

Mystery Client Evaluation Form for Veterinary Practices

Name of veterinary practice: _____ Date of visit: _____ Time: _____

| Points Evaluated | | | | | |
|--|-----------|------------|---------|------------|-----------|
| General (outside) | | | | | |
| Landscaping (the parking lot is clean, the lawn is cut, the entrance is cleared or cleared of snow in winter, etc.). | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| The sign outside is clean and clearly visible. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| The windows are clean. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| The business hours are clearly posted. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| General (reception area and consultation room) | | | | | |
| The room temperature is acceptable (not too cold or hot). | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| The lighting is adequate (no burned out bulbs, dark corners, or bright/aggressive lighting). | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| The floor and/or carpets are clean. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Posters and brochures are not worn out or faded. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| There are not too many posters or brochures. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| The ambient odour is pleasant. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| The restrooms are clean. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Punctuality: the consultation took place at the scheduled time. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Total: | | | | | |
| Customer Service | | | | | |
| The client is greeted in a timely manner. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Employees wear uniforms. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Employees wear name tags. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Employees are professional and polite at all times. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |

| | | | | | |
|---|-----------|------------|---------|------------|-----------|
| Once out of the consultation room, client is guided through the retail space (and not left to their own devices). | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| The invoice is explained to the client. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Total: | | | | | |

| Retail Space | | | | | |
|--|-----------|------------|---------|------------|-----------|
| The shelves are well stocked (no bare spaces). | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Products are organized so they are easy to find (by brand, cats/dogs, life stage, or pathology). | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| All products are within easy reach for clients (e.g., not behind the counter). | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Posters and visuals are appropriate; wayfinding signage is clear and easy to follow. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Each product price is clearly marked. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Themes and promotions are showcased visually. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| The employees know the products and can easily answer questions. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| The employee makes clear and relevant recommendations for the animal's needs. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Total: | | | | | |

| Marketing | | | | | |
|--|-----------|------------|---------|------------|-----------|
| The employee asks the client for his or her e-mail address in order to update the practice's database. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| The employees mention the online boutique (when applicable). | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| The practice has a Facebook page and adds content regularly. | Comments: | To improve | Average | Satisfying | Excellent |
| | | 1 | 2 | 3 | 4 |
| Total: | | | | | |

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Result

General - Exterior, reception area and consultation rooms

| Score | Analysis and possible solutions |
|----------|---|
| 1 to 15 | Oops! Time to take action—and take a look at your facility through the eyes of your clients. Does their experience correspond to the image you want your practice to have? Take a look at each low-score area to quickly address any issues and make sure you are providing a welcoming and pleasant environment for your clients... and your patients. Remember: you never get a second chance to make a good first impression! |
| 16 to 35 | You are on the right track! You could make adjustments in certain areas to reflect a professional image that inspires confidence. Look at the low-score areas for concrete examples of places to improve. Keep up the good work! |
| 36 to 48 | Congratulations! Your facility is clean, welcoming and professional... and your clients certainly notice! To keep your premises spotless, consider creating an indoor and outdoor maintenance checklist to be reviewed monthly or quarterly. |

Customer service

| | |
|----------|--|
| 1 to 10 | If the total score in this section is 10 points or less, it is important to act quickly to protect your reputation and ensure that you keep your clients over the long term. Have your employees been given training for their positions? Have you communicated your expectations to them? Are their duties clearly defined? Have you implemented a customer service protocol that explicitly states how you want your employees to greet clients? We invite you to read more about setting up a motivating performance management program . |
| 11 to 20 | Not bad, but there is always room for improvement! In addition to implementing a performance management program to ensure that you keep your employees motivated, you might consider surveying your clientele—at the clinic, by email or on social media—about their expectations. What improvements would they like to see at your practice? What are its strengths, and what could be improved? The information collected will allow you to identify actions to take or services to develop. |
| 21 to 24 | Customer service is your strong point! Congratulations. To stay on track, why not make this mystery shopper exercise a regular event? A visit every three or six months can help you continue to provide top notch client service. |

Retail area

| | |
|----------|---|
| 1 to 15 | A retail area integrated with a veterinary facility is a sure way to turn your recommendations into reality. This space does, however, require a designated person in charge, as well as daily attention, to remain efficient and to contribute to increased revenue for the practice. See our practical and easy-to-use tips on how to enhance your retail space! |
| 16 to 24 | You are on the right track; however, some elements of your retail area could be made more effective. We invite you to consult our Illustrated Guide to Merchandising Best Practices to see a list of things to improve, which will encourage your clients to follow recommendations. Another important point to check on is whether you have appointed a designated person to manage this sales area. Has this person been properly trained? What tasks should this person perform and how often? Find the answers to all these questions right here! |
| 25 to 32 | You know your way around retail! When your clients leave the consulting room, they are in good hands. You have a winning formula and a well-trained team to support your clients and make recommendations that result in concrete actions to promote animal health and well-being. |

Marketing

| | |
|---------|---|
| 1 to 4 | There are many concrete steps you can take to broaden the reach of your veterinary practice. Among the most effective: increase online visibility , a presence on social media , and integration of an online boutique that provides maximum convenience for your clients. Get started on a great marketing adventure that will strengthen your client relationships and—who knows—generate new ones! |
| 5 to 8 | Congratulations on actively managing your online presence! It's time to take it to the next level. Make sure you collect or update email addresses for all your clients and actively promote your online boutique at the clinic... and on social media as well! |
| 9 to 12 | Online sales and digital marketing hold no secrets for you: you understand that the key to success is the synergy of your actions at the practice and online. Whether your clients come to meet you, visit your Facebook page or buy through your online boutique, they enjoy a friendly, seamless experience that keeps them coming back! |