

SOUNDINGS Trade Only Today

DAILY NEWS FOR MARINE INDUSTRY PROFESSIONALS

[TradeOnlyToday](#) > [Columns & Blogs](#) > [Marketing Insight](#) > Searching for solutions? Try a 'mystery shopper'

Searching for solutions? Try a 'mystery shopper'

Posted on November 21st, 2014 Written by [Wanda Kenton Smith](#)



Everybody loves a good mystery, right? Set up the plot, define the problem, integrate memorable characters, enter the hero or heroine and then set the traps to snag the culprits. All leading to a solution.

I recall my beloved, dog-eared Nancy Drew series, which started my love affair with reading and helped make mysteries my favorite genre. Over the years I've hunkered down with hundreds of whodunits. I love to be led down a winding road, full of unexpected plot twists and potholes that provide jarring insight into the characters and their crimes. And when I turn the last page, I revel in solving the mystery, thanks to the series of scattered clues artfully planted by a gifted storyteller.

Maybe that's why "mystery shopping" has always fascinated me. It follows the same tight formula as a good mystery novel. When strategically orchestrated, this exercise has the potential to deliver one of marketing's most powerful 'aha!' moments.

If you're not familiar with the concept, mystery shopping is a market research initiative companies use to unearth information about their products and services. In essence, the company hires undercover mystery shoppers to engage with their organization. Encounters may come in a brick-and-mortar visit, a website rendezvous or, perhaps, a phone call. The goal is to gather real-world/real-time information about the customer experience under the cloak of anonymity. Mystery shopping can be used to observe everything from sales pitches and product presentations to measuring the quality of services, benchmarking competitors and ensuring staff compliance with established company practices. It may answer simple questions such as these: How were you greeted? Was your name used? Did the salesperson or receptionist gather your information for follow-up?

The mystery shopper is instructed to report on specific areas and told what to look for. After the interaction, the shopper provides feedback on his or her experiences. This can take the form of a simple print or online questionnaire or it may involve a more detailed interview.

Industries that use mystery shoppers regularly include retail chains, banks, fast-food restaurants, hotels, car dealers, health clubs and health care facilities.

I've been involved in several mystery-shopping activities. I shopped a hip new restaurant in Orlando, Fla.,

that had opened at one of the major theme parks. A former client managed several concierge programs and oversaw restaurant operations for some of the more prestigious hotels, and she invited me to buy lunch on a specific day at this venue. She gave me a comprehensive list of things to observe, as well as questions to ask. How long was my wait? Did my waiter mention the daily specials, try to up-sell signature beverages and desserts? Did he offer to sign me up for the rewards program? It was fun to have a free lunch and play spy! Although the food was tasty, suffice it to say my waiter failed to deliver his lines.

I've also mystery-shopped the boating industry where a purchase didn't occur at all.

Several clients hired my former agency to conduct mystery-shopping expeditions, with the goal of reviewing product presentations, customer follow-up and a multiplicity of closing tactics. We shopped manufacturers' dealers and their competition. We also spent countless hours shopping at boat shows. The results of these ventures, like a good mystery, always provided some unexpected turns. We found shortcomings, but also some successes.

Although it is not a mystery-shopping organization by any stretch, the Parker 20 Group does impress me with its visits to member dealerships. I was working with my former client Legendary Marine when the Cobalt 20 Group visited and conducted a comprehensive site inspection a few years ago. I asked David Parker to share what a 20 Group dealership visit entails, and he kindly forwarded me the exhaustive 11-page survey used for all such visits.

Each member of the 20 Group independently reviews a facility and completes the survey. They look at everything with a trained eye, ranging from the curb appeal of the facility to the parking situation, signage, lawn care, outside product displays, lighting, showroom condition and the reception area. Is there a kids' play area? They analyze point-of-purchase displays, steps and docks. They make first impressions of the sales staff.

Accounting staff and controls are viewed, and marketing practices are presented and critiqued. The parts and accessories department is visited with a view of everything from the lighting to the inventory methods and the appearance of the service counter. The service department inspection covers the gamut, from the team and facilities to the uniforms, time clocks and how efficiency is measured.

I've barely skimmed the surface.

Imagine having the benefit of top-performing dealership owners/executives quasi-mystery-shopping your facility. Yes, you knew they were coming, but even so, having others see your operation for the first time is enlightening. They will see things your eyes simply miss. In our case, we ended up with a set of great recommendations from other top retailers whose sole motivation was our improvement. Some might look at such an exercise with foreboding, but we understood that shortcomings are opportunities for improvement. And Legendary Marine, the top-ranked dealer in the nation, was all over that.

Companies that engage mystery-shopping activities often turn to a specialized market research organization to conduct the shopping study. The big mother ship is the Mystery Shopping Providers Association, whose members include mystery shopping firms, market research and merchandising companies, training organizations and private investigation firms that offer third-party customer experience metrics. The MSPA says there are 1.5 million mystery shoppers in the United States. A word of caution: If you decide to hire an outside mystery-shopping firm, know the laws in your state, or states in which the shopping will occur. Also, ask whether the shopping group has experience in the marine industry or a sister industry, and always check references.

I was thrilled to learn about the Recreational Boating & Fishing Foundation's "Retail Customer Experience Assessment" — a fancy way of referencing its recent mystery-shopping experience. The RBFF hired an independent marketing research firm to conduct shopping studies to assess the current fishing and boating retail consumer shopping experience. The goal was to analyze and identify areas of opportunity for increasing fishing license sales and boat sales in growth markets. Mystery shoppers included Hispanics, traditional family units and single women (fishing study only). Shoppers were thoroughly screened and qualified and underwent telephone and video training sessions, along with web-based learning modules.

For the fishing study, shoppers visited big-box stores, sporting goods stores, outdoor specialty shops and family-owned businesses in Houston and Dallas and in three Florida markets — Orlando, Tampa and Miami. The shopping was conducted throughout the week and evenly distributed by store type, city and targeted demo groups. The boating study included two major boating chains and independent and/or family-owned dealerships.

A variety of scenarios were presented for portrayal in the fishing study, including the shopper who had never fished before and shoppers with moderate fishing experience who were looking for new equipment or new places to fish. The boater study scenarios were twofold: those who had never owned a boat and those who had owned a boat and wanted to upgrade.

The shoppers in both studies reviewed everything from the greeting to the process of needs assessment, the overall sales process and the close. Product presentation and the overall impression also were covered in great detail.

It's not my place to steal the thunder from the RBFF which plans to reveal detailed results from this undertaking in a future webinar for industry stakeholders. For the record, however, I can say there are some findings that definitely will benefit those in the industry who are willing to listen. I highly encourage your participation.

Hope I've solved a mystery about how you can uncover new clues to improve your business and increase your sales in 2015. Let's go shopping!

Wanda Kenton Smith is chief marketing officer of Freedom Boat Club, president of Marine Marketers of America and president of Kenton Smith Marketing. wanda@kenton-smith-marketing.com

This article originally appeared in the December 2014 issue.