

Mystery Shopping Evaluation Checklist

Comprehensive assessment template for in-store and service evaluations

Visit Information

Location: _____ Date: _____
Evaluator: _____ Time In: _____
Visit Type: _____ Time Out: _____

Section 1: First Impressions & Store Environment

	Evaluation Criteria	Rating (1-5)	Notes
	Exterior signage visible and well-maintained		
	Entrance clean and inviting		
	Store layout easy to navigate		
	Lighting appropriate and adequate		
	Background music at suitable volume		
	Temperature comfortable		
	Displays organized and well-stocked		
	Promotional materials current and undamaged		

Section 2: Staff Greeting & Interaction

	Evaluation Criteria	Rating (1-5)	Notes
	Greeted within 30 seconds of entry		
	Staff smile and make eye contact		
	Name badge visible and correct		
	Professional appearance (uniform/grooming)		

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	Evaluation Criteria	Rating (1-5)	Notes
	Proactive engagement without being pushy		
	Knowledge of products/services demonstrated		
	Active listening during conversation		
	Personalized recommendations offered		

Section 3: Service Quality & Process

	Evaluation Criteria	Rating (1-5)	Notes
	Wait time acceptable (under stated SLA)		
	Accurate information provided		
	Cross-selling/upselling attempted appropriately		
	Process explained clearly step by step		
	Privacy and confidentiality maintained		
	Complaints handled professionally		
	Follow-up actions communicated clearly		

Section 4: Checkout & Closing Experience

	Evaluation Criteria	Rating (1-5)	Notes
	Transaction processed efficiently		
	Receipt provided with all details		
	Loyalty program or feedback survey mentioned		
	Thanked for visit / farewell greeting given		
	Exit area clean and organized		

Overall Assessment

Overall Score (out of 100):	
Key Strengths:	
Areas for Improvement:	

