

# You Squared Secret Shopper Training Guide

<http://yousquaredmedia.com/secret-shopper-program/>

© 2016 by You Squared Media, Inc. All rights reserved. No part of this workbook may be reproduced or transmitted in any form or by any means, electronic or mechanical, without permission.

You Squared Secret Shopper | 7026 Old Katy Rd. #350 | Houston, TX 77024 | 713.880.3387 |  
[kg@yousquaredmedia.com](mailto:kg@yousquaredmedia.com)

# Table of Contents

Overview	3
Letter from the Director	4
What is an Independent Contractor?	5
Contract Labor Agreement	5
IRS Rules	5
You are a Small Business Owner	5, 6
Tax Questions	6
Secret Shopper Code of Ethics	7
Rules of Ethical Conduct	7
Confidentiality	7, 8
Be a Professional Secret Shopper	8
Time Management	8
Communication	8
Planning	9
Getting more Assignments	9
Tips for the Shop	10
Keep it a Secret!	10
Follow the Guidelines	10
Information Gathering	10,11
Reporting and Record Keeping	11
Filling Out Your Report	11
Report Comments	11,12
Record Keeping	12
Getting Paid	12
Pay Schedule	12
Checks	13
Contract Signature	13

# Secret Shopper Program Overview

## Introduction:

Welcome to You Squared Media, Inc. Secret Shopper Training. We are pleased that you are interested in contracting with us to perform secret shops for our clients.

The purpose of this training manual is to acquaint you with You Squared Media, Inc.'s (Y2M) Secret Shopper Program and procedures. It will provide you with the information you will need to perform your shops, and to properly complete your reports.

When you applied to work as a Secret Shopper, you agreed to the Contract Labor Agreement, and your work will be as an Independent Contractor. The manual does not constitute a contract of employment. You or Y2M may terminate your shopper assignments at any time, with or without notice.

All information regarding the program including the online survey can be found at:

<http://yousquaredmedia.com/secret-shopper/>

and or

<http://www.facebook.com/yousquaredsecretshopperprogram>

## Letter from the Director:

Dear Secret Shopper,

It is my pleasure to welcome you to our Program. I hope you will find this manual to be helpful to you in learning about our policies and procedures.

Secret Shopping is a fun way to supplement your income while making a difference in the service levels of the industries we shop. But please always remember that you represent the You Squared Media, Inc. Secret Shopper Program, and the mystery shopping industry. Your passion and professionalism in completing your shop assignments will be rewarded by the award of more and more shopping assignments.

Our goal is to provide all of our clients with exceptional customer service. They contract us to help improve their operation and increase their net profits. We need your help to achieve these goals.

Please contact me directly if you ever have any questions about an assignment. My contact information is below.

Best wishes and have a great time!

Kristen Guzman  
Secret Shopper Program Coordinator  
You Squared Media, Inc.  
[KG@yousquaredmedia.com](mailto:KG@yousquaredmedia.com)  
361-774-9331

## What is an Independent Contractor?

### **Contract Labor Agreement**

When you agreed to work as a secret shopper for Y2M you agreed to a Contract Labor Agreement indicating your status as an independent contractor (IC). This is a legal agreement, and you should read and understand it prior to agreeing to its provisions.

### **IRS Rules**

The IRS has several rules for determining if someone should be considered an employee or an independent contractor, including:

- Does the possibility exist for the coworker to earn a profit or suffer a loss?
- Is the worker responsible for investing in materials or equipment required to do the work?
- Does the worker perform the work for more than one company at a time?
- Does the worker offer his or her services to the public?
- Is the agreement between the parties in writing?

---

Additionally, the IRS requires employers to withhold income taxes, withhold and pay Social Security and Medicare taxes, and pay unemployment tax on wages paid to an employee.

An employer does not generally withhold or pay any taxes on payments to independent contractors.

### **You Are A Small Business Owner**

When you are an Independent Contractor, you are in business for yourself. You are responsible for running your business and making it profitable. You will have the opportunity to accept your assignments based on which shops will be worthwhile and profitable to you. An example might be that you would not want to drive a long way to complete a shop, spending more in gas than you will make in fees.

## What is an Independent Contractor?, *Continued...*

### **You Are A Small Business Owner** *(continued)*

As a business person, you will want to demonstrate organization and professionalism by:

- Having a dedicated place to work.
  - Keeping good records of your income and expenses. There are some great financial programs available that can help you do this(Ex. Quicken or Quickbooks) or you can use Excel.
  - Be professional in all communications, written or oral.
  - Confirm all assignments promptly.
  - Complete all shopping assignments and reports by the deadlines.
- 

### **Tax Questions**

Y2M will issue you a 1099 form (similar to a W-2, but for IC) if you are paid \$600 or more in a year. We are required to do this by the IRS.

Even if you do not receive a 1099 form, you are still responsible for income and self-employment taxes on ALL of your secret shopping income. This does not usually include money you were paid as reimbursement for your shop expenses.

You will also get to deduct many expenses on your taxes, including your mileage or car expenses, postage, or fax fees, and possibly expenses for a home office, training courses, your cell phone, or computer equipment. You should consult your tax preparer for specific advice on your taxable income and eligible deductions

If you have a lot of self employment income, you may be required to file quarterly estimated tax payments to the IRS. You can be penalized for not making these payments, even if you pay all of the tax due when you file your April 15<sup>th</sup> tax return. You should consult your tax preparer about whether you will need to make quarterly tax payments.

# Secret Shopper Code of Ethics

## Rules of Ethical Conduct

- By accepting shopping assignments from Y2M, I agree to:
- \* Conduct all secret shops in an honest and ethical manner.
    - Perform all shops to the best of my ability.
    - Keep information about shopping fees for all clients confidential.
    - Contact Y2M immediately if I cannot fulfill an assignment.
    - Submit all reports and receipts within 48 hours of a shop.
    - Keep a copy of my report and my receipt on file for 60 days in case Y2M or a client has a question.
    - Return Y2M calls or emails as soon as possible.
    - Not falsify shop information on my reports.
    - Keep my assignments and the results of shops confidential.
    - Never post comments, reports, or commentary regarding a client to any social media, website or blog, including, but not limited to Facebook, Twitter, My Space, or Four Square.
    - Not perform any shops unless I have thoroughly read and understood the survey and the guidelines for the assignment.
    - Not contact the client directly without the approval of Y2M.
    - Not perform any shops under the influence of drugs or alcohol, including prescription drugs, which might impair my ability. I will not drink alcohol beyond the legal limits or become inebriated while secret shopping.
    - Not accept shopping assignments at any business location that I work for, or that my friends or family work for.
    - Keep my status as a secret shopper a secret, and not announce myself as a secret shopper to the business being shopped.
    - Not disrupt the operation of a business that I shop.
- 

## Confidentiality

As a Y2M Secret Shopper you will have access to information that is proprietary and confidential to the clients that you will evaluate. This includes information regarding their policies, training programs, and business practices and any report data. Additionally, you will use Y2M proprietary report forms, client data, and shop schedules.

**Confidentiality** Sharing this information with others could harm Y2M or our clients, and would be a direct violation of your Contract Labor Agreement and Rules of Ethical Conduct  
*(Continued...)*

---

## Be a Professional Secret Shopper

**Time Management** When you accept a secret shopping assignment, you are agreeing to complete it before the deadline, or within an allotted time window. This is a time commitment, and should be kept just like you keep your regular work schedule or an appointment with your doctor.

As an IC, you may be juggling assignments from many different shopping agencies. These assignments will have many different requirements and due dates. Missing an assignment or a deadline will damage your professional reputation and your small business. It is important to use a calendar or a scheduling program on your computer or smart phone.

Record your assignments on your calendar as soon as you receive them. Include any special notes regarding the shop that you will need to remember, and the report deadline.

If you have a time range in which to complete the shop, do it as soon as possible in the allowable window. This frees you up to accept additional assignments, and shows Y2M you can be trusted to meet our client's deadlines.

---

**Communication** Develop a routine schedule of checking your email and phone messages. Return calls and emails promptly so that Y2M can offer you as many shops as possible.



## **Be a Professional Secret Shopper, *Continued***

### **Planning**

Use Mapquest or your GPS when deciding which shop assignments to accept and to map out the most efficient route – especially when accepting several shops in one day.

Frequently your shop assignments will include dining establishments where you will be required to order a complete meal. Plan these shops around your regular meal times, and so you will not have to eat yourself sick by accepting more assignments in one day than you can reasonably accomplish.

---

### **Getting more Assignments**

We will always offer more assignments to secret shoppers who do a great job for us. Here are some things we appreciate:

- Complete your shops and reports on time. The earlier the better.
- Submit fully completed reports.
- Use spell check.
- Accept or decline assignments as soon as possible.
- If we call you with questions, respond immediately. Remember, we are on a short deadline.
- Always ask if you don't understand something about an assignment.
- Call immediately if there is a problem and you can't complete an assignment.
- Admit mistakes immediately, and do your best to correct them.
- Operate with integrity and submit honest reports.
- Be willing to cover a broader area of town.
- Be dependable.

## Tips for the Shop

**Keep it a Secret!** It's called secret shopping for a reason. Please:

- Look and behave like a customer.
  - Don't take notes in an obvious way. Use your cell phone and send yourself text messages, or type note into your smart phone.
  - Let the staff where you are shopping explain things to you. Don't appear too knowledgeable.
  - Use your regular spending patterns. Don't be a big spender.
  - If you invite your friends or family along on the shop, instruct them on behaving normally so they will not reveal that you are a secret shopper.
  - Do not discuss secret shopping while on a secret shop.
- 

### Follow the Guidelines

Each shopping assignment is developed to meet the requirements our Y2M clients. You will be given written guidelines specific to each assignment. Follow the guidelines exactly or you jeopardize your report being accepted. If your secret shop report is rejected by the client, you will not be reimbursed for the shop, and you will not be paid the shop fee.

The shop guidelines are dictated by our clients. Thoroughly read the guidelines and make sure you understand them. Be sure and ask any questions that you have.

---

### Information Gathering

Here are some creative ways to record information while on a shop:

- Use the notepad on your cell phone or smart phone.
- The survey can be filled out via your electronic device.
- Call your home phone and leave yourself a message.
- Send yourself a text message.
- Ask your friend or family member along, and have them focus on a part of the shop for you.

## Tips for the Shop, *Continued*

### Information Gathering

- Leave yourself a voice mail with things you don't want to forget, such as time guidelines, and retrieve it while you are on the shop.
  - If an employee introduces them self to you by name, repeat their name back to them. Example, "Thank you, Kathy."
- 

### Reporting and Record Keeping

#### Filling Out Your Report

As soon as you exit the shopping location and return to your car, take a minute to record important things that you do not want to forget. Then, write your report and or fill out the survey online as soon as possible while the details are fresh in your mind. Generally you will be allowed 48 hours to submit your report, but you should set a shorter goal, such as 24 hours. Our clients expect to see the reports immediately so that they can take quick action on any conditions that need correction. Also don't forget to attached a PDF of your receipt online and or fax it directly to the director.

---

#### Report Comments

Follow these guidelines when completing your report:

- Be objective, specific, thorough, and accurate.
- State facts, not suggestions.
- Balance your report with positive comments and opportunities for improvement.
- Don't simply answer questions with a Yes or No. Add details that clarify and enhance your answer.
- Complete your report professionally, using complete sentences, good grammar, correct spelling, and punctuation.
- Proofread your report for error.
- Do not include personal opinions.
- Criticize the issue, behavior or action, and not the person.

## Reporting and Record Keeping, *Continued*

### Report Comments

- Don't exaggerate.
  - Don't speculate or make excuses.
  - Do not let a bad experience in one area affect the entire report.
  - Do not use language or descriptions that might be offensive or discriminatory.
  - DON'T USE ALL CAPS.
  - do not use all lowercase letters.
  - You should not rpt in txt shrthnd 2 us :)
- 

**Record Keeping** Keep all of your paperwork from a secret shop for 60 days. File everything immediately after you have submitted your report. Have a filing system that will make it easy to pull your notes or a receipt if necessary.

---

## Getting Paid

**Pay Schedule** Checks are issued upon approval and acceptance of the monthly batch of shops by our client. This is usually by the 30<sup>th</sup> of the following month of the month you shopped. You will receive a stub which explains the amount paid as fees and the amount paid as a reimbursement.

Payment is: \$10.00 per shop & reimbursement varies pending on the shop agreement. See specific shop guidelines. A receipt must always be provided in order to be reimburse.

Because of our check cutting schedule, it is possible it may take up to forty five days for you to receive your check. Please know that we want to pay you as quickly as possible and we try to issue checks sooner. We understand that quick reimbursement will help you complete more shops for us. We appreciate your patience with this process.

## Getting Paid, *Continued*

**Checks**                      Payment will be made by check only and made payable to the assigned shopper. All checks will be mailed to the address you have supplied Y2M.

Questions regarding payment checks should be emailed to [Accounting@yousquaredmedia.com](mailto:Accounting@yousquaredmedia.com). No phone calls will be accepted.

*Don't forget to read the restaurant specific guidelines.*

*You are now ready to enroll and acknowledge you've read and agree to both the training manual and restaurant guidelines.*