



## We've shopped before: Exploring instructions as an influence on mystery shopper reporting

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### ABSTRACT

Western retail experience balances between customer expectations and experience in the service exchange. Retailers set on customer service improvement often use mystery shoppers to gauge alignment between intended service and client experience. This exploratory research considers how instructions typically used by mystery shopping providers impact the diagnostic value of data gathered, and whether those instructions become superseded by hired shopper experiences and cultural behavioral expectations. This work suggests the industry tacitly relies on mystery shoppers to leverage cultural knowledge to deliver insights, and that even robust instructional changes may not significantly change the reporting of mercenary shoppers.

### 1. Introduction

Beginning marketing students learn there are four main differences between physical products and intangible services. Service intangibility means difficulty establishing initial credibility. Perishability gives rise to the challenge of forecasting and planning for changing demand, while the more abstract concept of Inseparability describes the impossibility of divorcing the supply and demand of the service. The fourth difference, and the context of this paper, is Heterogeneity of services, which causes the operational problem of maintaining quality.

Compared to companies that sell products, service-based organizations have a unique heterogeneity problem. The managers train an employee on Day 1, and by Day 2, she starts diverging from that training for a myriad of reasons: seeing other people doing tasks in different ways; forgetting the details of new directives; or simply reverting to behavior from previous experience. Albeit a natural progression, this divergence is a barrier to achieving consistent high-quality customer service.

One way companies monitor this service decay is to employ mystery shoppers. Whether internal employees or external contractors, mystery shoppers act as a surrogate for day-to-day customers, an actor going through the culturally prescribed motions, to assess either individual employee service or the general service experience. Mystery Shoppers receive instructions and surveys to complete after each shopping experience, within a range of detail dependent on the needs of the average customer in that type of retail establishment and the skill set of the recruited shopper. Beyond completing the survey, Mystery Shoppers receive instruction to act as any other client or customer. This is an

intuitively appealing approach except for two things: shoppers bring with them a multitude of non-documented shopping experiences that may impact the survey; and, most importantly, mystery shopping is itself a service subject to the same decay as those whom shoppers assess. A mystery shopper is instructed on Day 1, and by Day 2, the performance decay has already begun.

As the Roman poet Juvenal wrote, “*Quis custodiet ipsos custodiet?*”... Who watches the watchers? Wilson (1998) acknowledged the importance of mitigating bias and reliability issues among mystery shoppers, considering: alignment with customer profile; training; experience; and repetition of data gathering. Finn (2001) notes these bias and reliability challenges could be outweighed because mystery shoppers may provide more details of the service process than surveys of actual customers, and can be used to gather specific facts (i.e. – number of customers in line) that general customers may not consciously observe, rather than simply experience perceptions captured in customer surveys.

For the purposes of this work, we will be examining only aspects applicable to the mystery shoppers recruited for the purposes of general consumer retail, as this is the largest group of mystery shoppers. This does not include mystery shopping tasks that require the specialized skills expected of shoppers who do Luxury retail (products and services like fine jewelry and hotels) or most business-to-business assessments of customer service.

There are two general questions driving our exploration with the studies presented here. First, when professional mystery shopping firms develop and use instructions to “positively” impact the applied value of data gathered using shoppers recruited online, to what extent do

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instructions affect responses? Second, do those instructions seem to supersede dramatically the influence of previous shopping experience and cultural behavioral expectations, or does the industry rely heavily on shoppers to leverage inherent knowledge to deliver valuable insights?

## 2. Review of literature

### 2.1. Framing customer service experiences

Framing customer service requires consideration of: customer/service experience; the concept of service; physical environment; customer value; and social interactions. [Walter et al. \(2010\)](#) worked from the definition that “a customer experience is defined as the customer’s direct and indirect experience of the service process, the organization, the facilities, and how the customer interacts with the service firm’s representatives and other customers.” The researchers suggest that these factors “create the customer’s cognitive, emotional and behavioral responses and leave the customer with memories about the experience.” In addition, the group assumed a customer experience occurs in a commercial context, by default shaped and offered by a service company for a commercial purpose.

[Johnston and Clark \(2005\)](#) present customer service from a decidedly operational and process-oriented view, where service entails not just a customer’s service experience, but also the perception of the outcome. Particularly in service-centered businesses like restaurants, the line between the actual experience and the perception of that experience becomes indistinguishable. In practical terms, they suggest that the actions of buying the meal, eating and being served blends inseparably from the guests’ feelings during the process. [Johnston and Clark \(2005\)](#) emphasize that service experience includes the service process, the organization (brand), the facilities, customer treatment by the service staff, and even other customers. In a wholly different perspective on the issue, [Sundbo and Hagedorn-Rasmussen, \(2008\)](#) define a customer experience in which the customer becomes actively involved in some way, plus they take memory aspects into account. Their version of a customer experience is “a mental journey that leaves the customer with memories” which could be considered on a spectrum from favorable to unfavorable. Both of these perspectives seem to allow that some difference exists between the actual happenings in the service experience and the feelings and perceptions of that experience by the customer after the fact.

[Freemantle \(1994\)](#) examined organizations of various types and “how they succeed with their customer service efforts, and more important, how any company can achieve this success if they both get the basics right.” The article suggests, among other common themes, honesty and integrity contribute to success in customer service from foundational management premises, but also in how these manifest in process and execution. For example, specific measures of the amount of customer wait time (as process) and once engaged, “all communication with the customer should be courteous, positive, honest and genuine.”

The design, management, and evaluation of customer service has garnered attention by both academic and applied researchers for many decades. One stream of that inquiry, blueprinting of the service process has specifically considered many aspects of the service delivery process ([Bitner et al., 2008](#); [Shostack, 1985](#)). In the last decade, some have been investigating using a customer journey approach, specifically because that tool maps the process of service delivery from the perspective of the customer only ([Schneider and Stickdorn, 2011](#)). According to ([Halvorsrud et al., 2016](#)), there exists “a possible gap between the service delivery process as it is planned by the service provider (and modeled in service blueprinting) and the same process as perceived by the customer (and mapped in the customer journey approach).”

While considering mitigation of “service performance gaps” has been considered ([Bitner et al., 2010](#)), arguably service providers can go deeper. Insights into the highly variable and subjective experiences of

individual touchpoints in a customer journey can shape understanding of the experience in ways that might practically lead to minimizing customer dissatisfaction ([Meyer and Schwager, 2007](#)). This suggests the necessity of delving into specific touchpoints and imbedded processes in service interactions to clarify which variables may or may not impact the customer experience, regardless of whether that process has been blueprinted or journey mapped.

### 2.2. Social theory and inferential mystery shopping

Consider the crucial importance of familiar interactions between mystery shoppers and retail personnel, which are tantamount to rituals that reinforce collective membership in a broadly defined group, and help achieve shared goals ([Durkheim, 1915](#)). The entire retail process becomes an interaction ritual chain ([Collins, 2004](#)), a series of actions and responses in social situations and economic exchange with specific expectations for each participant and detailed, although generally unwritten, rules for behavior. The mystery shopper represents all shoppers and must act according to all customary aspects, and the service person must fulfill the prescribed ritual expectations for the shopper to be satisfied with service. Missing an appropriate greeting, for instance, may create a “spoiled ritual” with consequences and prescribed customs of its own ([Mauss, 1935](#)).

As noted by Mauss in “The Gift” (1950) regarding the bartering of items – exchanging shells and trinkets for goods, effectively no different from exchanging paper or digital currency for goods.

In relation to a modern retail exchange, this means every customer encounter represents part of a greater ritual of expectations that go along with the choices consumers make. Retailers who fulfill the unwritten “obligations of exchange and contract” (good customer service) assumed by customers to be commensurate with the retailer’s reputation/brand/persona would successfully earn and retain customers. In considering concepts like Mauss’s “obligations of exchange” on an even more detailed level, exchanges of social capital that occur between customers and retail service people can be analyzed in terms [Goffman \(1967\)](#) addressed as what he termed “interaction rituals.” Much of Goffman’s text relies upon the assumption that interaction ritual depends, in societal terms, on the active self-regulation of members as to deference and demeanor during social encounters (1967). For instance, if a cordial greeting upon entering the store is part of the expected course of events, the employee is no less accountable in the ritual for that having happened if otherwise engaged when a customer arrives, and a mystery shopper would certainly note its absence in any evaluation of service.

In other work, [Goffman \(1974\)](#) described Frame Analysis, the complicated situational realities of frames individuals create around social action and resulting behaviors: rehearsals; recountings; debriefings; make-believes; broadcasting and others. Within this structure, his theatrical metaphor regarding front stage and back stage behavior arises. Clearly, backstage training and guidance by management drive the expected actions of customer service people are to one degree or another. For their role, customers have established expectations about what the actors on stage in a particular store must do to fulfill the promise of the brand. In the ultimate backstage action, however, the mystery shopper represents a tool of that management to assure the activities of customer service are being staged correctly. From this perspective, the mystery shopper at least needs to be cognizant of the generally accepted set of actions or rituals for the category of retail being reviewed, in addition to having a firm foundation in the broader exchange rituals of the culture in which the store operates.

In *Interaction Ritual Chains* (2004), Collins segues into the functionalist ritualism of Goffman by providing a historical explanation of its development from Durkheimian theoretical underpinnings. Collins suggests that regardless of what happens backstage to create the trappings of individual frontstage behavior and presence, demeanor of each individual participant in an interaction ritual (and the deference of

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