

## **Mystery Shopping Project Spring 2009**

***Redland Housing Association in partnership with  
Somerset Community Housing Trust and TPAS (Tenant  
Participation Advisory Service)***

**Report by Philippa Barton, Resident Involvement Manager**

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## **Executive Summary**

- 1.1 This report presents the findings of the second phase of mystery shopping project using Redland's own tenants, and those of Somer Community Housing Trust to test the customer services of the organisation. The mystery shops took place over three weeks in March and April 2009.
- 1.2 The results show an improvement on last year's results for staff treating customers as individuals, in accuracy of information provided by staff, and in responses to written communication. 84% of shoppers saying they were satisfied (48%) or very satisfied (36%) with the response overall.
- 1.3 Overall satisfaction with responses by staff to mystery shops went down 5% from 89% between 2008 and 2009. The most common cause of dissatisfaction was the staff member saying they needed more information in order to help the phone callers. Discussion with staff and residents about why this might be are in the results section of this report.
- 1.4 The results were collated and presented to the mystery shoppers, residents, and staff by the Resident Involvement Manager between May and July 2009. The actions arising from the project are assigned to the Head of Customer Services, and the Redland Residents' Committee will oversee the action plan by receiving an update at their meeting in May 2010.
- 1.5 The draft report was sent to the residents who participated in the project in November 2009 so they could see how the results have been used. Mystery shoppers who gave comments said they were happy with the report as a true reflection of how the project went and that the actions arising from it were appropriate.

## Background

- 2.1 Mystery shopping is a market research tool which we have used to check whether the services Redland's residents receive are up to standard. Redland wants to know where our customer services are really good and where they are not up to scratch, so that we can do something about it. By investing money in this project we aim to improve the overall customer service experience for residents.

### **What is mystery shopping?**

The mystery shopper poses as a customer, in this case a resident/residents' family member/ neighbour, and uses a made-up story, or scenario, to test what response they get from Redland by asking questions, and asking for help.

The mystery shopper then records on a questionnaire how the response they received compares with standards that Redland has published. For example, whether they received a written response within 5 days, or whether the staff member was able to resolve their query there and then.

- 2.2 We started the project in spring 2008, training residents to use the mystery shopping method, and found the results helpful. We agreed at the end of the project last year to do one more phase of scenario based mystery shopping before continuing with real-time mystery shopping, and developing a team of resident auditors who will inspect services in more depth. The report from last year is available from Redland's offices.

### **What is real-time mystery shopping?**

Mystery shoppers only test the services when they need to use them. For instance, they wait until they have a real repair before ringing up to report it and record on a questionnaire the response they get comparing it with standards that Redland has published.

- 2.3 Redland residents worked together with Somer Community Housing Trust (SCHT) residents to collect results, which meant that Redland collected more data this year and shared the costs of the training and project management with SCHT.

## ***Progress on last year's actions***

2.4 The following actions arose from discussion with mystery shoppers and agreed by Redland's management team.

<b>Item</b>	<b>Detail</b>	<b>Lead officer</b>	<b>Progress</b>
<b>Support for staff to answer general questions &amp; Frequently Asked Questions</b>	Series or quick guide to... sessions for staff taking place once a month covering each of the main areas of Redland's work	Head of Customer Service	✓ and ongoing
<b>Refresh residents' leaflet series</b>	To be reviewed with the tenants' handbook by the Communications focus group	Head of Customer Services	✓  Handbook - Oct 09 Leaflets – Dec 09
<b>Consistent approach to customers</b>	About promoting a 'can do' approach for staff through ongoing customer care coaching	Head of Customer Services	✓ and ongoing
<b>'Is there anything else?'</b>	Rephrased as 'is there anything else I can help you with?' recognised as mark of excellent customer care, and focus for customer care coaching sessions	Head of Customer Services	✓ and ongoing
<b>Recruit more mystery shoppers</b>	Second phase of mystery shopping	Resident Involvement Manager	✓
<b>Develop resident auditors from the team of mystery shoppers</b>	Agreed to follow up after the second phase of mystery shopping in summer 2009	Resident Involvement Manager	Winter 2009
<b>Consider real time mystery shopping in the longer term</b>	Agreed as part of resident auditors project above	Resident Involvement Manager	Winter 2009

## Methodology

### *The shoppers*

- 3.1 Four residents trained as mystery shoppers in 2008. This year, two of these residents were able to participate in the project, and one of these actually carried out the mystery shopping. We carried out another recruitment campaign, inviting all new tenants to apply and four responded. Of these people, one completed the recruitment process and became a mystery shopper. Three Redland residents took part in the project in total, and two of these did the mystery shopping. 15 SCHAT residents took part.
- 3.2 All shoppers agreed to shop both Redland and SCHAT services. This benefitted mystery shoppers who had experience of shopping two different organisations, and Redland, because we had a greater number of mystery shops carried out on our services. The table below shows the profile of the 17 mystery shoppers taking part.

Shopper profile		Percentage	Number
<b>Age</b>	16-24	29%	5
	25-44	29%	5
	45-64	35%	6
	65 or over	6%	1
<b>Gender</b>	Male	24%	4
	Female	76%	13
<b>Disability</b>	Disability	12%	2
	No disability	88%	15
<b>Ethnic background</b>	White British	94%	16
	BME	6%	1
<b>Landlord</b>	SCHAT	88%	15
	RHA	12%	2

### *Training and preparation*

- 3.3 We decided to work with TPAS again this year because their services were helpful last year, and for the sake of continuity. TPAS Associate, Jenny Vernon, provided training for new mystery shoppers and refresher training for existing mystery shoppers over two days in March 2009.
- 3.4 The training covered the following areas:
- what mystery shopping is, and what it isn't
  - different methods of mystery shopping, and when to use them
  - how mystery shopping links in to the inspection regime

- choosing which areas to shop, how mystery shopping works to improve services, and the method's limitations.
  - setting guidelines – code of conduct, confidentiality, keeping safe and being fair
  - identifying practical skills – such as observation, listening, telephone techniques etc
  - getting familiar with scenarios and recording information
  - planning the shop – developing the timetable and deciding next steps
- 3.5 The code of conduct was developed by the mystery shoppers last year and this year's mystery shopping team agreed to sign up to the same code which can be found in annex A. To help mystery shoppers be objective about the services they were testing, they agreed that if they personally had had made a complaint about a particular service in the past, they would leave the testing of that service to other mystery shoppers.
- 3.6 The mystery shoppers received support via telephone from Philippa Barton at Redland and from John Voysey at SCHAT during the shopping period, 15 working days between 26<sup>th</sup> March and 17<sup>th</sup> April 2009. The Easter bank holiday weekend fell within this period.
- 3.7 Each mystery shopping scenario or story gave a guideline for the shopper and questions to use to start the mystery shop. The shoppers had a chance to practice using the scenarios at the training day and were provided with mobile phones to make their calls which they returned when the project finished.
- 3.8 Redland spent £1335.92 on the project, and the rest of the costs were met by SCHAT.

### ***Feedback and using the results***

- 3.9 On 15<sup>th</sup> May, the mystery shoppers met together to review the results and to pick out any themes of strengths or weaknesses in the customer services. They also came up with suggestions of how weaknesses could be addressed and reflected on their own involvement with the mystery shopping project.
- 3.10 The results and recommendations were presented to Redland's Management Team on 22<sup>nd</sup> June, to the Redland Residents' Committee on 7<sup>th</sup> July and to the whole Redland staff team on 21<sup>st</sup> July. A summary of the results was published in Redletter's (tenants' newsletter) Autumn 09 issue and this report is available on the website and on request from Redland's office.

## **Standards tested**

- 3.11 The scenarios used were the same as those used in 2008, enabling us to compare results, with a few other scenarios added that had been developed last year but not used. Due to the higher number of mystery shops we wanted to make sure that scenarios would not be used too frequently and give our shoppers away.
- 3.12 Forty-two mystery shops were carried out on Redland (more than twice the amount carried out last year);
- 12 shops on repairs,
  - 5 shops on complaints process,
  - 9 shops on dealing with anti social behaviour,
  - 5 shops on the service for people needing alternative formats for communication, and
  - 11 shops on other housing queries, such as how to pay rent.
- 3.13 The scenarios were designed to test the following Customer care standards:

### **Customer Care standards**

1. *Customer Care standard 1* - Redland will reply to written communication within 5 days of receipt. (*Timescale shortened in July 2008 from 14 to 5 days*)
2. *Customer Care standard 2* - Offer a simple way to make a complaint, which residents understand.
3. *Customer Care standard 4* - Make sure callers speak to someone able to deal with their enquiry, usually when they first call.

### **Customer care charter commitments**

4. We will listen to you and treat you as an individual
5. Our staff will be helpful and courteous
6. We will tell you who you are speaking to
7. If you need us to use a different language or format (for example large print) we will arrange that
8. If you need to complain, we will tell you how to, and provide a clear procedure for you to follow

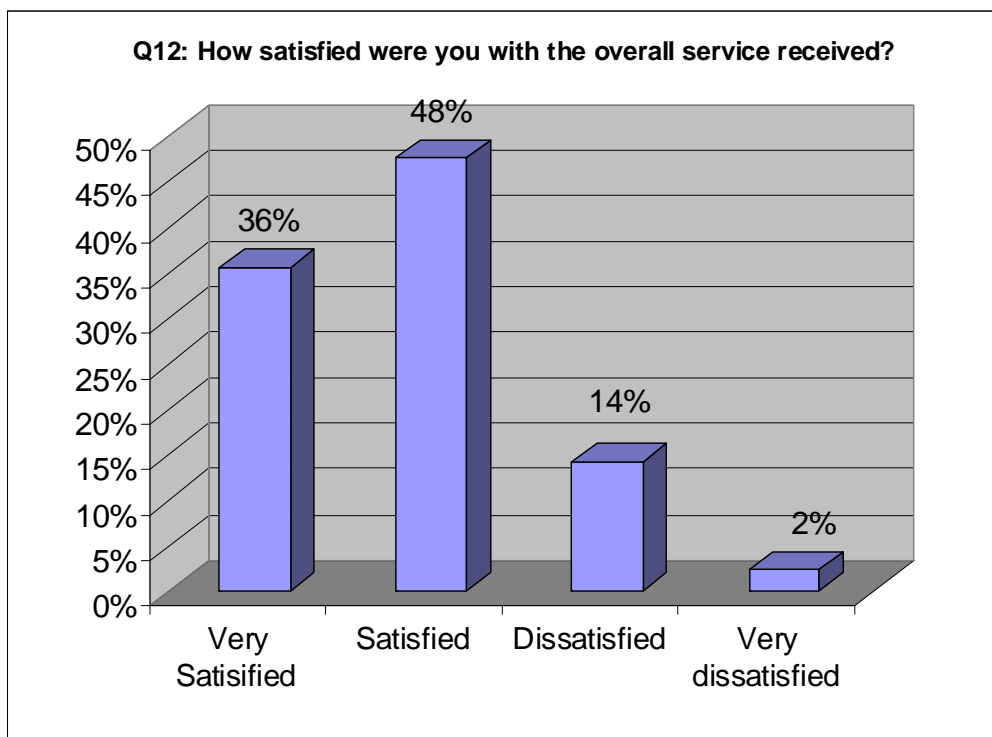
## The Results

- 4.1 Keeping mystery shoppers' identities a 'mystery' required that they did not give their name and address. This limited the kinds of queries that shoppers could make to general enquiries.
- 4.2 The shopping period took place between 26<sup>th</sup> March and 17<sup>th</sup> April. Between the 6<sup>th</sup> and 17<sup>th</sup> April at least three and up to seven members of staff were on annual leave out of a staff team of 26.
- 4.3 The feedback sheet was re-designed after the last mystery shopping project as shoppers had commented that the sheet was hard to use. Where the form asked residents to judge whether the service was excellent, good, fair or poor, with more positive measurements than negative ones, this could have skewed the results. By having an equal number of positive and negative measurements the results may be less favourable but they will be fairer. The new measures used were 'very satisfied, satisfied, dissatisfied, and very dissatisfied.

### ***Overall satisfaction with the service***

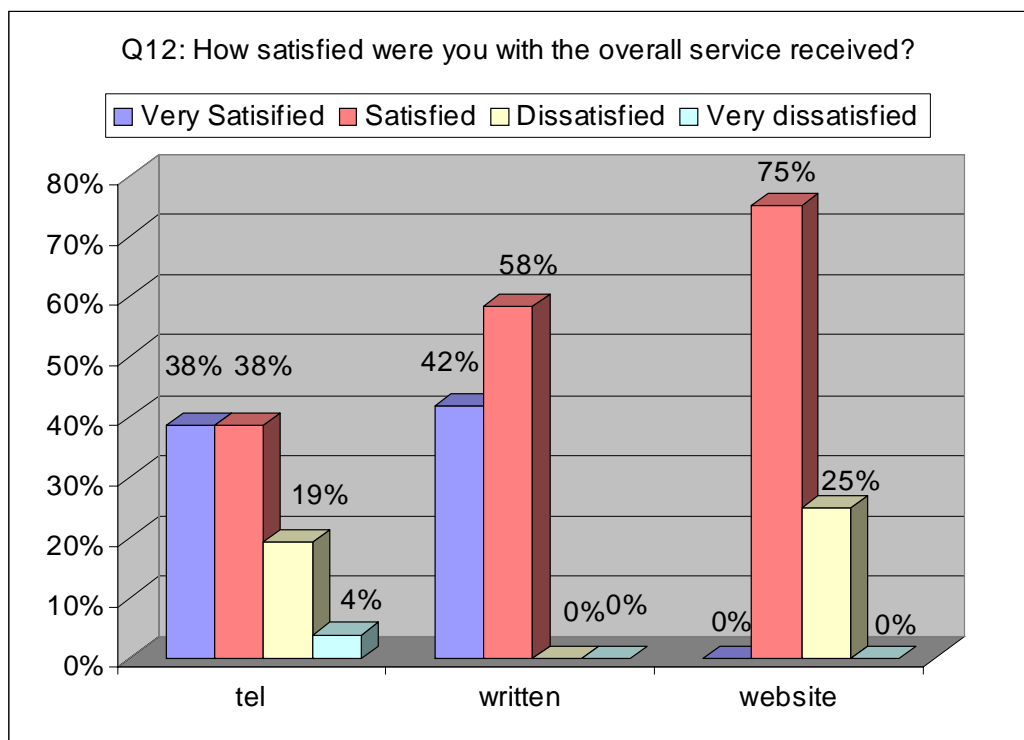
- 4.4 For all the shops at Redland carried out by telephone, in writing (either letter or email) and on the website 84% of the time the shoppers described themselves as satisfied or very satisfied with the service they received. 14% were dissatisfied with the shop overall, and 2 % very dissatisfied.

**Figure 1**



- 4.5 This compares with the 67% of the shoppers giving a judgement of excellent or good in 2008, 22% saying the service was fair, and 11% saying the service was poor. This shows a 3% decrease in the excellent or very satisfied band. The band for good, fair or satisfied showed a decrease of 2%, however we should bear in mind that the definition of a 'fair service' was not clarified in the project last year, and we cannot confidently say that the shops in this band last year would have equated to satisfaction. Therefore there was an increase in the dissatisfied, very dissatisfied, or poor service band of 5%.
- 4.6 Figure 2 compares the results of mystery shops by type of shop; by telephone, in writing (email or letter) and using the website.

**Figure 2**



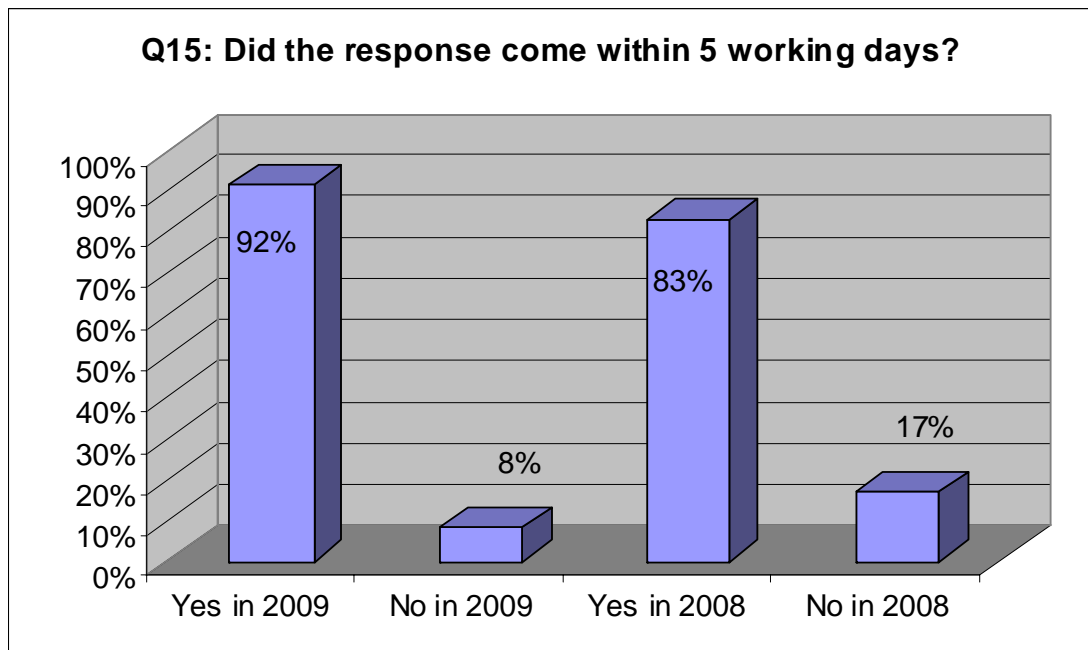
- 4.7 We asked mystery shoppers to record how accurate the answer given by staff members was compared to the model answer provided for the scenario. 92% of the time the information provided by staff members was accurate compared to the model answer provided. This is a 9% improvement on accuracy compared with last year's results.

## Customer care Standards and charter commitments

### Written communication

4.8 In July 2008, the Customer Care focus group shortened the timescale within which Redland must respond to written correspondence from 10 working days to 5 working days. When this standard was tested, a response was received by mystery shoppers within the timescale 92% of the time, compared to 83% of the time in 2008.

Figure 3



4.9 Satisfaction with written communication was high, with 92% of shoppers using this method saying that their query was resolved. The one shopper that said the query was not resolved added that the letter offered a home visit from the officer to resolve the issue and explained what would happen next.

4.10 In terms of providing an excellent service and offering further information, 50% of shoppers using written communication were offered further information or a leaflet. In the instances where they specifically asked for any further information, it was always provided. This is an improvement on last year when further information was offered in 22% of shops.

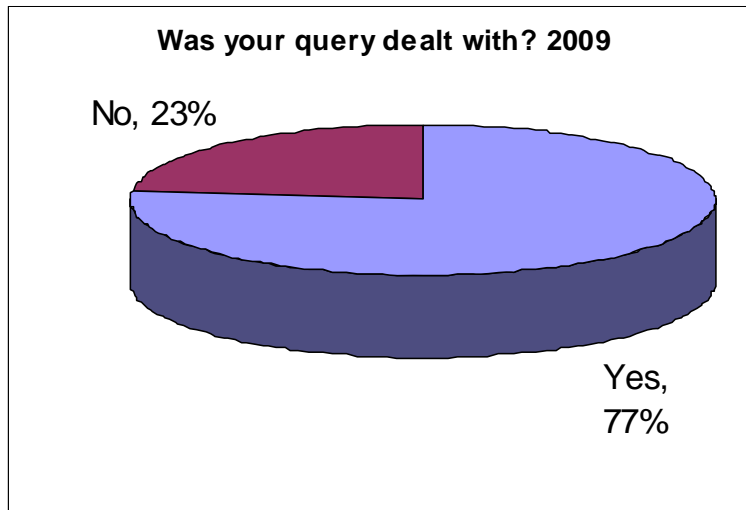
### Telephone communication

4.11 The customer care standard for phone calls is about customers being to get through to someone who can help them straight away. 81 % of shoppers were able to get through the first time of calling, 15% of

shoppers (four people) had to try a second time to get through. This happened twice on a Thursday and twice on a Friday.

4.12 Shoppers said in 77% of shops that their query was resolved first call, which meets the service standard target of 70%. This compares with a result of 91% last year. In the remaining unresolved shops (6 shops), staff explained who would be able to deal with the query in 50% of cases.

**Figure 4**



4.13 Staff made the point that their aim in serving customers is to listen to their individual needs and try and help them there and then. If a customer does not want to reveal their identity and there is not a clearly expressed reason for withholding their name, it is not easy to help someone.

4.14 We discussed the fact that all the mystery shops are designed around asking for information rather than asking for action by the landlord. The fact that staff members wanted to know more details about situations raised showed that they were keen to get the job done.

### **Complaints**

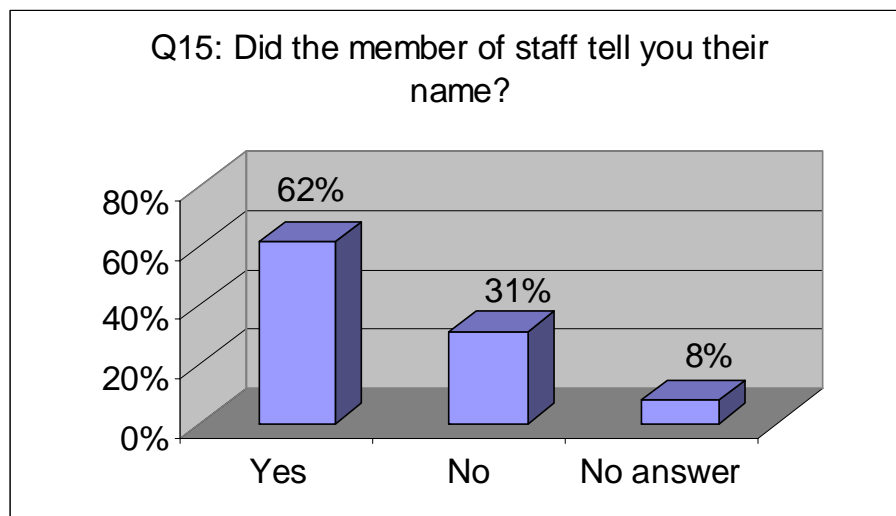
4.15 We tested how easy it was to find out about the complaints process with two phone calls and by one shop on the website. One phone shop went really well; the shopper was able to find out how to complain and was very satisfied with the response. The other phone shop was not so successful and the shopper was told that the complainant on whose behalf they were ringing must ring up in person instead, when in fact the shopper was asking for basic information about the complaints process.

4.16 The shopper using the website had some difficulty finding the information about complaints on the website, and commented that they felt there was too much on the page.

### **Customer Care commitments in the Charter**

- 4.17 Shoppers who said they were listened to and treated as an individual increased by 11% this year to 89%.
- 4.18 The judgement for staff members being judged as helpful and courteous stayed almost the same with a small decrease of 2% to 87% of shoppers saying staff members were helpful and courteous.
- 4.19 Shoppers measured whether staff told them their names and they recorded that this happened 62% of the time. Shoppers pointed out at the feedback day that staff members say their names when they first pick up the call. It was not always easy for them to record this data because they were poised and ready to ask their question.
- 4.20 Furthermore, staff were surprised to hear this result. Redland has reviewed the standard greeting staff use, made sure it includes the staff member's name, and concentrated efforts on everyone using it. What it may highlight is that a customer may not find it easy to listen at the beginning of a phone call and hear staff members giving their name.

**Figure 5**



- 4.21 Six mystery shops tested Redland's response to customers' needs in providing alternative formats for written information. In 83% of these shops shoppers were either satisfied or very satisfied, and received the information in the format they requested. In one of these shops the staff member said they could not help without the name and address of the tenant rather than providing information about the services available.

### **Website shops**

- 4.22 Four shops were made on the website, and 75% of these were successful. As explained in paragraph 4.13, one shopper could not find all the information they needed.

4.23 We asked the shoppers how long it took them to find the information they were looking for in the shop. 50% said it took less than 5 minutes, and 50% said it took longer than 10 minutes.

### ***In summary***

#### **Achievements and Improvements identified this year:**

- 77% of queries resolved straight away (target 70%)
- treating people as an individual (89%);
- offering further information (48%);
- giving accurate information (90%);
- replying to written queries within the timescale (92%)

#### **Observations and learning points:**

- more success resolving queries for written queries than phone queries
- most common cause of unsuccessful shops was insistence on getting name and address of the customer - "*said they couldn't help without my address*"
- Not everyone finds the website easy/ intuitive to use (finding information about rents and how to make a complaint)

### ***Shoppers experiences***

4.24 We asked shoppers how they felt about being involved in the project and whether they enjoyed it. Notably, most people said that they found the prospect of their first mystery shop very daunting and that in some instances had to gear themselves up for a phone shop. Some of the shoppers commented on their sense of personal achievement in having learnt a new skill and completed all their shops.

4.25 One shopper said of the whole project "the results are very good - I'm very impressed to see the improvement in results. It seems like Redland is always looking to iron out shortfalls and is constantly improving to make sure they can give the best service to the tenants."

4.26 Two of the Redland shoppers said they would be interested in doing real time mystery shopping, and one was interested in becoming a resident auditor.

## Recommendations and Redland's response

5.1 The mystery shoppers made recommendations as to how Redland could respond to the results.

Raise awareness of leaflets – list of leaflets available

Some staff were hesitating or having to check information – that's OK, but is there a training issue, or could staff have more information to hand? A customer service bible?

How about department swaps for a day, so everyone knows how each department works?

Improve and maintain good first contact - Always engage the person you're talking to

5.2 The Redland management team responded with the following points:

We are **pleased** that:

- performance in written communication has improved, and that the customer experience, such as people feeling like they have been treated as an individual scores highly
- short training sessions for staff have improved accuracy of answers, but there is still some hesitation in answers to general queries.

:

We are **concerned** that withholding name and address still sometimes prevented staff giving information –we have been promoting a 'can-do' attitude. This is something we can do more of!

We have **learned** that although staff use the standard greeting telling the customer who they are speaking to you, customers do not always notice or hear this at the beginning of phone calls – is there a better way of doing this?

We **plan** to:

- complete leaflet review promote amongst staff
- follow up with real time mystery shopping and team of resident auditors for monitoring standards
- make information easier to find on the website

## **Actions agreed**

5.3 This action plan was agreed by Redland's management team in July 09

<b>Item</b>	<b>Detail</b>	<b>Lead officer</b>	<b>When</b>
<b>Resolving queries</b>	- Promote new residents' leaflet series within office for staff	Head of Customer Services	Dec 09.
	- Promote leaflets at Tenants' Day and other events		Sep 2010
	- Promote leaflets on website		January 2010
	- Continue quick guide to... sessions for staff once a month	Head of Customer Service	Summer 2009 and ongoing
	- Provide directory of quick guides in induction for new staff		Sep 09
	Consider department swap pairing system, so staff can experience each other's day to day roles.	Head of Customer Services	Spring 2010
	Investigate telephone options to improve likelihood that first person customer speaks to can help them	Head of Customer Services	Spring 2010
<b>Customer experience</b>	- Refresh focus on 'can do' approach for staff through	Head of Customer Services	Spring 2010
	- Ongoing customer care coaching and staff meetings		Ongoing for all staff coaching sessions
	- Explore techniques for confirming staff name over phone.	Head of Customer Services	Spring 2010
	- Individual staff customer care coaching sessions to focus on wrap up		Ongoing
	Improve the way we use knowledge of customer's preferences. Audit from Civica (housing management database provider)	Head of Customer Services	December 09
<b>Develop resident auditors team</b>	Invite existing project participants to be real-time mystery shoppers as part of resident auditor project	Resident Involvement Manager	Winter 2009

## **Learning points for future projects**

### ***What worked well:***

- 6.1 We benefitted from sharing shoppers and resources with SCHAT. Redland only recruited one new shopper, so using SCHAT tenants as shoppers gave Redland a wider range of shoppers and a higher volume of data to use. It also provided better value for money, as providing different types of training for the new and existing shoppers would have been more costly and would have required us to fit in with timescale of when off-the-shelf training was available.
- 6.2 The sequence of reporting back the results worked well (shoppers first, management team second, Redland's Residents' Committee third, and staff fourth, wider residents in Redletter and website fifth). This meant that a larger number of residents and staff had the opportunity to influence the outcomes of the project. This helped staff to buy in to the action plan and participants to be confident that the project will make a difference to services to residents.
- 6.3 Providing shoppers with a mobile phone each to make their telephone shops worked well. Some shoppers needed more support than others to use the phones, but this avoided anyone being out of pocket for the calls they had to make. One Redland shopper did not receive their mobile phone until after their first telephone shop but they were reimbursed in cash within a few days.

### ***What we would do differently:***

- 6.4 One shop by email was not recorded in the results because on further investigation we discovered that the email had not been received by the organisation. Next time we would make sure that mystery shoppers have all the contact information they need and check within the shopping period that the scheduled emails and letters have been received.
- 6.5 Shoppers commented that there was too much paper. To a certain extent this is unavoidable, because shoppers need a directory of all the shops they will use. However the two day training materials for the new shoppers could have been combined so that they only used one folder.
- 6.6 The feedback sheets had to be re-designed at the last minute in order to be compatible with SCHAT's IT survey software. This meant that feedback sheets had to be sent in the post to shoppers rather than provided at the training days. Next time we would consider use of the software earlier.

## **Acknowledgements**

- 7.1 Redland would like to thank the mystery shoppers for the time and effort they have put in to this project. The shoppers that completed the project received a thank you present of £50 shopping vouchers as a token of our appreciation, though we recognise their input has been far more valuable than that.
- 7.2 I would also like to thank Jenny Vernon, Senior Associate Consultant for TPAS, who provided training for our mystery shoppers, provided guidance.
- 7.3 Finally, I would like to thank the staff of Redland Housing Association for their support for the project and their willingness to learn from it.

# Code of conduct and guidelines for mystery shoppers: Redland Housing Association and Somer Community Housing Trust

This code of conduct explains how the mystery shopping project will work and the standards, attitudes and behaviours that you must observe. Keeping to these guidelines is critical to the success and credibility of the project.

## Who can be a mystery shopper?

### To be involved in the project you must:

- Be a current resident of your landlord
- Or be a partner or spouse of a current resident of your landlord, and have lived in the property for at least a year
- Or be a representative of a community in which residents reside.
- And have successfully completed training around the aims of the project, and the skills, attitudes and techniques necessary to undertake the identified tasks

### You cannot be involved in the project if you:

- Are an employee of your landlord
- Have a current court order against you for breach of your tenancy agreement or lease
- Have not successfully completed training around the aims of the project, and the skills, attitudes and techniques necessary to undertake the identified tasks

## Your role

As a mystery shopper your job is to carry out detailed, robust assessments of the services provided by your landlord, and suggest how the services can be improved. To do this you must approach the task with the right attitude:

- **To be honest and open.** Without this, you won't be able to get to the truth about the services or be able to make a difference
- **Be positive.** It is important to highlight any problems or failings, but be sure to pick up on successful and good points too. Always try to look for and suggest improvements to make the service better for both customers and the people providing it
- Be friendly, **polite and courteous.** You will only get cooperation and support from people if you build, and keep, a good personal relationship with them. You must not insult, abuse or use any offensive language or behaviour towards anyone with whom you have contact as part of this project. Be tough on problems not people
- **Listen and keep an open mind** about things until you have collected all the facts and evidence. Try to understand and appreciate the concerns and circumstances of the people with whom you come into contact

- **Keep to any relevant rules** and policies, for example the ban on smoking
- **Record your findings objectively** (see below). If you feel strong negative emotions about the service area you are shopping, due to poor personal experience, then decline to shop this area until your dispute has been resolved
- **Keep your dealings confidential** (see below). Being a mystery shopper is a position of trust. Do not talk about your experiences with anyone outside the Mystery Shopping team – and then only in the appropriate meeting.
- **Keep yourself safe.** Before you ‘shop’ – even from home – make sure you are in a safe environment. If you feel uncomfortable in any way, leave the situation immediately and report it to your mystery shopper co-ordinator

## Being objective

Your direct experience as a customer is what makes you special and unique as a mystery shopper. Your own experience and views should inform but not dominate or dictate how you work. To help you stay impartial and avoid any conflicts of interest you must:

- Let the mystery shopper co-ordinator know if you have suffered poor service in any particular service area and feel your impartiality may be compromised as a result
- Focus on your aim and be accurate in your recording
- Try not to let personal bias creep in

When writing your report:

- Keep it simple and straight to the point
- Be clear and non-judgemental – keep an open mind
- Be fair and don't jump to conclusions
- Be reasonable in your recommendations – and don't forget others perspectives

## Handling information and confidentiality

As a mystery shopper you may have access to a lot of information about your landlord and its customers and suppliers. Some of the information will be personally or commercially sensitive and you will need to keep these things confidential.

So:

- Treat all information you receive as confidential and do not share it with anyone outside of the mystery shopping team
- Keep information in a safe place
- Make sure information recorded is accurate and not open to mis-interpretation
- Double check before you post

Aside from these formal protocols you will need to be tactful and diplomatic in all your dealings with people as part of the project. Only you can judge this, but always think about how you say what to whom, and what impact it may have.

## Being fair

In your work as a mystery shopper you must show respect for the people you deal with, and take their circumstances and personal differences into account. This is about putting **equal opportunities** into practice in your work. The key is simply **to respect differences fairly**, so that you do not exclude anyone from your work or treat anyone inappropriately or unfairly.

Again this can sometimes be difficult, and only you can make it happen. So in your work, think about:

- **How you assess the service** – does it allow everyone to have a say? For example, telephone surveys may exclude people for whom English is not their first language
- **Where you work** - for instance, holding meetings on an upper floor of an office building may be difficult for people using wheelchairs or who have limited mobility
- **When you work** - for example, holding focus groups during the day may exclude people who work or who have childcare responsibilities
- **Being consistent** - for example, do not be 'tougher' on some people than others without reason
- Again, if you are in doubt talk to your mystery shopper co-ordinator

Other things to consider include:

- Not making snap judgements/assumptions about people because of the way they answer the phone etc – everyone is different
- Act reasonably and be respectful
- Don't expect too much – make realistic recommendations
- Compare results against company policy
- Take others' needs and views into account when making recommendations

## Being professional

Being professional is partly about the things covered above, but it is also about how you personally conduct yourself. As a mystery shopper you are an ambassador for yourself, the organisation, all residents and the whole project. Most people will judge the project on how you present yourself and behave. So to project a good professional image, think about:

- Your personal **appearance and dress** – be clean, smart and appropriate
- **How you speak** – be clear, concise and courteous
- **Your body language** – be relaxed, focused and positive
- **Being organised** and punctual - plan and prepare things well and be on time
- **Being in control** – never do a 'shop' if you have recently had drugs or alcohol, are too tired, or have done anything that might affect your concentration and poise

Other things to consider include:

- Being calm, polite
- Being tactical/tactful
- Remembering you are playing a role

- Understanding your role
- Keeping to the agreed 'story'
- Practising empathy
- Keeping to agreed timescales
- Showing respect
- Keeping matters confidential
- Being organised
- Being focussed on the aim/goal
- Being human
- Having a calm approach
- Being discrete
- Keeping it 'real'
- Demonstrating good manners
- Don't personalise things
- Be flexible
- Be well prepared
- Plan you 'escape route'

## Staying safe

Before undertaking a 'shop', make sure you have assessed any risks that might occur. Your landlord will give you guidelines on this. You must take reasonable steps to ensure your own health, safety and welfare. Examples include:

- Not giving out personal details
- If you're going out after dark, make sure you let someone know before you leave and when you come back
- Work out beforehand how you are going to remove yourself from the 'shop' if necessary
- Keep your emotions in check

## Mystery shoppers' code of conduct agreement

I agree to abide by the above code of conduct and to observe confidentiality at all times, as outlined above.

Signed ..... Date: .....

Name (please print) .....

Address (please print) .....