



# Mystery Shopping & Automotive business

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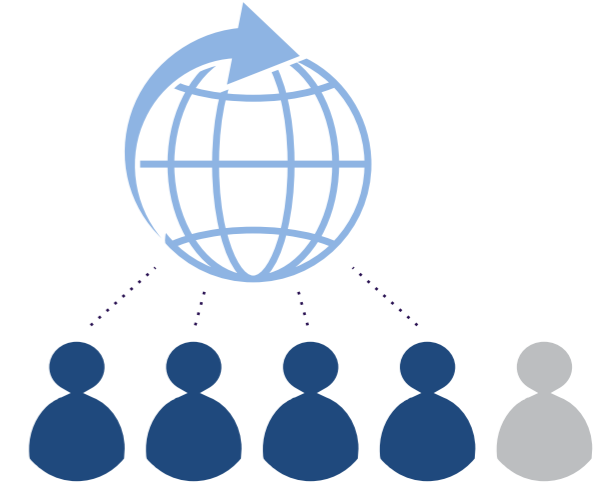
January 2015





Room for product differentiation is limited and competition is uphill

★ ★ ★ ★ ★  
**Best-in-class customer experience required!**



## All OEMs

offer quality, innovation, nice design and all size and style cars

Customers are more knowledgeable than ever before. So they expect more from your staff...



## 4 out of 5

new car buyers begin their customer journey Online



# Introducing Mystery Shopping

Ipsos Loyalty



# How are you performing?



Is the level of **service** you expect from your network delivered all the time?



What **tasks and processes** is your staff not complying with?



What **discounts** are offered by your network **versus the competition**?



To get a complete picture of your network staff compliance to corporate guidelines and business strategy, the solution is:

# MYSTERY SHOPPING



1



Focuses on what **customers get, not what they want nor expect**

2



**Objective feedback** from 'trained' customers

3



Provides **fast, fresh, actionable** insights

4



**Business stakeholders can be 'everywhere'** at once

# What does Mystery Shopping measure?



**PRESENTATION**



**PEOPLE**



**PRODUCT**



**PRICE**





# Ipsos' expertise in Mystery Shopping



Ipsos Loyalty





# Ipsos Mystery Shopping: Demonstrated Leadership



## Market Leaders

- **Top 3** Mystery Shop agency globally with **800** clients
  - **150** experienced Mystery Shop management professionals
  - **1,000,000** annual Mystery Shops
- *Dedicated global and regional teams to understand global and local practices*



## Thought Leaders

- Ipsos has innovated in three areas that are new to mystery shopping to deliver:
- **better design**
  - **better execution**
  - **better insights**
- *With specific and deep knowledge of survey design, fieldwork execution and reporting*



## Technology Leaders

- Our **project management and reporting platform** is the world's best in logistics optimization, quality control and data visualization
- *With shopper training modules, quality check processes and fast reporting delivery*



# Ipsos Mystery Shopping: Key Figures



Ipsos conducts  
Mystery Shopping  
in 100 countries

**80 Automotive projects**

**185 Financial services**

**65 Retail**

**60 Tech & Telco**

**60 Consumer goods**

**20 Oil**

**~200 'others' – Travel & leisure etc.**

*2013 data*

**You can't be everywhere at once, but we can!**

**In 2013-14 more than 20 offices** conducted Mystery Shopping activities with Automotive clients.

*(some projects are multi-country)*

Last year, we worked with:

38

**Clients**

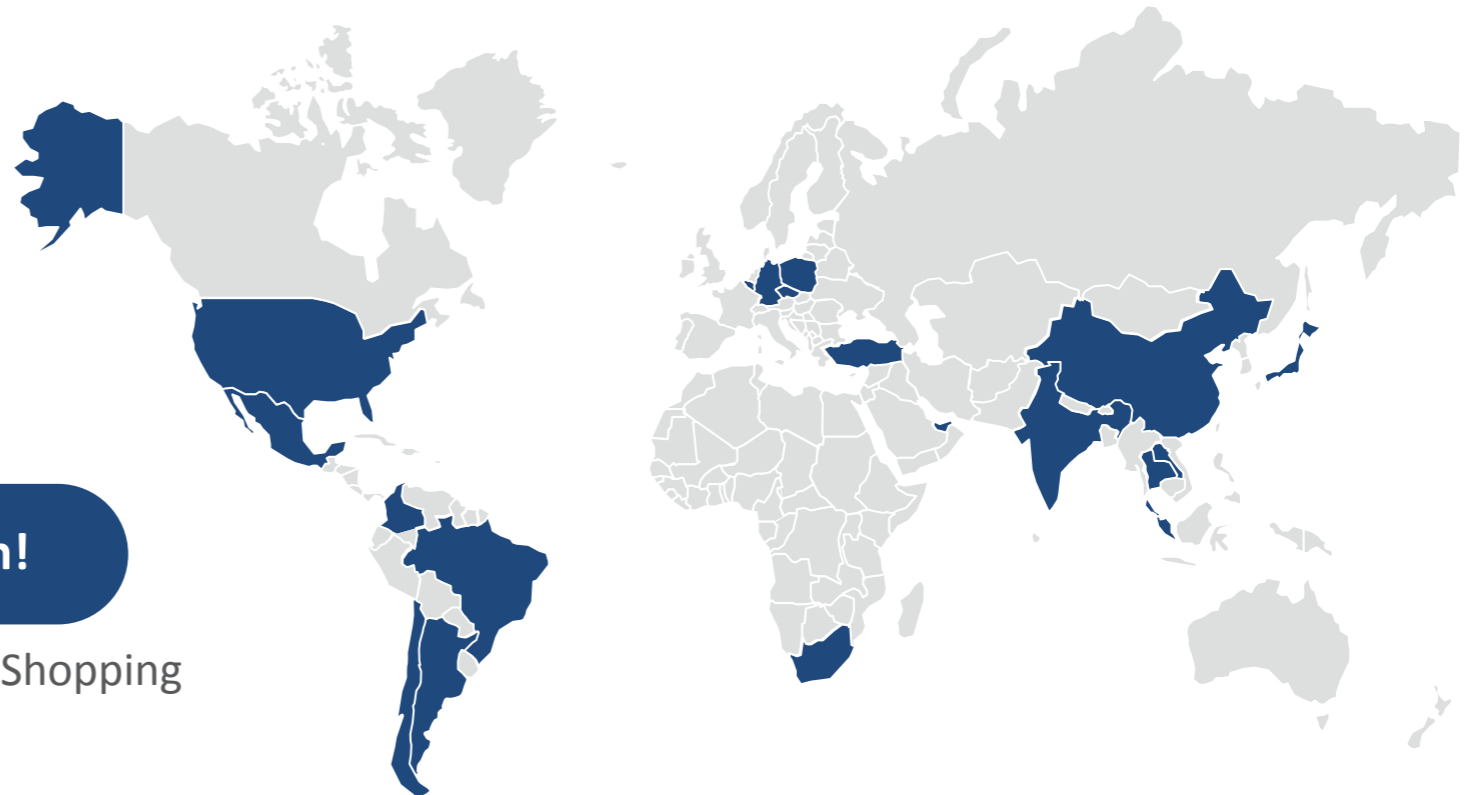
20

**OEMs**

Car, motorcycle  
or spare parts  
providers

18

**Dealer  
groups**



## Ipsos Loyalty

The Customer and Employee Research Specialists



# Ipsos Mystery Shopping: Auto Experience Across the Globe with...

Ipsos Loyalty  
The Customer and Employee Research Specialists





# Our Auto Mystery Shopping offer





# Ipsos Mystery Shopping Auto Main Offer



**Sales  
Performance**



**Transactional  
Prices**



**After sales  
Performance**



**Technical  
Performance**



## Sales Performance

Assesses the sales processes and infrastructure of dealerships

- Measuring the compliance with the brand's standards
- Highlighting staff' and facilities' strengths and weaknesses
- Rating test drive process performance and leads management

Enhancing the customer's shopping journey  
Supporting the definition of training programs  
Delivering Employee recognition certificates

Mystery Calling  
& Mystery e-  
mailing  
Benchmark  
information also  
available

EX # 1

US car manufacturer  
Measuring the sales processes at the dealership  
15 countries in Europe  
+/- 9,600 visits per year

EX # 2

Japanese car manufacturer  
Measuring the sales processes at the dealership in Mexico  
+/- 1,500 visits per year  
Leading the program since 2003

## Transactional prices

### Map the commercial practices of dealerships

- Collecting data about prices offered and discounts granted
- Gathering information about financial solutions suggested



Supporting definition of the pricing strategy

Can provide  
powerful  
benchmark  
information

EX # 1

Premium German van and truck manufacturer  
Defining transaction price levels  
22 countries worldwide  
+ 6,000 collects per year

EX # 2

Leading European car manufacturer  
Defining transaction price levels for passengers cars  
4 ASEAN markets  
+/- 4,500 visits per year

## After Sales Performance

Assess the after-sales processes and infrastructure of dealerships

- Measuring the compliance to the brand's standards
- Highlighting staff 's and facilities' strengths and weaknesses



Enhancing the brand's customer experience delivery  
Supporting the definition of training programs  
Delivering Employee recognition certificates

EX # 1

Japanese car manufacturer  
Measuring the after sales process at the dealership  
**5 countries** in MENA (UAE, Oman, Saudi Arabia, Qatar, Lebanon)  
**+ 500** visits per year

EX # 2

French car manufacturer  
Measuring the after sales processes at the dealership  
**3 Eastern Europe countries**  
**+/- 220** visits per year

## Technical Performance

Assess the technical performance of dealerships

- Measuring the compliance to the brand's standards
- Focusing on the staff's technical knowledge to detect and fix training problems



Enhancing the brand experience and customer journey  
Supporting the definition of training programs  
Delivering Employee recognition certificates

EX # 1

Premium German car manufacturer  
Running a '**Phantom test**' program in India with vehicles prepared with one or several faults installed within  
+/- **100** tests per year

EX # 2

Premium German car manufacturer  
Running a '**Phantom test**' program in Asia (8 countries) with vehicles prepared with one or several faults installed within  
+/- **85** visits per year



# Ipsos Mystery Shopping: Data Collection Options



## Face to Face

Shopper recall | Video recorded  
Audio recorded | Photo evidenced

## Mystery Calling

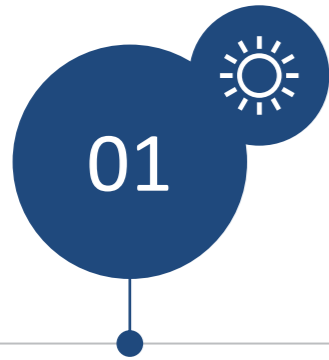
Recorded telephone calls  
(inbound and outbound calls)

**To be customized and completed according to your local capabilities and legal background**



# Mystery Shopping in concrete terms....

## Measuring Sales Performance



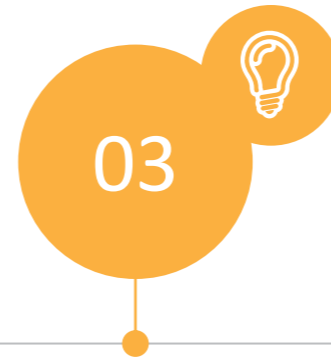
### WELCOME / RECEPTION AT THE DEALERSHIP

- Active greeting?
- Time until attended?



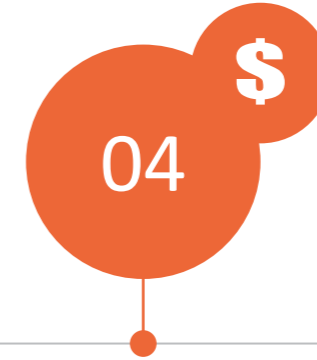
### SALES CONSULTATION

- Further questions in order to assess my needs? (Car usage, etc.)
- Questions about my profile? (Family structure, etc.)



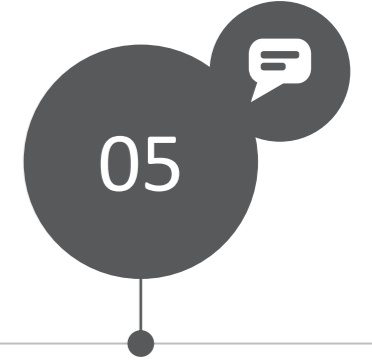
### VEHICLE PRESENTATION & PRODUCT KNOWLEDGE

- Vehicle described with a specific model physically available?
- Specification sheets visible?
- Vehicle features and their benefits introduced?
- Active offer for test drives?



### NEGOCIATION / TRADE-IN

- Trade-in offer for my vehicle?
- Delivery info provided?



### FOLLOW UP

- Contact by phone? Email?

How to know my relevant touch points?



To identify moments of delight and pain points within moments of truth with customers, the solution can be Ipsos'

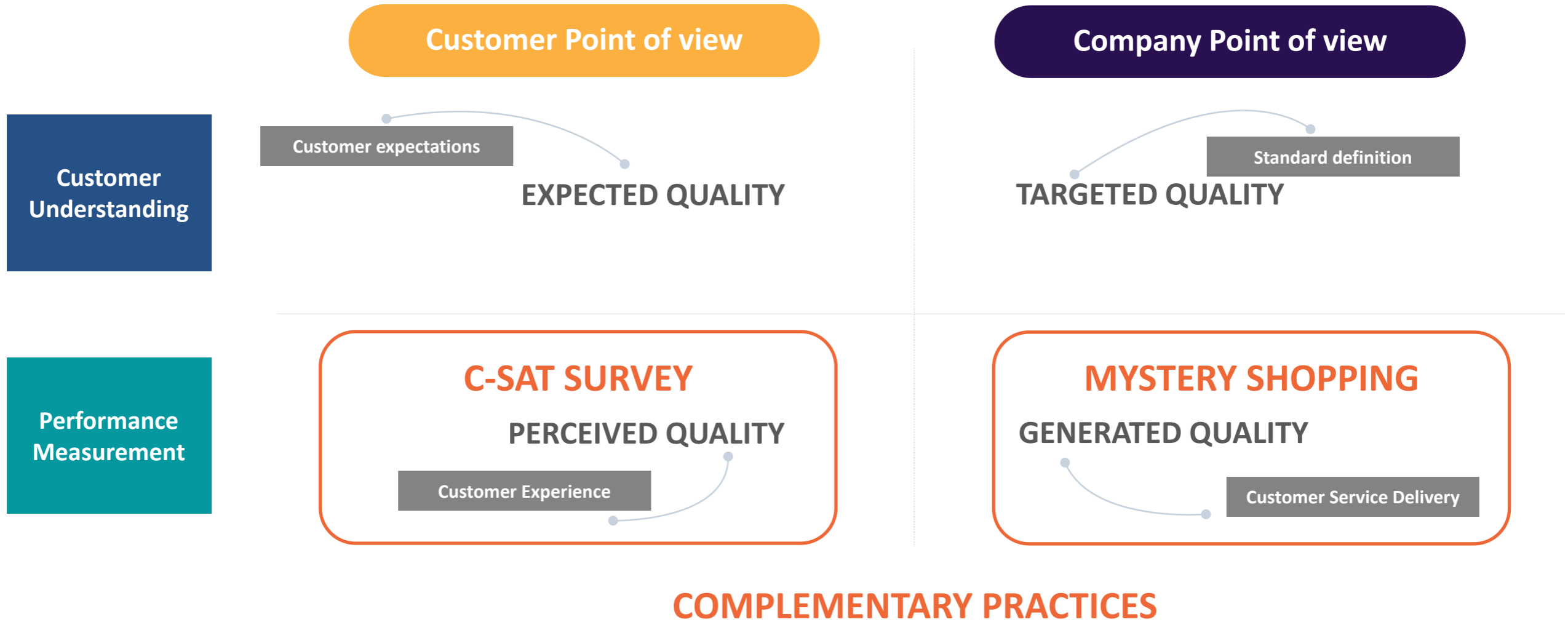
# IDEAL CUSTOMER EXPERIENCE

Ipsos Loyalty





# Mystery Shopping: Go Beyond....



# Our operational pillars





# Ipsos Mystery Shopping Operational Pillars



## Complete global coverage

Our experience and knowledge of managing large-scale programmes, together with established processes, ensure the objectives of even the most challenging surveys are met

We have the **people, platforms, pricing and processes** to deliver quality, consistent, profitable and insightful Mystery Shopping **anywhere on the planet**





# Ipsos Mystery Shopping Operational Pillars



## Strategic partnerships

Established partnerships with fieldwork partners support our direct fieldforces around the world





# Ipsos Mystery Shopping Operational Pillars



## Detailed recruitment, selection and training

Detailed criteria are captured during recruitment and screening

Mystery shoppers are provided with **programme-specific training** which must be completed before the task is undertaken

Only appropriate shoppers, who fit the customer demographic are selected

My Personal Details | **My Career** | My Education | My Family Status | My Health | My Housing

*Be aware that without filling out ALL these fields you will not be able to perform evaluations for us.  
Once you have filled out your profile you will not be able to amend certain fields.  
Fields marked with \* are required*

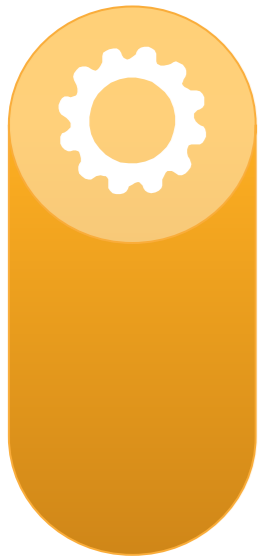
On which days can you do assignments? \*

	Before lunch	During lunch	After lunch	Evening
<input type="checkbox"/> Anytime	<input type="checkbox"/> All	<input type="checkbox"/> All	<input type="checkbox"/> All	<input type="checkbox"/> All
monday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
tuesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
wednesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
thursday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
friday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
saturday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
sunday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Shoppers recruited to look and behave like your current customers and with knowledge of cars



# Ipsos Mystery Shopping Operational Pillars



## System driven scheduling and rotation

*Fieldwork is managed* using a web project management system

Automated reallocation if shopper fails to meet deadlines

Rotation is pre-sent and managed via the system

Number of Records: 10 (of 10 total)

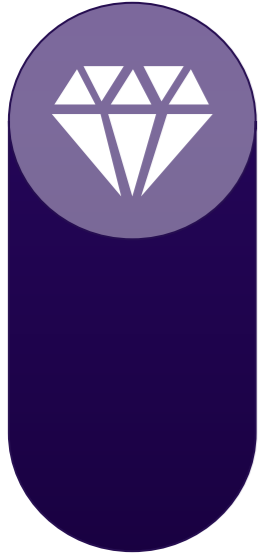
Coverage Analysis for: My First Big Client

Store	Name	City	State/Region	Form Code	Hrs	Total Shoppers	APNs	WOM	Subm. Total	Subm. 20	Subm. 40	Subm. 60	Subm. 80	Subm. 100
101	Sunset South	Washington	DC	4780	1	1								
102	Chik Street	Columbus	OH	4024	1	1								
103	Cleveland	Cleveland	OH	4025	1	1								
104	Chrysler Plaza	Cincinnati	OH	4027	1	1								
105	University	Ann Arbor	MI	4026	2	2			241	98	121	166	241	
106	Sylvania	Fremont	OH	4040	1	1			241	98	121	166	241	
107	Wickwood	Toronto	ON	4028	2	2			241	98	121	166	241	
108	Stiles	Atlanta	GA	4029	4	4			241	98	121	166	241	
109	Berk	Tampa Bay	FL	4032	4	4			241	98	121	166	241	
110	Monroe	Texas	TX	4034	4	4			241	98	121	166	241	





# Ipsos Mystery Shopping Operational Pillars



## Thorough quality control and data validation

*Quality criteria* for shoppers include items such as:

- Timeliness
- Accessibility
- Professionalism
- Shopper's ratings (given for every assignment)
- Quality recognized by the Industry – ESOMAR, MSPA
- Verification and validation through GPS data from smartphone where possible

The image shows a performance dashboard on the left and a photo metadata overlay on the right. The dashboard includes a table with the following data:

Performance	
Total Grade (points):	
Submitted Surveys:	
Submitted Last 30 Days:	
Submitted Last 60 Days:	
Submitted Last 120 Days:	
Declined Total:	
Declined Last 30 Days:	
Declined Last 60 Days:	
Declined Last 120 Days:	

The photo metadata overlay shows the following details:

- Date/Time: 2009-12-31 23:59:23
- Camera: Canon PowerShot SD1100 IS
- Size: PixelXDimension: 2240, PixelYDimension: 1680
- Exposure: 1/6539<sup>th</sup> second
- Flash: Did fire



# Ipsos Mystery Shopping Platform



## 1 Project management

- Project Management / Operational Dashboards
- Advanced survey programming
- Advanced quality assurance / validation Tools

## 2 Shopper management

- Shopper Certification
- Geo Scheduling
- Advanced Shopper Selection
- Advanced Scheduling / Rotation
- Mobile Data Collection

## 3 Reporting

- Touchpoint level scorecards
- Advanced Analysis | Personal dashboards
- Single sign-on | Branded website
- Mobile reporting | Drill down, Report Builder
- Media – audio, video | Geo-visualization
- Client Interaction Interface

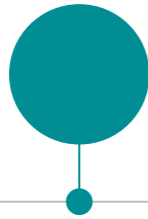


Add a **Mystery Shopping** program to your market research tools and **deliver the customer experience your brand promises.**

# THANK YOU



Any further information please contact:



**Eddie  
Parada**

Research Director Mystery Shopping  
Ipsos Loyalty (based in Hong Kong)  
[eddie.parada@ipsos.com](mailto:eddie.parada@ipsos.com)  
landline +852 141 98 97 40



**Craig  
Bradley**

Global Director Mystery Shopping  
Ipsos Loyalty (based in US)  
[craig.bradley@ipsos.com](mailto:craig.bradley@ipsos.com)  
mobile +1 5419742104