

Tips for Mystery Shopping

How to Tune Your Phone Sales for Higher Revenue

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When Managing Director Khaled Hashem of the Nantucket Island Resorts decided to replace shower heads in the White Elephant Hotel and Residences, he sifted and sorted and weighed the options. Then he tried 8 of them. Then he had others try the top three. Then he used each of the three for a week and had others do the same. And then he chose.

Fanatical? Certainly. Obsessive? Maybe. Effective? Absolutely. Not only had Khaled chosen what he believed was the best shower head, but he'd sent a message to the staff that absolute attention to detail was part of this top hotel's culture.

Is this kind of management over-the-top crazy? What sort of experience do you want your customers to have? How do your frontline employees handle telephone questions and requests from customers?

Spot-Check Your Sales

With its powerful devotion to service, you won't be surprised to learn that the Nantucket Island Resorts' reservations center is one of many that UpSell Training calls several times a month to spot-check the work of agents. Are they presenting the hotel's benefits effectively? Are they asking for the sale? It's called "mystery shopping" or "secret shopper" and organizations that deliver customer service rely on the technique to measure their consistency and effectiveness. [Here's a sample fictional reservation call.](#)

Here are some of the considerations for setting up mystery shopping at UpSell Training:

- How many calls each month
- Days and times for the calls
- Call scenarios
- Assessment criteria

The number of calls each month is often a function of budget, but around 10 is a good starting point. Since most organizations want to measure performance throughout the week, we'll usually distribute the calls throughout the time the phones are answered, with an emphasis on the times of highest call volumes.

Call Scenarios

Call scenarios can be very simple and similar (as most inquiry calls are) or they can become very customized, detailed and elaborate (as sales calls for a major event would be). We work this out with each organization, deciding what they want to measure.

In some cases we simply send an MP3 recording of a call by e-mail and let the organization review and assess the performance on the call. In some cases we provide a brief written assessment with a list of suggestions on how the call might have been improved. In most cases, we develop a scoring grid with objective and subjective criteria. The score sheet presents a total score or several category scores. The organization can listen to the call and compare the scoring. Reviewing it with the staff can make the calls and scores into powerful training tools.



Objective Criteria

Here are some examples of objective criteria that we can tick off on an assessment:

- How quickly is the phone answered?
- Is the representative able to answer questions?
- Do they offer additional information, such as when a new brochure will be out or when new services start?
- Do they ask for and use the caller's name throughout the call?
- Do they ask for the sale? ("May I make a reservation for you?")
- Do they end the call by offering additional assistance?

As you can imagine, tone is a critical part of the call as well. Are your people upbeat, pleasant, and helpful? Do they connect with the callers through questions and responses?

We know people make decisions based not only on objective facts, but also on an emotional connection. You usually get just one chance to make that connection on a phone call.

Constant Monitoring

It's also not enough to make a few calls, draw conclusions, and then assume performance will remain at a high level. For example, one hotel we work with showed astonishing improvement right after we went in for two days of on-site training. The calls bounced them to the top of the performance hill. But after a few weeks passed, their performance began to erode. People got careless. A few new employees who hadn't been trained came on-stream. A follow-up training session, telephone coaching, and continued monitoring brought them back to the top. We're continuing to monitor how they do and we jump in with coaching when we find performance slipping.

Coaching is highly effective. It starts out as a mystery shopping call, but when the caller would normally hang up, she identifies herself and offers immediate feedback on the call, making suggestions on how to improve and reminding the employee of the points presented during training. Or sometimes we find it works better simply to set up the call as a role-playing exercise, hitting the key points and offering instant reinforcement and instruction. A follow-up mystery shopping call will measure how well the coaching "took."

Interim Goals

Depending on the initial quality of service in your organization, you may decide to set some interim goals, meet them successfully, and then raise the bar. Trying to implement too many standards all at once may be discouraging both to you and to the people trying to live up to them. Rather than improving the quality of customer service, an "all at once" approach could have an opposite, morale-sapping effect. Instead, you can tell people that you'll be taking the process in increments, celebrate their successes, and then ratchet up expectations.

As you travel the road to customer service excellence, you're also likely to discover new issues you'll need to address. You may find that competitors are successfully trying something new that you need to match or top. And at each step of the way you'll know exactly how well you're meeting your performance expectations: you'll have the hard, indisputable evidence in the recorded phone calls of sample customers.

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