

MYSTERY SHOPPER AUDIT TEMPLATE

Mystery Shopper Audit Checklist

Use these questions, input types, and execution tips to build a credible mystery shopping program for retail stores and service locations.

LOCATION

VISIT SCENARIO

DATE AND TIME

SHOPPER / AUDIT ID

1. Visit setup and audit integrity

1 Confirm the assigned location, audit scenario, shopper profile, and visit window.

CRITICAL

SCENARIO + LOCATION

LOCATION | Select store

SCENARIO | Select

VISIT WINDOW | Start / end

Execution tip: Preload the approved location and scenario. Use a controlled visit window so the shopper cannot complete the audit too early or too late.

2 Capture the shopper check-in time and verify the visit starts inside the geo-fenced location.

CRITICAL

GEO-FENCE + TIMESTAMP

CHECK-IN | --:--

GEO-LOCATION | Verified

SHOPPER | User ID

Execution tip: Make geo-fencing and automatic timestamp capture mandatory. Escalate attempts made outside the location radius or assigned time window.

3 Confirm the store is open and trading during its published operating hours.

CRITICAL

SCORED + PHOTO

Compliant

Partial

Non-compliant

Add live photo

Execution tip: Compare the observed status with the published schedule. Require a live storefront photo if the store is closed, delayed, or inaccessible.

4 Record the visit type and whether a purchase, enquiry, return, pickup, or complaint scenario will be completed.

SINGLE SELECT

☐ Browse + purchase

☐ Product enquiry

☐ Return / exchange

☐ Click + collect

☐ Complaint

Execution tip: Use one clearly defined scenario per visit. Provide the shopper with a realistic customer profile, budget, and expected outcome.

5 Confirm the shopper has not revealed their identity or audit purpose to store employees.

CRITICAL

INTEGRITY CONFIRMATION

Confirmed

At risk

Invalid

Execution tip: Require a comment for any interaction that may have exposed the visit. Mark the audit invalid when staff behaviour could have been influenced.

6 Record any external condition that could make the visit unrepresentative.

COMMENT + EVIDENCE

CONDITION | Describe

IMPACT | Low / Medium / High

EVIDENCE | Attach

Execution tip: Capture unusual closures, local events, construction, technology outages, or crowding that could materially affect the customer experience.

2. Exterior and first impression

7 Is the storefront easy to identify, visible, and consistent with the approved brand presentation? SCORED + PHOTO

Compliant Partial Non-compliant N/A Add live photo

Execution tip: Observe signage, facade, window branding, lighting, and general presentation from a customer approach path. Require a photo for material gaps.

8 Are opening hours, contact information, and customer notices current and readable? CRITICAL SCORED + PHOTO

Compliant Partial Non-compliant N/A Add live photo

Execution tip: Check physical and digital information against the approved source. Capture incorrect, missing, or outdated notices.

9 Is the entrance clean, safe, accessible, and free from obstructions? CRITICAL SCORED + COMMENT

Compliant Partial Non-compliant N/A

Execution tip: Cover doors, mats, steps, ramps, handles, queue barriers, and accessibility. Create a high-priority action for safety or access failures.

10 Does the store create a welcoming and organized first impression on entry? RATING + COMMENT

RATING | 1 to 5

COMMENT | Required below 4

Execution tip: Guide shoppers to assess observable conditions such as visibility, organization, lighting, employee presence, and ease of navigation.

11 Are promotional windows, campaign displays, and entrance messages complete and correctly executed? SCORED + PHOTO

Compliant Partial Non-compliant N/A Add live photo

Execution tip: Compare the execution with the current campaign brief. Capture missing assets, outdated messages, poor installation, or damaged materials.

12 Record the number of customers waiting or unattended when the shopper enters. NUMERIC + TIME

WAITING CUSTOMERS | Count

ARRIVAL TIME | __:__

UNATTENDED | Count

Execution tip: Capture the count immediately on entry. Use this with greeting time to understand whether staffing or service coverage affected the visit.

3. Greeting and staff availability

13 Record the time taken before an employee acknowledges or greets the shopper.

CRITICAL

TIMER + VALIDATION

ARRIVAL | | :_:_

GREETING | | :_:_

ELAPSED | | Minutes

💡 Execution tip: Start the timer at entry and stop it at the first genuine acknowledgement. Set the target by store format and escalate repeated misses.

14 Was the greeting polite, natural, confident, and aligned with the brand service standard?

SCORED + COMMENT

Compliant

Partial

Non-compliant

N/A

💡 Execution tip: Capture the exact wording or behaviour when the greeting is partial or non-compliant. Avoid judging personality when the required behaviour was delivered.

15 Were employees visible, available, and positioned to support customers?

SCORED + PHOTO

Compliant

Partial

Non-compliant

N/A

Add live photo

💡 Execution tip: Observe coverage across the entrance, shop floor, fitting rooms, counters, and service points. Use evidence only where permitted and discreet.

16 Did the employee make appropriate eye contact and use attentive body language?

SCORED RESPONSE

Compliant

Partial

Non-compliant

N/A

💡 Execution tip: Look for eye contact, open posture, active attention, and avoidance of distracting private conversations or device use.

17 Did the employee introduce themselves or offer help in the expected way?

SCORED + EXACT WORDING

Compliant

Partial

Non-compliant

N/A

💡 Execution tip: Record the wording used and whether assistance was proactive, appropriate, and not intrusive. Configure this to the brand script where applicable.

18 Were customers acknowledged in order and managed fairly during busy periods?

CRITICAL

SCORED + QUEUE OBSERVATION

Compliant

Partial

Non-compliant

N/A

💡 Execution tip: Observe whether employees recognize waiting customers, explain delays, and avoid skipping or ignoring people. Capture the queue condition and time.

4. Needs discovery and product knowledge

19 Did the employee ask relevant questions before recommending a product or service?

SCORED + COMMENT

Compliant Partial Non-compliant N/A

🔍 Execution tip: Check whether questions cover intended use, preference, size, budget, urgency, and constraints. Record at least one question asked.

20 Did the employee listen and respond to the shopper's stated needs?

SCORED + NARRATIVE

Compliant Partial Non-compliant N/A

🔍 Execution tip: Compare the recommendation with what the shopper actually said. Capture examples of listening, interruption, assumptions, or missed needs.

21 Could the employee explain key product or service features accurately?

CRITICAL

KNOWLEDGE RATING

ACCURACY | 1 to 5

CONFIDENCE | 1 to 5

EXAMPLE | Comment

🔍 Execution tip: Test only the approved knowledge area. Record the feature discussed and any incorrect, misleading, or incomplete information.

22 Did the employee explain customer benefits rather than only listing features?

SCORED + EXAMPLE

Compliant Partial Non-compliant N/A

🔍 Execution tip: Capture one benefit statement and whether it connected the product to the shopper's need, problem, or expected outcome.

23 Did the employee handle a question they could not answer appropriately?

CRITICAL

SCENARIO RESPONSE

Compliant Partial Non-compliant N/A

🔍 Execution tip: Assess whether the employee checked a trusted source, asked a colleague, or explained the next step instead of guessing.

24 Were suitable alternatives offered when the requested option was unavailable?

SCORED + ALTERNATIVES

REQUESTED
ITEM | Record

ALTERNATIVE
OFFERED | Record

REASON | Comment

🔍 Execution tip: Capture whether the alternative matches the shopper's need, price range, and use case. Do not reward irrelevant substitution.

5. Recommendation and sales execution

25 Did the recommendation match the shopper's need, budget, and stated priorities?

CRITICAL

SCORED + REASON

Compliant

Partial

Non-compliant

N/A

🔍 Execution tip: Require a short explanation of why the recommendation was or was not relevant. Weight serious mismatches more heavily.

26 Did the employee compare suitable options clearly and fairly?

SCORED + COMPARISON

Compliant

Partial

Non-compliant

N/A

🔍 Execution tip: Observe whether differences in price, value, features, availability, and limitations were explained without misleading claims.

27 Was a demonstration, trial, sample, fitting, or product interaction offered where relevant?

SCORED + EVIDENCE

Compliant

Partial

Non-compliant

N/A

🔍 Execution tip: Adapt the expected interaction to the category. Record whether the shopper could properly evaluate the product or service.

28 Were complementary products or services suggested naturally?

MULTI-SELECT

☐ Accessory

☐ Service plan

☐ Delivery

☐ Membership

☐ No suggestion

🔍 Execution tip: Capture what was suggested and whether it added value. Do not treat irrelevant or aggressive upselling as compliant.

29 Were current promotions, loyalty benefits, warranties, delivery, or after-sales services explained accurately?

CRITICAL

MULTI-SELECT + COMMENT

☐ Promotion

☐ Loyalty

☐ Warranty

☐ Delivery

☐ After-sales

🔍 Execution tip: Use the active campaign and policy as the reference. Require a comment for incorrect eligibility, price, condition, or promise.

30 Did the employee attempt to close the interaction in a helpful, non-pressured way?

SCORED RESPONSE

Compliant

Partial

Non-compliant

N/A

🔍 Execution tip: Look for a clear next step, confirmation question, or offer to complete the purchase. Record any pressure, dismissal, or abrupt ending.

6. Store standards, merchandising, pricing, and promotions

31

Are priority products available, easy to find, and presented in the correct location?

CRITICAL

SCORED + PHOTO

Compliant

Partial

Non-compliant

N/A

Add live photo

Execution tip: Use the current priority SKU or category list. Capture empty positions, hidden stock, incorrect placement, or poor accessibility.

32

Are products faced, organized, clean, and free from visible damage?

SCORED + PHOTO

Compliant

Partial

Non-compliant

N/A

Add live photo

Execution tip: Observe a representative sample across the assigned area. Capture damaged packaging, dust, clutter, or poor replenishment.

33

Are shelf labels, product information, and promotional messages accurate and readable?

CRITICAL

SCORED + PHOTO

Compliant

Partial

Non-compliant

N/A

Add live photo

Execution tip: Compare labels with the actual product and active campaign. Create a critical action for misleading or material price information.

34

Does the displayed or quoted price match the price processed at checkout?

CRITICAL

PRICE COMPARISON

Displayed	Quoted	POS	Difference

Execution tip: Record each price exactly and retain the receipt where permitted. Any mismatch should create an urgent price accuracy action.

35

Are campaign displays and visual merchandising executed to the approved standard?

SCORED + CAMPAIGN PHOTO

Compliant

Partial

Non-compliant

N/A

Add live photo

Execution tip: Compare with the latest campaign reference. Capture missing elements, wrong products, incorrect order, damaged assets, or expired materials.

36

Are testers, samples, digital screens, interactive devices, or demonstration units usable?

MULTI-SELECT

Available

Clean

Working

Current content

Safe

Execution tip: Record the specific device or tester and the failure type. Assign maintenance or replenishment rather than using a general comment.

7. Customer environment, cleanliness, safety, and facilities

37

Are floors, counters, shelves, fitting rooms, seating, and customer touchpoints clean?

SCORED + PHOTO

Compliant

Partial

Non-compliant

N/A

Add live photo

🔗 Execution tip: Assess visible customer areas, not back-of-house areas outside the scenario. Require evidence for significant cleanliness gaps.

38

Are lighting, temperature, music, scent, and ambience within the approved brand standard?

RATING + READING

AMBIENCE | 1 to 5

TEMPERATURE | Reading

COMMENT | Exception

🔗 Execution tip: Use objective readings where available and a short factual comment for subjective environment standards.

39

Are walkways, exits, accessibility routes, and customer movement areas clear and safe?

CRITICAL

SCORED + ACTION

Compliant

Partial

Non-compliant

N/A

🔗 Execution tip: Create a high-priority action for blocked exits, trip hazards, damaged flooring, inaccessible routes, or unsafe fixtures.

40

Are customer-use baskets, trolleys, fitting rooms, testers, kiosks, or service devices available and usable?

MULTI-SELECT

☐ Available

☐ Clean

☐ Working

☐ Sufficient

☐ Accessible

🔗 Execution tip: Select only the facilities relevant to the location. Capture the item, quantity, and failure instead of a broad pass or fail.

41

Are customer washrooms, consultation areas, or waiting zones clean and properly supplied where applicable?

SCORED + TIME

Compliant

Partial

Non-compliant

N/A

🔗 Execution tip: Record the check time and exact area. Capture missing supplies, odor, damage, privacy, or accessibility concerns.

42

Record any maintenance or safety issue that affects the customer experience.

CRITICAL

ISSUE GRID

Area	Issue	Severity	Action

🔗 Execution tip: Capture location, observable issue, customer impact, severity, and recommended containment. Escalate critical safety risks immediately.

8. Queue, checkout, payment, receipt, and farewell

43 Record the queue length and time taken before checkout or final service begins. CRITICAL QUEUE TIMER

QUEUE COUNT

|| Number

JOIN TIME

|| _: _

SERVICE TIME

|| _: _

WAIT

|| Minutes

 Execution tip: Capture the queue count when joining and use automatic time fields. Compare results with the approved target for the store format.

44 Did the cashier or employee acknowledge the shopper at the counter? SCORED + EXACT WORDING

Compliant

Partial

Non-compliant

N/A

 Execution tip: Record the greeting or acknowledgement. Separate a functional transaction from a complete service interaction.

45 Were product, quantity, price, promotion, discount, and tax details processed correctly? CRITICAL TRANSACTION ACCURACY

Item	Expected	Charged	Variance

 Execution tip: Use the receipt and active promotion rules. Create an urgent action for material overcharge, incorrect discount, or missing item.

46 Were payment options and loyalty or membership benefits handled correctly? MULTI-SELECT

Cash

Card

Digital

Loyalty

Voucher

 Execution tip: Test only the assigned payment or loyalty scenario. Record declined options, incorrect eligibility, or avoidable friction.

47 Was an accurate receipt offered in the approved format? CRITICAL RECEIPT + PHOTO

RECEIPT

|| Received / not

FORMAT

|| Print / digital

REFERENCE

|| Attach

 Execution tip: Retain or photograph the receipt only where permitted. Check item, price, tax, discount, date, time, and location details.

48 Did the employee explain return, warranty, delivery, or next-step information where required? SCORED + COMMENT

Compliant

Partial

Non-compliant

N/A

 Execution tip: Use the assigned purchase scenario to determine what should be explained. Record inaccurate or missing policy information.

9. Complaint, return, and service recovery

- 49 Present the approved complaint, objection, return, or exchange scenario without creating unnecessary disruption. **CRITICAL** SCENARIO CONFIRMATION

SCENARIO | Select

START TIME | | :_:_

EMPLOYEE | Role / name

🔗 Execution tip: Provide exact scenario boundaries and prohibited behaviours. The shopper should not invent safety, discrimination, or high-risk allegations.

- 50 Did the employee listen fully and acknowledge the concern with empathy? **CRITICAL** SCORED + NARRATIVE

Compliant

Partial

Non-compliant

N/A

🔗 Execution tip: Capture the wording and whether the employee interrupted, blamed, dismissed, or showed ownership. Focus on observable behaviour.

- 51 Was the correct policy or service recovery process followed? **CRITICAL** POLICY COMPLIANCE

Compliant

Partial

Non-compliant

N/A

🔗 Execution tip: Compare the response with the approved return, refund, exchange, complaint, or escalation policy. Record the policy step missed.

- 52 Was an appropriate solution or escalation offered? **CRITICAL** RESOLUTION GRID

Solution	Owner	Time promised	Status

🔗 Execution tip: Capture the proposed solution, authority level, owner, and promised timeline. Do not score an unsupported promise as resolved.

- 53 Were next steps, timing, and responsibility explained clearly? SCORED + EXACT DETAILS

Compliant

Partial

Non-compliant

N/A

🔗 Execution tip: Record what the shopper was told, who would act, and by when. Require a comment when information is vague or contradictory.

- 54 Did the interaction restore confidence in the brand? RATING + REASON

CONFIDENCE | 1 to 5

REASON | Comment required

🔗 Execution tip: Base the rating on resolution quality, ownership, clarity, and treatment. Avoid scoring only on whether the shopper received the desired outcome.

- 55 Record the total time taken to resolve or escalate the scenario. TIMER + OUTCOME

START | | :_:_

END | | :_:_

ELAPSED | Minutes

OUTCOME | Resolved / escalated

🔗 Execution tip: Use automatic timestamps where possible. Compare the duration with the service recovery target and investigate repeated delays.

10. Overall experience, evidence, narrative, and sign-off

56 Rate the overall customer journey across ease, confidence, service, and brand consistency.

CRITICAL

WEIGHTED RATING

EASE | 1 to 5

SERVICE | 1 to 5

CONFIDENCE | 1 to 5

OVERALL | Score

Execution tip: Keep category ratings separate before calculating the overall score. Weight critical failures so they cannot be hidden by strong cosmetic scores.

57 Record the strongest positive behaviour observed during the visit.

LONG COMMENT

POSITIVE
OBSERVATION | Describe exact behaviour

Execution tip: Capture a specific action or statement that can be recognized and repeated, not a general compliment such as good service.

58 Record the most important gap that should be corrected.

CRITICAL

PRIORITY FINDING

GAP | Describe

IMPACT | Customer / brand / sales

PRIORITY | High / medium / low

Execution tip: Select one priority gap based on customer impact, frequency risk, and brand importance. Link it to a responsible location owner.

59 Assess likelihood to purchase, return, or recommend based on the observed experience.

INTENT RATING

PURCHASE | 0 to 10

RETURN | 0 to 10

RECOMMEND | 0 to 10

Execution tip: Treat intent as an outcome indicator, not a substitute for the detailed audit. Require a reason for very high or very low scores.

60 Complete the shopper narrative and submit the audit with required evidence and reviewer sign-off.

CRITICAL

NARRATIVE + EVIDENCE + SIGNATURE

NARRATIVE | Required

EVIDENCE | Complete

REVIEWER | Sign

SUBMITTED | Timestamp

Execution tip: Require a chronological factual narrative, all mandatory evidence, reviewer approval, and submission within the defined post-visit window.

RUN THIS AUDIT IN TAQTICS

Make every mystery visit verifiable and actionable

Schedule audits by store, enforce geo-fencing and visit windows, capture live evidence and timestamps, create corrective actions, and compare customer experience across locations.

Geo-fenced visits

Live photo evidence

Weighted scoring

Corrective actions

Real-time dashboards

Try the mystery shopper audit in Taqtics