

Leveraging mystery shopping to improve customer service

A Case Study on Retail Banking

Service quality has been considered one of the key differentiating factors to business success. Organizations able to manage the critical customer service flow capture enormous rewards: enhanced customer satisfaction, increased revenue, and greater employee satisfaction.

The Objective

A retail bank in Hong Kong implemented a mystery shopper program to measure service quality of all branches and selected peer banks. The goal was to identify areas of improvement and learn the best practice.

The Methodology

This was a one-year program with branches evaluated one to two times every month. This generated a steady flow of data for evaluation while keeping the frontline staff aware of bank's dedication to enhance customer service.

After the first month, one of the issues observed by mystery shoppers was

that a great majority of counter staff did not promote any products while customers were waiting in front of the counter, idled. This was considered a golden moment where the staff could promote products, e.g., saving plans, to the regular customers and therefore potentially increase the revenue.

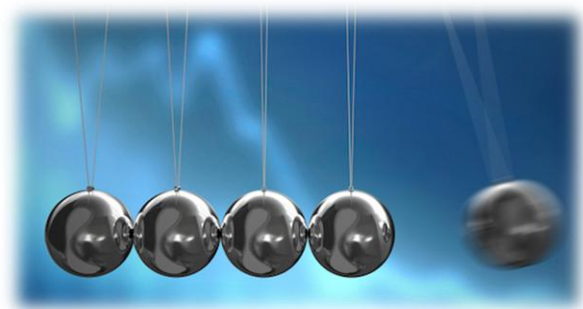
The bank shared the cases and suggestions with the branch staff and operations team. Together with other findings in the program and service indicators, the consultant and internal training team launched a series of workshops for the branch staff. In addition, they streamlined the service process where customer could be served more efficiently.

The Result

Starting in the second round, the bank improved in most of the service indicators including the “cross-selling” rate by counter staff.

In addition to the assessment, the program was leveraged as a recognition tool. On yearly basis, the bank presented different awards to outstanding branches and staff as motivation.

Mystery shopping generates invaluable insight.



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