

# Mystery Shopping Webinar

Top 50 Call Centres for Customer Service 2011

# Agenda

Background to mystery shopping and the Top 50 Call Centres for Customer

Service

Who are the shoppers?

Scenario generation

Questionnaires and scoring

Quality assurance

# Background to mystery shopping



**Mystery shopping:** Provides an objective measure of performance across any industry providing business to consumer contact and across all channels – including face to face, telephone and on-line.

## Effective mystery shopping will:

- Be representative of the customer journey/enquiry type
- Focus on the key drivers of good performance
- Understand the business context
- Provide actionable recommendations and drive change

# Top 50 Call Centres for Customer Service

Now in **4th** year

**5** service outcome questions

**200** calls per organisation

**5** service areas

**6** industry sectors

**100** emails per organisation



**TOP 50 CALL CENTRES FOR CUSTOMER SERVICE**



# Who are the shoppers

Mostly ordinary people with no axe to grind



## Mystery call unit

- Digital recording
- 25 booths
- Central control
- Cost efficient for right task
- Trained and tested

## National field force

- 15,000 shoppers
- UK and S. Ireland
- Geo-demographically representative
- Ongoing recruitment
- Trained and tested



# Trained and tested

Shoppers are given extensive briefing instructions and have to pass a test at 100% before they can proceed

## GfK Mystery Shopping

Top 50 Call Centres 2011 - TELEPHONE CALLS - 696703 - Briefing Notes  
UBM130648

### Summary of Assessment

- This assessment is part of a large project evaluating the service received when customers telephone organisations to make enquiries, solve problems and/or purchase products.
- The organisation to be assessed is shown in VISIT DETAILS (Click on [icon] on your Visits Available/Scheduled Visits page).
- The type of assessment you will be making is shown in VISIT DETAILS (Click on [icon] on your Visits Available/Scheduled Visits page). There are 2 types:
  - 1) → **Simple** - a straightforward enquiry usually taking a few minutes and usually covering only one enquiry subject.
  - 2) → **Complex** - slightly more involved evaluation whereby you will make a more in-depth enquiry that may take longer than a few minutes, may require a transfer to another department and is likely to involve a more in-depth discussion covering a number of aspects.
- Follow all instructions precisely. Your Coversheet provides all the information you need regarding what questions to ask, how to respond to any questions asked of you and what you should expect in the response.
- Assessments are to be made by telephone ONLY. Check your Coversheet to be certain that you are using the correct telephone number. In some cases, where you have to be an existing customer of the organisation, you will be asked to use the telephone number on the documentation you already have from this organisation.
- **IMPORTANT** - You may only carry out a maximum of 15 calls on this project and no more than 2 (which must be different scenarios) to any individual organisation.

### Estimated Length of Assessment

- Will vary in length between around 5 and 30 minutes including any waiting times.

### Fees

- The fee is shown in VISIT DETAILS (Click on [icon] on your Visits Available/Scheduled Visits page).
- Your fee includes any expenses incurred whilst undertaking this assessment.

### Profile

- Your profile is shown on VISIT DETAILS (Click on [icon] on your Visits Available/Scheduled Visits page). You must fit this profile to undertake this assessment. In some cases you must be a customer of the organisation you are calling.
- You must not work for the organisation you are assessing.
- None of your immediate family must work for the organisation you are assessing.

- Q3.1 (whether CSA spoke clearly) - the main CSA means the person who mainly handled your call. In most cases, this will be the same person who you initially got through to. In some cases, you may be transferred early on in the call, in which case, the main CSA would be the second person you spoke to - i.e. the person who mainly handled your enquiry.
- Q3.3 (IVR layers) - an IVR layer is a set of automated options - e.g. For service press 1, for sales - press 2 - this would be 1 layer. If, when you got through to sales, there was another option - e.g. for enquiries about A - press 1, for enquiries about B, press 2 - this would be a second layer. Do not confuse IVR - a way of routing your call - with straightforward recorded information messages which you may hear at the start of your call or during transfers.
- Q3.4 (IVR options) - options within layers are the number of possibilities for you to go to - e.g. if, once you have selected from the first set of IVR layers - you are again given several options such as - for A press 1, for B press 2, for C press 3, for D press 4, for E press 5, for F press 6 - this would be more than 5 options in one layer and the answer to Q3.4 would be Yes.
- Q3.4a (IVR route) - if there was no IVR, select No IVR. If there was IVR, always write in the form of the selection and then a description of the selection in brackets - e.g. 1 (current account enquiries) or \* (enquiries about your bill).

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- Q3.4b (problems with IVR) - record this as YES only if the IVR system was clearly not working properly - e.g. it took you round in a circle or the line went dead after you had pressed the IVR option you thought was correct. If you do encounter problems, explain fully what happened.
- Q3.4c (having to give personal details more than once) - an example here would be if you had to enter your account details within the automated IVR system and then had to give them again when you eventually got through to a CSA. Do not mark down if you are asked to simply confirm or reconfirm your name.
- Q3.6 (reasons for transfer) - only answer YES if you are told in advance why you were being transferred. You should only answer YES if you are given a reason - although this reason does not have to be in depth. E.g. you would answer YES if the CSA said - I'm just transferring you to the correct department or I'm just transferring you to someone who can help with that whereas you would answer NO if they said nothing when transferring you or simply said - Wait one moment.
- Q3.9 (whether enquiry answered after transfer) - you should answer YES if you were transferred to someone who could help you in some way. This might not mean that you received a complete answer to your enquiry - it could mean you were asked to call back or be called back or it could mean that you were given information to help you know where else you could get the answer to your enquiry. Only answer NO if, for example, the person you got through to gave you no further information, or if you were transferred to endless more IVR or to a dead line. If you were unable to get any further information at this stage - then you will be routed towards the end of the questionnaire where you should provide a full explanation of exactly what happened and why you were unable to resolve your enquiry in any way.
- Q3.10 (whether details of your enquiry passed on) relates to any follow up call you received or call back you had to make. If you only made one call - your answer will be response 3 - No call-backs / follow-ups. The enquiries on this project have been constructed so that most will be answered in a single call - so having to receive a follow up call or having to call back is not likely to happen very often.

# Profiling

Census data allows us to select by age/gender/region/previous history and many other attributes such as bank account held, home owner and product holdings.

Where census data is unavailable, we carry out 'shout-outs' to the panel. This is built into the database.

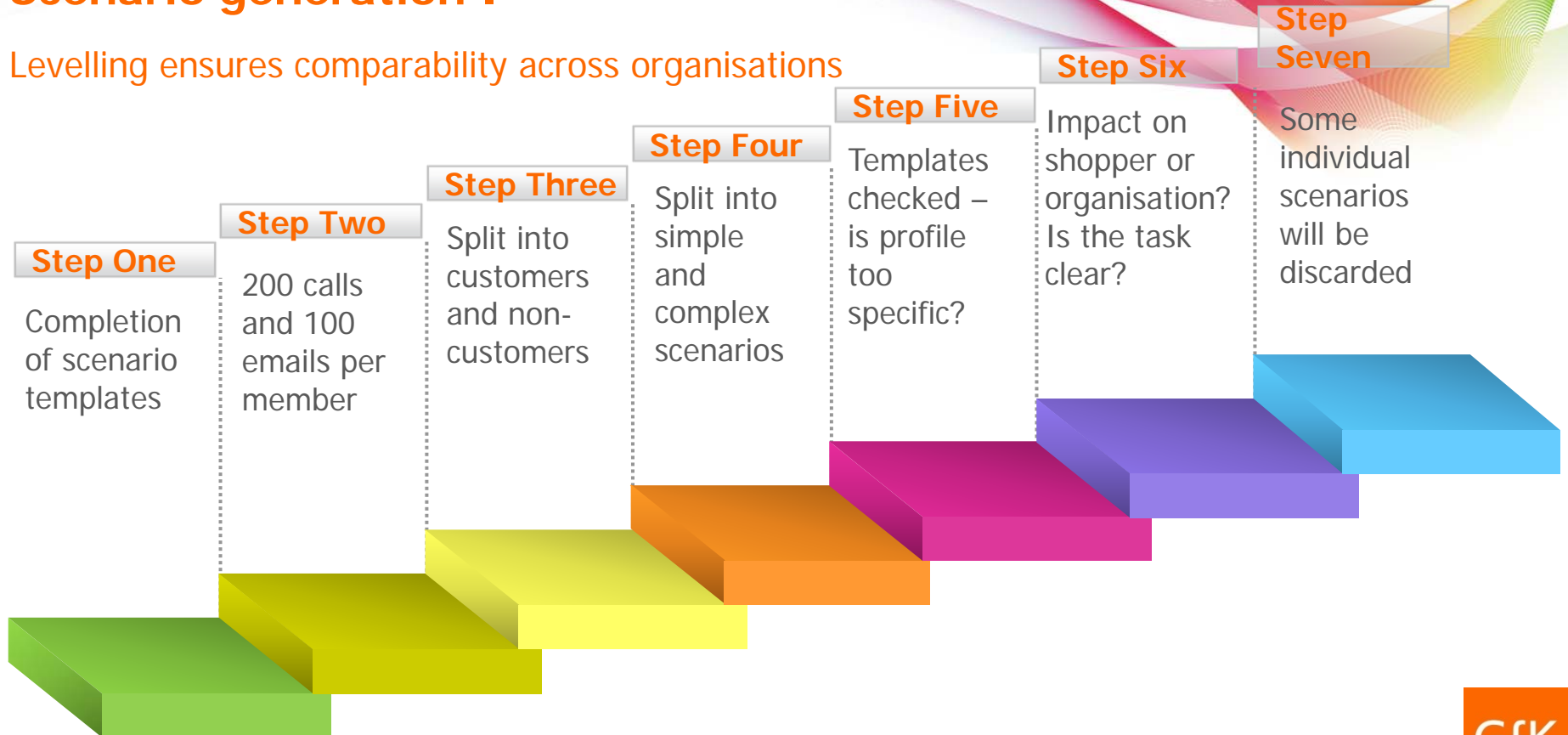


Our Cybershop allocation system also contains questions on

- Willingness to use real details
- Security
- Information that must be provided
- Assessment volume restrictions

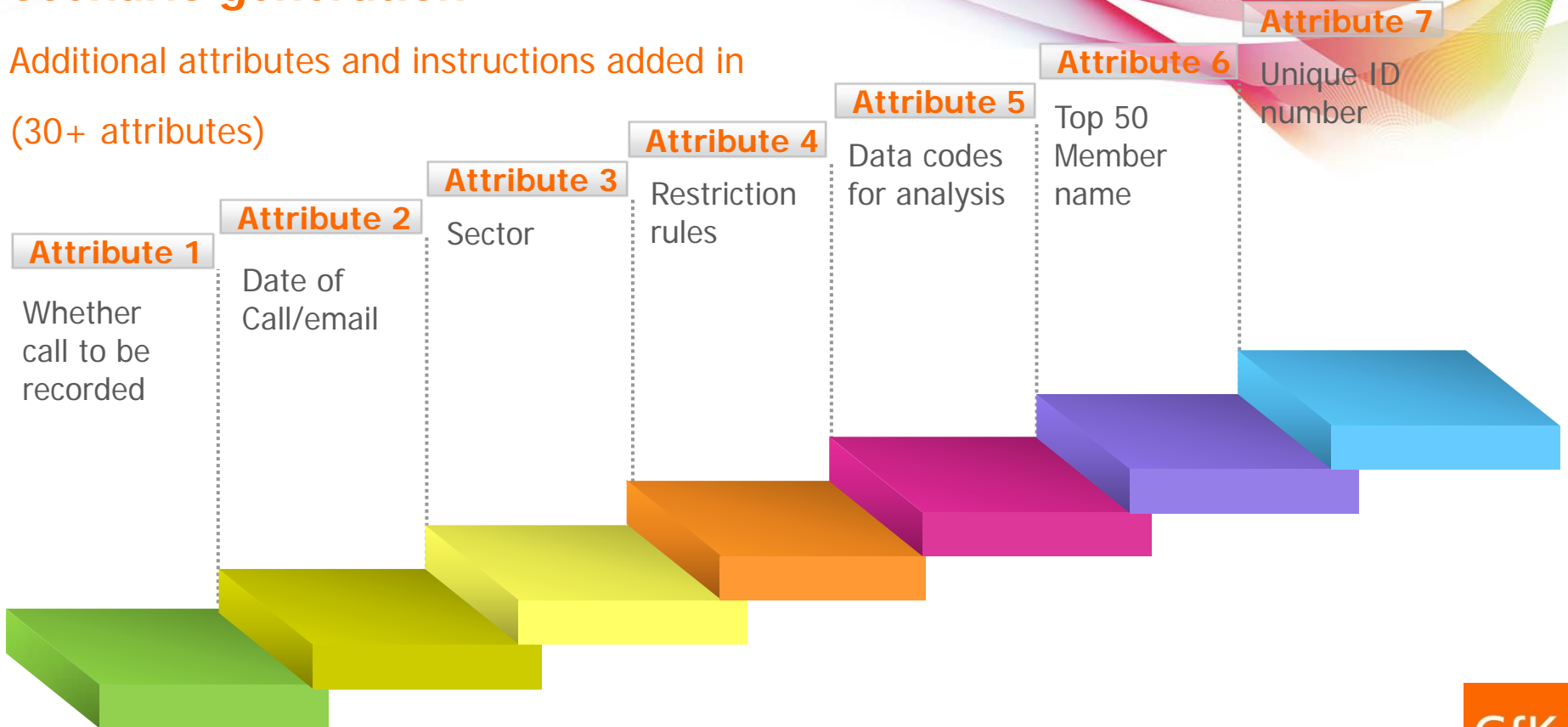
# Scenario generation I

Levelling ensures comparability across organisations



# Scenario generation II

Additional attributes and instructions added in  
(30+ attributes)



# Questionnaire

One calls version, one email version. Same questions across the board

Based on consumer research.

20 points

20 points

20 points

20 points

20 points

Not scored



## TIMELY

Time to get through/  
receive email  
response

## EASY TO USE

IVR, easy to understand,  
transfers  
Clear email subject, format  
etc.

## RELIABLE

Easy to hear,  
enquiry  
resolved  
Email spelling,  
grammar and  
accuracy

## KNOWLEDGEABLE

Technical  
knowledge  
and ability to  
resolve  
enquiry

## PERSONALISED

Softer skills,  
proactivity,  
ownership,  
engagement

## EXPERIENCE

Satisfaction,  
perceptions,  
recommendations

# Measurement elements fully defined for objectivity and consistency

Examples:



## GETTING THROUGH

If you cannot get through:

- Wait for 10 minutes on the line – unless engaged or otherwise cut off
- Try again at 15 minute intervals
- Try for up to 6 attempts

## OWNERSHIP

Rate the CSA on whether they really made an effort, went out of their way to personally help you resolve your enquiry and took your enquiry seriously. As an example they may say – ‘I can see this is a problem for you, let me look into it personally and get back to you with an answer’. Mark them down if you felt they were only ‘going through the motions’ or took no personal responsibility in answering your enquiry.

# Changes in 2011



Based on updated consumer research

## Calls:

- Timeliness – maximum points for getting through in up to 1 minute
- Easy to use – maximum points for no IVR **OR 1 layer**
- Whether any problems with IVR (not scored)
- Easy to use - whether asked a second time for personal details not already provided during IVR process (1 point)
- Personalised – sincerity added to understanding & caring question
- Personalised – expanded definition for ‘thanked at end of call’
- Personalised – expanded definition of further assistance offered
- Likelihood to recommend moved to a 10 point scale (not scored)

## Emails:

- Likelihood to recommend moved to a 10 point scale (not scored)

# TIMELY

	Through on 1 <sup>st</sup> attempt / no problems sending email	Through to a CSA in 1 minute / acknowledgement email in 10 mins	20 POINTS Not put on hold / email clarified full response timing	Length of call reasonable / full email response within 1 working day
CALLS	3 points	10 points	5 points	2 points
EMAILS	2 points	5 points	3 points	10 points
Points lost if:	Cannot get through	No helpful messages / not thanked for waiting	Holds not well handled	

# EASY TO USE

	CSA speaks clearly / good English/ clear email subject	No IVR/1 layer IVR/ no email jargon	20 POINTS No more than 5 options per IVR layer / offer of further contact in email	Not asked for details more than once / named staff member on email	Not transferred / call backs handled well / email tel no and acceptable format
CALLS	2 points	5 points	4 points	1 point	8 points
EMAILS	4 points	4 points	4 points	4 points	4 points
Points lost if:					Transfers not well handled

# RELIABLE

20 POINTS

	No background noise / email spelt correctly	No technical problems / email reads well	Enquiry resolved / email showed accurate customer details	Email took account of security
CALLS	3 points	2 points	15 points	
EMAILS	5 points	5 points	5 points	5 points
Points lost if:	Cut off		Call backs not offered or delivered successfully	

# KNOWLEDGEABLE

20 POINTS

Product/technical knowledge

Ability to resolve enquiry/ email answered enquiry

CALLS

10 points

10 points

EMAILS

20 points

Points lost if:

Correct response data also captured but not scored

# PERSONALISED

20 POINTS



**REPORTING** – double checks against raw data, consistency checks across report types, double checking of manual entry, spelling and grammar

**DATA** – automated validation, attribute checks, routing checks, proofing of comments, automated double score checker

**SET UP** – scenario levelling, telephone number and email address checks, system checks, test questions, validation, scoring

**FIELDWORK** – validation at point of entry, staff names, verification against recordings / email samples where possible, checks on field spread, queries back to shoppers



# Systems and security

**ISO 9001:2008**  
Quality Assurance Standard: GfK NOP has been accredited to the standard since 1994, thus ensuring quality is an integral part of how we work

**ISO 20252:2006**  
Market, Opinion and Social Research Standard: GfK NOP has been accredited to this standard since its inception

GfK NOP is a Market Research Society (MRS) Company Partner



A member of Interviewer Quality Control Scheme (IQCS) since its inception in 1978



Company Membership of the Chartered Quality Institute (CQI), since 1996



GfK NOP is wholly committed to meeting the requirements of the **UK Data Protection Act 1998**

GfK NOP follows **ICC/ESOMAR**  
The World Association of Research Professionals

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