

WISE Mystery Shopping Services

WHY. Effective, invisible and unbiased Mystery Shopping is impossible to do yourself. Mystery Shopping keeps your team on track and focused on your mission. This is not a game of “gotcha.” Instead it is a great way to understand where your team’s performance is at today, identify opportune areas, then track and celebrate improvements over time.

WHAT. Our program is based on the WISE Mystery Shopping Scorecard, which ensures consistency of feedback over time and is also a great tool for individual coaching. Shops can cover winery tasting room, tours, phone calls, club membership and online shopping guest experiences. The WISE scorecard consists of over 70 questions, and wineries may also add in their own questions if there are specific areas in which they would like more detailed feedback.

WHO. Our mystery shoppers are unbiased third-party, industry professionals who understand WISE standards regarding guest experience, sales skills and industry best practices. They are all WISE Certified Tasting Room, Wine Club and / or Phone Sales Professionals. WISE Mystery Shopping is a natural extension of our courses in which mystery shopping is assigned as homework. Over the past few years, we’ve conducted over 3,500 mystery shops and have been tracking industry trends, which gives WISE a unique prospective.

WHEN. We recommend a full round of mystery shops per location three times a year. This rhythm gives wineries enough time to review the results, implement changes, and measure again. It is best is to get several data points within a short period – e.g. six shops on different days/times over a few weeks – to ensure different associates are shopped.

COST. \$250 program fee plus \$250 per property, per program, including summary report of each program: standard in-person tasting-room shop (\$150 per shop or \$200 if tour is included) and phone shop (\$75 per) and wine club (\$150 per). Out-of-pocket tasting (or tour & tasting) fees for two & wine purchases (if requested) will be reimbursed at cost. See breakdown of costs on last page.

HOW IT WORKS:

1. Fill out the form (“Decisions / Next Steps” on pages 2 – 4) to capitalize on this program and ensure that we are evaluating the things that are important to your winery. Submit this completed form (on pages 2 – 4) to WISE along with a 50% deposit.
2. WISE will review the form and send you a confirmation recapping all of your needs along with fee structure and invoice for the 50% deposit due.
3. WISE will send out mystery shoppers, compile and analyze the findings, and prepare your summary report.
4. We will schedule a debrief meeting to review our WISE Mystery Shopping results and summary report recommendations for your winery at the earliest mutually agreeable date.
5. A copy of your *WISE Mystery Shopping Summary Report* as well as copies of the individual *WISE Mystery Shopping Scorecard Reports* will be delivered via email following the debrief meeting.

DECISIONS / NEXT STEPS: Please complete.

1. **Locations** – Which winery/wineries in person: _____
2. **Phone Calls** – Which winery departments on the phone: _____
3. **Scope** – Number of shops, preferred days: _____
4. **Tasting** – Which menu selection to choose: _____
5. **Tours** – Which options to choose: _____
6. **Purchases** – Complete purchase process or not? YES / NO
Only if asked for the order? YES / NO Or regardless? YES / NO
If yes, budget per shopper? _____
7. **Wine Club** – sign up? YES / NO If YES, cancel ASAP? YES / NO
OR receive one shipment and get feedback on wine club? _____
8. **Project Due Date** – suggested debrief meeting dates: _____
9. **Strengths** – What do you think your teams’ strengths are? What do you believe you do really well? _____

10. **Hot Spots** – What are your ‘hot spots’? Where do you see your teams’ weaknesses and/ or biggest opportunities? _____

11. **Goals** – What are your goals for the outcome of these mystery shops?

12. **Additional Specific Winery Requests** (To leverage your mystery shopping investment, please make sure that we are evaluating the things that are important to your winery. For example, is there something specific you want feedback on when it comes to: Brand Story, Guest Experience, Sales Success, Rapport Building, Service Standards, etc.) –



COST BREAKDOWN: *

	Number:		Cost:		Total:
Mystery Shopping Program Fee:	1	x	\$ 250.00	=	\$250.00
<i>(Base cost plus à la carte below.)</i>					
Tasting Room Program					
Per Property:		x	\$ 250.00	=	
Tasting Only Shops:		x	\$ 150.00	=	
Tour & Tasting Shops:		x	\$ 200.00	=	
			Tasting Room Subtotal:		
Phone Program					
Per Property:		x	\$ 250.00	=	
Phone Shops:		x	\$ 75.00	=	
			Phone Subtotal:		
Wine Club Program					
# of Wine Clubs:		x	\$ 250.00	=	
Wine Club Shops:		x	\$ 150.00	=	
			Wine Club Subtotal:		
Out-of-pocket Reimbursement:					
<i>(For your internal budgeting)</i>					
Fees:					
_____ Tasting fees		x #	_____ of shops x 2 =		_____
_____ Tour fees		x #	_____ of shops x 2 =		_____
Purchases:					
_____ (budget/shopper)		x #	_____ of shoppers =		_____
Club Shipment:					
_____ (per club)		x #	_____ of shoppers =		_____
			Reimbursement Subtotal:		_____
					Grand Total:

*See sample on page 5



AGREEMENT:

Please complete form (on page 3) indicating which programs and the number of shops for each with a grand total. A deposit of 50% of the total is due upon agreement of WISE Mystery Shopping Services.

Grand Total: \$_____

Deposit (50% of Grand Total): \$_____

Balance is due upon completion. \$_____

Signature: _____

Winery: _____

Name: _____

Date: _____

Check:

Please address and mail check to:

WISE Academy
1443 Main Street, #102A
Napa, CA 94559

Form:

Please fax or scan and email this completed form to:

Fax: 877-852-6304
or
Shop@WineIndustrySalesEducation.com