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By Oleksiy Tsysar, Owner & CEO – 4Service - Austria - <https://4service.company/en>

Where Mystery Shopping fits in today's CX metrics universe

This article brings up many emotions for me. Twenty five years ago we became the first company to introduce Mystery Shopping at scale in Eastern Europe, starting in Ukraine and quickly evolving into a broader CX focused research practice. We expanded internationally, built a diverse portfolio and today deliver complex global research projects that I could not have imagined back then.

In the world of CX metrics, we often talk about NPS, CSAT, CES, emotional drivers and journey outcomes. But it is the mystery shopping method that has been quietly powering customer experience management for decades. It's an extremely practical tool to close the gap between what has been promised to customers, and embedded into your brand standards, and what's really happening at the retail level. And for us at 4Service this method is in our blood, still accounting for a sizable chunk of our revenue today.

After at least five million visits, calls and digital checks over that time (about half of them in Russia before the war), we can say confidently that we know this method inside out.

Mystery shopping combines two layers:

- I. it measures operational reality: standards, processes, compliance, speed, accuracy, availability.
- II. it measures elements of CX perception and outcomes, such as warmth of interaction, clarity of communication, professionalism, emotional tone etc.

Here are some examples:

OPERATIONS:

Store readiness and availability

1. Store open on time
2. Stock availability
3. Clean entrance
4. Correct promotions
5. Clear pricing

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Service process execution

- | | |
|----------------------------|---------------------|
| 1. Following service steps | 4. Purchase check |
| 2. Greeting time | 5. Receipt provided |
| 3. Add on offer | |

Speed and efficiency

- | | |
|--------------------------|---------------------|
| 1. Time to first contact | 4. No delays |
| 2. Checkout speed | 5. Accurate payment |
| 3. Queue handling | |

Accuracy and compliance

- | | |
|---------------------|----------------------------|
| 1. Correct info | 4. Correct price |
| 2. Compliance steps | 5. Safety or hygiene rules |
| 3. POS accuracy | |

Facilities and environment

- | | |
|--------------------|--------------------|
| 1. Clean store | 4. Updated signage |
| 2. Tidy counters | 5. Clean restrooms |
| 3. Proper lighting | |

CX PERCEPTION AND OUTCOMES:

Emotional tone and warmth

- | | |
|---------------------------|-------------|
| 1. Feeling welcome | 4. Patience |
| 2. Friendly body language | 5. Respect |
| 3. Sincerity | |

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Clarity and communication

1. Clear explanations
2. Checking understanding
3. No jargon
4. Tailored communication
5. Polite tone

Professionalism and confidence

1. Knowledge
2. Confident answers
3. Calm handling
4. No contradictions
5. Trust building

Customer orientation and personalisation

1. Active listening
2. Adjusted recommendation
3. Genuine help
4. Relevant alternatives
5. Feeling individually treated

Overall CX outcomes

1. Satisfaction
2. Likelihood to return
3. Expectations met
4. Feeling valued
5. Improved perception

This mix makes it a powerful KPI for managing CX because it integrates compliance and process with the subjective perception that ultimately drives satisfaction and retention.

Golden MS rules:

1. Shoppers should mirror the target audience
2. Shoppers should be continuously rotated
3. Shoppers should behave as real customers. It is not a profession, but a form of gig work for actual brand consumers*
4. Studies should measure the CX standards and processes that actually matter.

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5. Results of an ongoing MS program should be tied to OKRs, scorecards and management motivation, so the organisation pays attention and acts.
6. The Mystery Shopping program should be ongoing, but refreshed and re-designed at least once a year, to stay aligned with customer expectations.
7. Communicating insights and findings should be embedded into the broader CX governance framework, so actions are prioritised and monitored across the company.

** Whenever a provider says otherwise i.e. Mystery Shopping should be a profession, it's a red flag for me. Because no one who does this professionally can retain the fresh authentic consumer perception, which is almost always what companies want to measure in Mystery Shopping too. A shopper working full day, checking brand standards will inevitably introduce an interviewer bias to the perception-based evaluation. And that is a red flag for any research like me.*

Our internal research also shows that wherever rotation rules are broken, that is a shopper does too many visits to retain that perception “freshness”, their report quality goes down.

Most importantly, Mystery Shopping should never live alone, it's not a magic pill. It must be part of an integrated CX intelligence and orchestration program, correlated with feedback data, operational data and financial outcomes. And it should always be shared with frontline teams - in a positive way, so they understand, collaborate and improve.

At 4Service we continue to evolve this method, connecting it with analytics, journey design CX strategy and consulting. When designed well, Mystery Shopping is one of the most precise, behaviour based metrics available today for companies that truly want to manage and elevate their Customer Experience.
