

Mystery Shopper Platinum Guide



How To Get Paid To Shop!

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INTRODUCTION

Mystery Shoppers are a vital part of business today. Their role is as necessary as the store clerk, restaurant staff, or leasing agent that they audit. They provide a human element that in store security cameras cannot duplicate. Surveying customers can also provide helpful information to business except for two important elements. First, many customers don't want to take the time to fill out a survey unless they have a complaint. This does not give management a clear objective view of their operation's overall performance. Second, a regular shopper isn't paying enough attention to all of the details that management is attempting to gather on their operation. Mystery shoppers know what management specifically is looking for and how to evaluate the information the management wants. We'll discuss in detail many of the particulars that management is looking for later in the manual.

Performing Mystery Shopper service is mostly done on a part time basis, but many are successful in performing shops on a full time basis as well. You will probably discover that as you begin to increase the volume of assignments and repeat assignments, you will need to become more flexible with the hours and days that you are available. Most prefer to keep it as a great part time business and that's acceptable as well as the standard of the industry.

This can be a fun, easy, and profitable way to earn extra money or develop into full time income. It can easily be worked around another job allowing you to keep your present income while building your new business. As you develop your client and agency list and skills, you can take it to a full time career, if that is what you choose to do, when you are comfortable. Let me be totally honest with you. I have read advertisements suggesting that it is possible to earn in excess of a hundred thousand dollars per year performing shops. If it is possible, I have not discovered how to do it or had contact with any actual mystery shoppers that have. If you are performing shops in your spare time while maintaining a regular 40 hour a week job or attending school full time, one could realistically expect to earn between \$150.00 and \$250.00 a week. If you are a stay at home parent or semi retired with greater time flexibility, you may be able to earn even more. There are many Mystery Shoppers that do earn more, a lot more!

Remember that these are only earning estimates based on average assignment fees at a rate of performing 20 assignments per week (10 to 20 Hours). These are only estimates and not intended to be interpreted as guaranteed earnings.

As a Mystery Shopper, you will perform a variety of tasks. You may be called upon to go to a restaurant to have a meal and report on your experience. You might be asked to visit an apartment complex and preview an apartment, reporting back on the professionalism of the leasing agent. You could be asked to go to a tire shop and obtain an estimate on a particular set of tires. This is only a few of the many assignments you may be asked to fulfill.

Although this may sound like easy tasks to perform, you will need to maintain an extra level of attention to detail. After each assignment you will be required to complete a survey or audit report on your experience. Your success as a "shopper" will depend on your ability to complete these reports in a detailed fashion and without drawing attention to yourself while gathering this information at your assignment.

There is also an "undercover agent" side to this business. You must be very cautious about other individuals that you discuss your business or even what it is that you do. One never knows with whom they may be in contact with while performing an assignment. The less individuals know about what you do the more effective you will be. This also holds true for your friends and other than immediate family members as well.

Some assignments will allow you to take along a friend, spouse, or children. In these cases, it is imperative that they are not aware of what you are doing. They may have the best intentions of helping you and end up drawing unnecessary attention to you thus "blowing your cover".

WHERE TO GET FREE INTERNET AND FREE EMAIL

Do not let not having Internet service and an Email account deter you from becoming a Mystery Shopper. They are necessities of the trade. The providers listed below advertise on the web that they will provide you with these services for free. I'm not talking about free trial offers for a month or two. They are currently advertising free service on an ongoing basis.

Why in the world would they make such offers? Some are trying to introduce you to their products in hopes of eventually upgrading to a paid service. Others make up the fees normally charged through advertising partner relationships. In any event, they will offer you the opportunity to obtain these services that you need to get started, now. Explore all the offers to find the ones that suit you best and get your accounts set up now!

If you have no Internet service on your PC at all and you are wondering how to get to their sites to sign up, here's a couple of ideas. First, you can use a friend or relative's PC that has a PC with Internet service to visit these sites. After you have chosen the ones that interest you, save their download to a removable disk and the load that disk into your PC after booting up (make sure you have a phone line plugged into your modem). If you can't find a friend or family member with Internet service, try using a PC at a local Library (remember to take a blank disk along with you). If time restraints or availability is a problem, you can usually find free trial disk for Internet providers at or near the checkout counters of many major retail stores. I see them all the time at Grocery Stores, Department Stores, Office Supply Sores, and Computer Stores. They usually give you a free month of Internet service to try out their service. Go ahead and give their service a try and if you like it and think it is worth their normal monthly service fee, stay with them. If not, while you are trying out their service, you can gain access to these other sites to see if one of them interest you.

It is important for me to note that none of the services listed below are paid advertisers to ShoppingJobs.net.. They are listed as affordable alternatives to you. Read all information on their offers carefully and utilize at your own risk.

NETZERO - OFFERS A PACKAGE OF 10 HOURS PER MONTH FREE INTERNET & A FREE EMAIL ACCOUNT!
CLICK HERE FOR A FREE 10 HRS PER MO NETZERO <http://www.netzero.net/support/start/online.html>

CLICK HERE FOR UNLIMITED HIGHSPEED @ \$14.95! <http://www.netzero.net/compare/&cf=cj?AID=9950729&PID=1>

JUNO - OFFERS A PACKAGE OF 10 HOURS PER MONTH FREE INTERNET PLUS A FREE EMAIL ACCOUNT! !
CLICK HERE FOR A FREE 10 HRS PER MO JUNO <http://my.juno.com/s/signup>

ADOBE SHOPPING MALL - FREE INTERNET SERVICE AND WEB ACCELERATOR! !
CLICK HERE FOR FREE INTERNET <http://www.adobeshoppingmall.com/free-internet-acess-canada.htm>

FASTMAIL IS FREE! - "ONE OF THE SLICKEST, MOST POWERFUL EMAIL SYSTEMSON THE PLANET"
(THE TIMES). Up to 150mb, Spam protection that really works.
CLICK HERE FOR FREE FASTMAIL! <http://www.fastmail.fm/>

WHAT ARE THE REQUIREMENTS TO MYSTERY SHOP?

A Mystery Shopper visits businesses (at the management's request) acting as a regular customer. It may be to make a simple purchase, make a purchase and then return it for a refund, order and eat a meal, or possibly to purchase alcohol or tobacco products to insure identification is properly being checked. A shopper may also visit a business to act as a prospective customer and listen to the "sales presentation" or to obtain a price quote. This is only a few of several possible assignments that you may encounter as a Mystery Shopper.

As a Mystery Shopper your role will change from assignment to assignment. Different businesses will require different information from you. There is also the possibility that the same business will sometimes have different types of assignments for various needs within their internal structure. An example of this would be a discount store requiring Mystery Shoppers for both liquor / tobacco identification and refund procedure. Two different Shoppers would probably do these two assignments at two different times. The fact is that if it is a business that deals directly with the public, they probably use the services of Mystery Shoppers. Here is a partial list of types of businesses that do use Mystery Shoppers:

Amusement Parks, Apartment Complexes, Arcades
Auto Dealers and Service Centers, Baby Stores, Banks
Bars, Book Stores, Cafes, Carnivals, Casinos, Department Stores
Drug Stores, Electronic Stores, Family Entertainment Centers, Fairs
Fast Food, Gas Stations, Grocery Stores, Hair Salons, Hardware Stores
Health Clubs, Hotels, Ice Cream Parlors, Jewelry Stores, Liquor Stores
Motels, Movie Theaters, Museums, Optical Shops, Paint Stores
Pet Stores, Real Estate and Home Builders, Restaurants
Smoke Shops, Toy Stores, and more!

There are no specific requirements to become a Mystery Shopper other than in many instances one must be at least 18 years old.

Several opportunities are available for individuals between 16 and 21 years of age. Some of these opportunities include tobacco sales identification monitoring, fast food shopping, arcade shopping and CDs and Tapes shopping. Keep in mind that if you are under 18 years of age, you'll probably need a guardian's consent.

Ultimately, your age and appearance will dictate the range of assignment that you will be eligible for. If you were under the age of 21, it would be illegal for you to attempt to buy alcohol. Likewise, a 16 or 17-year-old shopper may be out of place performing an assignment for a homebuilder. Since you want to perform your assignments without drawing attention to yourself, there are some physical characteristics that may be deterrents to getting some assignments. They include unique haircuts and coloration, distinctive tattoos and attention grabbing clothing apparel. Try to stay as generic and mainstream in your appearance as possible to maximize your opportunities.

There are no special degrees, certificates or training courses required to Mystery Shop. One must be reliable, have the ability to follow directions, and be observant. For the most part, specific training instructions will be provided to you at the time that you accept each assignment.

As long as you understand the basics of Mystery Shopping, your training and skills will be obtained with each new assignment that you complete. When being offered an assignment, don't hesitate to

ask any questions that you may have. The more you understand about an assignment, the more helpful your report information will be.

As a Mystery Shopper your time will be divided into 3 major areas:

1) Searching and finding available assignments (Marketing).

The first major area of mystery shopping is obvious but I'll state it anyhow. You might be the best mystery shopper on the planet but unless you market yourself, no one will ever know. The good news is that as a mystery shopper you don't need an expensive advertising budget, make endless phone calls or pound the pavement going door to door. You simply need to click on the Websites that are included in this manual, fill out their applications and complete their online orientations. It is necessary for you to embrace and continue this process until you have enough agencies to supply you with your desired amount of assignment opportunities.

Later in this manual we'll discuss the different type of organizations that offer shopping assignments. In the vast majority of these organizations, you will be working as an independent contractor. As an independent contractor, it is to your advantage to be offered assignments from as many sources as possible. The more assignments you avail yourself to, the more selective, more profitable and more enjoyable your venture will become. As an independent contractor you may accept or refuse any assignments offered to you. The more assignment offers that become available to you really equals advantage you!

The final section of this manual before the Agencies and Businesses listings is titled, "**GETTING STARTED ON THE FAST TRACK**". In this section we'll discuss the most effective and efficient methods to getting signed up these organizations. It is important to your success to continually apply, explore and register with new organizations to maximize your available assignment opportunities.

As you begin to get registered with organizations, it is important to pay close attention to how they expect you to search for available assignments. Some of them will email you when assignments are available while others will expect you to regularly check their shopper's Website. Make sure and set time aside to check your email and the Websites on a daily basis.

2) Performing assignments (Providing service).

Now that you are being offered available assignments, remember you may accept or refuse any assignment. Once you do accept an assignment and are scheduled for it, you are responsible for completing that assignment. It is just as important to complete the assignment within the scheduled time and date. If you should fail to complete a scheduled assignment within the allotted time frame, chances are good that you will be black listed by that agency.

After you have accepted an assignment, the first step is to schedule a date and time to perform the shop. Usually when you are offered assignments there is a window of available dates and times that you may choose from. Generally there is window of anywhere between 3 and 14 days that you may choose from as the target date you wish to perform the shopping assignment. Typically you'll also be able to select from various time slots on that date. Occasionally you will be offered last minute or ASAP assignments. These are the result of either no one accepting the assignments originally or another shopper notifying the agency that they will not be able to complete the assignment.

The next step is to complete the orientation for the assignment. This is usually provided in an online format and only takes ten to twenty minutes to complete. The orientation will give you background information on the company for which you will be performing the assignment for, a

scenario to follow while performing the shop and information as to what specific issues the company is expecting you to evaluate. You should be able to also print a paper copy of the audit report that you will be filing for the assignment. Review this in your vehicle before and after completing each assignment. Each assignment that you are offered and accept will have a primary objective. Along with that objective you will be expected to report on several generic issues on each assignment as well.

The generic issues will vary from client to client. Generic issues generally include over all conditions of premise, acknowledgment of customers, signage, uniforms and etc. Your ability to gather all of the necessary information while not being recognized as a mystery shopper is critical to your success. You should always have access to and preview your audit report before going to your assignment. These are usually supplied online and in printable form.

By reviewing it and knowing what information your client is looking for, your assignment will be easier to complete. Be sure and take your printed copy along to your assignment but keep it out of view even in your car.

Do not jeopardize your autonomy over such things as inspecting a restroom. If store personnel insist that they do not have facilities available, simply state that in your comments on your report. Do not persist in an effort to use the restrooms.

Understand that things are not always a "perfect world condition." It is not your task to "hammer" the employees you are auditing, but to give a fair and honest assessment of what you found. For example, if during your visit the floors and counters are fairly clean but it is obvious that the store is or has been fairly busy, make such notations in your report. The same holds true with shelves being stocked and faced. The simple truth is that if they are absolutely perfect, there are probably no customers shopping there! On the other hand, if the store is truly dirty with stains on the floor and holes everywhere in the shelves, the management needs to know that as well. Commit yourself to giving a fair and honest assessment factoring in the conditions of you assignment, including weather.

There are no exceptions when you are performing age verification assignments. Whether it is for liquor, tobacco, Adult entertainment products or movie ratings, verification processes must be conducted in accordance with company policy and local statutes. You must report any failures to perform these processes no matter how busy the company employee appears to be. The employee's failure to consistently perform these duties could result in large fines or worse, suspension or loss of privilege licenses.

After you have finished the shopping portion of your assignment, leave the customer's premises and find a safe place to make notes on your printed copy of your audit report. It is important to do this while the information is fresh in you mind. If you are performing multiple assignments at that time, it is extra important to include this step in between each assignment you perform. If you don't take the time to make notes in between assignments you will risk confusing important information between the different assignments.

3) Reporting assignments & bookkeeping (Administrative).

The third element of mystery shopping is the administrative portion. This includes filing audits (usually online), preparing and sending any receipts or proofs of shop and completing any necessary bookkeeping associated with that shop.

Once you have completed the field portion of the assignment(s), the next step is to file your audit report(s). This is usually completed online although in some instances this is completed via email, fax or by phone interview. These audit reports are usually required to be filed by the start of the

next business day following the day of the field visit. Failure to complete this part of the assignment within the required time frame will affect your standing with the agency that you are performing that assignment for. Just as important is faxing, scanning or mailing your receipts or proof of visit within the required time frame.

As an independent contractor, it is just as important to keep you records up to date. Tasks such as entering trips in your mileage log as well as your other necessary bookkeeping records take only a few minutes when done on a daily basis. When you leave this same simple task pile up for a week or two, they can become almost unmanageable. We will discuss in detail all of the necessary records you'll need to maintain later in this manual.

PRACTICE ASSIGNMENTS

The following three exercises are designed to give you experiences as mystery shopper as well as familiarize you with what type of reports you will be expected to file after you complete your assignment. Although you are under no obligation to fulfill these exercises, we strongly recommend that you do. At the very back of this manual you will find completed audits of these three exercises. After you have completed these exercises, compare your reports and see where you may need to improve in your skills. They will also give you an idea of the time period it will take to totally complete an assignment. Keep in mind that the more assignment that you do, the more efficient you will become. (Hint) remember to review your entire audit report before completing your assignment.

TRIAL SHOP #1

You are being requested to perform a shop for a particular Drug Store. You are to go in and purchase a 32ounce bottle of Hydrogen Peroxide. For this exercise, choose a drugstore that is not your regular store, since most shopping assignments will be at places you are not familiar with. You are to enter the store and walk around acting as if you can not find the item you are looking for. If no one offers to assist you within 5 minutes, you are to approach a store clerk and ask him or her to help you. Only if you can not find a clerk in the floor area of the store, are you to approach a cashier and ask for assistance. After you have finished your shop complete the following report.

Name _____
Date of assignment _____ Time on Site _____ Time off Site _____
Store Name _____
Store Location _____
Did a clerk approach you to offer assistance? YES NO / COMMENT: _____

How long did you wait for clerk to offer assistance? _____ MINUTES
Clerk's Name _____
Description of clerk: Gender _____ Height _____ Built _____ Hair Color _____
Item Purchased _____ Cost of Purchase \$ _____
Were the rest rooms clean and comfortable? YES NO
Were the floors and counter tops clean? YES NO
Were the windows and doors clean? YES NO
Were the isles free of clutter and products faced and adequately stocked? YES NO
Were weather conditions a factor in any of the NO responses above? YES NO
Were the different departments and isles clearly labeled? YES NO
ADDITIONAL COMMENTS ON QUESTIONS ABOVE: _____

Were you greeted by anyone in the first minute after entering the business? YES NO
 Were any questions answered in a knowledgeable manner? YES NO
 Were you asked if you needed or were additional items suggested? YES NO
 If returning a product, were you treated in a respectful manner? YES NO N/A
 If returning a product were all verification procedures followed? YES NO N/A
 At checkout, were customers being processed in a timely and efficient manner? YES NO
 At checkout, were impulse items plentiful and well stocked at the registers? YES NO
 At checkout, was your change counted back for your cash purchases? YES NO N/A
 At checkout, were you thanked for your purchase? YES NO
 Cashier's Name _____
 Description of cashier: Gender _____ Height _____ Built _____ Hair Color _____
 Were the store employees focused on meeting customer needs? COMMENT _____

ADDITIONAL COMMENTS ON QUESTIONS ABOVE: _____

Rate your shopping experience on a scale of 1 to 5 (5 being the most enjoyable) _____
 Do you have any suggestions on how to improve on your shopping experience at our store(s)? _____

TRIAL SHOP #2

Next, you are being requested to perform a shop for a particular Fast Food Restaurant. You are to go in and purchase any meal of your choice. For your own benefit, choose a fast food restaurant that is not your regular choice, since most shopping assignments will be at places you are not familiar with. After you have finished your shop complete the following report.

Name _____
 Date of assignment _____ Time on Site _____ Time off Site _____
 Store Name _____
 Store Location _____
 Server's Name _____
 Server's Description: Gender _____ Height _____ Built _____ Hair Color _____
 Item(s) Purchased _____ Cost of Purchase \$ _____

Were the rest rooms clean and comfortable? YES NO
 Were the floors and counter tops clean? YES NO
 Were the windows and doors clean? YES NO
 Were the tables, booths and seats clean? YES NO
 COMMENT ON ANY NO ANSWERS TO QUESTIONS ABOVE: _____

Were you greeted by anyone in the first minute after entering the business? YES NO
 Was your meal served exactly as you ordered it? YES NO COMMENT: _____

Were any questions answered in a knowledgeable manner? YES NO
 Were you asked if you needed or additional items suggested? YES NO COMMENT: _____

Was your meal served properly and fresh? YES NO COMMENT (IF NO): _____

Were customers being processed in a timely and efficient manner? YES NO
 Was there an ample supply of condiments, cup lids, napkins & utensils available? YES NO
 At checkout, was change being counted back to cash purchases? YES NO
 At checkout, were you thanked for your purchase? YES NO
 COMMENT ON ANY NO ANSWERS TO QUESTIONS ABOVE: _____

Were the restaurant employees focused on meeting customer needs? COMMENT: _____

Rate your shopping experience on a scale of 1 to 5 (5 being the most enjoyable) _____
Do you have any suggestions on how to improve on your shopping experience at our store(s)? _____

TRIAL SHOP #3

Next, you are being requested to perform a shop for a particular Apartment Complex. You are to go in and ask to preview apartments and inquire about the terms of the lease. Choose an Apartment Complex that you are not familiar with, since most shopping assignments will be at places you are not familiar with. After you have finished your preview, complete the following report.

Name _____

Date of assignment _____ Time on Site _____ Time off Site _____

Apartment Complex Name _____

Location _____

Leasing Agent's Name _____

Agent's Description: Gender _____ Height _____ Built _____ Hair Color _____

Did the Leasing Agent offer you a business card? __YES __NO

Did the Leasing Agent offer you a brochure? __YES __NO

Were you asked for identification prior to touring the models? __YES __NO

Were the rest rooms clean and comfortable? __YES __NO / COMMENT (IF NO): _____

Were the floors and counter tops clean in the office? __YES __NO / COMMENT (IF NO) _____

Were the windows and doors in the office clean? __YES __NO / COMMENT (IF NO) _____

Did you find the apartment models clean, well groomed and comfortable? __YES __NO

COMMENT ON CONDITION OF MODELS: _____

Were you greeted by anyone in the first minute after entering the business? __YES __NO

Were any questions answered in a knowledgeable manner? __YES __NO / COMMENT _____

Do you feel that all terms of the lease and community rules were fully explained? __YES __NO

Did you feel pressured in any way to sign a lease? __YES __NO / COMMENT _____

Were other prospects being acknowledged and assured that someone would be with them as quickly as possible? __YES __NO

Rate your experience on a scale of 1 to 5 (5 being the most enjoyable) _____

Do you have any suggestions on how to improve on your experience at our Apartment Complexes?

HOW TO FIND ASSIGNMENTS (WORK)

There are basically three different methods you can use to acquire assignments. They are through research agencies, from businesses advertising for mystery shoppers and through bulletin boards with mystery shopping organizations. You can utilize one or all three of these methods.

Research Agencies

Research agencies often times provide a wide array of services to a wide variety of businesses. One of the more in demand services they offer is a mystery-shopping service. Since many of these research agencies service national and regional companies, they are constantly searching for mystery shoppers to do the local shopping assignments for the companies they represent. One of the most important factors in selecting research agencies to apply as a mystery shoppers with is whether they are an exclusive agency or a non-exclusive agency. Our listings that are included with this report contain both exclusive and non-exclusive agencies. Most agencies retain their shoppers under independent contractor agreements, which means you are not an actual company employee. **You and not the agency will be responsible for taxes and benefits.** Most agencies will not guarantee that they can offer you certain amount of assignments per week. Terms and conditions of Independent Contractor agreements will vary from agency to agency. Be sure to always review them carefully before agreeing to them.

Exclusive agencies are just what the name suggests they be. Their independent contractor agreements states that you will only perform shopping assignments for their agency. This type of relationship is fine for someone who is only looking for assignments on a very limited basis. A positive to this type of relationship is that you don't have to deal with multiple contacts since you'll probably be interacting with one person and stream lined paperwork. Another plus is there is probably a lot less competition for their assignments. The negative aspect is that in reality one agency is probably not going to keep you very busy and limit your opportunities to expand your ventures.

Non-exclusive agencies on the other hand understand that as an independent contractor you will probably be seeking and performing shopping assignments for other agencies as well as directly from businesses themselves. They understand that they probably will not be able to provide you with as many assignments as you would like. There are a few ethical concerns that must be adhered to when enjoying such entrepreneur freedoms and it is important that you adhere to them.

First, never share information between agencies or clients! This includes but is not limited to, who clients are, what questions are asked on audit reports and what prices are charged for shopping assignments. **Second, never try to approach or solicit a client of one of the agencies that you are working for directly!**

Applying to agencies is a simple process as long as you have access to the Internet and an email address. Included in this manual is a list of web sites of agencies that utilize shoppers.

More times than not, each agency will have an online application asking very specific questions of you. This information is necessary to match up a very specific type of shopper for some assignments. The application usually includes an Independent Contractor's Agreement (which you will need to agree to the terms of to continue). The next step is usually a 30-minute to 1-hour orientation and training class with a test at the end that you will need to pass. With this in mind, plan to spend 60 to 70 minutes at each site you are applying at.

Private Businesses Classifieds

Unlike research agencies that offer services to up to hundreds of different businesses, some companies prefer to operate their own mystery shopping programs. I have included the few that I have found in the list that is included at the end of this report. Keep in mind that most companies will use research agencies for obvious reasons. Much like the research agencies all of the private businesses that I have listed utilize shoppers on an independent contractor basis (you will not be an actual employee). You will also want to read their offer carefully because some will only offer a reimbursement for the purchase(s) that you make. With offers like these when there is no cash payment involved, it can still provide you with an opportunity to enjoy a free meal at a great restaurant or enjoy a free movie and that can be almost as good as getting paid since you are actually saving money.

Applying to companies is a simple process as long as you have access to the Internet and an email address. Included in this manual is a list of web sites that include a few of the private businesses that utilize shoppers. If you ordered this manual in download or email form, simply double click on the links (after logging in to your Internet provider). If you ordered this manual in print form, you will need to individually enter each link into your address bar on the home page of your Internet provider.

Each of these sites will vary in format. I have attempted to direct you as close as possible to the web page recruiting shoppers on their web sites, but in some instances you will need to look for links to direct you to these pages. More times than not, each company will have an online application asking very specific questions of you. This information is necessary to match up a very specific type of shopper for some assignments. The application usually includes an Independent Contractor's Agreement (which you will need to agree to the terms of to continue).

Organizations' Job Boards

As I mentioned previously, another method of procuring assignments is available through various mystery shopper organizations. Utilize the Job Board section of our Member's Area.. With the super list provided, we have included a couple of the more prominent organizations.

YOUR FEES AND THE PAYMENT PROCESS

The fees you will earn will vary assignment to assignment. I have seen fees offered as low as \$5 and as high as \$40 per assignment. The good news is that you are an Independent Contractor. You have the right to accept or refuse any assignment offered to you. The agencies that I am registered with will not hold it against you if you decline an assignment. It is my opinion that three major factors dictate what fees are offered on assignments:

1. The first factor, of course, is what contract price the agencies are able to negotiate with the clients. Because of the large number of agencies offering mystery-shopping services, there is

always heavy competition for contracts.

2. The second factor is supply and demand. Restaurant, Movie Theater and other entertainment assignments tend to offer lower fees because of their popularity amongst shoppers. Shops like Auto Dealers, Apartments, and Technical Schools tend to pay more because many shoppers are more reluctant to accept these shops.

3. The third factor is the time element. This is directly related to the supply and demand factor. Sometimes when an agency offers an assignment and there are no takers right away, they will offer it again with a higher fee in hopes of swaying a shopper to accept it. This may happen for a number of reasons including availability of shoppers in that area, shoppers declining the assignment because they feel the fees are too low, or a shopper accepting the assignment and then backing out at the last minute. Another time factor is how long it will take to complete an assignment. Some assignments can be completed in less time than others can.

Your payment will generally be sent to you in 2 to 6 weeks after you have completed an assignment. The timing of the payments, for the most part, are calculated by the Accounts Payable departments, who fund only once or twice a month on specific days. The time it takes to receive your payment(s) will depend on when your assignment(s) were completed in correlation to the agency's funding days. Any reimbursable expenses that you may have incurred during your shop will usually be paid at the same time as your fee is paid.

Your payment for service(s) will be available to you in three different methods. It is important to read carefully the payment terms with each company that you apply to do business with. Some offer a combination of available payment methods, while others offer only one payment method. If there is a type of payment method that you are uncomfortable with, be aware that it may be the only method that is offered by a particular company. Also keep in mind that the more flexible you are with payment options, the more opportunities you make available to yourself. As an Independent Contractor, the forms of payment you accept are ultimately yours. These are the three common forms of payment:

1. **PAYMENT SENT BY CHECK.** This is fairly self-explanatory. On the specific payable days for each client or agency that you have completed assignment(s) for during that specific pay period, they will send you payments via U.S. Postal Service.

2. **DIRECT DEPOSIT.** This is the preferred method of many agencies and businesses to pay you for your services. On the specific payable days for each client or agency that you have completed assignment(s) for during that specific pay period, they will electronically send you payments directly to your specified checking or savings account. The advantages of this method are no postage expense for the business and faster access to your funds for you.

3. **DEPOSIT TO AN ONLINE ACCOUNT.** A few agencies also pay via online accounts. As time goes by, chances are you will see more and more companies begin to pay this way. It works exactly like direct deposit delivery only it will be transferred to your online account. The more popular online account center is called Paypal. It is a subsidiary of EBAY, which should tell you that it is a very stable operation. It really is a quite simple and safe method of transferring funds. It is absolutely free to open an account and cost nothing to receive funds or transfer funds to your checking or savings account. And after 60 days you are eligible to receive a MasterCard Debit Card so that you can use funds directly from your Paypal account anywhere. It also makes bidding and buying from EBAY, Yahoo and over 40,000 other online merchants including me very simple and secure. If you have not opened an online account:

CLICK HERE FOR A FREE PREMIER PayPal ACCOUNT! <http://www.paypal.com>

BOOKKEEPING TIPS

When you start any business venture, it is important to establish a record keeping system before you begin doing business. As a mystery shopper, you will be acting as an independent contractor. This means you will be responsible for reporting income to the government, withholding taxes, social security and Medicare. Likewise, you will now be able to take advantage of tax deductions related to your business venture. It is also impossible to gauge the success and profitability of your venture without a solid record keeping system.

You don't need to be an MBA to set up a practical bookkeeping system. You simply need to set up a system that is easy to maintain, understandable to you, and understandable to your tax preparer. Below is the bookkeeping system that I use. It is easy to set up and maintain and you are welcome to use it. I developed it not only to track financial information, but to also have vital information readily available. You can quickly set up this system on computer spreadsheet or paper ledger.

MILEAGE LOG - Having a mileage log is fundamental to any business that involves use of a personal vehicle. There are actually a couple of methods for deducting vehicle expense from your taxes, but taking the mileage deduction is the easiest and most popular when you are using a vehicle for both business and personal purposes. Setting up a mileage log is simple but it takes diligence to maintain. In order to be successful at using your log you will need to write down your log information each time that you use your vehicle for business.

If you are going to use a paper log, develop it in an easy format that you can carry with you. If you are going to use a spreadsheet, make sure to record every trip on paper so that you can enter it onto your computer later.

The information that is vital to a mileage log for each entry is:

1. **The date**
2. **Beginning Mileage**
3. **Ending Mileage**
4. **Total Miles Driven**
5. **Reason For Trip**
6. **Destination**
7. **Which Vehicle Used?** (The vehicle used is for someone who uses more than one vehicle. Entries of A or B could designate which vehicle was used for that trip.)

Track all of your business-related trips not just appointments or assignments. If you need office supplies, to mail packages and even a trip to the cleaners should all be logged since they are necessary functions of performing at your business activities.

MILAGE LOG

Date Beginning Miles Ending Miles Total Miles Reason For Trip Destination Vehicle Used

02/01/05	25222	25231	9	Shop 918 W Irvington #138	Ranger
02/01/05	25231	25237	6	Shop 5147 #C S 12th Ave	Ranger
02/01/05	25237	25244	7	Fax Service 7655 S. Houghton	Ranger
02/01/05	25244	25251	7	Print supplies 9401 E. 22nd St	Ranger
02/02/05	33071	33082	11	Shop 442 W Valencia	Civic
02/02/05	33082	33087	5	Shop 3565 E Irvington	Civic
02/02/05	33087	33093	6	Fax Service 7655 S. Houghton	Civic
02/03/05	25288	25298	10	Shop 907 W. 22nd	Ranger
02/03/05	25298	25306	8	Shop 2980 S 6th Ave	Ranger

02/03/05 25306 25312 6 Fax Service 7655 S. Houghton Ranger
02/03/05 25312 25323 11 Postage Supplies 8235 S. Houghton Ranger

INCOME LEDGER - An income ledger is used to show an accountability of all of your business revenue activity. You will use this ledger to enter each assignment or job line by line. It will show you how much revenue you have earned for any given period. It will also show you which jobs you have been paid for and which ones you have not been paid for. This ledger will help you track how much revenue you have acquired from individual clients and agencies.

As a reputable and ethical mystery shopper you will be able to shop the same location only once in a certain time period whether it is for the same agency or a different one. By a quick review of your income ledger, you be able to determine if you are eligible for an available assignment.

The important columns you will need for your income ledger should include:

1. Date
2. Company or Agency
3. Address of Assignment
4. Name of Business
5. Fee Amount
6. Amount of Reimbursable Expense
7. Amount of Out Of Pocket Expense
8. Payment Status of Entry

INCOME LOG

Reimbursed Out of Pckt Pymnt

Date

Agency

Address

Business Name Fee Expense Expense Status

02/01/05 ABC 918 W Irvington #138 Radio Shack 15 0 0.25 PAID

02/01/05 PRO 5147 #C S 12th Ave My Cellular 10 0 0.25 PAID

02/02/05 PRO 442 W Valencia Jack In The Box 10 7.8 0.25 PAID

02/02/05 XYZ 3565 E Irvington Waffle House 11 8.13 0.25 PAID

02/03/05 XYZ 907 W. 22nd Waffle House 11 7.44 0.25 PAID

02/03/05 ABC 2980 S 6th Ave UPS Store 13 5.17 2.73 PAID

EXPENSE LEDGER- The main purpose of maintaining a separate expense ledger is that even though you will be entering your expenses that are directly related to your assignments in the income ledger, you will probably have other expenses that are more general in nature. One example of this would be postage. The postage that you will be purchasing will be used to fulfill assignments as well as other business functions. In other words, chances are that you probably will not buy just one stamp at a time for a specific assignment. The same holds true for any computer equipment that you will need, organizers, dry cleaning, and etc.

Along with your expense ledger you will need to keep a file or large envelope with receipts, credit card slips, or cashed checks for each entry. Remember that you will need to make an entry in your expense ledger for each business expense that you incur including those that you also entered in your income ledger.

The important columns that you will need in your expense ledger are:

1. Date
2. Item(s) Purchased

- 3. Reimbursable Expense
- 4. Non Reimbursable Expense
- 5. Comment

EXPENSE LOG

Date

Item(s) Purchased

Reimb Exp Amnt

Out of Pckt Exp

Comments

02/01/05 Fax Charge 0.25 For Radio Shack Shop
 02/01/05 Fax Charge 0.25 For My Cellular Shop
 02/01/05 Printing Supplies 27.62 Blck Ink Cartridge / 500 sheets paper
 02/02/05 Fax Charge 0.25 For Jack In The Box Shop
 02/02/05 Meal 7.8 For Jack In The Box Shop
 02/02/05 Fax Charge 0.25 For Waffle House Shop
 02/02/05 Meal 8.13 For Waffle House Shop
 02/03/05 Fax Charge 0.25 For Waffle House Shop
 02/03/05 Meal 7.44 For Waffle House Shop
 02/03/05 UPS shipping fee 5.17 For UPS Store Shop
 2/3/2005 2lb bag of rice 0.99 For UPS Store Shop
 2/3/2005 Shipping Box 1.49 For UPS Store Shop
 2/3/2005 Fax Charge 0.25 For UPS Store Shop
 2/3/2005 Stamps 3.7 Postage Supplies

ACCOUNTS LIST - An accurate, up to date account list is vital to your success. Every agency or client that you interact with will have various information that you will need easy access to. This information will include contact information such as mailing address, phone number, email address and web site address. You will also need to list password, shopper ID, as well as payment method used.

The columns for this list should be as follows:

1. Agency or client name
2. Shopper ID
3. Password
4. Web site address
5. Email address
6. Telephone number
7. Fax number
8. Mailing address
9. Payment method
10. Posting of available work

ACCOUNTS LIST

AGENCY OR CLIENT NAME WEBSITE ADDRESS TELEPHONE NUMBER

ABC AGENCY www.abc.com (555) 555-5551

CONTACT NAME SHOPPER ID FAX NUMBER

Jill Smith joeshopper@email.com (555) 555-5552

EMAIL ADDRESS PASSWORD MAILING ADDRESS

jsmith@abc.com batman 111 E. 1st ST

PAYMENT METHOD POSTING OF AVAILABLE WORK Mytown, ST 99991

Paypal via email

AGENCY OR CLIENT NAME WEBSITE ADDRESS TELEPHONE NUMBER

XYZ AGENCY www.xyz.com (555) 555-5553

CONTACT NAME SHOPPER ID FAX NUMBER

Wanda White jshopper (555) 555-5554

EMAIL ADDRESS PASSWORD MAILING ADDRESS

wwhite@xyz.com 723e471k66 222 S. 22nd Ave

PAYMENT METHOD POSTING OF AVAILABLE WORK Suite 2202

Check via mail Check Website / Postings daily Yourtown, ST 99992

AGENCY OR CLIENT NAME WEBSITE ADDRESS TELEPHONE NUMBER

PRO SHOP AGENCY www.proshopagency.com (555) 555-5555

CONTACT NAME SHOPPER ID FAX NUMBER

Betty Gil JS40505 (555) 555-5556

EMAIL ADDRESS PASSWORD MAILING ADDRESS

bgil@proshopagency.com batman 33 N. 3rd Drive

PAYMENT METHOD POSTING OF AVAILABLE WORK Anytown, ST 99993

Direct Deposit Check Website / Postings monthly

***** FREE BLANK COPIES INCLUDED *****

Included at the end of this Guide are blank copies of the Mileage Log, the Income Log, the Expense Log, and the Accounts List for your usage. These reports will provide you with an easy but powerful bookkeeping system if you so choose to use it.

BONUS BOOKKEEPING TIP

Many of the mystery shopping agencies listed in this manual and that you will be applying with as an independent contractor will allow you to view and apply for shopping assignments outside of the area that you reside in. What this means to you as an independent contractor is that if you enjoy taking weekend trips or vacations, you can turn those trips into business trips. Just because it is a business trip does not mean you have to be clocking 10-hour days. What it does mean is that as an independent businessperson you can deduct part or all of your trip expenses from your business income on your taxes. As matter of fact if your business should happen to experience a loss for the year, that loss may reduce your income tax due from other forms of income that you or your household (if filing jointly) may report.

You don't need to perform but a few shopping assignments on your trip for it to be considered a business trip. For that matter I guess that just one shopping assignment would justify it as a business trip depending on the length of your stay. There is no written rule or laws that states that you must show a profit on every revenue generating move you make as a businessperson.

Sometimes as a businessperson you may think it is necessary to spend \$400.00 to \$600.00 on a few assignments that will only generate say \$40.00 to explore possible additional revenue streams for your business. It is important to remember that a deduction benefit such as this is only possible through complete and accurate accounting practices right from the beginning of your business venture. You must also be able to complete the time sensitive reports associated with the assignments. If you don't have a laptop, consider using a computer terminal at a public library.

IMPORTANT- Be sure and consult your tax professional or the IRS concerning whether it will be necessary for you to make quarterly estimated tax deposits to avoid penalties.

GETTING STARTED ON THE FAST TRACK!

Now it is time to get started. To make sure that you get started in the most efficient way and are prepared and able to receive and accept assignments immediately, I have included this fast track system. Follow the five steps below and they will provide you with a business plan that will help you get started and keep you moving in a direction toward success!

1. MAKE SURE AND HAVE YOUR TOOLS IN PLACE AND SETUP!

DO YOU HAVE AN AVAILABLE COMPUTER WITH INTERNET ACCESS SECURED? If you do not have easy access to a computer with Internet access at this point, you must find one now! Let me repeat the importance of having this in place. You can not even think about beginning this enterprise without it. If you do not own a computer, use the suggestions mentioned in this manual to set up access. If you own a computer but don't currently have Internet access, utilize the links available in this manual to sign up for free access now.

DO YOU HAVE THE EMAIL ACCOUNT THAT YOU PLAN TO USE SECURED AND IN PLACE? Before you answer this question, let me share a little insight with you. As you begin to get signed up with agencies, your email account will become very busy. If your current email traffic is already heavy it may be in your best interest to set up a separate account now.

This issue will be better resolved now than later. If you choose to set up an online payment account such as Paypal, any agencies that pay via this method will need to have the same primary email account listed with them as you have listed with your online payment account. Please understand that you may always change email addresses later but expect that at that point you will need to go back to each contact individually and edit your account information.

HAVE YOU FOUND ACCESS TO A FAX MACHINE FOR SENDING FAXES? With almost every assignment that you will perform, you will be required to send a receipt, business card, or brochure as proof of your shop. If you do not have a personal fax machine, use the helpful info in this manual to arrange usage of one now.

HAVE YOU SIGNED UP FOR AN ONLINE ACCOUNT (PayPal)? Have you completed any registrations for any online accounts yet? You decide what forms of payment that you are willing to accept. A PayPal account not only allows you to accept these type of payments, but also major credit card payments from any other ventures you may be starting online. They will also issue you a MasterCard Debit card to allow you even easier access to your funds. [Click on this SPECIAL OFFER link to sign up for a FREE Premier PayPal Account.](http://www.paypal.com) <http://www.paypal.com>

HAVE YOU SET UP A BOOKKEEPING SYSTEM? Before you go any further make sure to set up a system to account for your revenue and expenses.

2. FIND AGENCIES WITH ASSIGNMENTS IN YOUR AREA NOW, FIRST!

As you make your way through the list of agencies below and get signed up with 50, 60, 70 agencies or more, you will probably have all the assignment offers you can handle and then some. During your start up, you need to work as efficiently as possible. As I mentioned earlier in the manual, most agencies will take anywhere from 30 minutes to 1 hour and thirty minutes to get signed up with. This could take you the bigger part of a couple of weeks working at it full time just to get signed up most of the agencies.

Helpful Hint: Before you begin to apply for assignments, create 3 short documents on the following subjects and save them. These will be asked for on several of the applications that you will be filling out. The agencies requesting these are not actually concerned with your actual shopping experience but rather your grammar. Once you have developed them, spell checked them and then you can simply copy and paste to the application. This will save you tons of time. The 3 subjects to prepare a few short paragraphs on are: *"Describe your best shopping experience"*, *"Describe your worst shopping experience"*, *"Tell us why you think you would be a good shopper"*.

3. ORGANIZE YOURSELF!

4.

DO YOU HAVE AN ORGANIZER SET UP? A key element of success in any venture is organization. Any time you can turn "down time" into productivity, chances are good you are going to be more profitable. Choosing and maintaining an organizer will be vital to your success. Whether you choose to use a paper type (Dayrunner or Franklin) or a PDA (Palm or Pocket PC), select an organizer that is easy for you to use and convenient to keep with you. An organizer will allow you to keep a Calendar, Address Book, and even your bookkeeping files in one simple place.

SET A SCHEDULE FOR YOURSELF! Another important step in getting started in the right direction is scheduling time every week for your new venture. Unless you commit yourself to work your plan, your plan simply will not work.

Schedule yourself a 30-minute period at least Monday through Friday in the morning to check for available assignments. Some agencies will send you an email with a login link when assignments are available. Others will expect you to visit their shopper's Website to see if assignments are available. It should not take you long to develop a pattern to efficiently search for assignments. You must also set time aside to apply with more agencies. A successful formula for any business venture includes equal parts of manufacturing revenue, tracking your revenue, marketing for future revenue.

DETERMINE HOURS OF AVAILABILITY. It is of the utmost importance that you meet all of your assignment obligations within the stated commitment times. Failure to meet your commitment times for just one assignment will probably result in you being blacklisted by that agency for future assignment offers. Meeting your assignment commitments not only includes performing your shop within the stated time frame, but also completing any online reporting or faxing of verification within the stated time frame as well.

Make sure and schedule your assignments in a manner that does not conflict with other obligations. For the most part, try to form a schedule of available hours that will not clash with your other obligations. If you are a stay at home parent and your spouse works in the daytime, you may want to schedule assignments for late afternoons, early evenings, and weekends. Be sure and always remember to leave at least a little time in your scheduling to spend with your family.

TRY AND SCHEDULE ASSIGNMENTS FOR MAXIMUM PROFITABILITY: When you first are getting started and you have a limited amount of assignment offers coming in; you'll for the most part have to perform assignments as you accept them. As you get set up with more agencies and start to have more assignments become available to you, try and schedule your shops in a manner that will allow you to work in the most profitable way. Here are the facts of why how you schedule your work is so important.

4. APPLY, APPLY, APPLY AND KEEP ON APPLYING!

As I mentioned earlier, applying as an independent contractor with most of the agencies will take you anywhere between 30 minutes and 1 hour each. **Don't try to get listed with all of them in the first couple of days.** Your new venture is a marathon not a sprint. Set yourself an hour block of time at least 4 days a week for 10 weeks to apply with new agencies. This means that at the end of 10 weeks you will be signed up with 40 to 50 agencies and you will probably be offered more assignments than you could handle even if you was working 16 hours a day. After that set aside time to apply for at least one new agency each week. The important message is pace yourself since the only real marketing cost that you have in this venture is the time that it takes to get registered with the agencies. Since you can always decline any assignments that you do not want or do not think that you will be able to fit into your schedule, it is to your advantage to have an opportunity to be offered as many assignments as you can. The more assignments that you are offered, the more selective you can become and the better you can schedule yourself for maximum profitability. One of your keys to success will be to *apply, apply and keep on applying.*

5. CREATE AN EASY SYSTEM TO CHECK FOR AVAILABLE ASSIGNMENTS!

As mentioned earlier, different companies will make assignment offerings available to you in different methods. Some agencies will email you when assignments are available. Other agencies will expect you to regularly visit their Website to check for available assignments. You must develop a way to check for these assignments in manner that does not consume a large chunk of your time.

The first step is to make sure that you have developed the "Client's List" that we discussed in the **BOOKKEEPING TIPS** section of this manual. Your "*Shopper's ID*" and "*Password*" will be different for each agency that you are listed with. You will need this information to log into the registered shopper's pages of their Website.

Next, create a folder in your Internet's "favorites" folder and name it something like, "Mystery Shopper's Agencies". This can usually be accomplished by clicking on your "Favorites" tab. You should have a button for "Create New Folder", click on it. In this folder, create a link each time you complete registration with an agency or private company. Now you have an easy system to access available assignments. You are now ready to get started as a mystery shopper. Follow the plan that has been developed in this manual and you should be on your way to a rewarding venture. Good luck and happy shopping.

SAMPLE REPORT FOR TRIAL SHOP #1

You are being requested to perform a shop for a particular Drug Store. You are to go in and purchase a 32ounce bottle of Hydrogen Peroxide. For this exercise, choose a drugstore that is not your regular store, since most shopping assignments will be at places you are not familiar with. You are to enter the store and walk around acting as if you can not find the item you are looking for. If no one offers to assist you within 5 minutes, you are to approach a store clerk and ask him or her to help you. Only if you can not find a clerk in the floor area of the store, are you to approach a cashier and ask for assistance. After you have finished your shop complete the following report.

Name Joe Shopper
Date of assignment 01/01/2005 Time on Site 11:08 AM Time off Site 11:23 AM
Store Name Clark's Drug Center
Store Location 30 North Main Street, Mytown, ST, 99991
Did a clerk approach you to offer assistance? YES NO / COMMENT: I was walking up and down isles and passed a clerk who asked, "Can I help you find something?"
How long did you wait for clerk to offer assistance? 2 MINUTES
Clerk's Name Steve (no last name on badge)
Description of clerk: Gender M Height 5' 7" Built Medium Hair Color Gray
Item Purchased 32 OZ Bottle of MEDCO Hydrogen Peroxide Cost of Purchase \$ 0.85

Were the rest rooms clean and comfortable? YES NO
 Were the floors and counter tops clean? YES NO
 Were the windows and doors clean? YES NO
 Were the isles free of clutter and products faced and adequately stocked? YES NO
 Were weather conditions a factor in any of the NO responses above? YES NO
 Were the different departments and isles clearly labeled? YES NO
 COMMENTS ON QUESTIONS ABOVE: Many of the shelves were out of product but the employees were stocking them as I was shopping. Steve remarked while assisting that the flu had many employees sick and they were trying to get caught up.

Were you greeted by anyone in the first minute after entering the business? YES NO
 Were any questions answered in a knowledgeable manner? YES NO
 Were you asked if you needed or were additional items suggested? YES NO
 If returning a product, were you treated in a respectful manner? YES NO N/A
 If returning a product were all verification procedures followed? YES NO N/A
 At checkout, were customers being processed in a timely and efficient manner? YES NO
 At checkout, were impulse items plentiful and well stocked at the registers? YES NO
 At checkout, was your change counted back for your cash purchases? YES NO N/A
 At checkout, were you thanked for your purchase? YES NO
 Cashier's Name Jennifer (no last name on badge)
 Description of cashier: Gender F Height 5' 9" Built Slim Hair Color Red
 Were the store employees focused on meeting customer needs? COMMENT: The 2 floor Clerks trying to restock and assist customers. Both cashiers and manager were checking out customers.

COMMENTS ON QUESTIONS ABOVE: The store had 17 customer groups when I was in the store. All 5 of the employees that were visible in the store at that time were busy helping or checking out customers. Jennifer had cleaning supplies sitting on the checkout counter and appeared to be cleaning in between customers.

Rate your shopping experience on a scale of 1 to 5 (5 being the most enjoyable) 4
 Do you have any suggestions on how to improve on your shopping experience at our store(s)? From a customer prospective I have no suggestions for improvement. It was a nice shopping experience.

SAMPLE REPORT FOR TRIAL SHOP #2

Next, you are being requested to perform a shop for a particular Fast Food Restaurant. You are to go in and purchase any meal of your choice. For your own benefit, choose a fast food restaurant that is not your regular choice, since most shopping assignments will be at places you are not familiar with. After you have finished your shop complete the following report.

Name Joe Shopper
 Date of assignment 01/02/05 Time on Site 12:10 PM Time off Site 12:37 PM
 Store Name Famous Fred's Dogs and Burgers
 Store Location 445 East Elm Street, Mytown, ST, 99992
 Server's Name Karen (no last name on name badge)
 Server's Description: Gender F Height 5" 2" Built Heavy Hair Color Black
 Item(s) Purchased Fred's Double Cheeseburger Combo Meal Cost of Purchase \$ 5.39
 Were the rest rooms clean and comfortable? YES NO
 Were the floors and counter tops clean? YES NO
 Were the windows and doors clean? YES NO
 Were the tables, booths and seats clean? YES NO
 COMMENT ON ANY NO ANSWERS TO QUESTIONS ABOVE: After I got my meal, I passed three booths and one table with trash and crumbs. I finally located a table in the rear of the store that was clean. I saw no effort to clean the dirty eating stations while I ate my meal.

Were you greeted by anyone in the first minute after entering the business? YES NO
 Was your meal served exactly as you ordered it? YES NO COMMENT: I ordered my burger with mustard, pickles and lettuce only. That was exactly how it was served.

Were any questions answered in a knowledgeable manner? YES NO
 Were you asked if you needed or additional items suggested? YES NO COMMENT: After repeating my order back to me and asking if it was correct, Karen ask me if I would like an order of

chocolate chip cookies for desert. _____
Was your meal served properly and fresh? YES NO COMMENT (IF NO): _____

Were customers being processed in a timely and efficient manner? YES NO
Was there an ample supply of condiments, cup lids, napkins & utensils available? YES NO
At checkout, was change being counted back to cash purchases? YES NO
At checkout, were you thanked for your purchase? YES NO
COMMENT ON ANY NO ANSWERS TO QUESTIONS ABOVE: N/A _____

Were the restaurant employees focused on meeting customer needs? COMMENT: No. There were two employees taking orders at the counter. There was another employee working the grill. There were two employees in the back talking loud and laughing. They could see the restaurant was starting to get busy and they continued their conversation. _____

Rate your shopping experience on a scale of 1 to 5 (5 being the most enjoyable) 1 2 3 4 5
Do you have any suggestions on how to improve on your shopping experience at our store(s)? No. Yes.
The food was terrific and the counter help friendly, but more emphasis needs to be placed on keeping the eating area picked up and clean. _____

SAMPLE REPORT FOR TRIAL SHOP #3

Next, you are being requested to perform a shop for a particular Apartment Complex. You are to go in and ask to preview apartments and inquire about the terms of the lease. Choose an Apartment Complex that you are not familiar with, since most shopping assignments will be at places you are not familiar with. After you have finished your preview, complete the following report.

Name Joe Shopper
Date of assignment 01/03/05 Time on Site 04:03 PM Time off Site 04:41 PM
Apartment Complex Name The Palms On Adams
Location 4400 W. Adams Ave., Mytown, ST, 99994
Leasing Agent's Name Carol Smith
Agent's Description: Gender F Height 5' 6" Built Slim Hair Color Blonde
Did the Leasing Agent offer you a business card? YES NO
Did the Leasing Agent offer you a brochure? YES NO
Were you asked for identification prior to touring the models? YES NO
Were the rest rooms clean and comfortable? YES NO / COMMENT (IF NO): _____

Were the floors and counter tops clean in the office? YES NO / COMMENT (IF NO) _____

Were the windows and doors in the office clean? YES NO / COMMENT (IF NO) _____

Did you find the apartment models clean, well groomed and comfortable? YES NO
COMMENT ON CONDITION OF MODELS: The two models were very clean and furnished in a way to make them appear spacious yet able room lots of furniture. They had the look of lived in apartments including coffee makers, toasters, and table books. They both showed very nicely. _____

Were you greeted by anyone in the first minute after entering the business? YES NO
Were any questions answered in a knowledgeable manner? YES NO / COMMENT I asked Carol about bus routes, libraries, and satellite TV service. She answered my questions about libraries, satellite TV, and supplied with a phone number to inquire in more detail about bus service. _____

Do you feel that all terms of the lease and community rules were fully explained? YES NO
Did you feel pressured in any way to sign a lease? YES NO / COMMENT Carol explained the lease pricing and terms as well as the community rules. She then said that they only had a few apartments in the style that I was looking at left and she would need to run a background check and get a deposit to hold one for me. I said that I would like to look around at some other complexes and she thanked me for stopping in and said to call her if I decided to lease or if I had any other questions. _____

Were other prospects being acknowledged and assured that someone would be with them as quickly as possible? YES NO

Rate your experience on a scale of 1 to 5 (5 being the most enjoyable) 5

Do you have any suggestions on how to improve on your experience at our Apartment Complexes? I really do not have any improvement suggestion for you. I had an excellent experience and was treat great by Carol. If I were looking for a place to live, I would definitely consider The Palms.

REPORTING TIPS TO REMEMBER

1. Be as specific as possible in your answers. Avoid using terms like “a lot”, “many”, and “quite a few”.
2. When counting customers, count them in customer groups. Four people that are together, is one customer group. Always include yourself as a customer group.
3. When asked to comment, always try to comment in complete sentences and paragraphs. Try to give as much detail as you can. You are the eyes and ears of management.
4. Try to be objective in your answers. How you may personally feel about an employee is not the issue here. The issue is how employees perform their duties.