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| **Preshop Procedures** |
| **1** | **Reservations** | 1. You are responsible for making the room reservation2. Please look at the reservation tab for information on: A: What method to use to book the room, phone vs. internet B: What type of accommodations to book C: Number of nights to book3. In some cases you may be required to make a deposit to hold the room. However if the room is offered at a discounted rate in exchange for prepayment avoid that rate. You want a rate that allows you to cancel it and make changes up until you are within the hotels cancelation window. |
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| **2** | **Excel** | Excel it is an integral part of the Buckalew Hospitality mystery shopping experience. It is a requirement that you know how to use Excel. If you are not proficient at using excel please remove yourself from the shop. If we later find out you are not proficient at excel we may remove you from the shop and remove you from our database.  |
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| **3** | **Cancelations** | We understand that circumstances may occur that cause you to cancel your commitment to complete the shop. Cancellations do not immediately remove you from our database. The best way to cancel is to let us know immediately. We can find another shopper, especially when you give us enough time. Cancelling after the pre-shop call or at the last minute can be a cause for removal. We review all cancelations on a case by case basis. To cancel your shop please email Joanna at Joanna@BuckalewHospitality.com immediately. If you are cancelling because the date you selected is either not available at the hotel or no longer works for you, please let us know, sometimes we can change your date.  |
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| **4** | **Preshop Call** | After you have been assigned your shop you will be emailed a confirmation. The next step is to book your room. After that we will meet on the telephone to go over the details of your assignment. This meeting is what we call a "Preshop call". This call is our chance to go over procedures of your shop and our expectations. The Preshop call last 15-20 minutes. If you are a repeat shopper this call should be brief. This is your chance to ask any open questions you may have. We will need you to be in front of your computer with this template in front of you.  |
| **Buckalew Hospitality Standards and Keys to Success** |
| **1** | **Employee's Names**  | 1. Please do whatever is possible to get names.2. Suggestions include: Introduce yourself, ask them to repeat their name, have your guest look at the name tag3. Missing names is not acceptable, be prepared4. Try to control the interaction so you have time to get the name. Ways to do this include stalling, asking questions and making additional requests A. An effective way to ask for a name without raising suspicion is to just say “I didn’t catch your name” and then use the employee’s name immediately in the next sentence when you speak to them. Or use their name at the end of the interaction. This makes it less suspicious as to why you asked for the name. 5. If you are unable to get a name please provide a physical description of the employee and write the description where the name would go. Also let us know in the narrative why you aren't able to get the name (employee was missing their name tag, wearing it upside down, employee refused to give their name, had it covered with something, etc.)6. Include in your description: (Race, Sex, Age, Height, Hair Color)7. Be politically correct on the race description. (Caucasian, African American, Hispanic, Asian)8. Example: (Hispanic male, mid 30's, 5'8", Black hair) |
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| **2** | **Guests** | 1. You are always welcomed to bring an adult guest with you. Their meals are covered2. Children are welcomed as well. Please be considerate to food costs when bringing children.3. Children are welcomed to dine with you in the restaurants. (order off the kids menu or order lower priced items for the family in this situation)4. When talking about your adult guests on a shop refer to them as "my guest" instead of spouse, friend, boyfriend/girlfriend, buddy or pal5. You can refer to your children as "my child" or "my children" |
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| **3** | **Food and Beverage** | 1. Food ordering standards include:  A: Meals: 1 entrée per guest, 1 appetizer to share, 1 dessert to share, and soft drinks/coffee/tea for everyone (do not order alcohol, unless otherwise stated) B: You can get 2 appetizers instead of a dessert, or 2 desserts instead of an Appetizer with your meal C: Bars: unless otherwise stated, 2 drinks per person maximum (4 total maximum) or 1 drink per person and an appetizer D: Please do not order alcoholic beverages unless instructed to do so2. On the food and beverage tabs please briefly describe the following in 2-3 sentences A: The presentation of the food B: The quality of the food C: The taste of the food |
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| **4A** | **Writing the narratives** | 1. **Write in complete sentences** A: We are looking for you to write in paragraph style sentences that tell us a story of what you experienced and did not experience in the interaction. B: Avoid phrases, note style, shorthand, one word answers and bullet points C: Avoid slang, Exclamation points, and smiley faces D: Write your narratives in such a way that a stranger reading it would get the complete picture of what happened from the start to the end of your interaction.2. **Use Employee Names** A: We want you to initially use the employee's name then go to a he/she format B: Do not use the employees title. Example (Say: Maria welcomed us, she told us to have a good stay, instead of the Front Desk Agent welcomed us, the front desk agent told us..)3. **Cover your "no" answers** A: when you score a question as "no" please include an explanation into the narrative on why you put "no" even if it is obvious B: The hotel wants to know why you put "no" for a response, so give them an explanation C: In your narrative description we are looking for both a description of what you encountered and what you did not encounter (which is your "no" answers) D: If part of a questions is "no" then the whole question should be scored as a "no"4. **Please write in first person and write in past tense.** Refer to yourself as (I, we, us). Do not refer to yourself as "the shopper" or "the guest". (The Bellman placed the luggage at the food of the bed, as opposed to The Bellman is placing the luggage at the foot of the bed) |
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| **4B** | **Writing the narratives** | 5. Please proofread your shop, it makes a huge difference. Also once you complete each tab press the F7 button on your keyboard and that will spellcheck the tab you are on. You will need to do this on EACH tab.6. You can make the text boxes bigger by placing your mouse in between the two numbers to left, click and drag it down. Please do this so we can see everything you write. 7. Do not speculate on why an employee did something. A. Do not make excuses in the shop for why something was not done (example: the employee did not greet me, perhaps because she was tired) B. In most cases its best to put NA if something was not able to be done, but don't guess/assume why it wasn't done and write that in the shop8. Please plan to do every tab and fill out every section. If you come to a circumstance where you believe you won't be able to do a section, please call me while you are at the hotel. Missing a section is unacceptable. 9. When directly quoting an employee use quotation marks and mention the employees name that said the quote. A. for example: Mark greeted us and said, "hello how are you doing today." |
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| **5** | **Hotel Charges** | 1. Please post all hotel charges to your room, unless otherwise told to. Occasionally you will be asked to pay cash2. When you receive the check in a restaurant please put the charges for the food AND TIP on your room. Please tip 15%-20%3. When you go to checkout all charges should be listed on your room. 4. If any charges are missing please have the hotel add these BEFORE you leave. If anything is missing please include this detail in the narrative.5. We DO NOT need receipts unless you are instructed to get them. Occasionally we will need the check number if given a receipt. When you provide a check number the hotel can look it up6. Please do not order any movies or video games in the room7. Please do not post an unauthorized charges to the room **(doing so will be cause for removal from our database)**8. One Internet connection in the room is an authorized charge. The hotel WILL charge per connection or per computer or device. Post the internet charge to your room so it will be reversed.9. We do not need a copy of your room folio. When you provide a confirmation number the hotel can look it up |
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| **6** | **Deadline** | 1. Your shop is due 36 hours after checkout. We assume you checkout at noon so you have until 11:59pm on the day after checkout to turn in your report. If you foresee being late please let us know immediately. 2. Please email the completed shop to Aimee@BuckalewHospitality.com3. Turning the report in late can be a possible cause for removal from our database |
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| **7** | **Contacting us** | 1. Buckalew Hospitality is reachable 24 hours a day before your shop, when you are at the hotel, and after your shop.2. Please contact us while on-site with the following concerns: A: Any questions you may have B: let us know if departments are closed so that we can plan or offer an alternative C: if you make a mistake D: need advice on how to handle a task or situation E: Call/text if you are unable to fill out a section. Do not leave the hotel with sections incomplete. Call and tell us and we will figure out an alternative3. Our preferred method of contact is, in the following order: A: Text Message: 407-810-6596, please include your name and the hotel you are at or calling about B: Email: Dave@BuckalewHospitality.com C: Phone: 407-810-6596 |
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| **8** | **Remaining Anonymous** | 1. One of the challenges of mystery shopping is not being obvious as a shopper2. You want to blend in with the hotel you are staying at A: If it is a resort, wear resort attire B: If it is a family place, bring children C: If it is a business hotel dress in business attire3. Be aware of what's on your vehicle that may make you obvious that you are a local (bumper stickers, license plates, luggage tags with your home address)4. It is acceptable to use a hotel loyalty/club number when you make the reservation, however when shopping within 75 miles of your house, it may be wise to use a non-local address and/or not put your loyalty number on the reservation until you go to checkout. Your local address may be a dead giveaway that you are a mystery shopper5. Try to spread out your interactions at various times of day and different points in your stay so that you are not always interacting with the same hotel staff. 6. You cannot visit the same hotel for a shop within 12 months of this stay. 7. Have your guest do some of the interactions. 8. Vary your appearance and wear different clothes. 9. Do not write down details in front of an employee. 10. Try to do everything short of asking employees what their name is.  |
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| **9** | **FAQ's** | Please check out this link for frequently asked questions:  |
|  |  | <http://www.facebook.com/note.php?note_id=10150800073770571> |
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| **10** | **Common Mistakes** | Please check out this link for a gallery of tips on how to improve your shop:  |
|   |  | [http://www.facebook.com/#!/media/set/?set=a.10150268619391374.327429.154192701373&type=1](http://www.facebook.com/#!/media/set/?set=a.10150268619391374.327429.154192701373&type=1 )  |
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|   | **Executive Summary/Narrative Tab** | If your template has these tabs, please do not make ANY edits to these tab. Leave them exactly as is.  |
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