

Implementation of Mystery Shopping in Hotel Management: Practical Overview in F&B

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Abstract

The dynamic of the present ever-changing market makes service quality management increasingly demanding, compelling organizations to monitor constantly the rapid changes that are often unexpected. It is in this context that quality management value becomes essential for organizations. Mystery Shopping has become an accepted method of performance measurement in many industries.

Therefore, the goal of this research is to present the development and implementation of mystery shopping tool carried out by a Portuguese hotel chain with the final purpose of analyzing its efficiency. This paper shows the methodology towards the construction of the questionnaires that analyze the compliance with the standards, and also describes the technical training throughout the project to which the employees of the Food and Beverage (F&B) department were submitted as well as a comprehensive mystery shopper training program to ensure consistency of quality in the assessment process. After collecting the information of the mystery shopper audits, the information is processed and presented as reports containing the interpretation of the results. The results indicate that an ongoing process of mystery shopping visits can contribute for a short-term improvement in quality service results.

This study contributes to the Mystery Shopping research stream by empirically testing if the tool effectively produces an improvement in compliance with the standards in a practical context. Further, this study proposes future research directions.

Keywords:

Quality Management, Mystery Shopper, Standards, Service

1. Introduction

The setting of this paper is the implementation of Mystery Shopper visits, carried out by an organization related to the hospitality business with a hotel chain in Portugal and abroad, having the purpose of testing the efficiency of this tool.

The study was based on, two interviews, one to the General Manager of the hotel that was the subject of this research, and the other to the Head of the Training Department of the Hotel Chain. Also, two inspection audits were applied through a Mystery Shopper questionnaire, and in addition, information was collected through research in books, articles on Marketing, Management and Quality Management.

In this rapid growing experience economy, customers are seeking more variety and customization than they used to in the past (McColl-Kennedy et al., 2015). Some theories support a systematic feedback to employees on their performance. These theories also uphold that this factor contributes to a critical self-analysis of its output. (Latham, Ford, & Tzabbar, 2012).

There is no measuring tool that assesses restaurants nor a standardized and official rating system in Portugal. It is suggested by Liu, Su, Ganc, & Chou, (2014), that the decision-making organizations, including government departments, create or adapt assessment models, and reveal the results with the

objective of improving the quality of the food and beverage industry.

Food is a very important source of revenue for tourism. (Liu, Su, & Chou, 2014). As part of the strategy, restaurants can be turned into a tourism topic through its assessment and promotion. For this, it is important to understand how to identify the restaurants with great quality service. This study brings some significant contributions to the extent that it is pioneer in Portugal, in the development of an assessment of the quality of service in restaurants, through the Mystery Shopper (M.S.) tool.

Consequently, solutions are proposed so that all the departments of a hotel comply with the procedures, thus increasing the consistency of the service provided and the degree of customer satisfaction.

This study makes it possible to see if this tool effectively produces an improvement in the compliance with standards in a practical context and functions as a pilot project, being prepared to replicate in other restaurants and hotels.

The purpose of this study is to briefly explain the operation model regarding the implementation of Mystery Shopper visits. For this, a literature review was elaborated to analyze and relate concepts regarding the Mystery Shopper, a revised outline was proposed, and the results were analyzed and interpreted, which allowed the final conclusions.

2. Literature Review

Quality, in the tourism service industry, is the main factor that serves to differentiate one hotel to another. The quality of service delivery is the most important element in this equation. (Madar, 2017). Hotel General Managers receive constant feedback from their consumers via customer satisfaction surveys, online reviews, letters, e-mails, and in-person complaints, among others. General Managers also receive information from experts who usually evaluate hotels. This information can come in the form of hotel rating systems and mystery shopping. Management also receives feedback from corporate executives, employees, and other internal stakeholders. However, a key question remains: what forms of feedback are most relevant, and how are they used? (Torres, Adler, & Behnke, 2014).

There are several assessment systems for restaurants, as is the case with Zagat Restaurant Survey¹, which assesses restaurants based on three criteria: food, decoration and service. The highest score is 30 points (Liu, Su, & Chou, 2014).

Currently, the most prestigious rankings in Portugal for hotels and restaurants are *Boa Cama Boa Mesa* of *Expresso*, *Trip Adviser*, *Booking* and the *Red Michelin Guide*². Studies point to the fact that the latter, influences restaurants in several aspects namely in the change of prices, income and social position of the *chefs* as well as its prestige. (Liu, Su, & Chou, 2014). Despite the great influence of the *Red Michelin Guide* in the restaurant and catering industry, the assessment criteria for obtaining the certificates in the different categories have never been disclosed. This represents a gap in academic research with regard to the creation of consistent criteria for assessing the service quality in restaurants. (Liu, Su, & Chou, 2014).

According to Evans, Stonehouse, & Campbell, (2003) the following indicators should be considered when assessing service quality in restaurants: quality of the ingredients and their production; cooking skill and talent; characteristics of the meal; menu balance; experience of each visit. The waiter is a critical element that directly affects restaurant's revenue. (Latham, Ford, & Tzabbar, 2012). The main objective is to understand whether a Mystery Shopper's feedback can potentiate on job training, improve sales performance, and exceed customer expectations at the same time.

There are several studies that focus on the relationship between quality of service and restaurant rating, since quality of service has already been recognized as an important standard in the selection of a restaurant.

For Xie et. Al (2014), service quality in restaurants is directly related to the perceived value and experience of the meal. It is understood by perceived value the assessment of the food, service, environment and price. These factors actively contribute to the client's emotional behavior (Liu, Su, &

¹Most used guide in the United States for the Restaurant Industry <URL: <https://www.zagat.com>>

²Restaurant Guide used worldwide <URL:<https://www.viamichelin.com>>

Chou, 2014). In today's dynamic hospitality industry, specialists have to make decisions on how to best allocate their efforts to improve or sustain service quality. Consequently, the practitioners' perceptions of the importance of consumer and expert feedback are particularly valuable. (Torres, Adler, & Behnke, 2014).

Therefore, this study intends to fill the gaps of previous studies integrating the Mystery Shopper as a way of observation, with the aim of improving service delivery through continuous training taking into consideration the Mystery Shopper's feedback.

Like any external audit, this project will bring additional costs. The Vice President of the study elaborated by Latham, Ford, & Tzabbar (2012) - which aims to implement Mystery Shopper visits in a Restaurant chain – explains that \$1 spent on the program had a return of \$ 2 of profit due to increased sales. Another of the indirect benefits and more difficult to measure, is the improvement of the service provided which was only possible due to continuous training through constant feedback from the Mystery Shopper.

Service Quality

Cited in Pinto & Soares (2011), Mikel J. Harry says that, “quality is a state in which there is value creation for the customer and the supplier in all aspects of the business relationship”. According to the definition in the standard NP EN ISO 9000:2005 quality is understood as a “degree of satisfaction of requirements given by a set of intrinsic characteristics”. Pinto & Soares (2011) state that the success of any organization depends directly on its ability to mobilize and organize the means and resources needed to produce products and/or services that meet the requirements, needs and expectations of its customers. As such, quality is the engine of success for organizations and paves the way to the effectiveness and continuous improvement of methods and processes.

Research on Michelin-starred restaurants claim that more expensive restaurants have more resources to maintain a quality service, food and environment (Liu, Su, & Chou, 2014).

The service industry is the largest driver of the economy in developed countries (Latham, Ford, & Tzabbar, 2012). Since consumers will make decisions and take an action based on their perceptions, there is urgent need for the hotel industry to take an effort in comprehending and understanding consumer's expectation in order to provide good quality services. (Țițu, Răulea, & Țițu, 2016)

According to Grönroos (1990) service is an activity or series of activities of a more or less tangible nature, which normally, but not necessarily, occurs during the interaction between customers, and service employees or physical resources or assets, which are provided as a solution to a problem or customer need.

The hotel service demands: constant innovation, increasing performance and quality. Quality is directly associated to the differentiation of the service. The more personalized the service, the closer it is to the customer's needs.

Thus, differentiation puts the company in a privileged position in the conquest and maintenance of markets. The differentiation of a product or service from the competition is a factor that contributes to the success of the company and to the valuation by the customers. The result is the competitive advantage, generated by the differentiation, creating conditions to increase the profit of the Hotel. (Almeida, 2010).

Sometimes there is a gap, between the quality that the company produces and the one that the customer needs, situations in which the company is making efforts and making investments that are not recognized or valued by the customer, thus wasting various resources. (Almeida, 2010).

The norms NP EN ISO 9000, presented by the *International Standard Organisation* (ISO), explicit the concept of quality in the capacity of a set of characteristics inherent to the product, system and process to meet the requirements of customers as well as other stakeholders in the company, considering it as the degree of satisfaction of requirements given by a set of intrinsic characteristics. (IPQ, 2005).

From a management point of view, quality is a fundamental concept that branches from the need of companies to meet, or even exceed, customer expectations. (Costa & Sousa, 2011). In order to be able to provide a quality service, it is necessary to know the requirements associated with the client's needs and to meet them or, if possible, to overcome them.

Mystery Shopper

Although the Mystery Shopper tool it is a technique known and used worldwide, in Portugal it is little applied.

The mystery client is a technique that aims anonymous observations of the service provided from the consumer's point of view (Liu, Su, & Chou, 2014).

According to Latham, Ford, & Tzabbar (2012), the mystery shoppers are usually hired by organizations in the service industry, and are also known as ghost, anonymous or secret customers. Through this technique, managers can specifically evaluate standards they would like to see measured. (Sykes, 2011). Several studies point to the contribution of this technique through better performance in a short period of time.

After visiting the restaurant, the mystery shopper completes a series of reports, providing all relevant information such as: performance of service providers working at the front-office, product quality, compliance with procedures and other potential problems. (Liu, Su, & Chou, 2014).

This gives the manager the opportunity to improve performance - sometimes in areas that seemed to be working properly (Sykes, 2011).

One of the internationally known companies providing this service in the hotel sector is the *Leading Hotels of the World (LHW)*³ through their *leading quality assurance* program. This program promotes at the request of the hotel, solutions for the quality management, such as mystery shopper audits to the service and training for employees.

Sykes (2011), tells us to think about each Mystery Shopper report as an instant picture of what is happening in a given period of time. Since business is not static – its constantly changing - the more pictures we get together, the better we know what's happening.

Procedures and Audit

The backbone of any quality management system (QMS)⁴ is its documentation (Pinto & Soares, 2011). So that the system is not too bureaucratic, thus losing some efficiency, the documentation should be managed in a practical way ensuring that relevant information on quality is reached by all who need it, and it must also be of quality.

Pinto & Soares (2011), define procedures such as the documents that establish guidelines and methods to carry out and manage the necessary activities in order to ensure the Quality Management System.

For Pinto & Soares (2011), audit can be defined as actions taken in accordance with a plan established to ensure that the relevant processes and activities relevant to quality are carried out and maintained at an appropriate level of effectiveness.

Willborn (2006), states that audits have to be systematic and underline the importance of creating a cycle scheme. It is based on this assertion that, for this study, the scheme shown in figure 2 was created for a more effective control of the inspection.

It is based on these concepts that a system was created for the implementation of the Mystery Shopper tool. In order to stimulate research in this area to help the hotel chain with the application and measurement of a quality service.

3. Methodology

Following a study by Latham, Ford, & Tzabbar (2012), an on job training program was developed for waiters to improve performance, behavior, customer interaction, and customer satisfaction. These inputs were created by studying the mission, values and strategy of the company, thus ensuring that all employees involved were able to perform their duties and in accordance with the principles of the company.

Figure 1 shows the work process timeline that was predetermined for an efficient

³ A Leading Hotels of the World is a prestigious organization that operates in luxury hotels and represents the most exquisite hotels and resorts in the world <URL: <http://www.lhw.com>>

⁴ Quality Management System – According to Pinto & Soares, 2011, represent the organization's culture that enables them to provide products and services that can meet the needs and expectations of customers.

implementation of Mystery Shopper (M.S.). inspections.

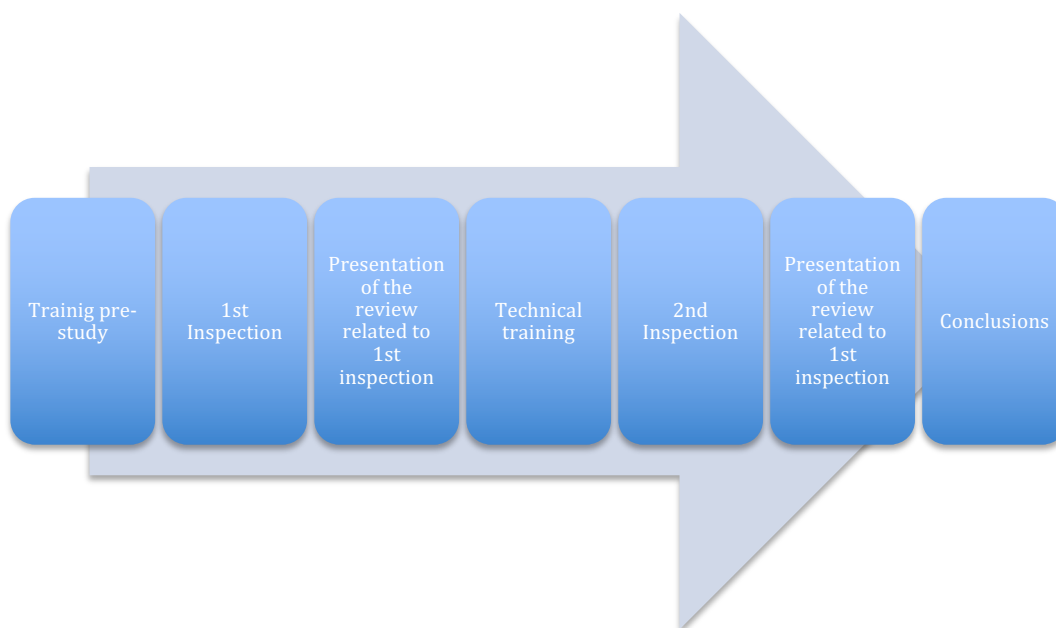


Figure 1 - Timeline

What is proposed is to create a cycle of audits as shown in figure 2, which can later be used to create a historic of evaluations and corrective actions to prevent the recurrence of past mistakes.

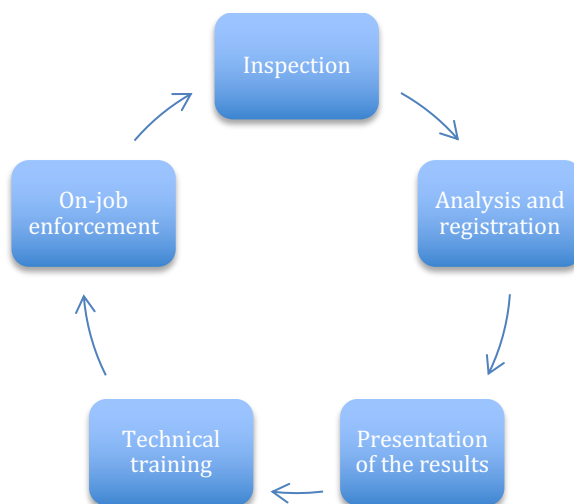


Figure 2 – Inspection Cycle

The first inspection was done without the employees' awareness in order to analyze the service without any influence. Sykes (2011) argues that once we share with employees the intention to start a M.S. program, we will change the working environment and influence the sequence of inspections.

Presentation of Mystery Shopper evaluations to organization management and operation

In each assessment, the results were sent to the administration in the shape of a report where the most important information was condensed as procedures that were more, or less accomplished in the different sale points.

Regarding the presentation of results to the organization it is very important to maintain a positive attitude. Following the suggestions of the Head of the Training Department, the presentation of the results was very dynamic. We assemble all employees involved in the study and together we filled out the questionnaire used in the inspection by M.S., as a self-assessment. After analyzing the self-assessment score, the real results of the first inspection were presented with the purpose of comparing with the self-assessment. At this point, it is very important to reflect and try to understand the employee's opinion, analyzing what led them to make certain mistakes.

Over a period of time, supervisors reinforced technical training, taking into account the most common mistakes dictated by the first inspection. The second inspection was then carried out. This time the presentation of the results was simpler, corresponding only to an informative presentation.

Questionnaire designing

Based on other studies, the questionnaire was designed based on the following dimensions: (1) Reservation: Assesses the telephone service and the skill of the employee during the conversation; (2) Arrival: This dimension assesses the behavior of the employee in the first contact as well but also how the employee hosts the customer to the table; (3) Menu: evaluates the design of the menu, the language used, grammar, hygiene and if the product corresponds to what is mentioned in it; (4) Order: Evaluates how the employee lists the order by analyzing their speech and expertise as well their willingness to sell; (5) Beverage Service: Evaluates the employee's technical knowledge regarding the beverage service as well the ability to increase sales; (6) Service: Evaluates the interaction at the level of anticipation of the employee in relation to the needs of the client, technical knowledge and ability to increase sales; (7) Employee Behavior: Evaluates employee behavior, language used, how it behaves and relates to colleagues in front of the client; (8) Buffet: Evaluates the presentation, cleaning and functionality of the Buffet; (9) Food: evaluates the quality, presentation and variety of food; (10) Presentation of the table: evaluates the assembly of the tables, the set-up, presentation and cleanliness.

Each dimension of this questionnaire consists of several questions with locked answer between "meet", "below" and "Not Applicable". This kind of response, was considered so that it could be extended to the maximum number of standards to be evaluated without making it too difficult to fill from M.S. point of view (Sykes, 2011). Each question was built taking into account the hotel's procedures manual and can thus effectively analyze whether each procedure was completed or not.

Another concern in the design of the questionnaire was the order of the questions. These were sequenced according the natural sequence of the service. Thus, the inspector can fill out the questionnaire discreetly through an electronic device such as a tablet or smartphone as the service is being provided and can immediately send the evaluation to the supervisor to prepare the rectification of the inaccuracies for the next shift.

The "price" was considered too subjective to be assessed in this study. The perception of the price is in some way related to the income of each one, as well as its social class, cultural context, among other factors. For all the reasons, the price was not considered in this study.

$$\frac{n^{\circ} \text{ met standards}}{(n^{\circ} \text{ total standards} - n^{\circ} \text{ N/A standards})} \times 100 \quad (1)$$

Equation (1) shows the formula of how the outlet score is calculated. The formula divides the number of met standards by the total number of standards excluding those not applicable. The formula was based on the LHW system, the study of Latham, Ford, & Tzabbar (2012), and the criteria created by Liu, Su, & Chou (2014) in their article on evaluation scales for restaurants.

Recruitment, profile and training of Mystery Shopper

The choice of M.S. is a crucial factor for the effectiveness of the tool. Contrary to an auditor, M.S. does not necessarily have a specific qualification, nor should they be professionals in the industry. According to Sykes (2011), they may even be the customers themselves of the organization that they inspect. In their study, Latham, Ford, & Tzabbar (2012) developed a system in which the M.S. were the customers themselves and in return the restaurant chain refunded part of the meal money once M.S.

completed the questionnaire. Sykes (2011) also says that M.S. has to have the ability to follow orders, have fundamental knowledge of arithmetic and be an excellent communicator and, very important, special attention to detail. Another concern was that the inspector represented the target of the hotel.

Before the first evaluation, the questionnaire was tested in another hotel, and simultaneously this test worked as a training for the M.S. As the service elapsed, we filled out the questionnaire to clarify the doubts of the recruited.

4. Results Discussion

1.st Inspection

The first inspection took place on March 21 and 22, 2016. Figure 3 shows the percentage score of each outlet.

Instead of analyzing each outlet, the decision was to analyze which procedures were not met transversally, if they were not met at any of the outlets it is because the message is not passing properly from the supervisors to the restaurant staff, which means that is where the improvement has to begin.

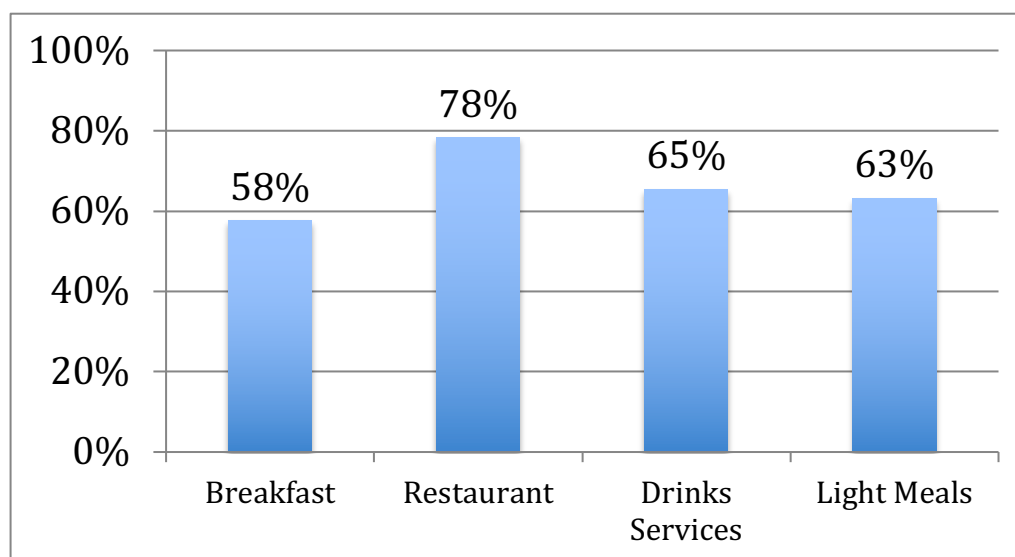


Figure 3 – Percentage score by outlet (1st Inspection)

- One of the failed procedures was the attempt to increase sales by offering drinks and complementary foods such as snacks, coffees, desserts, among others.
- Both at breakfast and in the restaurant, the waiter has access to the client's name. Even so, in none of these points of sale the customer was hosted by his name.
- In any part of the service was offered reading material to the client, action required according to the standards of the hotel.
- Except for the restaurant, M.S. evaluated the service as not very intuitive, in example, the client's needs were not anticipated.
- The only menu that was considered clean and well written was the room service. All others were considered dirty, poorly written, or obsolete.
- There are no vegetarian options in the menus as set out in the standards.
- The interaction with the customer was also very weak. The customer did not feel that the service was customized.

There are punctual and simple mistakes that together had a lot of influence on the score, for

example: lack of the glass coaster at the bar; left elements to be removed from the tables at the end of the meal; the employees did not say goodbye to customers, among others.

Also note the positive aspects. The restaurant had a high score. We believe that it is essentially due to the fact that the supervisor himself is present during the period of restaurant service.

- In every outlet the food was considered to have good presentation, tasty, served at the right temperature and made with fresh products.
- In general, employees were considered to have alert postures, a high level of confidence, well arranged and spoken English well.
- The tables were considered clean, organized and in good shape.

2.nd Inspection

The second inspection took place between 8 and 18 August 2016. Figure 4 shows the percentage score for each point of sale in the second inspection. The percentage corresponds to the number of procedures that have been completed, excluding those that are not applicable.

It should be noted that the occupancy was much higher during the second inspection than in the first one, which could have been a risk factor for standard compliance – more workflow, more difficult to meet the standards. This assumption did not occur.

As can be seen, the average evaluation between the points of sale was 66% in the first inspection and 81% in the second inspection - which corresponds to an increase of 15 percentage points.

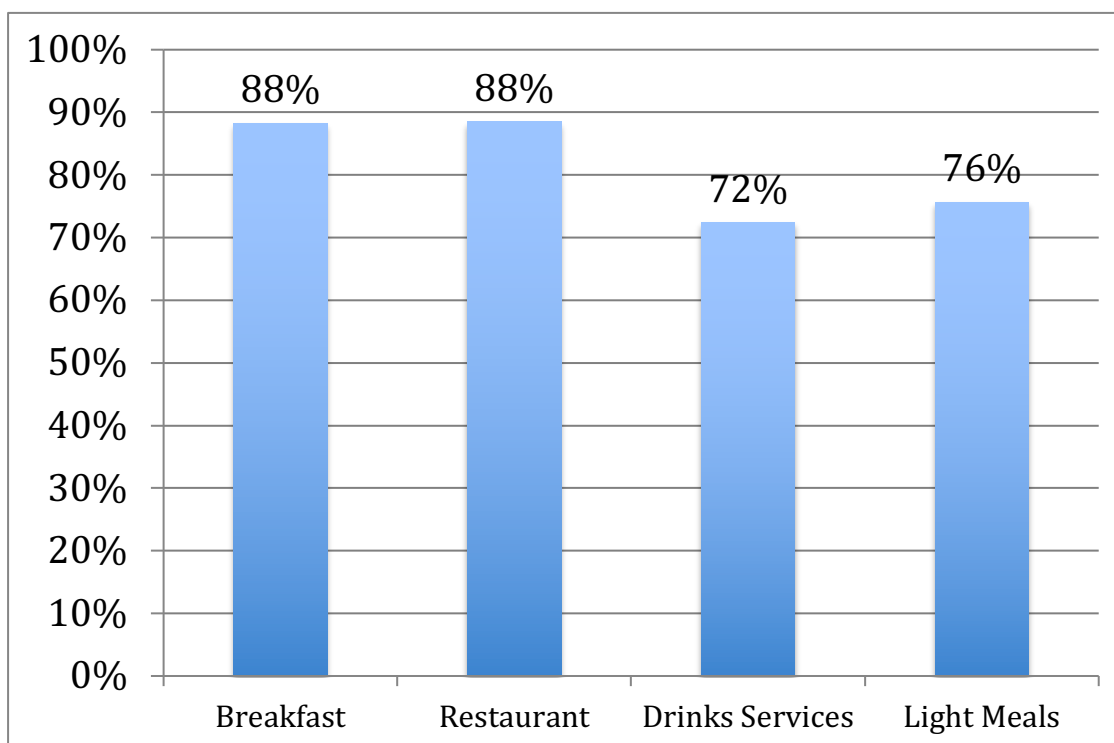


Figure 4 - Percentage score by outlet (2st Inspection)

- Except for the restaurant and breakfast, M.S. continues to evaluate the service as unintuitive, in example customer needs were not anticipated.
- There is still no vegetarian option as set out in the standards.
- This time, only in the light meals service, the interaction was considered weak and not customized. Contrary to the 1st inspection, where this opinion had been verified in all outlets.
- In all outlets the food was considered to have good presentation, tasty, served at the

- right temperature and made with fresh products.
- Regarding up selling, there is a big improvement but there are still points that need to be reinforced.

5. Conclusion

With this improvement of compliance with the procedures of the hotel chain, this tool can be an added value if applied and monitored continuously through an external evaluation that is coordinated with the intermediate managers. At the prominence of a Mystery Shopper inspection, the employees are more aware, and thus, are more sensitive to the detail and the compliance of the procedures, being a very effective tool in assisting the training of teams and also in helping the decision making by the managers.

Because at the first audit many of the employees were completely unaware of the standards, a 15 percentage point increase in the average evaluation were expected. In a potential next evaluation, the improvement would certainly be slower.

It should be noted that the behavior of all employees regarding the acceptance of the implementation of the project was exemplary. All of them committed themselves to pay more attention to the standards. In the development of the project, there was also an extra motivation and healthy motivation in the performance of the functions, in the sense of trying to see if they were serving the Mystery Shopper.

The dynamic of the present ever-changing market is a reality that influences the performance of companies. Although the positioning of a brand may possibly be associated with a type of status/advantage, this does not guarantee that this position does not require an analysis. This should be monitored whenever possible, seeking to assess and correct any anomalies. Managers need to create value not only for the company but also for their target audience, reducing costs, streamlining processes and standing out positively from the competitors. In this way, the tool presented in this study proved to be highly effective, and a good help for managers to overcome the challenges created by the present ever-changing market.

It was considered that this tool should be part of the company's strategy and be seen in the long run, so managers can create a historic and simultaneously cultivating the creation of a ranking among hotels to try to perceive which hotels have the highest percentage of compliance with the standards, thus creating a healthy competition between hotels, but also, with the purpose of having an exchange of knowledge, with the responsibility of those who hold the top places in the ranking to train those with a low score.

The fact that feedback is given by third parties (M.S.) allows the supervisor to perform his duties correctly, drawing attention and criticizing the work of his subordinates, without worry that the employee feels that the evaluation is personal and partial. We can consider M.S. as a neutral observer, who knows nothing about each employee, than his performance.

Inspection reports were also considered, not be used as a disciplinary tool for punishment, but rather as an opportunity to improve and reward good performance. It is very important to publish the results in the internal corridors to remember, motivate and recognize the work of employees.

Future studies and limitations

Firstly, this study doesn't focus anywhere on the quality of the infrastructure at the level of the atmosphere provided to the customers through the decoration and comfort. Future research may include criteria related to this point.

Second, food processing consumes a lot of energy and resources, which leads to pollution and greenhouse gas emissions. Therefore, due to the phenomenon of global warming, it is recommended that future research include environmental impact as a criterion to be considered.

Third, after testing the score system, it was perceived that the score of each dimension should be analyzed individually, and thus more easily detect the focus of the problem.

Fourth, for a more efficient inspection, that is, to make better use of the tool, evaluations should be considered in all departments including: reservations, luggage, housekeeping, reception, concierge, common areas, gym and SPA. One should know that these inspections have a cost. Thus, this cost is

minimized is used in more outlets which leads to more reviews.

Fifth, no part of this study refers to the costs associated with project implementation. Future studies should include cost forecasts for companies to be able to allocate costs in their annual budgets in a timely manner.

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