

BLUEPRINTS FOR THE PROPER USE OF A MYSTERY SHOPPER REPORT IN PERSONNEL ISSUES

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Most hotels, at some point in time, engaged the services of a "mystery shopper" or guest services evaluator. Those having the greatest success with this type of program have reports completed semi-annually.

This shopper's job is to discreetly observe the hotel's operations and objectively report observations to Management. Obviously, in observing how a hotel operates, the evaluator is observing the actions of hotel employees, from the quality of their service to the integrity of their financial transactions. Therefore, the evaluator's observations have significant personnel implications and are powerful as both a complimentary and disciplinary tool.

An evaluator survey can take a variety of forms, ranging from a multi-day observation of all guest services, to an audit, to a brief survey of a particular hotel department.

The evaluator typically poses as a guest, uses hotel facilities and takes note (literally and figuratively) of the positive and negative aspects of the operation. In a full survey, the evaluator will use all of the services available beginning with making a reservation and continuing through to the checking out of the property. He or she will note employee behavior, speed, attitude and accuracy, and will report the transactions carried out by employees (particularly monetary transactions) enabling Management to insure compliance with proper procedures.

Notes are sometimes written, though usually dictated. Prompt documentation is of major importance to insure accuracy. Upon check-out, the evaluator (or shopper) will often provide a verbal executive debriefing with senior management, in order to report key issues (issues, possible irregularities and opportunities) and then follow-up with a full written report of all observations.

Reports should include, but not be limited to, observations of

- a) Satisfactory or exceptional employee performance
- b) Integrity issues
- c) Training opportunities

d) Housekeeping

e) Revenue building opportunities (i.e. room service salesmanship)

e) Facility maintenance, to include possible liability issues.

Prudent operators use these reports as a tool to work with and develop management and staff, and prevent / correct problems. Once the evaluation has been performed, the key is to utilize the information provided in a most meaningful way. For the balance of this article, we will focus only on personnel ramifications.

There may be issues if the mystery shopper report is used as the ONLY basis for discipline staff. Using the report as a springboard for further research is most preferable.

It is essential that Management adhere to procedure when disciplinary action is required. For example, if the evaluator reported that his room was not properly cleaned, the Executive Housekeeper could begin periodic spot checks and use his/her own observations as the basis for corrective action against any implicated employees. Or, if the evaluator reported inconsistent cash handling procedures in the bar, Management could deal with the problem by re-issuing Policies & Procedures and re-instructing its employees on proper cash handling. Establish the perception of control with your staff.

Management research, by using in house personnel, can often assure everyone involved of the thoroughness and accuracy of details provided. Consider though, that in house test may not garner the same perspective of hotel services as that of an anonymous evaluator.

Often, Management's gut reaction is to view the shopper's report as the gospel . . . sufficient evidence for disciplinary action. In using a reputable established shopper firm, there should seldom be an issue, but I recommend you scrutinize the facts closely.

Call the Shopper Company and ask to speak with the shopper. Solidify your comfort level with the shoppers' credibility and the details provided in their report. Detailed narratives are significantly more credible than an audit checklist or a yes/no format with limited comments.

If the report is to be used as a basis for disciplinary action, that action may be challenged, (i.e. union grievances) and the evaluator must be ready to testify. Before deciding to use the evaluator report as the sole documentation for employee discipline, consider an arbitrator may not take an evaluators report at face value.

Insure you have acted promptly in investigating the facts and deciding upon potential

disciplinary action. The shorter the time lapse between the incident and your action, the better, as time can undermine the report's usefulness. Some union contracts require discipline take place within 48 hours of your receipt of the report.

Talk with the employee in question to get their side of the story. Employees in California must be given relevant portions of the report prior to discipline being imposed. Management is also required to fully investigate the employee's explanation. Find and interview witnesses. Remember . . . innocent till proven guilty.

Completely review and save all evidence, especially with reports that involve possible financial improprieties. All original checks, credit card vouchers and register tapes must be reviewed to see if there is any explanation other than employee misconduct for discrepancies. Check for patterns of "overages" or even drawers that always balance to the penny. Check and double-check.

Make an honest assessment if the rule or procedure violated has been adequately published and enforced. Actions that seem to violate house procedures may be overturned if there has not been consistent enforcement.

IN SUMMARY

- A) Use of credible mystery shopper firm periodically pays dividends.
- B) Use the reports to reinforce positive behavior and establish a "Perception of control" with your staff.
- C) Commit to diligence in researching the details of a report.
- D) Be consistent in your actions.
- E) Consider the ramifications of disciplinary action, but DO TAKE ACTION as the need requires.
- F) Contact your legal department for additional information.

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