

## Protocols for Face-to-Face Mystery Shopping during the Covid-19 period

### Purpose

The purpose of this document is to provide advice to MSPA Europe/Africa members on the protocols to consider for face-to-face Mystery Shopping during the period of removal of lockdown and the return to working in markets covered by our membership.

### Important Disclaimer:

- **The MSPA** is providing these recommendations in good faith based on our broad understanding of the interventions to the COVID-19 pandemic as applied by our members
- **As such, the MSPA** cannot in any way be held liable for these recommendations and are sharing advice to generate a common understanding amongst members
- **Above all, MSPA members must always comply with the specific legislative requirements of their local authorities, these take precedence over any advice herein**
- **Further, members must keep themselves abreast of local developments** and stay informed about updates from government, health and related authorities.

Our goals of this document are to ensure (wherever possible):

- **Duty of Care:** For Clients, client employees and their customers. For MSPA EA members, their employees and Mystery Shoppers. To ensure the prevention of infection and transmission of infection as a result of Mystery Shopping activity.
- **Reputation and limitation of any liability:** For members by providing clear advice that can be shared as appropriately with clients, colleagues and Mystery Shoppers.

## Recommended Steps

These are presented in a logical order to ensure that general business, project specific set up, recruitment, fieldwork and feedback actions are taken:-

### A. General Business Guidelines

#### CHECK LOCAL LEGISLATION, SECTOR, CLIENT AND EMPLOYMENT GUIDELINES

Firstly, and above all, respect local legislation and protocols from government authorities and accepted health departments.

- Secondly, respect sector and client protocols, always ensuring that they are within the local legislative requirements.
- Thirdly, ensure that, as a provider, you understand whether you have any legal protection yourself contractually to the following:-

Any harm caused by Covid-19 to the shoppers:

- Your shopper agreements should mention the new safety obligations to be respected by the shopper and the possible sanctions in case of non-compliance
- Providers must impose on the shoppers the clear safety rules compatible with the laws of the country and beyond if these are insufficient
- As a provider, you may not have the means to verify that the shopper has properly protected himself therefore you should ask shoppers to accept the risks involved in the assignment and waive your liability as a result
- Providers must authorise shoppers not to perform a visit when the procedures put in place by the customer appear to him or her to be likely to endanger him or her; and obviously make an immediate report as a hot alert back to you the provider (See below – During the Visit).

Any harm caused by Covid-19 to the client's employees:

- The contract between the provider and the client must detail all security measures imposed on the shopper for their own safety, and also the behavioural rules imposed on shoppers to eliminate any risk in their interaction with client's staff
- These should be developed with the client and understood and agreed, as clear evidence of acting responsibly and mitigating risk (adaptation of the scenario)
- Ensuring that Mystery Shopping selection and screening procedures are followed and those not meeting the screening criteria are not allowed to conduct face to face assignments.

## B. Preparation of the Project

### **Agreements with Clients**

- Consider if there are alternative methods rather than face to face to enact the assignment or part therein (telephone, online etc). However, if the purpose is to assess face to face business performance then proceed with a mutual understanding and agreement to the goals and risks involved.
- As a Mystery Shopping provider, you should present your guidelines to your client and have their approval on them, in writing.
- Ask your client, in writing, if there are any guidelines that you need to respect during fieldwork. These could be guidelines for suppliers or for customers – as a mystery shopper we are acting as a customer. Analyse if those need to be reflected in the questionnaire.
- Timelines: Align with the client on fieldwork periods and shopper fees. Visits will probably take longer when respecting waiting lines for entering the shops.

### **Agreements with Shoppers**

- Issue a shopper checklist that shoppers accept when agreeing to take the assignment, and in that the provider indicates clearly that the shopper conducts this assignment of their own free will while going about normal shopping routines and that the agency accepts no liability for any illness or injury incurred.
- Shoppers should never be asked to act in a way that contravenes local government regulations in order to test a retail outlet remedial action, i.e. asking shoppers to not wear a face mask and see if they are asked to wear one.
- Consider amendments to the questionnaire: insert an open comment box (not visible to the client) with the following question: “Did you feel safe and do you have any comment or recommendations regarding health & safety issues?”

### C. Recruitment and Briefing

It is important to consider who you select therefore ask Covid-19 related screener questions and gain shopper acceptance of the risks. For what is known to date about the Covid-19, there are some demographic characteristics and health conditions that may increase the risk of infection, the severity of symptoms and the fatality rate.

Recruitment messages for projects should include that information with a note that shoppers under those circumstances are more vulnerable to Covid-19 and as such should consider those risks before accepting any assignments.

A Shopper is NOT ALLOWED to conduct Mystery Shopping Visits should they:-

- Feel Sick / ill, have a cough or temperature (37+) or any other symptom your local health authority identifies as an indicator of infection.
- Based on your local health authority advice: had directly contact, in the last 14 days, with people who are symptomatic or who have tested positive to Covid-19.

In addition to the above:-

- It is recommended to take additional precautions with shoppers who have underlying Health issues which your local health authority identifies them as a high risk and low immunity.
- in light of GDPR it is difficult to include screening questions about health. Therefore, all Shoppers should sign an Indemnity advising that they have understood the associated risks and that they take full responsibility for doing mystery shopping visits in good health, and that they will respect local legislations from government authorities and accepted health departments during each mystery visit.
- As a good practice, additional warning should be given in cases where the project may involve additional risk, for example public transportation and business where is more difficult to keep social distance.

It is also important to consider the following in terms of the assignment:-

- Providers and shoppers should avoid scheduling visits during peak times
- Whenever possible, use real customers who will evaluate services in their routine shopping
- Shoppers should avoid public transport if possible
- Whenever possible, use local shoppers, to avoid unnecessary travel
- When routes are required, alert shoppers about the risks of cross-contamination when visiting multiple outlets. In general, it is advisable to prevent one shopper accepting multiple assignments
- As safety equipment is expensive (masks, gloves, hand sanitizer etc.), providers need to review with their clients what is the recommended equipment, depending on country / type of business. It may be necessary to reimburse these expenses for shoppers.

## D. Training Your Shoppers

Providers need to provide training for employees and likewise we need to reflect these in briefings to shoppers, in order to adapt to the new “touchless” economy. (Please do not leave the duty of care in the hands of shoppers, in the hope that many rules are common sense – they are not.)

- Some evaluation elements may have changed (in some projects shoppers used to evaluate handshakes, selling techniques that involved handling several products, etc.).
- Based on the desired (new) experience, shoppers need to be aware of the key risk factors. Examples include: Door knobs, pens available on site, chairs, menus, touchscreens, samplers, business cards, etc. Personal belongings of the shopper (mobile phone, bag, etc.).

## E. Preparing for the Visit – Shopper Check List

Before leaving to conduct assignments, shoppers should check for any typical COVID-19 symptoms (cough, high temperature, shortness of breath). As many of infected patients are asymptomatic, shoppers need to refrain from F2F work if they are aware, they were in contact with infected patients, in the last 14 days.

- Whether part of local legislation or not we recommend shoppers need to
  - ensure they have their face masks with them.
  - carry with them hand sanitizers with minimum 70% alcohol content.
- Shoppers should be advised not to take unnecessary belongings to minimise cross-contamination.

## F. During the Visit

Shoppers should be advised to:-

- Abort the visit if at any time they feel at risk and inform your provider. Specifically, where there is evidence that the location is not complying to any of the local legislations or client specific requirements relating to Covid-19
- Shoppers should not be asked to complete an assignment if that may represent a significant risk. For example, if a shopper enters a store and the employees are not wearing a mask (where it is mandatory) or the amount of customers is clearly above the maximum allowed due to the need of physical distance, the shopper should consider the visit as completed and report the results
- Shoppers should not be penalised (financially and/or their grading [visit/shop score]) for not completing the whole visit in those cases
- Companies should have a dedicated channel (phone or email) where shoppers can quickly report this kind of situation, so clients can be alerted fast and the situation may be corrected as soon as possible
- Put the facemasks on before entering the store
- Maintain social distancing (for example 2 metres, depending on local regulations)
- Be aware of Safety / Health Standards of Retailers
- Use hand sanitisers to be used when entering all shops/ outlets
- Use a debit or credit card, preferably with contactless payments – where possible to avoid cash
- Avoid handling goods unnecessarily and contact with surfaces as much as possible
- When visiting toilets ensure that they wash their hands before and after leaving the toilet and sanitising their hands
- When leaving the store use a hand sanitiser
- Hand hygiene should be a top priority, before and after every visit. In the event that the shopper wears disposable gloves; these need to be disposed after the visit (or sanitised). Special care should be taken with mobile phones and payment cards
- Follow the safety rules implemented – for example should cooperate in case businesses are checking temperatures
- To not delay while shopping or chat with neighbours/friends/store staff more than is necessary for their visit.

### G. After the Visit

Providers need to keep an open communication channel with shoppers and ask to be notified in case of infection or in case someone from his/ her family is infected. In case a mystery shopper gets sick with Covid-19, providers need to check what projects they were involved in the previous 14 days and notify the clients where appropriate.