



## **Tool 3.15: Tips for Mystery Shoppers and Observers**

### **Tips for Mystery Shoppers**

1. Focus on your role
2. Be consistent with your story/scenario
3. Do not include the observer in the conversation (let the observer observe)
4. Start right away
5. Find out title, name and contact information of the person speaking to you. (Ask for fliers, business card, etc.)
6. Ask what types of services they provide
7. Ask about the costs of the services (upfront costs, payment plans, associated fees and costs, refunds if not satisfied, etc.)
8. Get specific information about the how they provide services (requirements and qualifications for consumer, what personal information they need, timeline, etc.)
9. Find out if they will give you a contract

### **Tips for Observers**

1. Focus on your role (be observant)
2. Try not to be part of the conversation unless you are asked a question
3. Do not use your cell phone during the conversation
4. Look around for posters, pictures, fliers on the walls
5. Look for relevant documentation (certificates of service, license numbers, relevant laws and statutes, etc.)
6. Collect fliers, pamphlets, brochures, business cards, and other information
7. Once you are done observing, pay attention to the conversation