

# TRAINING MANUAL

how to be a mystery shopper

PERSONALLY  
**recommended**



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# welcome!

**It's so great to have you as part of the team.**

Personally Recommended is dedicated to providing the best Mystery Shopping experience in Australia. With your help, we help companies all across Australia to deliver the best customer experience available.

Now that you're here, we're sure you're eager to dive right in. So we have put together this training manual to walk you through everything you need to know to get started.

This manual covers all the information you will need in order to use the SASSIE system, conduct an effective shop, and complete a successful survey every time. We also have some FAQs, tips, and other basics to help you get started.

Please keep a copy of this manual, as it is helpful if you need a refresher!

**If you have questions not covered in this manual**

please email [shopper@personallyrecommended.com.au](mailto:shopper@personallyrecommended.com.au)



# how mystery shopping works



a quick breakdown:



## JOB BOARD

All available shops are posted on the job board. Here you can apply for the jobs you would like to complete.



## SHOP

After looking over your guidelines and survey you head out and complete your mystery shop.



## REPORT

After your shop you will be required to answer a survey/write a report about your experiences.



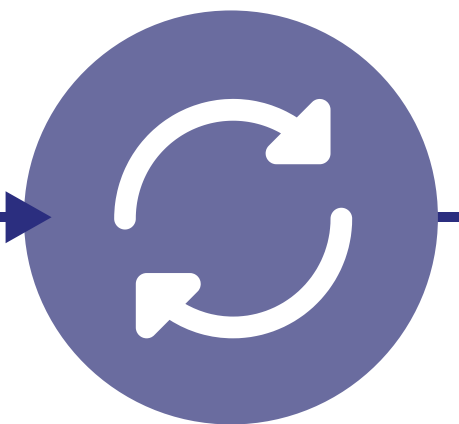
## REVIEW

After you submit your report it is reviewed by the Personally Recommended team. Once approved it is sent to the client.



## PAYMENT

Once your report has been finalised you will be added into the closest payroll (run regularly).



## REPEAT

You can accept a variety of shops to suit your schedule. New shops are uploaded to the board every month.

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# communication

01

## how we will contact you

It is important for us to be able to contact you about available jobs or to follow up on your assignments. We will do this either by email or phone:

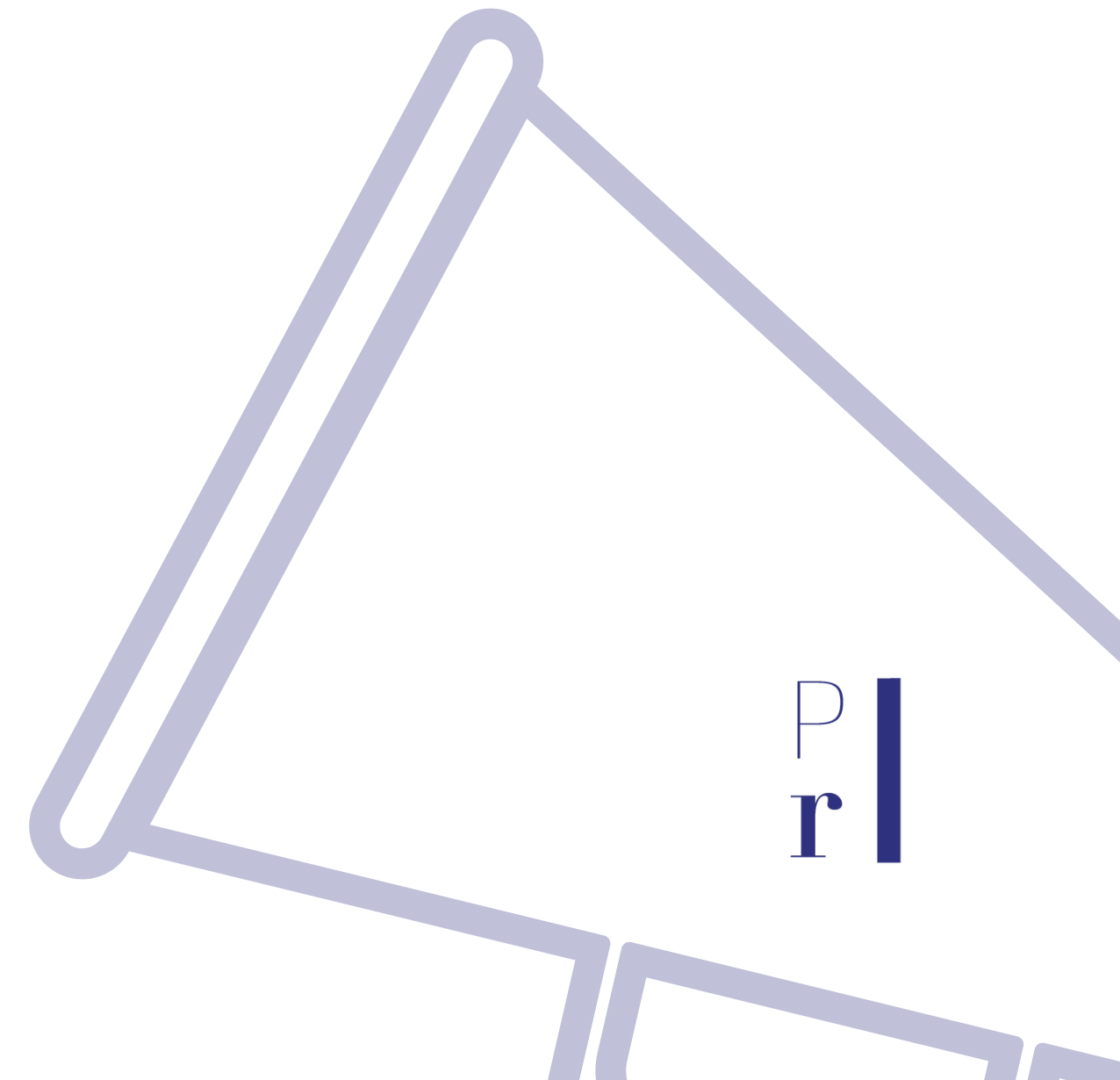
### EMAIL

In order to receive emails from us please ensure that your emails are turned on in your **SASSIE** account. You will only ever receive emails from us for the following reasons: We have a shop available in your area, we need to confirm information about a shop/report you have completed/have in progress or to provide you assistance.

**Our email address is: [shopper@personallyrecommended.com.au](mailto:shopper@personallyrecommended.com.au)**

### PHONE

Personally Recommended may contact you via text in order to register EOIs for jobs available in your area or to receive updates or confirmation on shops you are conducting. We are also available to answer enquiries or speak to you directly via our phone **0451512556**.



# getting started

02

## Service level agreements

We are 100% committed to providing clients with completed reports by the due date.

If you are unable to complete the shop assignment by the due date please contact our office **immediately** so that the shop can be re-allocated to an alternate shopper. You can do this via email or phone (shopper@personallyrecommended.com.au or 0451512556).

If you do not contact us in advance of the due date and the shop is not completed on time, you will not be paid for the assignment.

## Privacy

It is important that you understand the privacy regulations regarding your role as a mystery shopper. Please remember the following:

- Do not share information about a client to anyone.
- Do not share information about a staff member that you mystery shopped to anyone.
- Do not share information about Personally Recommended to anyone.
- Keep your identify as a mystery shopper a secret.

# creating an account

03

If you have not yet created an account on SASSIE you will need to do this now.

Following your successful application, you should have received a link in an email. You must **COPY & PASTE** the link into your web browser (do not simply click on it, as this will not work).

Once you have reached the site follow these steps:

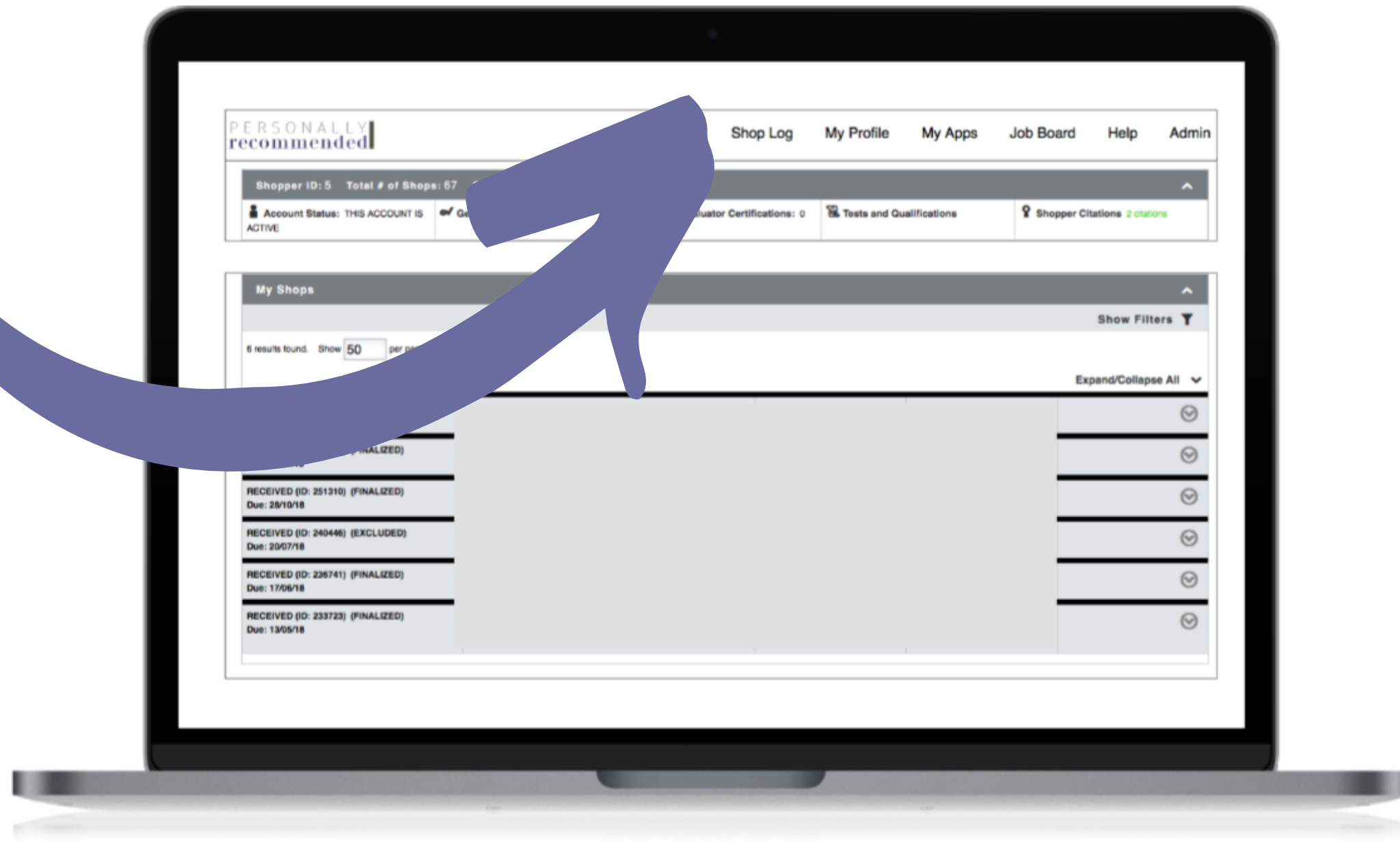
- The 'Shopper Sign Up Form' (see beside) should pop up
- Once to Sign Up form appears, enter your email address in the space at the bottom of the page and click 'GO'
- Complete your account details and create a unique password. Keep a record of this password for your reference. Personally Recommended does not keep a copy of shopper passwords
- Once you have registered please read the Privacy Policy



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# your shop log

This is where you can see all of your past and current shops!



- Once you have created an account and logged on, you will be taken to the 'Shop Log' screen.
- You can reach this through the Personally Recommended website by clicking SHOPPER LOGIN or by saving the link below in your favorites: <http://www.sassieshop.com/2prms/shoppers/LoginShopper.norm.php>
- Your "Shopper Login" screen will look like the image beside.
- The shop log will show jobs that you have applied for and have been assigned to you.
- You will only have a history of shop logs after you have completed a number of shopping assignments.



# the job board

This is where you can see and assign all of the available shops in your area!

- To see what jobs are available in your area, click on Job Board in the banner at the top of the page.
- The Job Board shows all available shops that have not yet been assigned. To apply for any job on the job board click on Apply.
- You can expand the location range in kilometers on the left-hand side to suit the areas you wish to shop in.

PERSONALLY recommended

Shop Log My Profile My Apps Job Board Help Admin

Logout : Personally Recommended

### Personally Recommended Job Board

**FIND SHOPS**

20 km from

My home Help  
 Near me (Found!)  
 Enter an address Help

Additional filters

13 available shops found!

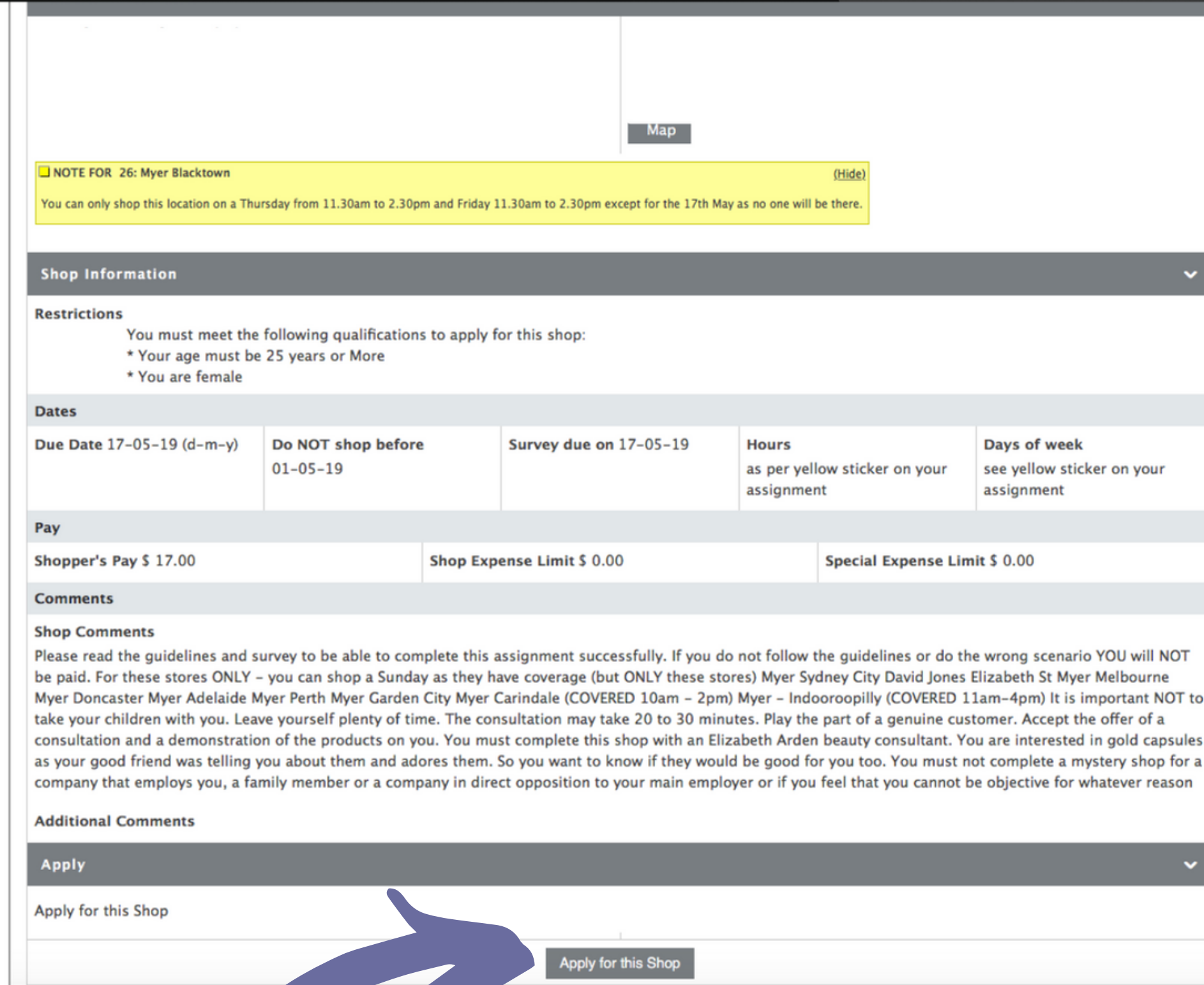
### Standard Shops

| From  | To     | Company | Location, Address, City, State, Postcode, Country                                 | Distance | Fees | Apply      |
|-------|--------|---------|---|----------|------|------------|
| May 9 | May 17 |         | Myer Blacktown, Kildare Street, Blacktown, NSW, 2148, Australia                   | 7.37 km  |      | Apply      |
| May 9 | May 19 |         | Chattabox West Ryde, West Ryde Marketplace Kiosk, West Ryde, NSW, 2114, Australia | 14.10 km |      | Apply      |
| May 9 | May 19 |         | Connect Today, 128c Ware st, FAIRFIELD, NSW, 2165, Australia                      |          |      | More Apply |

# shop details

## getting all the info before you go

- When you click on Apply the shop details for the assignment will appear.
- If the assignment is of interest to you, you meet the shop requirements and, are able to complete the job by the due date, please click on the Apply for this Shop button.



Map

NOTE FOR 26: Myer Blacktown (Hide)  
You can only shop this location on a Thursday from 11.30am to 2.30pm and Friday 11.30am to 2.30pm except for the 17th May as no one will be there.

**Shop Information** ▾

**Restrictions**  
You must meet the following qualifications to apply for this shop:  
\* Your age must be 25 years or More  
\* You are female

**Dates**

|                           |                             |                        |  |  |
|---------------------------|-----------------------------|------------------------|--|--|
| Due Date 17-05-19 (d-m-y) | Do NOT shop before 01-05-19 | Survey due on 17-05-19 | Hours as per yellow sticker on your assignment | Days of week see yellow sticker on your assignment |
|---------------------------|-----------------------------|------------------------|--|--|

**Pay**

|                        |                            |                               |
|------------------------|----------------------------|-------------------------------|
| Shopper's Pay \$ 17.00 | Shop Expense Limit \$ 0.00 | Special Expense Limit \$ 0.00 |
|------------------------|----------------------------|-------------------------------|

**Comments**

**Shop Comments**  
Please read the guidelines and survey to be able to complete this assignment successfully. If you do not follow the guidelines or do the wrong scenario YOU will NOT be paid. For these stores ONLY – you can shop a Sunday as they have coverage (but ONLY these stores) Myer Sydney City David Jones Elizabeth St Myer Melbourne Myer Doncaster Myer Adelaide Myer Perth Myer Garden City Myer Carindale (COVERED 10am – 2pm) Myer – Indooroopilly (COVERED 11am–4pm) It is important NOT to take your children with you. Leave yourself plenty of time. The consultation may take 20 to 30 minutes. Play the part of a genuine customer. Accept the offer of a consultation and a demonstration of the products on you. You must complete this shop with an Elizabeth Arden beauty consultant. You are interested in gold capsules as your good friend was telling you about them and adores them. So you want to know if they would be good for you too. You must not complete a mystery shop for a company that employs you, a family member or a company in direct opposition to your main employer or if you feel that you cannot be objective for whatever reason

**Additional Comments**

**Apply** ▾

Apply for this Shop

Apply for this Shop

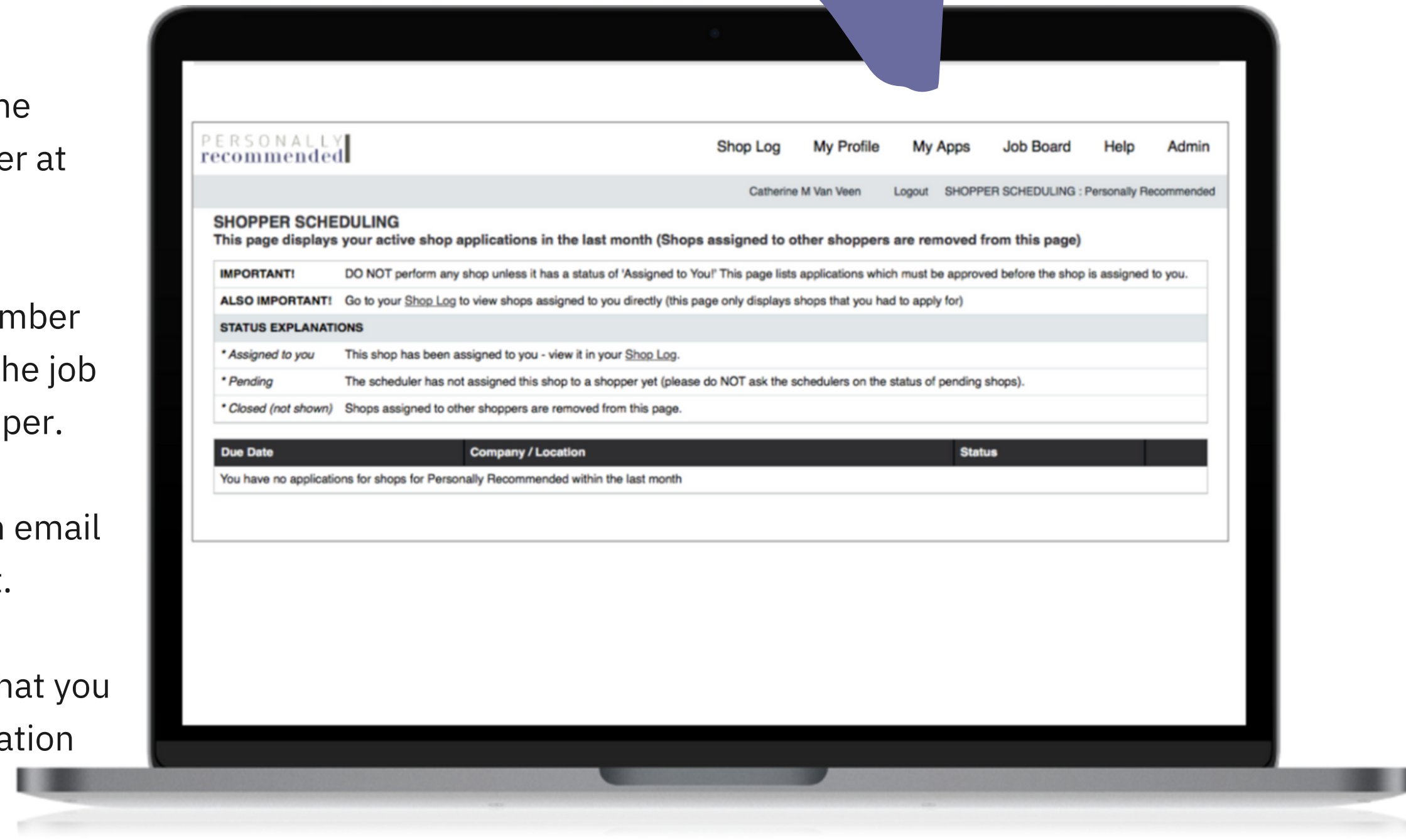
# your applications

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## How do you know if you got the shop?

- To view the shops that you have applied for and the status of those jobs, click on My Apps in the banner at the top of the page.
- A Personally Recommended Scheduling team member will review all shoppers who have nominated for the job and assign the shop to the most appropriate shopper.
- If your application is accepted, you will receive an email with specific shop instructions for the assignment.
- You can change your mind about any of the jobs that you have applied for by clicking the Delete this Application button if you wish.



# your profile

## Keeping track of your details.

You can change your personal details (e.g address, phone number etc.) by clicking on 'My Profile' in the banner at the top of the page. It is important to keep this up to date so we can offer you the correct shops and keep in touch with you.

**Basic Account Information**

\* required fields

First Name \* Trial

Middle Initial

Last Name \* Shopper

Email \* consultant@personallyrecommended.com.au

Password \* New Password: [masked] Confirm: [masked] [Send Reset Link to consultant@personallyrecommended.com.au](#) (only visible to managers)

Address Line 1 \* 303 Zhen Building

Address Line 2 Norwest

City \* Baukhams Hills

State \* NSW

Country \* Australia

Zip/Postal Code \* 2153

Language Preference

Phone 1 \* 0288145000

Phone 2 0288145000

**Payment Information**

As these fields are mandatory if you are not ready to provide your bank details, please type 1 in each text field, to allow your shopper profile to save. You can return to this page at any time to fill in these details when ready for payment.

**This is a required field**

Account Name: (The name your bank account is held in, usually your name or details, eg: Mr A & Mrs H Smith) \*

Emma

PERSONALLY recommended SHOP LOG MY APPS JOB BOARD HELP ADMIN

C.O.M.O.D.O. AUTHENTIC SITE SECURED BY SSL

SHOPPER PROFILE

**PLEASE CORRECT THE 4 ERRORS MARKED BELOW IN RED!**

**Trial Shopper** Shopper #1

Personally Recommended Signup Date: 25/08/2

| Status                         |  |
|--------------------------------|--|
| Account Status                 | THIS ACCOUNT IS ACTIVE <a href="#">Change</a> <a href="#">info</a>   |
| Get Shop Offer Emails          | Please verify your email address to get shop offer emails <a href="#">info</a>   |
| MSPA Certifications            | None Register New Code <a href="#">info</a>  |
| Confirmed GPS Verifier Codes   | 0 Become a preferred shopper by using your iPhone or Android phone to verify your location when doing GPS Verifier-enabled shops. <a href="#">Download the Free GPS Verifier App Here!</a> |
| Home/Work Address Verification | Please verify your address to ensure that you view offers for NEARBY shops only <a href="#">info</a><br>Address not verified <a href="#">Update</a>  |

**Admin Only**

[Delete Shopper](#) [Add New Citation](#) [Disqualifications](#)

Private Comments (not visible to shoppers)

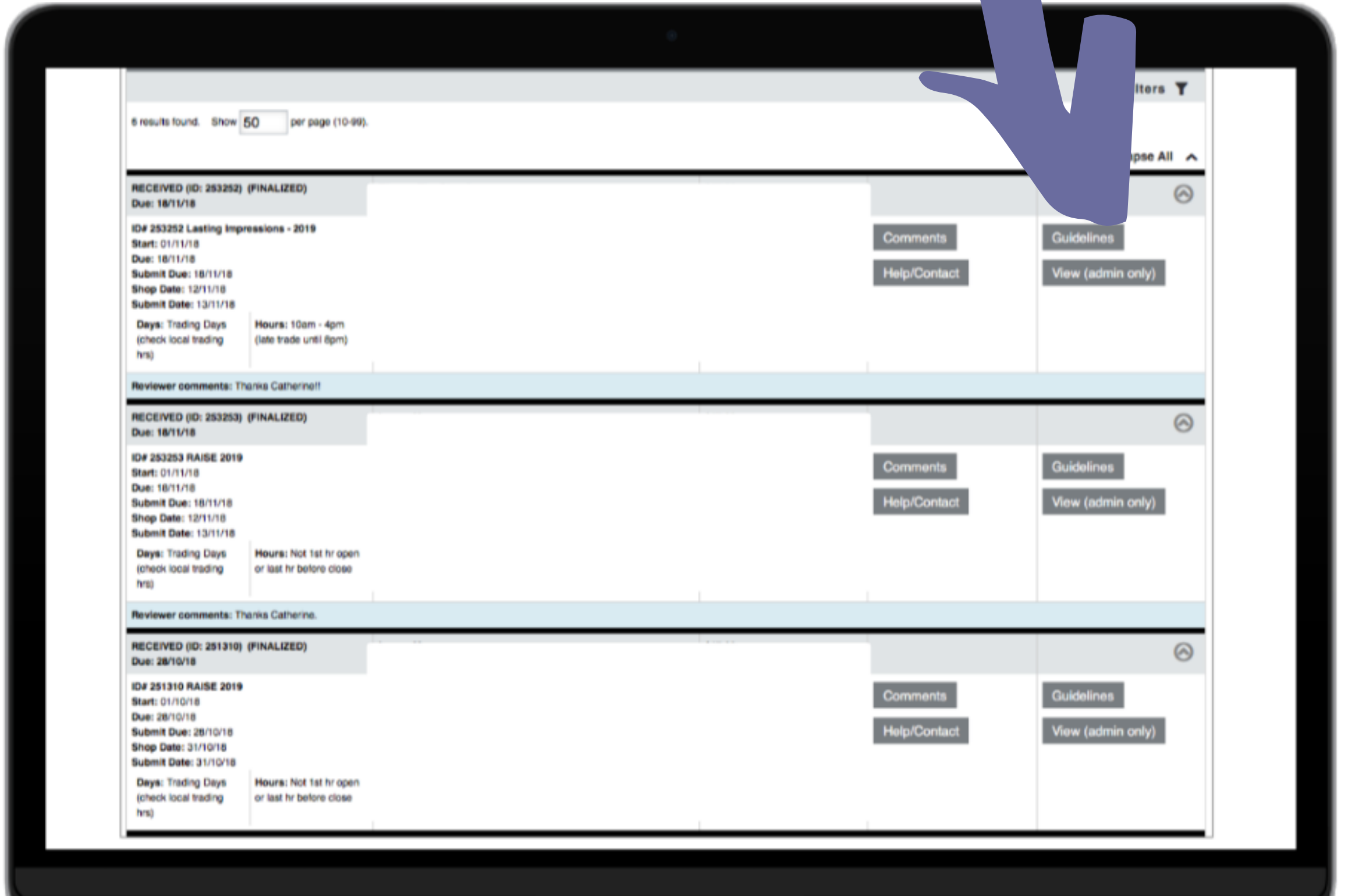
- 5-16-2019 (/MJ):No S/C. HB - low scoring, almost no help.
- 11-6-2017 (/CR):Brief.

Basic Account Information

# conducting the shop

## Shopper guidelines

Shop Guidelines for allocated assignments are provided in the Shop Log. To view them, click on the Guidelines link.



# conducting the shop

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**When you click on Guidelines specific shop instructions will be downloaded**

The guidelines include:

1. The enquiry you must make.
  2. Information you must gather.
  3. Other important details relevant to this client.
- You read this information prior to conducting the shop. You can download this file to print or keep digitally so that you can refer to it before you conduct your shop.
  - You must also click on the “Yellow Sticker” if there is one to check if there are any special comments to assist you with this mystery shop from the Personally Recommended Scheduler.
  - If you have any concerns or you realise that you cannot complete the job for any reason, please email us at [shopper@personallyrecommended.com.au](mailto:shopper@personallyrecommended.com.au)
  - Failure to follow the Guidelines and/or Special Instructions will result in you being ineligible for payment.

## In store do

Check you have the right store. You may or may not need to take photos.

Observe the overall appearance of the outside of the store. Slowly walk into the store and observe the surroundings.

Observe the staff – general grooming, uniforms/name badges where required.

Time how long it takes to be acknowledged and offered service.

If no service is offered after a reasonable amount of time, you must approach a staff member.

Remembering your specific instructions conduct the shop and make an enquiry regarding the relevant product or service.

Ask questions and listen carefully to help you understand and remember the conversation.

Be an interested customer. Use positive body language.

Take notes after the shop



## 15 don't

Visit a store that is in a different location to the one you have been assigned – even if it is for the same client. You must visit the exact location you have been assigned.

Be unpleasant or difficult for the staff to deal with.

Try to ‘catch the staff member out’. Be objective.

Conduct the shop outside the specified hours or days provided in your Shop Guidelines.

Take a copy of the survey into the store and/or answer questions as you go. NEVER identify yourself as a Mystery Shopper.

Make an enquiry that is irrelevant or different to the requirements of your Shop Guidelines.

Leave the store without engaging with a staff member (unless specified in your Shop Guidelines).

Take notes about the shop in view of the store.

# the shop survey

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## Getting to know the questions

- Once you have read through the Guidelines you will be able to view your shop survey. It is important to read through the survey prior to undertaking the shop so that you are familiar with the questions and understand what you need to observe during the shop.
- You can see the survey by clicking the 'GO' button. You will see that the View/Submit button is now blue in colour. Click on this and the survey will open.

The image shows a laptop screen displaying a survey form titled "PRMS: Customer Experience - 2013 (#Demo)". The form is divided into several sections:

- Shop Requirements:** This shop must be performed between Demo and Demo, on these days and times: Demo: Demo. This shop must be submitted by Demo.
- Location Info:** Demo (ID# Demo), Demo, Demo, Demo, Demo, Demo Demo, Demo.
- Shop Info:** Your Shop Fee: \$Demo, Approved Expenses: \$Demo, Special Expenses (Demo): \$Demo, Bonus Pay: \$Demo, Comments: Demo.
- Shopper Info:** Demo Demo (#Demo), Demo@Demo.com.
- Download:** (Empty field)
- View:** [Printer-friendly version of this form](#), [Time-saving tips and frequently asked questions](#).

Below these sections is a table with columns for "Question" and "Answer". The survey content includes:

- PRMS Customer Experience**
- The Environment**
  - Store Name: [Text input]
  - Date shop performed: [Day: [Dropdown], Mon: [Dropdown], Year: [Dropdown]]
  - Time shop performed: [00: [Dropdown], : [Dropdown], 00: [Dropdown]]
  - Customer traffic: [Select One: [Dropdown]]
  - Number of staff in the store: [Text input]
  - 1.1 What was the nature of your enquiry? [Text input]
  - 1.2 Describe the environment and store appearance. [Text input]
- The People**
  - 2.1 When you entered the store were you acknowledged with eye contact, a smile and/or a verbal greeting?  Yes  No
  - 2.2 Were you greeted in a friendly manner?  Yes  No
  - 2.3 Were you offered service as you browsed the store?  Yes  No
  - 2.4 Describe the appearance of the team members in the store. [Text input]
  - 2.5 Comment on the welcome you received and what the staff were doing as you entered the store. [Text input]
- The Service & Advice**



# preparing to shop

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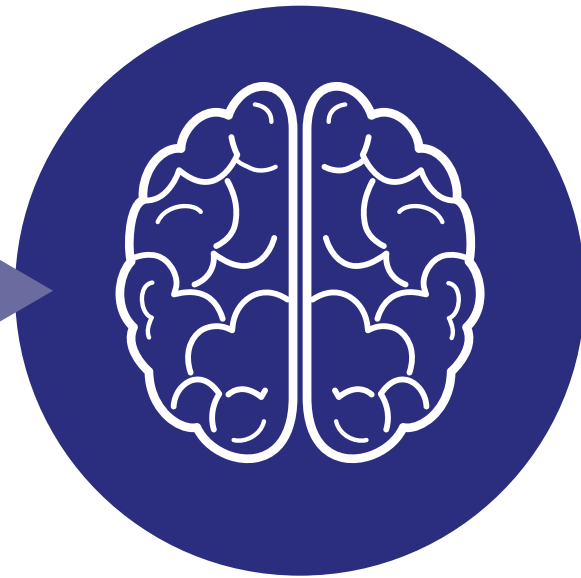
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r |

the checklist before you go:



## READ

Remember to read your **shopper guidelines** and **survey** before shopping..



## MEMORISE

Be sure to memorise the details of your scenario and requirements.



## LOCATION

Be sure to confirm your location online and on maps.



## NOTES

Be prepared to take notes after your shop to help you remember details.

# writing a good report

## Example Question

Comment on the staff member who assisted you today – what did they do and how did this make you feel.

## Poor Response

HE WAS SUPER FRIENDLY AND HELPFUL. TIM WAS AWESOME.

## Better Response

The staff member developed the conversation and asked questions to understand what I was looking for. They were friendly and helpful.

## Best Response

The staff member engaged me in conversation and developed the relationship. They asked questions to understand my needs and really listened to what I said. They were friendly, helpful and knowledgeable. I felt like a valued customer.

## Reviewing

- To ensure the reports that we send to our clients are exceptional, all completed surveys are quality checked twice. In the first instance, SASSIE will identify any system noted errors for you to fix before the report is submitted. If there are issues that need to be addressed, you will see an **OOPS** message. If there are no **OOPS** messages your report will be submitted.
- Once you have successfully submitted your report, our team of Review Specialists will read your completed survey. This is both to ensure a standard on your part and to provide you feedback on your reports.
- Please remain mindful that the ranking/review team feedback is not designed to make you feel disheartened about your work. Instead, it is designed to help you to improve your reports and ensure our quality assurance standards are maintained for clients.

## Writing Reports

do

+

don't

Use correct spelling and grammar.

Submit your report within 24 hours of carrying out the shop and by the due date.

Refer to staff by the correct name as per the guidelines (eg. Staff members, team members, or consultants).

Provide relevant commentary about your experience in as much detail as possible.

**If there are specific instructions for taking photos, you must provide these or the shop will have to be re-done.**

If you select a NO' response for a particular question, you may be required to explain this in the comments section of the survey. You must do this in detail where asked.

If no comments are required, you may leave that section blank.

Meet minimum word requirements.

Use incorrect capitalisation.

Refer to staff by name throughout the report. Most clients will ask you to provide the name in one question only. This is the only time you should use it.

Identify staff by gender - please use they/them for privacy.

Copy or paste from previous answers.

Identify yourself in the comments e.g. "I am pregnant so the team member helped me to my care, or "The team member said 'Good morning Mary'.

Provide the shortest possible response or explanation to your answers. Details are important to clients.

# frequently asked questions

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## what to do if...

### **the staff member doesn't have a name badge**

You can ask their name when you thank them for help. If you are unable to get a name you will be asked to provide a physical description.

### **you are asked if you are a mystery shopper**

Always plead ignorant and ask: "What is a mystery shopper?" Never admit you are the shopper and carry on the visit as per the instructions.

### **you are familiar with someone at the store**

Unfortunately, you cannot conduct the mystery shop for this client as it is considered a conflict of interest.

### **you forgot important information**

If you forget to collect any critical information or pictures you will have to return to the store and conduct the shop properly in order to be paid.

### **you want to take your child on a mystery shop**

It is preferred that you do not take children with you when complete an assignment. Some clients will allow for or specify if children are allowed/needed for the shop.

### **the store was too busy**

First, please try and approach a team member. If the store is clearly understaffed or too busy please return at another time and note this in your report.

### **how do i get paid?**

Each shop is assigned a different payment amount. Shops that require you to make a purchase will also come with a reimbursement amount.

We conduct a pay run each fortnight however before payment can be made your report first needs to be reviewed and finalised by one of our reviewers.

Once it is has been reviewed and finalised it is then placed into the closest fortnightly pay run cycle.

In order to be paid you must ensure you have given us your correct payment details and update your profile if they change.

# connect and contact

## Be a part of our online community!

Our team would love to connect with all our shoppers via these platforms as another way to inform you of new jobs going up on the job board, to help you with any queries you have via Facebook Chat, to share news in the Mystery Shopping field and more!



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personallyrecommended.com.au