



## **Activity 3.10: Mystery Shopping Training**

### **Purpose of Activity:**

To make participants familiar with the instrument being used for mystery shopping and to train shoppers and observers on how to conduct the mystery shopping visits.

### **By the end of the activity Participants will:**

Understand what mystery shopping is and why it is being used  
Understand how mystery shopping fits in to the larger campaign  
Be familiar with some research terms  
Be familiar with the mystery shopping instrument  
Understand all the key terms in the instrument  
Understand who/where should be targeted by the mystery shopping visits

### **Before this Activity Participants Will Need to:**

Determine where you want to go for the mystery shopping  
Have finalized your mystery shopping instrument  
Develop scenarios for your mystery shoppers

### **Materials Needed:**

Paper  
Writing Utensils  
Research questions  
Copies of the mystery shopping scenarios  
Copies of the mystery shopping instrument  
List of “Key Terms” in your mystery shopping instrument

### **Key Terms**

Mystery Shopping  
Sample  
Respondent

### **Intended Audience:**

Organization members

### **Time Needed:**

2 hours

### **Part I: “What is mystery shopping and why are we are we doing it??” (10 minutes)**

#### **Facilitator Instructions:**

1. *Ask a volunteer who’s been consistently involved in the research project to describe the research project and how it fits into your campaign to the rest of the group.*



2. Explain that mystery shopping is a type of observation research used to evaluate businesses or programs. People pose as consumers and track their observations about how a business or program operates and whether or not they are in compliance with the law.
3. Introduce how the mystery shopping fits into your research project.
4. Popcorn questions about how the mystery shopping is connected to organizing.

### **Part II: “Who are we targeting?”** (10 minutes)

1. What are our research questions? What information do we need to gather to answer these questions? Who do we need to observe in order to gather the information we need?
2. Explain that the type of person or business that we observe will be our sample.
3. Ask the group to tell you why we targeting this particular group of people? Clarify that we are trying to find out if these businesses or agencies are committing fraud against our members so we can hold them accountable and improve services.
4. Discuss who you are not targeting and how to make sure you are surveying the right people.

### **Part III: How To Approach People for Mystery Shopping** (30 minutes)

1. Handout copies of “the Types of Shoppers and Scenarios” you have created for your mystery shoppers.
2. Explain the different Types of shoppers and explain that each person will assume the identity of one of these. Read it through once as a group and answer any questions.
3. Have participants role play the scenarios in partners
4. Come back to the big group to debrief
5. Discuss any issues that need special attention in doing outreach for the survey (confidentiality, discussing sensitive issues, etc.)

### **Part IV: Getting Familiar with the Mystery Shopping Instrument** (1 hour)

1. Before the meeting, prepare a list of key terms that show up frequently in the survey that are specific to your campaign.
2. Give each participant a handout that includes:
  - a. The list of key terms
  - b. A copy of the instrument
  - c. The “tips for mystery shopping” handout (see p. x in toolkit)
3. Go over the list of key terms with members, clarify any questions that arise.
4. Walk through the survey with the group and discuss how to use each part of it.
5. Discuss the questions that are tricky.
  - a. Are there any questions that seemed hard to understand or explain?
  - b. Are there any words that are confusing or hard to read?
  - c. Are there directions in the survey that are confusing?
6. Troubleshoot – brainstorm how to address some the issues that came up
7. Next go over the general tips for mystery shopping.

### **Part V: Wrap up check out** (10 minutes)



1. *Discuss questions, and concerns that came up throughout the day's activity.*
2. *Discuss next steps in conducting mystery shopping.*