



## 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 80 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 trained for understanding best practices and standards. 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 5,000 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.** Single winery program fee is \$350, corporate is \$1,000 plus \$350 per property, per program, including summary report of each program: standard in-person tasting-room shop (\$350 per shop or \$400 if tour or food pairing is included), phone shop (\$125 per), text shop (\$50) and wine club (\$350 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. If you would like WISE to deliver results to the team (without naming who was shopped), it is \$400 for the hour (1½ hour). For one-on-one coaching for managers (to then coach their team based on the results), WISE offers this for \$750 per winery/location.

	<b>TASTING ROOM</b>	<b>PHONE</b>	<b>CLUB</b>	<b>WEB</b>
Program Fee – Corporate:	\$1,000			
Property Fee:	\$350	\$350 (per phone center)	\$350 (per club)	\$350 (per website)
Shop Fee:	\$350 (Tasting-only)	\$125 (per shop call)	\$350 (per shipment)	\$350 (per ecom shop)
Shop Fee:	\$400 (Tour/Food-Pairing)	\$75 (per text shop)	N/A	N/A
Team Debrief:	\$400 / winery			
1:1 Coaching:	\$750 / winery			
Property Fee:	\$350	\$350 (per phone center)	\$350 (per club)	\$350 (per website)

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.
  - a. Note – for club or ecom/online, a separate form will be provided to complete.
  - b. Note – Budget for purchase (to incentivize server to ask for the sale) and tips (to incentivize excellent service) are recommended, but not required.
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. **Tips** – Shopper should leave a tip for server or not?  YES /  NO  
Only if service is good?  YES /  NO Or regardless?  YES /  NO  
If yes, budget per shopper? \_\_\_\_\_
8. **Wine Club** – sign up?  YES /  NO If YES, cancel ASAP?  YES /  NO  
OR receive one shipment and get feedback on wine club? \_\_\_\_\_
9. **Project Due Date** – suggested debrief meeting dates: \_\_\_\_\_
10. **Strengths** – What do you think your teams’ strengths are? What do you believe you do really well? \_\_\_\_\_
11. **Hot Spots** – What are your ‘hot spots’? Where do you see your teams’ weaknesses and/ or biggest opportunities? \_\_\_\_\_
12. **Goals** – What are your goals for the outcome of these mystery shops?  
\_\_\_\_\_
13. **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 beyond our basic 80+ questions.)  
\_\_\_\_\_



# Please Complete

## COST BREAKDOWN: \*

	Number:		Cost:		Total:
<b>Mystery Shopping Program Fee:</b>	1	x	\$	=	\$
<i>(Base cost plus à la carte below.)</i>					
<b>Tasting Room Program</b>					
Per Property:	_____	x	\$ 325.00	=	_____
Tasting Only Shops:	_____	x	\$ 325.00	=	_____
Food Pairing/Tour Shops:	_____	x	\$ 375.00	=	_____
			<b>Tasting Room Subtotal:</b>		_____
<b>Phone Program</b>					
Per Property:	_____	x	\$ 325.00	=	_____
Phone Shops:	_____	x	\$ 100.00	=	_____
			<b>Phone Subtotal:</b>		_____
<b>Wine Club Program</b>					
# of Wine Clubs:	_____	x	\$ 325.00	=	_____
Wine Club Shops:	_____	x	\$ 325.00	=	_____
			<b>Wine Club Subtotal:</b>		_____
<b>Team Debrief Meeting</b>			\$ 400.00	=	_____
<b>1:1 Coaching</b>			\$ 750.00	=	_____
					_____
<i>(For internal budgeting)</i>					
<b>Out-of-pocket Reimbursement:</b>					
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 =	_____
			<b>Reimbursement Subtotal:</b>		_____
			<b>Grand Total:</b>		



# Please Complete

## AGREEMENT:

Please complete form (on pages 2 & 3) indicating which programs and the number of shops for each with a grand total. A deposit of 50% of the total (pre-out-of-pocket expenses) 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  
PO Box 2089  
Napa, CA 94559

Form:

*Please scan and email this completed form to:*

Shop@WineIndustrySalesEducation.com