MYSTERY SHOP SCORECARD TASTING ROOM

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 (phone or email)?	Yes, No or N/A
• 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
• Were the descriptions of the tastings clear? Was it obvious how to reserve specific experiences?	Rating 1 - 5
• 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 Winery 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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BACKSTAGE

• Physical - Entrance Clear Signage & Easy Access	Yes or No
• Physical - Parking lot tidy?	Yes or No
• Physical - Was there adequate parking near the tasting room?	Yes or No
• Physical - Are the grounds tidy?	
• Physical - From the OUTSIDE, what was your first impression of the entryway and tasting room building?	Yes or No Comments
• Physical - From the INSIDE, what was your first impression of the tasting or reception area?	Comments
• Physical - Is the tasting room tidy (including merchandise)?	Yes or No
• Physical - Was the seated tasting area tidy?	Yes or No
• Physical - Were the glasses clean, no smell?	Yes or No
• Physical - Was the bathroom tidy?	Yes or No
• Physical - Was the lighting appropriae?	Yes or No
• Physical - Was there music playing and was it appropriate?	Yes or No
• Physical - Were you able to hear? Not too loud?	Yes or No
• Physical - Was the temperature appropriate?	Yes or No
• Physical - Were smells appropriate?	Yes or No
• Wine - Correct temperature?	Yes or No
• Wine - Corked or flawed?	Corked/Flawed or Not Corked/Flawed
• Wine - Was the pour a proper size? (1 oz to 1.5 oz)	Yes or No
• Wine - Did they provide or offer you a dump bucket?	Yes or No
• Staff - Were discussions & staff attitudes always appropriate?	Yes or No
• Staff - Was their attire appropriate and consistent with the winery's brand?	Yes or No

SILENT SELLING

• Materials - Select which silent selling tools were provided to you.	Tasting Menu, Price List, Order Form, Club Brochure, Pen/Pencil
• Materials - Were all the silent selling materials clear & effective?	Rating 1 - 5
• Materials - Was each taster provided their own set of silent selling materials?	Yes or No
• Materials - Were there other club mentions besides the Club Brochure? (Signage, Price List, VIP Area, Photos, etc.)	Rating 1 - 5
• Beyond the silent selling materials given during the tasting, was there collateral in the bag if you purchased wine?	Rating 1 - 5

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CUSTOMER SERVICE

• Staff - was there a friendly greeting with eye contact within 15 seconds?	Rating 1 - 5
• Where did the staff greet you? Where was the check in process?	Comments
• How seamless was the ‘check-in’ process?	Rating 1 - 5
• Was the staff member who greeted you your host for the duration of your visit?	Comments
• Staff - if you asked, did the staff provide guidance in selecting wine that they thought you might enjoy?	Yes or No
• Staff - What was the server's style of service? Did he or she truly want to help, did they have a "service heart”?	Rating 1 - 5
• Staff - Did they use etiquette? Did they say 'please' and 'thank you' often?	Rating 1 - 5
• Staff - Was language appropriate and representative of the brand?	Rating 1 - 5
• Staff - Did the host use your name (or any of the guests) during the experience?	Rating 1 - 5
• Did the staff do anything to 'surprise and delight' you beyond the "extra pour"? (Not something that everyone is getting, but something special done for YOU based on your preferences or interests.)	Yes or No
• What did they do to surprise and delight you?	Comments
• Staff - Was there a quick, error-free checkout?	Rating 1 - 5
• Staff - Was there a friendly farewell and/or invited back?	Rating 1 - 5

SALES SKILLS

• Server - Did the server begin with a friendly icebreaker before starting the tasting? (e.g. A comment, a compliment or a question)	Rating 1 - 5
• What was the ice breaker?	Comments
• Server - Did the server ask for a referral source? (How did you hear about us?)	Rating 1 - 5
• If yes, how did they ask for the referral source?	Comments
• Server - Did the server determine if you had been there before or new anything about the wines or brand?	Rating 1 - 5
• Server - Did the server pour and describe the wines with enthusiasm?	Rating 1 - 5

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• Server - Did the server have knowledge of the wines and winery?	Rating 1 - 5
• Server - Did the server use analogies?	Rating 1 - 5
• If yes, what were the analogies?	Comments
• Server - Did the server make use of storytelling? (Did they tell a story, or recite facts?)	Rating 1 - 5
• If so, what were the stories?	Comments
• Server - Did the server share anything about what made the winery unique or special? (e.g. sustainability, art collection, location, etc.)	Rating 1 - 5
• Server - Did the server share a memorable story that brought the winery's brand to life? One that you will remember a year from now?	Yes or No
• Server - If yes, how effective was the server in telling a memorable brand story? (Did they do a good job of telling the story?)	Rating 1 - 5
• What was the memorable brand story?	Comments
• Server - Did the server ask open-ended questions beyond your wine preferences to learn more about you and your visit?	Rating 1 - 5
• If yes, what kind of open ended questions? Be specific.	Comments
• Positive Profiling - How well did the server use the information gathered through their questions to understand you as a guest and personalize the experience?	Rating 1 - 5
• How did they personalize the experience?	Comments
• Server - Did the server use features and benefits as a sales technique? Did they go beyond the facts (features) and highlight why you might want to buy or join?	Rating 1 - 5
• Please state how F & B selling was done:	Comments
• Service - Did staff explain shipping options and use it as a selling tool?	Rating 1 - 5
• Server - Did the server plant sales seeds throughout the experience? (Reasons to buy or join from beginning to end of the experience.)	Rating 1 - 5
• Please state how seed planting was done:	Comments
• Server - Did the server pick up on buying signals? (Both verbal and/or non-verbal cues?)	Rating 1 - 5
• What signals?	Comments

FOOD PAIRING

• Was this experience a Food & Wine pairing experience? (Beyond the light bites and snacks)	Yes or No
• What was your overall satisfaction with the food service?	Rating 1 - 5

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- How would you rate the overall quality of the food? Rating 1 - 5
- How would you rate the overall presentation of the food? Rating 1 - 5
- Based on the price, was the food/experience worth the price? Rating 1 - 5
- How well would you rate the staff's explanation of the food pairings (and why that food was paired with that wine)? Rating 1 - 5
- Server- Did your server explain the dishes and ingredients? Rating 1 - 5
- Server- Server - Did your server ask about allergies or dietary restrictions for the group? Yes or No
- Server- Did your server make pairing and food recommendations? Yes or No
- Server - How was the overall food service execution and guest engagement? Rating 1 - 5
- Staff- Were sufficient cutlery, napkins, plates, etc. provided? Rating 1 - 5
- Server- How effectively did the server manage table maintenance? Consider whether finished dishes were removed promptly and whether new dishes were delivered and cleared smoothly. Rating 1 - 5
- Brand - Did the food offerings make sense with the brand? Rating 1 - 5

TOUR

- Did your experience include a tour? Yes or No
- Did the tour guide begin the tour on time? Yes or No
- Did the tour guide conclude the tour on time? Yes or No
- Staff - If the tour was at the beginning of your experience, was there a good icebreaker as the tour began? Rating 1 - 5
- Tour - Could the tour guide be easily heard during the tour? Yes or No
- Tour - While on the tour, did the tour guide encourage questions? Yes or No
- Did the guide smile and make eye contact with their guest during the tour? Rating 1 - 5
- During the tour, did the guide entertain, educate, and converse with their guests? Rating 1 - 5
- How was the guide's presentation and delivery during the tour? Rating 1 - 5
- During the tour, did the guide mention wine club and benefits of membership? Rating 1 - 5
- During the tour, did the guide effectively set the stage to encourage wine sales? Rating 1 - 5
- Did the tour guide stay with their guests after the tour concluded? Yes or No
- What was your overall satisfaction with the tour? Rating 1 - 5

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WISE TRIPLE SCORE

• Did they Ask for the Order?	Rating 1 - 5
• 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, 3 Times, 4 Times, 5+
• Did they effectively try to sell the wine club?	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, etc.)	Comments

SUMMARY

• What was your overall satisfaction with the customer experience? How did they do?	Rating 1- 5
• Did the experience meet your expectations? Why or why not?	Comments
• How did your perception of the brand change?	Comments
• How likely are you to recommend this winery to a friend?	Never, Not Likely, Likely, Definitely
• What was your overall feeling after your visit? Select all that apply.	Relaxed, Luxurious. Fun/Social, Educationals, Transactional, Rushed, Other - See comments
• Based on the cost of this experience, do you feel you received a value? Was it worth its cost?	Rating 1 - 5
• What did they do well?	Comments
• Where do they need to improve?	Comments
• Please add any additional comments about your visit below:	Comments
• Where you charged a tasting fee? How much?	Comments
• Did you purchase wine? Enter # of bottles and $ amount.	Comments
• If today were simply a personal visit and not connected to your role, would you have considered purchasing wine? If so, what amount feels realistic?	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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