

# Mystery Shopper Visit

A mystery shopping visit record capturing the agreed scenario, service timings, factual observations, purchase evidence and client review actions.

## 1. Record details and scope

### Project

Filled in from the project in SiteSurvey.

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**Site or premises address**

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**Client or organisation**

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**Record date \***

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**Person completing the record \***

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This records an authorised service evaluation. It does not authorise covert audio or video, entrapment, employee surveillance or collection of unnecessary personal details.

MRS guidance emphasises objective research, avoiding harm and respecting privacy. Its Code obligations apply to MRS members and Company Partners; the guidance is not a blanket legal permission for covert recording or collecting personal information.

## 2. Visit brief

**Client brief and authorisation reference \***

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**Branch or service location \***

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**Visit date \***

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**Arrival and departure times**

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**Agreed enquiry or purchase scenario \***

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**Shopper reference**

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### 3. Observed service

**Service observation** (copy this block for each one)

**Stage \*** (choose one)

- ☐ Arrival
- ☐ Enquiry
- ☐ Product or service explanation
- ☐ Purchase
- ☐ Departure
- ☐ Other

**Requirement in the client brief \***

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**What was observed, with time where relevant \***

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**Result \*** (choose one)

- ☐ Met   ☐ Not met   ☐ Not observed

**Context or limitation**

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### 4. Evidence and report

**Transaction or receipt reference without payment card details**

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**Factual summary and limitations \***

Separate observed facts from interpretation. Refer to the brief and specific observations when explaining the result.

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**Personal details removed or restricted before sharing**

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**Client review contact**

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## 5. Actions and review

**Are further actions required? \*** (choose one)

☐ Yes ☐ No

**Further action** (copy this block for each one; if applicable)

**Action and evidence reference \***

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**Person responsible \***

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**Target date**

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**Action status \*** (choose one)

☐ Open ☐ In progress ☐ Completed

**Completion evidence \*** (if applicable)

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**Outstanding limitations and information to pass on**

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**Record status \*** (choose one)

☐ Ready for review ☐ Further work needed ☐ Work or use stopped

**Reviewed by**

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**Review date**

**Author signature \***

Signing records the information entered. It does not itself certify legal compliance, remove a limitation or authorise unsafe work.