

Survey Scoring Configuration

Mystery Shopping Template



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This survey has **57** questions, **42** options and **0** matrix options

Notes:

The purpose of this Mystery Shop evaluation is to establish if staff are listening to the buying signals of customers and optimizing on the sales potential, offering to upgrade the client's purchase and offer additional services based on her available budget and obtaining some form of commitment from the customer.

The notes in each section may be used in your report to educate staff on what the Mystery Shopper is assessing.

Category: Close

Weight: 30

Question Type: Select One

Did the Consultant provide you with an approximate/firm price easily?

Weight: 10.00

Options:

Weight:

Yes

10.00

No

0.00

Question Type: Select One

Did the Consultant ask for your feedback on the price quoted?

Weight: 10.00

Options:

Weight:

Yes

10.00

No

0.00

Question Type: Select One

If the consultant was unable to close the sale immediately, did he/she ask for some form of commitment by means of offering to hold provisionally?

Weight: 10.00

Options:

Weight:

Yes

10.00

No

0.00

N/A

10.00

Question Type: Select One

Did the Consultant offer to send you a written quotation?

Weight: 10.00

Options:

Weight:

Provided price telephonically and offered to follow up with written quote

10.00

Only offered a written quotation

7.00

Consultant did not provide information/price indication, only offered written quotation

7.00

No quote was offered

0.00

Question Type: Select One

Did the Consultant indicate that they would be happy to review the quotation should you find a better price for the same requirements elsewhere?

Weight: 10.00

Options:

Weight:

Yes

10.00

No

0.00

Question Type: Select One

Overall, did you find that the Consultant strived to obtain commitment from you to make the booking with your company?

Weight: 10.00

Options:

Weight:

Yes

10.00

No

0.00

Category: Gathering Information

Weight: 30

Question Type: Select One

Did the Consultant ask you what kind of budget you had?

Weight: 10.00

Options:

Weight:

Yes

10.00

No

0.00

Question Type: Select One

Did the Consultant ask if you had gotten a price/quote from elsewhere yet or if you had or plan to shop around?

Weight: 10.00

Options:

Weight:

Yes

10.00

No

0.00

Question Type: Select One

Overall, did you feel that the Consultant explored your needs, wants and expectations?

Weight: 10.00

Options:

Weight:

Definitely

10.00

To Some Degree

7.00

Not at All

0.00

Question Type: Select One

Did the Consultant review all your requirements?

Weight: 10.00

Options:

Weight:

Yes

10.00

No

0.00

Category: Main

Weight:

Question Type: Heading

First Impressions

Weight: 10.00

Options:

Weight:

Question Type: Text Only

First impressions are lasting; we only get one chance to create a great first impression. Remember that customers enquiring telephonically do not have a picture of what is happening in the shop/office. Before answering the call, take on the mind-set that you would with a face to face customer, answer the phone with a smile and ensure the caller has your full attention.

Weight: 10.00

Options:

Weight:

Question Type: Heading
First Impressions - Sales Consultant

Weight: 10.00

Options:

Weight:

Question Type: Text Only

Most customers will enquire telephonically before visiting a store and will more than likely contact more than 1 company. This means that they are actually interviewing you. Treat each enquiry like an interview, be enthusiastic and take an interest in the person. Also remember that they are calling a Consultant as they want advice and recommendations, otherwise they could purchase online.

Weight: 10.00

Options:

Weight:

Question Type: Heading
Identify Needs, Wants & Expectations

Weight: 10.00

Options:

Weight:

Question Type: Text Only

Identifying needs is qualifying the enquiry. It is a perfect way to build rapport with the customer as it shows that you are interested in what and will provide them with a product/service specific to them. It also builds trust - People buy from people they like and trust. If you don't take an interest in them, why would they trust you by giving you large sums of money? You will be able to obtain all this information by chatting to the customer, it doesn't have to be an interrogation!

Weight: 10.00

Options:

Weight:

Question Type: Heading
Up-Sell

Weight: 10.00

Options:

Weight:

Question Type: Text Only

Remember that the customer may not know all the services you provide, tell them what additional services you provide.

Weight: 10.00

Options:

Weight:

Question Type: Heading
Informing The Customer

Weight: 10.00

Options:

Weight:

Question Type: Text Only

It is important to realize that just because it all seem simple to you, the customer does work in your industry and will most likely not know how it all works. The customer is looking for information and advice from you. It will also help to build trust as they will know that they are speaking to the right person

Weight: 10.00

Options:

Weight:

Question Type: Heading
Closing The Sale

Weight: 10.00

Options:	Weight:
.....

Question Type: Text Only Weight: 10.00

Remember to ask for the sale! Closing the sale helps customers make a decision. If you have built rapport they know they can trust you. If you have qualified you know you have a product that meets their needs. If you have presented the product and explained the features and benefits they know it is the right product for them. Now is the time to ask them if they want to buy. Don't be an information service; make sure you make all of your time and effort worthwhile. Even if you are waiting for information from a third party, ask the customer if you can hold it provisionally when you receive confirmation of availability etc.

Options:	Weight:
.....

Question Type: Heading Weight: 10.00

Service Delivery

Options:	Weight:
.....

Category: Meet and Greet **Weight: 30**

Question Type: Select One Weight: 10.00

Was your call answered within a satisfactory timeframe?

Options:	Weight:
Very Quickly	10.00
Quickly	9.00
Average	7.00
Quite Long	4.00
Very Long	3.00
Was Not Answered	0.00

Question Type: Select One Weight: 10.00

Did the Receptionist answer the call to include a greeting including name of company and own name?

Options:	Weight:
Only mentioned the company name but did not state his/her name	7.00
Very unclear in his/her introduction	5.00
Came across as unprofessional	0.00
Very professional and clearly stated the company and her/his name	10.00

Question Type: Select One Weight: 10.00

Were you competently transferred to a Consultant within 15 seconds?

Options:	Weight:
Yes	10.00
No	0.00
N/A	10.00

Question Type: Select One Weight: 10.00

Did the Consultant ask your name?

Options:	Weight:
.....

Yes	10.00
No	0.00

Question Type: Select One
 Did the Consultant remember and use your name during the conversation? Weight: 10.00

Options:	Weight:
Yes	10.00
No	0.00

Question Type: Select Multiple
 Was your FIRST impression of the Consultant very positive? (Please choose one of the options which best describes your initial impression) Weight: 10.00

Options:	Weight:
Bored	0.00
Dismissive	0.00
Distracted	3.00
Enthusiastic	10.00
Friendly	10.00
Professional	10.00
Quite Friendly	7.00
Rude	0.00
Very Friendly	7.00

Category: Overall Experience Weight: 30

Question Type: Select One
 Based on the this evaluation rating, how likely would you be to book with the Consultant? (Please do not consider personality, it should be based purely on following procedure) Weight: 10.00

Options:	Weight:
Would only buy from this consultant	10.00
Would include this quotation but would contact other companies	7.00
Would not buy from this consultant	4.00
Would put down the phone and call another company	0.00

Question Type: Select One
 Based on the Consultant's personality, how likely would you be to book with the Consultant? Weight: 10.00

Options:	Weight:
Would only book with this consultant	10.00
Would consider this consultant but would compare to other Consultants	7.00
Would not book with this consultant	4.00
Would put down the phone and call another company	0.00

Question Type: Select One
 Was your OVERALL impression of the Consultant very positive? (Please choose one of the options which best describes your overall impression at the end of the call) Weight: 10.00

Options:	Weight:
Showed an interested in me and my needs	10.00

Provided basic information but little interest	6.00
Went through the motions of the enquiry but showed no interest	5.00
Showed no interest in me or my needs	0.00

Category: Presentation	Weight: 30
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<u>Question Type: Select One</u> Did the Consultant mention {Product/Service 1}? (Input a service/product your company offers which the consultant should be promoting)	Weight: 10.00
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Options:	Weight:
Yes	10.00
No	0.00

<u>Question Type: Select One</u> Did the Consultant mention {Product/Service 2}? (Input a service/product your company offers which the consultant should be promoting)	Weight: 10.00
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Options:	Weight:
No	10.00
Yes	0.00

<u>Question Type: Select One</u> Did the Consultant mention {Product/Service 3}? (Input a service/product your company offers which the consultant should be promoting)	Weight: 10.00
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Options:	Weight:
Yes	10.00
No	0.00

<u>Question Type: Select One</u> Overall, did you feel that the Consultant did what he/she could to sell as many products and/or services as possible?	Weight: 10.00
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Options:	Weight:
Offered all of the product/services required	10.00
Offered most of the product/services required	7.00
Offered some of the product/services required	5.00
Did not offer any additional products/services	0.00

<u>Question Type: Select One</u> Did the Consultant explain the features and benefits of the destination/product?	Weight: 10.00
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Options:	Weight:
Fully explained features and benefits	10.00
Provided very basic information	5.00
Did not provide any information	0.00

Category: Rapport Building	Weight: 30
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<u>Question Type: Select One</u> Overall, did you feel that the Consultant engaged in conversation and, take an interest in you ?	Weight: 10.00
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Options:	Weight:
Very good at building rapport	10.00

Chatty but did not ask enough questions about me	7.00
Showed no real interest in becoming acquainted	0.00

Question Type: Select One
 Did the Consultant ask you if there was any reason for choosing this product/service? Weight: 10.00

Options:	Weight:
Yes	10.00
No	0.00

Question Type: Select One
 Did the Consultant ask what you are looking for from the product/service and your reason for purchasing?
 (This question is to determine if the product is right for the client) Weight: 10.00

Options:	Weight:
Yes	10.00
No	0.00

Question Type: Select One
 Whilst the Consultant was searching for options, did he/she keep you informed as to what he/she was doing and use this opportunity to obtain information from you about you and needs? Weight: 10.00

Options:	Weight:
Consultant used this opportunity to find out information about me and what I wanted	10.00
Did not search for options	5.00
Consultant put me on hold	5.00
I was left on the line listening to keys tapping/office noise	5.00

Question Type: Select One
 Overall, the Consultant was informative, knew the product well, established my requirements. Weight: 10.00

Options:	Weight:
Consultant knew the product well and was informative	10.00
Basic information was provided	5.00
No information was provided	0.00