

FREE CUSTOMER EXPERIENCE AUDIT TEMPLATE

Mystery Shopper Audit Template

Use this 60-point template to evaluate the full customer journey across arrival, employee behaviour, product or service guidance, merchandising, service speed, cleanliness, checkout, complaint handling, evidence, and overall brand experience.

Location Visit date / time Shopper ID Scenario

1. Audit setup, visit profile, shopper brief, location, and evidence rules

- 1** Confirm the location, visit date, daypart, shopper ID, audit scenario, assigned customer journey, and any required purchase or enquiry before the visit begins.

MYSTERY SHOPPER

SHOPPER / REVIEWER

Enter

DATE / TIME

Enter

APPROVAL

Sign

● Execution tip: Use one consistent shopper scenario and evidence standard across comparable locations so scores reflect execution differences rather than different audit behaviour.

- 2** Verify the shopper understands the audit brief, scoring logic, required observations, prohibited actions, photo or receipt evidence rules, and submission deadline.

MYSTERY SHOPPER

Observation	Score	Evidence	Owner	Action
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● Execution tip: Use one consistent shopper scenario and evidence standard across comparable locations so scores reflect execution differences rather than different audit behaviour.

- 3** Record the actual arrival time, queue conditions, store traffic level, staffing visibility, weather or external factors, and any unusual circumstances that may affect the visit.

MYSTERY SHOPPER

ACTUAL TIME

Enter

TARGET

Enter

STATUS

Record

● Execution tip: Use one consistent shopper scenario and evidence standard across comparable locations so scores reflect execution differences rather than different audit behaviour.

- 4** Confirm the shopper does not reveal the audit purpose and follows the assigned scenario naturally without coaching employees or creating artificial failures.

CRITICAL

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Use one consistent shopper scenario and evidence standard across comparable locations so scores reflect execution differences rather than different audit behaviour.

- 5** Check required evidence such as receipt, order number, product image, storefront image, timestamp, or notes can be captured without disrupting normal customer interaction.

MYSTERY SHOPPER

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Use one consistent shopper scenario and evidence standard across comparable locations so scores reflect execution differences rather than different audit behaviour.

- 6** Define any critical-failure conditions for the audit, such as serious hygiene concern, discriminatory treatment, unsafe condition, refusal of required service, or major brand-standard breach.

CRITICAL

MYSTERY SHOPPER

Observation	Score	Evidence	Owner	Action
-------------	-------	----------	-------	--------

● Execution tip: Use one consistent shopper scenario and evidence standard across comparable locations so scores reflect execution differences rather than different audit behaviour.

2. Exterior, arrival, accessibility, first impression, and store readiness

- 7 Assess whether the storefront, entrance, signage, lighting, windows, parking or approach, and surrounding area create a clean and professional first impression.**

MYSTERY SHOPPER

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Capture first impressions immediately after arrival. Exterior and readiness issues are easy to forget once the service interaction begins.

- 8 Check entrance doors, access routes, ramps or customer pathways, mats, handrails, and other visible access features are usable and free from avoidable obstruction.**

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Capture first impressions immediately after arrival. Exterior and readiness issues are easy to forget once the service interaction begins.

- 9 Observe whether opening hours, promotional messages, menu boards, pricing, service notices, and key customer information are visible and current where expected.**

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Capture first impressions immediately after arrival. Exterior and readiness issues are easy to forget once the service interaction begins.

- 10 Assess the cleanliness of the entrance, windows, facade, outdoor seating, carts, baskets, bins, and other customer-facing exterior elements.**

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Capture first impressions immediately after arrival. Exterior and readiness issues are easy to forget once the service interaction begins.

- 11 Check whether the location appears operationally ready for the visit, with products, counters, service points, staff presence, lighting, music, and equipment appearing prepared.**

MYSTERY SHOPPER

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Capture first impressions immediately after arrival. Exterior and readiness issues are easy to forget once the service interaction begins.

- 12 Record any first-impression gap that would make a customer hesitate to enter, reduce confidence in the brand, or suggest the location is not ready for business.**

MYSTERY SHOPPER

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Capture first impressions immediately after arrival. Exterior and readiness issues are easy to forget once the service interaction begins.

3. Greeting, staff availability, appearance, body language, and customer acknowledgement

- 13 Record whether the shopper is acknowledged within the expected service window after entering or approaching the service point.**

MYSTERY SHOPPER

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Score observable behaviour, not personality. Focus on acknowledgement, tone, presentation, attentiveness, and customer-facing conduct you can describe objectively.

- 14 Assess whether the greeting feels natural, polite, brand-appropriate, and relevant to the customer situation rather than scripted or indifferent.**

MYSTERY SHOPPER

ACTUAL TIME

Enter

TARGET

Enter

STATUS

Record

● Execution tip: Score observable behaviour, not personality. Focus on acknowledgement, tone, presentation, attentiveness, and customer-facing conduct you can describe objectively.

- 15 Check employee appearance, grooming, uniform, name badge, hygiene, and presentation meet the brand's customer-facing standards.**

MYSTERY SHOPPER

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Score observable behaviour, not personality. Focus on acknowledgement, tone, presentation, attentiveness, and customer-facing conduct you can describe objectively.

- 16 Observe posture, eye contact, attentiveness, tone, facial expression, and whether employees appear approachable and ready to assist.**

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Score observable behaviour, not personality. Focus on acknowledgement, tone, presentation, attentiveness, and customer-facing conduct you can describe objectively.

- 17 Assess whether staff remain attentive when the location is busy and whether waiting customers receive acknowledgement or an expectation of when they will be served.**

MYSTERY SHOPPER

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Score observable behaviour, not personality. Focus on acknowledgement, tone, presentation, attentiveness, and customer-facing conduct you can describe objectively.

- 18 Record employees who ignore customers, continue personal conversations, use phones inappropriately, appear disengaged, or display behaviour that weakens customer confidence.**

MYSTERY SHOPPER

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Score observable behaviour, not personality. Focus on acknowledgement, tone, presentation, attentiveness, and customer-facing conduct you can describe objectively.

4. Needs discovery, product knowledge, recommendations, and sales or service guidance

- 19 Assess whether the employee asks useful questions to understand the shopper's need, purpose, preference, budget, urgency, size, quantity, or other relevant requirement.**

CRITICAL

MYSTERY SHOPPER

Observation	Score	Evidence	Owner	Action
-------------	-------	----------	-------	--------

- Execution tip: Ask natural questions from the assigned scenario. Product knowledge is best tested when the employee must understand a need, explain options, and make a recommendation.

- 20 Check the employee listens to the answers and uses them to guide the interaction instead of immediately pushing a generic product or service.**

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

- Execution tip: Ask natural questions from the assigned scenario. Product knowledge is best tested when the employee must understand a need, explain options, and make a recommendation.

- 21 Evaluate product, menu, service, policy, promotion, stock, feature, ingredient, specification, or category knowledge relevant to the assigned scenario.**

CRITICAL

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

- Execution tip: Ask natural questions from the assigned scenario. Product knowledge is best tested when the employee must understand a need, explain options, and make a recommendation.

- 22 Confirm recommendations are accurate, understandable, and connected to the shopper's stated need rather than relying on vague or unsupported claims.**

CRITICAL

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

- Execution tip: Ask natural questions from the assigned scenario. Product knowledge is best tested when the employee must understand a need, explain options, and make a recommendation.

- 23 Assess whether the employee offers suitable alternatives when the preferred item, option, size, service, or timing is unavailable.**

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

- Execution tip: Ask natural questions from the assigned scenario. Product knowledge is best tested when the employee must understand a need, explain options, and make a recommendation.

- 24 Record incorrect information, visible uncertainty, unnecessary handoffs, overpromising, poor recommendation logic, or missed opportunities to help the shopper decide.**

CRITICAL

MYSTERY SHOPPER

Observation	Score	Evidence	Owner	Action
-------------	-------	----------	-------	--------

- Execution tip: Ask natural questions from the assigned scenario. Product knowledge is best tested when the employee must understand a need, explain options, and make a recommendation.

5. Product availability, merchandising, display, pricing, and customer-facing standards

- 25** Check whether the product, menu item, service, or category included in the shopper scenario is available as expected at the time of visit.

MYSTERY SHOPPER

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Separate availability from merchandising quality. A product can be in stock but still create a poor customer experience because pricing, display, or presentation is wrong.

- 26** Assess shelves, displays, racks, counters, menus, promotional units, or digital screens for organization, cleanliness, completeness, and easy customer navigation.

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Separate availability from merchandising quality. A product can be in stock but still create a poor customer experience because pricing, display, or presentation is wrong.

- 27** Verify visible prices, offers, product descriptions, labels, tags, menu information, promotional claims, and point-of-sale materials are clear and internally consistent.

MYSTERY SHOPPER

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Separate availability from merchandising quality. A product can be in stock but still create a poor customer experience because pricing, display, or presentation is wrong.

- 28** Check products or customer-facing items appear undamaged, clean, correctly arranged, properly faced, suitably stocked, and free from obvious quality defects.

MYSTERY SHOPPER

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Separate availability from merchandising quality. A product can be in stock but still create a poor customer experience because pricing, display, or presentation is wrong.

- 29** Assess whether promotional or campaign execution matches the visible customer promise and whether staff understand the promoted offer when asked.

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Separate availability from merchandising quality. A product can be in stock but still create a poor customer experience because pricing, display, or presentation is wrong.

- 30** Record out-of-stock conditions, missing prices, incorrect signage, clutter, damaged displays, poor facing, expired promotions, or other gaps that reduce purchase confidence.

MYSTERY SHOPPER

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Separate availability from merchandising quality. A product can be in stock but still create a poor customer experience because pricing, display, or presentation is wrong.

6. Service execution, process accuracy, speed, order handling, and handoffs

- 31 Observe whether the employee follows the expected service or sales process from enquiry through selection, order, preparation, checkout, handoff, or completion.**

CRITICAL

MYSTERY SHOPPER

ACTUAL TIME

Enter

TARGET

Enter

STATUS

Record

● Execution tip: Time key service stages discreetly where required. Record the actual delay and its customer impact instead of describing service only as fast or slow.

- 32 Measure or estimate waiting time, service time, preparation time, or queue movement where the audit brief requires a timing check.**

CRITICAL

MYSTERY SHOPPER

ACTUAL TIME

Enter

TARGET

Enter

STATUS

Record

● Execution tip: Time key service stages discreetly where required. Record the actual delay and its customer impact instead of describing service only as fast or slow.

- 33 Check the order, request, customization, quantity, product, service detail, customer name, or other instruction is captured accurately the first time.**

CRITICAL

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Time key service stages discreetly where required. Record the actual delay and its customer impact instead of describing service only as fast or slow.

- 34 Assess whether handoffs between employees, departments, counters, or service stages are smooth and whether the shopper needs to repeat information unnecessarily.**

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Time key service stages discreetly where required. Record the actual delay and its customer impact instead of describing service only as fast or slow.

- 35 Verify employees explain delays, unavailable options, additional steps, or service limitations clearly and set realistic customer expectations.**

CRITICAL

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Time key service stages discreetly where required. Record the actual delay and its customer impact instead of describing service only as fast or slow.

- 36 Record missed steps, repeated corrections, avoidable waiting, order errors, poor coordination, unclear ownership, or process breakdowns that affect the customer experience.**

CRITICAL

MYSTERY SHOPPER

Observation

Score

Evidence

Owner

Action

● Execution tip: Time key service stages discreetly where required. Record the actual delay and its customer impact instead of describing service only as fast or slow.

7. Cleanliness, hygiene, comfort, facilities, ambience, and customer environment

- 37 Assess customer-facing floors, counters, tables, shelves, fixtures, displays, seating, mirrors, doors, touchpoints, and visible work areas for cleanliness and condition.**

MYSTERY SHOPPER

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Judge cleanliness and ambience from a customer's normal line of sight. Prioritize visible conditions that affect comfort, trust, or willingness to stay.

- 38 Check restrooms or customer wash areas where included in the scenario for cleanliness, odour, supplies, fixtures, bins, handwashing provision, and general upkeep.**

MYSTERY SHOPPER

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Judge cleanliness and ambience from a customer's normal line of sight. Prioritize visible conditions that affect comfort, trust, or willingness to stay.

- 39 Observe temperature, lighting, music, noise, odour, ventilation, crowding, seating comfort, and overall ambience from a normal customer perspective.**

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Judge cleanliness and ambience from a customer's normal line of sight. Prioritize visible conditions that affect comfort, trust, or willingness to stay.

- 40 Check waste bins, cleaning tools, cartons, stock, delivery materials, maintenance equipment, or staff belongings are not creating visible clutter in customer areas.**

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Judge cleanliness and ambience from a customer's normal line of sight. Prioritize visible conditions that affect comfort, trust, or willingness to stay.

- 41 Assess visible food, beverage, sampling, preparation, service, or hygiene practices from the customer's viewpoint where relevant to the location type.**

MYSTERY SHOPPER

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Judge cleanliness and ambience from a customer's normal line of sight. Prioritize visible conditions that affect comfort, trust, or willingness to stay.

- 42 Record cleanliness, hygiene, maintenance, odour, comfort, or ambience problems that would materially lower customer trust or willingness to stay and purchase.**

MYSTERY SHOPPER

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Judge cleanliness and ambience from a customer's normal line of sight. Prioritize visible conditions that affect comfort, trust, or willingness to stay.

8. Checkout, billing, payment, loyalty, receipt, and transaction close

43 Assess whether the checkout or payment process is clear, efficient, professional, and free from avoidable delay.

MYSTERY SHOPPER

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Keep the checkout check factual. Record what was charged, what was offered, and how the transaction closed rather than guessing internal process compliance.

44 Verify the correct item, service, quantity, price, discount, promotion, tax, fee, or other charge appears on the transaction where the shopper can reasonably verify it.

MYSTERY SHOPPER

CRITICAL

ACTUAL TIME

Enter

TARGET

Enter

STATUS

Record

● Execution tip: Keep the checkout check factual. Record what was charged, what was offered, and how the transaction closed rather than guessing internal process compliance.

45 Check the employee explains loyalty, membership, warranty, return, delivery, add-on, or other relevant customer information when required by the scenario or brand standard.

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Keep the checkout check factual. Record what was charged, what was offered, and how the transaction closed rather than guessing internal process compliance.

46 Observe whether cash, card, digital payment, voucher, refund, or other transaction handling appears accurate and professional from the customer's perspective.

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Keep the checkout check factual. Record what was charged, what was offered, and how the transaction closed rather than guessing internal process compliance.

47 Confirm the shopper receives the expected receipt, invoice, order confirmation, token, collection reference, packaging, or other proof of transaction.

MYSTERY SHOPPER

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Keep the checkout check factual. Record what was charged, what was offered, and how the transaction closed rather than guessing internal process compliance.

48 Assess whether the interaction closes positively with thanks, confirmation of next steps, invitation to return, or another brand-appropriate closing rather than ending abruptly.

MYSTERY SHOPPER

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Keep the checkout check factual. Record what was charged, what was offered, and how the transaction closed rather than guessing internal process compliance.

9. Problem handling, complaint response, service recovery, escalation, and ownership

- 49** Use the assigned scenario, if applicable, to assess whether the employee listens fully before responding to a complaint, concern, return, delay, defect, or service problem.

MYSTERY SHOPPER

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: When testing service recovery, follow the approved scenario and avoid provoking conflict. The goal is to observe how the team handles a realistic customer problem.

- 50** Check the employee remains calm, respectful, and professional and avoids blaming the customer, colleague, supplier, system, or policy unnecessarily.

MYSTERY SHOPPER

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: When testing service recovery, follow the approved scenario and avoid provoking conflict. The goal is to observe how the team handles a realistic customer problem.

- 51** Assess whether the employee explains available options, policy, next steps, or limitations clearly and offers a practical resolution within their authority.

MYSTERY SHOPPER

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: When testing service recovery, follow the approved scenario and avoid provoking conflict. The goal is to observe how the team handles a realistic customer problem.

- 52** Verify escalation to a supervisor or another owner is timely when the issue cannot be resolved at frontline level and the shopper does not need to restart the explanation.

MYSTERY SHOPPER

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: When testing service recovery, follow the approved scenario and avoid provoking conflict. The goal is to observe how the team handles a realistic customer problem.

- 53** Assess whether service recovery restores customer confidence through ownership, apology where appropriate, clear action, realistic timing, and follow-through.

MYSTERY SHOPPER

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: When testing service recovery, follow the approved scenario and avoid provoking conflict. The goal is to observe how the team handles a realistic customer problem.

- 54** Record dismissive behaviour, policy confusion, repeated handoffs, refusal to own the issue, inconsistent explanations, poor escalation, or unresolved customer frustration.

MYSTERY SHOPPER

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: When testing service recovery, follow the approved scenario and avoid provoking conflict. The goal is to observe how the team handles a realistic customer problem.

10. Overall experience, brand consistency, scoring, evidence, findings, and final submission

- 55 Rate the overall customer experience based on the full visit rather than allowing one isolated positive or negative moment to dominate the score.**

CRITICAL

MYSTERY SHOPPER

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Write findings so a manager can act on them without speaking to the shopper. Specific evidence makes the audit useful for coaching and corrective action.

- 56 Assess whether the location delivered the intended brand promise consistently across environment, employee behaviour, product or service execution, and transaction close.**

CRITICAL

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Write findings so a manager can act on them without speaking to the shopper. Specific evidence makes the audit useful for coaching and corrective action.

- 57 Record the strongest positive observation and the most important improvement opportunity with specific evidence rather than vague impressions.**

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Write findings so a manager can act on them without speaking to the shopper. Specific evidence makes the audit useful for coaching and corrective action.

- 58 Confirm every failed or low-scoring check includes enough detail for a location manager to understand what happened, where it happened, and why it affected the customer experience.**

CRITICAL

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Write findings so a manager can act on them without speaking to the shopper. Specific evidence makes the audit useful for coaching and corrective action.

- 59 Verify required receipts, photos, timestamps, notes, employee or service-point references, timing data, and other evidence are attached before submission.**

CRITICAL

MYSTERY SHOPPER

Excellent

Partial

Failed

N/A

● Execution tip: Write findings so a manager can act on them without speaking to the shopper. Specific evidence makes the audit useful for coaching and corrective action.

- 60 Record the final audit score, critical failures, recommended corrective actions, shopper comments, visit completion time, reviewer status, and final submission or approval.**

CRITICAL

MYSTERY SHOPPER

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Write findings so a manager can act on them without speaking to the shopper. Specific evidence makes the audit useful for coaching and corrective action.

RUN THIS AUDIT DIGITALLY

Turn shopper feedback into measurable customer-experience improvement

Use Taqtics to schedule mystery visits, capture evidence, compare location scores, assign corrective actions, verify improvement, and identify recurring customer-experience gaps across every store.