

Evaluating All Steps of the Buyer or Renter Journey

The Ultimate Guide to Real Estate Mystery Shopping

Real estate professionals face increasing challenges. Finding, managing, and retaining tenants is certainly challenging for property owners and managers. Real estate agents and developers feel the impact of high interest rates, inflation, and complex regulations. These pressures demand real-time insights into the customer experience.

Mystery shopping has become an invaluable tool in the real estate industry.



With mystery shopping, property management companies, real estate developers, homebuilders, real estate agents and short-term rental companies collect data and feedback on the interactions that directly influence renter and buyer decisions.

Mystery shopping provides valuable insights into how effectively teams engage potential clients, while additionally highlighting areas that may need improvement.

Renting a new apartment or purchasing a new home is a significant decision that involves multiple steps. In this document, we will explore the phases of a real estate mystery shop and break down how each step can be evaluated to ensure the highest level of service.

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The 4 Phases of a Real Estate Mystery Shop

Phase #1: Property Research

The first phase of a real estate mystery shop focuses on the online research experience. Prospective tenants or buyers often begin their journey by exploring the property's website. Mystery shoppers can evaluate the ease of navigation, clarity of information, and overall website functionality.

Key elements include how quickly visitors can find floor plans, how photos that showcase the property are perceived by prospective clients, and how accessible essential details, such as pricing and amenities, truly are. Mystery shopping offers valuable insights into what influences potential tenants or buyers to move to the next stage of their decision-making process—or abandon.

Phase #2: Initial Contact

The second phase of a real estate mystery shop focuses on the initial contact with a property representative. This may occur through various channels: phone, email, website form, response to an ad, or third-party listing site. In some cases, the mystery shopper may skip this step altogether and conduct a walk-in evaluation.

Mystery shoppers can assess many key elements during the initial contact:

- Responding promptly and professionally
- Offering an in-person tour
- Communicating property benefits and amenities ahead of the visit
- Asking qualifying questions to assess fit to the community
- Sending reminders or follow-up communications to keep the prospective client engaged

Once the appointment is made and key information has been shared, the mystery shopper will report on their experience. This feedback provides insights into what aspects of the first interaction were successful and highlights areas for improvement.

Understanding these early impressions can help real estate professionals fine-tune their approach to ensure potential clients remain engaged and eager to proceed to the next phase.

Phase #3: In-Person or Virtual Tour

The in-person or virtual tour is a pivotal moment in the real estate mystery shop, providing a direct evaluation of how the property is presented to potential tenants or buyers. Whether the tour is conducted on-site or virtually, mystery shoppers assess how well the representative guides the tour, highlights key amenities, and tailors the experience to the client's specific needs.

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During this phase, mystery shoppers can test the representative's knowledge of the property and community and observe whether the representative emphasizes features that align with the client's lifestyle and needs. Mystery shoppers can also assess how the unit is presented to appeal to prospective tenants or buyers and evaluate the condition of building amenities, such as gyms or common areas.

During an in-person tour, the mystery shopper will observe the building's curb appeal, including landscaping and exterior maintenance. During a virtual tour, the mystery shopper will assess how effectively technology is used to showcase the property, ensuring the experience remains engaging despite the remote setting.

Ultimately, the tour leads to the next step: closing the deal. Mystery shoppers can evaluate how the representative transitions from showcasing the property to asking for a commitment. Mystery shoppers assess whether the representative discusses current promotions, schedules a follow-up appointment, or creates a sense of urgency. This allows real estate businesses to understand how the representative encourages clients to act and move forward in the decision-making process.

Phase #4: Follow-Up

The final phase of a real estate mystery shop focuses on the follow-up, where mystery shoppers assess whether the representative follows up after the tour and how it is handled. Key aspects evaluated include the timeliness, professionalism, and content of the follow-up communication. Was the follow-up done promptly? Did it maintain a high level of professionalism?

Plus, real estate companies can compare the actual follow-up received by the mystery shoppers to what is recorded in their CRM, ensuring that internal processes align with client experiences.

Using Mystery Shopping to Prevent Discrimination

Mystery shopping can be a powerful tool in ensuring that no discrimination occurs during the leasing or purchasing process. By using mystery shoppers from visible minority groups or those with visible disabilities, companies can evaluate how their representatives interact with diverse prospective clients. This approach helps identify whether any biases or discriminatory practices are affecting the customer experience.

By monitoring these interactions and collecting mystery shopper feedback, companies can ensure that all clients are treated with fairness, professionalism, and respect. This will help uphold ethical standards and compliance with anti-discrimination laws.

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Choosing the Right Mystery Shopping Partner

Premier Service understands the unique metrics you will want to measure whether you are a property management company, a real estate developer, a home builder, a real estate agent, or a short-term rental company.

We have developed mystery shopping programs that cover all phases of the real estate mystery shop, encompassing the most crucial steps of the customer's journey.

Here is what we recommend considering when choosing your mystery shopping partner:

Real Estate Industry Experience

Look for a provider with a proven track record in the real estate industry. Your mystery shopping provider must be familiar with the complexities of property sales and leasing. They will be able to tailor your mystery shopping programs to address your specific needs and objectives while guiding you with their expertise in the industry.

The Right Technology for Your Program

Having the right technology is essential to streamline the complexity of real estate mystery shopping. When your provider has the right tools and software for your program, they can ensure seamless coordination, even with the four stages of the mystery shop to manage. Plus, the right technology will enable you to quickly access detailed reports, with actionable recommendations.

Trained & Credible Mystery Shoppers

For real estate mystery shopping, it is important that mystery shoppers are specifically trained to understand the industry and their role during an interaction with a professional. Selecting the right mystery shopper for the property is essential to avoid raising suspicion. A shopper assessing a multi-million-dollar condo should fit the expected buyer profile, just as one shopping for a smaller rental should match that community's typical tenant, ensuring authenticity throughout the process.

Mystery shopping can help you understand your potential renter or buyer's real experience. Let's discuss this so you can gain new insights.



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