MYSTERY SHOP SCORECARD RESTAURANT

WISE

This is the baseline WISE Mystery Shop Scorecard for Tasting Room experiences. It evaluates key touchpoints throughout the guest journey, including hospitality, sales behaviors, wine club presentation, contact data capture, and the overall experience.

Questions use either a Yes/No response or a five-point rating scale:

Rating Description:

- 1 - Poor
- 2 - Fair
- 3 - Good
- 4 - Very Good
- 5 - Excellent

Every question includes space for detailed comments, so shoppers can share observations and examples that give context to their answers.

The ratings provide a quick view of the experience, while the shopper's comments explain what happened and help identify strengths and opportunities for improvement.

The scorecard can also be tailored to a winery's standards, experiences, and areas of focus.

Our Mystery Shoppers

Our mystery shoppers are unbiased third-party industry professionals who understand WISE standards regarding guest experience, sales skills, and industry best practices.

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Shopper Name:
Date/Day of the Week:
Name of Server:
Description of Server
Name of Tasting Selected
Weather:
Time Entered:
Time Exited
Visitor Volume:
Number of Staff:

RESERVATIONS

• Did you make a reservation?	Yes or No
• How did you make a reservation?	Phone, Text, Online
• How was the overall reservation process? Was it straight forward?	Rating 1 - 5
• Was the reservation staff friendly?	Yes or No
• Was there a reasonable time to get an appointment/reservation? How far out did you have to book?	Comments
• Was there a follow up after your reservation? (Survey or confirmation email sent?) How helpful was the email?	Yes or No
• During the reservation process, was the following information captured?	Name, Phone, Email, Zip
• Were you asked if you'd like to receive email communications during the reservation process?	Yes or No
• Did you receive a confirmation email with the winery location and contact information? How helpful was the email?	Yes or No
• If applicable, how easy was it to make changes to or cancel your reservation? How did you do it?	Yes or No
• Did someone from the restaurant reach out to you before your reservation?	Yes or No
• How seamless was the ‘check-in’ process?	Rating 1 - 5
• Where it was the "check-in" process done and how it was handled?	Comments
• Please share any additional information regarding the reservation process.	Comments

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ARRIVAL EXPERIENCE

- Were you greeted promptly and warmly upon arrival? Rating 1 - 5
- Did the staff make you feel welcome and valued? Rating 1 - 5
- How did the seating experience go? Rating 1 - 5
- Is there anyway to improve the arrival process? Rating 1 - 5

ENVIRONMENT

- Overall, first impression of the restaurant? Rating 1 - 5
- How is the restaurant appropriately set for the experience? Rating 1 - 5
- How does the environment (music, lighting, decor) enhance the overall experience? Rating 1 - 5

SERVICE EXPERIENCE

- Did your server greet you in a timely manner? Rating 1 - 5
- Did your server introduce themselves, use your name and welcome you to the restaurant? Rating 1 - 5
- Did your server clarify any food restrictions up front? Rating 1 - 5
- Did they get a glass of wine or other beverage on the table before the food started? Rating 1 - 5
- How was the flow of the meal? Were the pacing / wait times appropriate? Rating 1 - 5

SERVICE ENGAGEMENT

- Did they focus on your tastes and help put together a personalized experience? Rating 1 - 5
- Did the server build rapport? If so, how? Rating 1 - 5
- Did the server tailor the experience based on information gathered / learning your preferences? If so, how? Rating 1 - 5
- Are interactions genuine and personalized to your preferences? Rating 1 - 5
- Did they share any of the brand story? If so, how? Rating 1 - 5
- Is the service attentive without being intrusive? Rating 1 - 5
- Does the service reflect a high standard (e.g., clean pours, no drips, polished glassware)? Rating 1 - 5

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PRODUCT KNOWLEDGE & WINE INTEGRATION

- Does the server confidently describe dishes, wine pairings, and ingredients? Rating 1 - 5
- Are local, seasonal, or brand-relevant stories used to enhance the dining experience? Rating 1 - 5
- Are the winery's wines featured and highlighted appropriately? Rating 1 - 5
- Does the server suggest wine pairings? Rating 1 - 5

SALES SKILLS

- Are guests offered add-ons like course enhancements or wine upgrades? Rating 1 - 5
- Is the upselling approach tasteful and aligned with guest preferences? Rating 1 - 5
- Did they plant seeds about wine club membership or notice which wines were your favorites? Rating 1 - 5
- Were there any silent selling tools used? Rating 1 - 5

Rating 1 - 5

CLOSING THE EXPERIENCE

- Is the bill presented clearly and processed efficiently? Rating 1 - 5
- Is there a thoughtful close to the visit (e.g., thanking the guest, offering a take-home menu)? Rating 1 - 5

OVERALL IMPRESSION

- What was your overal satisfaction with this experience? Rating 1 - 5
- Did you experience genuine hospitality? Rating 1 - 5
- Did you walk away with a better understanding of who they are and what they are about? Rating 1 - 5
- Did your experience meet or exceed your expectations? Rating 1 - 5
- Would you return for another visit? Rating 1 - 5
- Would you recommend this experience to family and friends? Rating 1 - 5
- What did they do well? Rating 1 - 5
- Where do they need to improve? Rating 1 - 5
- Please add any additional comments about your visit. Rating 1 - 5

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WISE TRIPLE SCORE

• Did they Ask for the Order?	Yes or No
• How did they ask for the order? What exactly did they say?	Comments
• How did they attempt to sell wine club - what did they say about the club specifically? (Did they use features & benefit selling?)	Comments
• How often did the host mention the wine club throughout the experience?	Never, Once, Twice, Three Times, Four Times, More than Five Times
• Did they effectively try to sell the wine club? (Did they mention it over the course of the experience a few times, drop hints on why to join, helpful but not pushy?)	Yes or No
• Did they capture your (and your guest's) during the experience? (AKA check information was correct, ask for guest's info, etc.)	Yes or No
• HOW did they attempt to capture your contact data? (Note if they collected it as part of a wine club sign up or a phone appointment.)	Comments

ADMINISTRATION

• Total cost of the experience	Comments
• Did you purchase wine? (Enter # bottles and $ amount here)?	Comments
• If NO, how did the host handle this? Please explain in detail.	Comments
• Did you join the wine club?	Yes or No
• Did you tip for good service? If so, how much?	Comments

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