type="checkbox"/>	<input type="checkbox"/>
(vi) They used jargon or language that I did not understand	<input type="checkbox"/>	<input type="checkbox"/>
(vii) They were quick and efficient	<input type="checkbox"/>	<input type="checkbox"/>

- |                                   | YES                      | NO                       |
|-----------------------------------|--------------------------|--------------------------|
| (viii) They appeared rude         | <input type="checkbox"/> | <input type="checkbox"/> |
| (ix) They treated me with respect | <input type="checkbox"/> | <input type="checkbox"/> |

**15. Were you able to hear the staff member clearly?**

- | YES                      | NO                       |
|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> |

**16. If you ticked 'NO' please explain why not...**

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**17. What did the staff member say at the end of the call?**

(Please tick appropriate boxes)

- |                                                                   |                          |
|-------------------------------------------------------------------|--------------------------|
| (i) They checked that they had answered my enquiry satisfactorily | <input type="checkbox"/> |
| (ii) They asked for my contact details                            | <input type="checkbox"/> |
| (iii) They said "Thank you"                                       | <input type="checkbox"/> |
| (iv) They said "Goodbye"                                          | <input type="checkbox"/> |
| (v) Nothing was said                                              | <input type="checkbox"/> |

**18. Do you wish to add anything else about how you think the second staff member handled your call?**

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# Telephone Mystery Shop

All the questionnaires for the various scenarios are basically the same, except for Section 3 question 10, which relates to each specific scenario, and is therefore different each time.

## Scenario B

### 10. What was the result of your enquiry?

(Please tick either YES or NO for each question – but do not contradict yourself)

	YES	NO
(i) The member of staff was polite and listened actively to what I had to say	<input type="checkbox"/>	<input type="checkbox"/>
(ii) They explained Stadium's Complaints Procedure fully....They told me that I could make a complaint – verbally over the telephone, in writing or in person at London & Quadrant's office	<input type="checkbox"/>	<input type="checkbox"/>
(iii) The member of staff tried to take my details so they could send me a formal complaint form	<input type="checkbox"/>	<input type="checkbox"/>
(iv) They advised me as to how quickly I would get a response if making an Official Complaint	<input type="checkbox"/>	<input type="checkbox"/>
(v) None of the above	<input type="checkbox"/>	<input type="checkbox"/>

## Scenario C

### 10. What was the result of your enquiry?

(Please tick either YES or NO for each question – but do not contradict yourself)

	YES	NO
(i) They simply said that Stadium don't do that repair	<input type="checkbox"/>	<input type="checkbox"/>
(ii) They took the time to explain that this repair is actually the responsibility of the tenant to sort out	<input type="checkbox"/>	<input type="checkbox"/>
(iii) They suggested alternative methods of fixing the problem (eg: Buy a new seat at a DIY store)	<input type="checkbox"/>	<input type="checkbox"/>
(iv) I was told to call the Repairs Helpline	<input type="checkbox"/>	<input type="checkbox"/>
(v) None of the above	<input type="checkbox"/>	<input type="checkbox"/>

## Scenario D

### 10. What was the result of your enquiry?

(Please tick either YES or NO for each question – but do not contradict yourself)

	YES	NO
(i) The member of staff was polite and listened actively to what I had to say	<input type="checkbox"/>	<input type="checkbox"/>
(ii) They explained that I could supply details of the problem either over the telephone, in writing or in person at Stadium's housing office	<input type="checkbox"/>	<input type="checkbox"/>

	YES	NO
(iii) The member of staff tried to take my details so they could send me a diary sheet or information sheet about how Stadium tackles neighbour nuisance issues	<input type="checkbox"/>	<input type="checkbox"/>
(iv) They advised me as to how quickly I would get a response	<input type="checkbox"/>	<input type="checkbox"/>
(v) They suggested that I contact the Council's Environmental Health Dept. who will monitor noise levels	<input type="checkbox"/>	<input type="checkbox"/>
(vi) None of the above	<input type="checkbox"/>	<input type="checkbox"/>

**Scenario E****10. What was the result of your enquiry?**

(Please tick either YES or NO for each question – but do not contradict yourself)

	YES	NO
(i) They asked about the household details: <ul style="list-style-type: none"> <li>• whether I was sole or joint tenant</li> <li>• whether I was occupying the home by myself, and</li> <li>• whether I had any dependants etc.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) They explained that I could have sole tenancy of the property but would need to make an appointment to review the tenancy	<input type="checkbox"/>	<input type="checkbox"/>
(iii) They explained that I would need to apply to see if I am eligible for a transfer and offered to send me an application form and / or invited me to drop into the office to complete a form	<input type="checkbox"/>	<input type="checkbox"/>
(iv) They advised me as to how quickly I would get a home, if I was eligible	<input type="checkbox"/>	<input type="checkbox"/>

**Scenario F****10. What was the result of your enquiry?**

(Please tick either YES or NO for each question – but do not contradict yourself)

	YES	NO
(i) They asked for more information, for example <ul style="list-style-type: none"> <li>• size of current home?</li> <li>• number of people in the household?</li> <li>• which area do you wish to move to? and</li> <li>• details of your present landlord?</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) They explained that: <ul style="list-style-type: none"> <li>• Stadium does not have a waiting list</li> <li>• Nominations ALWAYS come direct from the local authority</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
(iii) They explained that : <ul style="list-style-type: none"> <li>• I must apply to my current local authority/landlord to see if I am eligible for a transfer or for the HOMES scheme</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
(iv) They gave an indication of how often properties became available in certain areas	<input type="checkbox"/>	<input type="checkbox"/>

## 8. Training Course Outline

**Scenarios and questionnaires must be agreed before you deliver the training.**

- Keep training groups small, between 4 & 10 residents
- Do not hold the training session in the association's office where Mystery Shoppers could be identified by staff
- Maximise role play in the session
- Organise shops and agree dates at the end of the day
- Scenarios and questionnaires to be used in the project should be available for residents to take away at the end of day
- Buy stop watches to give to each resident
- Bring petty cash to reimburse residents travelling costs
- Ask residents to complete a feedback questionnaire before they leave at the end of the day

The session will need careful organisation as every scenario and questionnaire will have to be copied for each participant to use during the day. Additional copies should be available for residents to take with them when they leave at the end of the day so they can carry out the shops.

Consider having a trainer and an assistant trainer present so they can act out each scenario before asking residents to role play. This can help build confidence with participants.

## Training Letter

Dear

**Re: Mystery Shopper Training**

Thank you for your interest in the Mystery Shopper Project. Please find enclosed "An Introduction to Mystery Shopping", an application form, the training course outline and a map showing the location of the venue. Please complete the application form and return it to us using the pre-paid envelope by [Add date] confirming that you will be attending the training session.

**Date of session:**

**Training venue:**

Lunch and refreshments will be provided at the training session and your travel expenses will be reimbursed. You will also be able to claim any child care expenses.

If you have any queries regarding the training session, the application form, travel arrangements etc., please do not hesitate to contact me on our freephone number.

**All trainees who complete the one-day training session and five "mystery shops" will receive £40 worth of shopping vouchers and £10 to cover the cost of phone calls.**

It is important that you make every effort to arrive to register at 9am, as the training session will start promptly at 9.30am.

Yours sincerely,

# Training Programme

## Course Outline

Time	Activity
9.00am	<b>Registration</b>
	<b>Refreshments</b> Tea/coffee, pastries, fruit
9.30am	<b>Introductions &amp; Warm up</b>
	<b>Mystery Shopping</b> 1. What is Mystery Shopping? 2. Role of the Mystery Shopper 3. Qualities needed
10am	<b>Getting ready</b> Stop watches Organising your workspace
	<b>Introduction to Telephone Scenarios and Questionnaires</b>
10.45am	<b>Refreshments</b> tea/coffee etc.
11.am	<b>Scenarios and questionnaires and role play</b>
12.30 pm	<b>Lunch</b>
1.00 pm	<b>Scenarios, questionnaires and role play</b>
3.00 pm	<b>Refreshments</b> tea/coffee etc.
3.15pm	<b>More scenarios, questionnaires and role play</b>
3.50pm	<b>Mystery Shopper Work Allocation Programmes</b>
	<b>Feedback Forms and expenses</b>
5pm	<b>Finish</b>

## Check list of documents for Mystery Shopper training

### Training for 10 residents

1. Feedback forms
2. Monitoring forms
3. Outline programme
4. Voucher forms
5. Expenses and childcare claim forms
6. 3 lots of each telephone scenario for each resident (6 scenarios)
7. 3 lots of telephone Questionnaires for each Scenario for each resident
8. 1 of each personal visit Scenario and Questionnaire for each resident (2 Scenarios)
9. Work programme for Solon to fill in
10. Work programme for residents to fill in and take away

## 9. Training Feedback Form

### Feedback on Training Course held on

**1. How did you feel your application was handled?**

Very poor     Poor     Average     Good     Excellent

**2. Was the information in the pack clear?**

Very poor     Poor     Average     Good     Excellent

**3. What did you think of the venue?**

Very poor     Poor     Average     Good     Excellent

**4. What did you think of the catering?**

Very poor     Poor     Average     Good     Excellent

**Please TICK the phrases that you think best describe your experience of the course**

- "I was made to feel welcome when I arrived"
- "The warm-up exercise broke the ice and made me laugh"
- "I was bored some / all of the time"
- "I found the course really interesting"
- "The trainer talked for too long"
- "I wanted more role-playing exercises"
- "There wasn't enough time to do everything"
- "I found it easier to talk / work in small groups"
- "The trainer should have stuck to the timetable more"
- "I enjoyed working in a big group"
- "There wasn't enough time to chat to the other trainees"

5. What did you find most useful about the course and why?

Four horizontal lines for writing an answer.

6. What parts of the course or exercises did you find LEAST useful?

Four horizontal lines for writing an answer.

7. How could it be improved?

Four horizontal lines for writing an answer.

8. What did you think about the level at which the course was pitched?

to basic	basic	about right	advanced	too advanced
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. Overall, how satisfied were you with this training course?

very dissatisfied	dissatisfied	ok	satisfied	very satisfied
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

# 10. Expenses Form

Name \_\_\_\_\_

## CHOOSE YOUR £50 SHOPPING VOUCHERS

Please select the vouchers you would like sent to you up to a maximum value of £50 (which includes telephone cover of £10). You can make up to two selections from the list shown below.

<b>Argos</b>	£10	£20	£30	£40	£50
<b>Iceland</b>	£10	£20	£30	£40	£50
<b>Marks and Spencer</b>	£10	£20	£30	£40	£50
<b>Sainsbury's</b>	£10	£20	£30	£40	£50
<b>Safeway</b>	£10	£20	£30	£40	£50
<b>Tesco's</b>	£10	£20	£30	£40	£50
<b>Woolworth</b>	£10	£20	£30	£40	£50



# 11. Programming Shops & Ongoing Support

**Agree the programme of shops with each resident at the end of the training day.**

- Encourage residents to carry out the shops as soon as practicable after the training, when confidence and enthusiasm are high
- Allocate each resident 5 shops, preferably 4 telephone shops and 1 personal visit
- Participants can select their favourite scenarios, but they must choose a minimum of 3 different Scenarios
- Agree a specific time for each resident to carry out each scenario and put it on the work programme
- Ensure times and scenarios are staggered so as not to attract undue attention when the shops are carried out
- Remind residents to phone the support line before they start their first shop, to build confidence and assist monitoring
- Provide ongoing support through a freephone telephone helpline

## Programme Of Shops

Name : \_\_\_\_\_

(Total of 5 Telephone Shops or 4 Telephone shops and 1 personal Visit)

Scenario	Date	Time	Branch Tel No.	Contact with SCN Staff	Completed
<b>Telephone Mystery Shop</b>					
<b>Scenario A</b> Enquiring about office opening times					
<b>Scenario B</b> Making a complaint on behalf of someone else					
<b>Scenario C</b> Requesting a repair on behalf on someone else					
<b>Scenario D</b> Reporting a neighbour nuisance problem					
<b>Scenario E</b> Applying for a home after a relationship breakdown					
<b>Scenario F</b> Requesting a transfer to another property					
Scenario	Date	Time	Branch Tel No.	Contact with SCN Staff	Completed
<b>Personal Visit Mystery Shop</b>					
<b>Scenario A</b> Requesting a complaint form/leaflet					
<b>Scenario B</b> Requesting a housing application (waiting list) form					

**Don't forget** to contact Solon staff before you carry out your Mystery Shop!

**Phone:** Shahan Islam on freephone **0800 169 4406**

### Sample Calendar for Mystery Shops

	Wed 2/7		Thurs 3/7		Fri 4/7		Mon 7/7		Tues 8/7	
	am	pm	am	pm	am	pm	am	pm	am	pm
<b>Scenario A</b>										
<b>Scenario B</b>										
<b>Scenario C</b>										
<b>Scenario D</b>										
<b>Scenario E</b>										
<b>Scenario F</b>										

### Personal Visit Mystery Shop

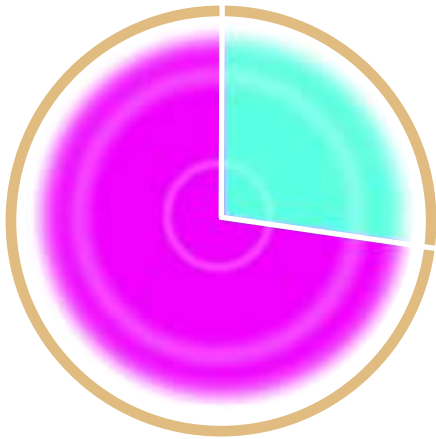
<b>Scenario A</b>						
<b>Scenario B</b>						



## 12. Resident Profile

Shown here is the statistical monitoring information for Stadium and West Yorkshire housing associations residents who took part in Mystery Shopper pilot.

### Gender



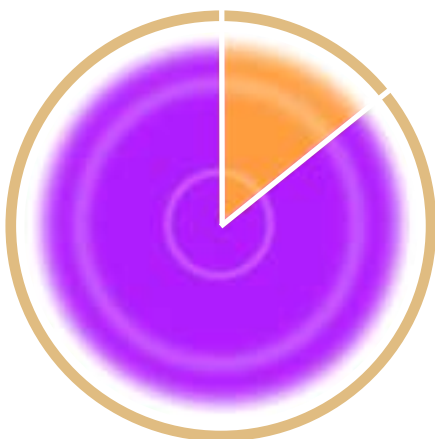
Gender	No.	%	Colour
Male	6	27	Teal
Female	16	73	Pink
<b>Total</b>	<b>22</b>		

### Age Range



Age Range	No.	%	Colour
25 – 34	5	23	Teal
35 – 44	7	31	Red
45 – 54	5	23	Orange
55 – 64	2	9	Blue
65+	3	14	Light Green
<b>Total</b>	<b>22</b>		

### Disability



Disabled	No.	%	Colour
Yes	3	14	Orange
No	18	86	Purple
<b>Total</b>	<b>21</b>		

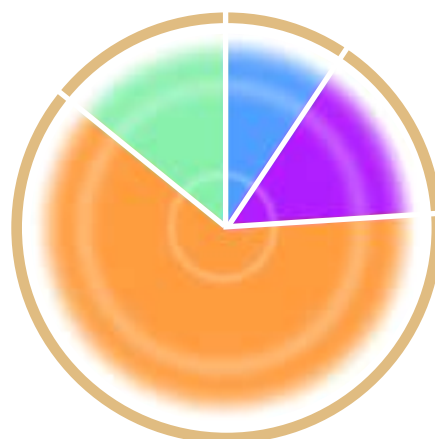
## Ethnic Origin

Ethnic group	No.	%	Colour
White British	8	37	
White Other	1	5	
Black British	4	19	
Black Caribbean	1	5	
Black African	4	19	
Asian	1	5	
Mixed African	1	5	
Mixed Other	1	5	
<b>Total</b>	<b>21</b>		



## Employment

Nature of Employment	No.	%	Colour
Full time	2	10	
Part time	3	14	
Unemployed	13	62	
Retired	3	14	
<b>Total</b>	<b>21</b>		



## Useful contacts

### Solon Community Network

Susy Lloyd  
Managing Director

Tel: 020 7780 2220  
Fax: 020 7702 7381  
Email: [Slloyd@solonchs.org.uk](mailto:Slloyd@solonchs.org.uk)  
Website [www.solontp.org.uk](http://www.solontp.org.uk)



### ORC International

Dipannita Betal  
Housing Research Manager

Tel: 020 7675 1061  
Fax: 020 7675 1903  
Email: [dipannita.betal@orc.co.uk](mailto:dipannita.betal@orc.co.uk)



### Stadium Housing Association

Caroline Allotey-Annan  
Director of Community Services

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### Housing Corporation

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### West Yorkshire Housing Association

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Director of Housing Services

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A **guide** for social landlords to recruiting, training and supporting residents as mystery shoppers.

Written by **Susy Lloyd**

**Solon** Community Network

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