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Use of Mystery Shopping in Competence Measurement and Human Development: Results of an Empirical Research in Hungary

***Abstract.** The aim of research is to investigate the methods and possibilities of mystery shopping conducted in the interest of competence measurement. The article focuses on the problems of measurability and on the possibilities of monitoring conducted within the frame of mystery shopping. During research we observed behavioural mosaics and determined certain levels that make the measurement possible and by the use of these levels we conducted comparisons. Control the reliability, validity and consistency of the developed evaluation system by mathematical-statistical procedures also included.*

***Keywords:** competency, measurement, observation, mystery shopping*

Introduction

Organization development consultants mostly agree that, after the era of engineers the era of economists followed and by today the period of behavioural science has arrived. Of course this does not mean that, acquired and applied knowledge from before has lost its validity. The fact is that, engineering and economical approaches have become widely known by today and people have increasingly started implementing these into organisational-management practices so that further developments are now focusing on other areas, i.e. on behavioural science.

The sharper competition on markets and the fight for consumers in daily business and in science demands new approaches in economic science itself. Accor-



ding to János Kornai “twenty or thirty years ago an economist was able to take an empirical study seriously only if it was using *ex post* statistical data.” He believed that, using the method of questioning as the basis of an economic study is just not a serious approach. Only market researchers or maybe sociologists do these kind of things but a serious and prestigious economist would not do that. Nowadays it is not like that. The industry has realised that we need to know how people think. What kind of expectations they have, what are their hopes, how they sense things, what kind of values have an effect on their thinking, how optimistic or pessimistic they are?” [Kornai 2006: 953-954].

By focusing on consumer decisions Gábor Koltay and János Vincze [2009] compared the classical economic approach with the results of the new behavioural science discipline, the behavioural economics and have come to the same conclusion as Kornai [2006: 953]. „Behavioural economics, as they say, is a reaction to the understanding of human being by neoclassical economics. Its main question is that, compared to the idealised neoclassical assumptions, how economic players really behave, i.e. the reality of behavioural assumptions attracted the main emphasis. [...] We can conclude from researches of behavioural economics that, »intellect and emotions« often cannot be separated in consumer decisions” [Koltay & Vincze 2009: 495, 496 and 521].

Its marketing conception is anyway closer to the areas of psychology and social psychology than to economics, i.e. primarily it does not assume general rationale from market participants and at its examinations it considers consumers as individuals. The approach of psychology and sociology that focuses on behaviour gave analytical tools into the hands of researchers and, indirectly, corporate executives to provide a better understanding of consumers. Consumer behaviour... basically depends on the context [Bauer, Berács & Kenesei 2014].

Within the marketing industry, “client and consumer behaviour, the increase of the number of loyal clients as well as paying attention to the satisfaction of customers” [Hofmeister-Tóth, Sajtos & Simon 2003] have become more and more important because the retention of an existing client usually costs more than the acquisition of a new one. Marketing researchers often say that, it is estimated that, during purchases (upon products offered with similar conditions and upon interchangeable products) product characteristics determine the saleability of a certain product or service, the decision of consumers and the satisfaction of clients only in about 30%.

In our research, by monitoring mystery shopping, we examined one of the most important ingredients of the remaining 70% determinant, the competences of sales representatives. For consumer satisfaction we considered politeness, helpfulness, open communication with customers, the endeavour for problem identification and problem solving, the individual’s personal needs for the tidiness of his/her environment and customer care to be important competences. Every text

book mention these properties as basic requirements for sales representatives and administrators dealing with clients and customers. However, we were more interested in the question that, how the monitored sales representatives can really meet these requirements.

1. Examination of competences of “front office” colleagues by mystery shopping

The marketing phrase of “front office” in the title relates to all colleagues who get in direct connection with the consumers and buyers of the organisation or company. I.e. sales representatives, administrators, consultants, agents, etc. In this article, for simplicity, we will give an equal meaning to sales representatives and sales consultants.

„Personal sales is the most expensive contacting and communicational tool of the company” – concludes László Dankó [2009: 165]. For this particular reason companies try to replace it with other tools. In lights of its benefits and relatively high costs it is surprising that it does not attract a lot of attention [Furnham & Milner 2013; Lombart & Didier 2012] Meanwhile there are more and more signs showing that, even in self-service shops, people need service, consultation and help more often. Or every one of us have heard complaints from people communicating with an automated voice on the phone saying: “I want to talk to a real person!”.

In many fields of business it is essential to use the different methods of personal sales. From consultants and agents to local sales representatives there are many employees with a task of getting in touch personally with clients and buyers. There are important expectations against the behaviour of sales representatives while exercising personal interactions. Of course these expectations depend on the type and situation of sales as well as on the type of the client, however there are some rules that each and every sales representative should follow at every type of personal sales. These are after all very simple behavioural rules: the sales representative should be polite, helpful, discreet, patient, a good judge of human nature, and should have the right personality for making contacts and the ability to express himself/herself. The sales representative is expected to have a tidy and clean appearance, appropriate knowledge, professional literacy, empathy and helpfulness. We defined these according to the classical grouping of sales procedures: greeting, approaching the client, presentation, product referral, closing and CRM.

In the definition of competences we relied on the results of researches on professional dedication of on-site sales representatives. An early example is a sociological research conducted in the 1960’s in the United States [Friedmann & Havihurst 1962] saying that, professional pride of sales representatives at work was

fed by the challenge they were feeling at work and by their own creativity. They felt their work like a service for helping customers so that they can find what they are looking for, even if sometimes the customers themselves do not know what they want. A good sales can reach something that „only love can reach: to scrutinise the most inner desires before the individual would recognise them by himself/herself” [Simmel 1950: 62]. Based on these things we classified the competences of problem recognition and active problem solving, apart from politeness, to be amongst the most important and most basic competences.

According to Zoltán Báthory and Iván Falus [1997: 266] competence is „basically an intellectual (cognitive) quality, however motivational elements, skills and other emotional factors also play an important role in it.” According to this definition it is obvious that we are facing a complex system” as Vilmos Vass says [2009]. Further to that, competences can be considered as a sort of personal success and are in direct connection with high level performance [Fehér 2011]. Due to the nature of competences the “competence definitions” [Komor 2001], and competence-maps try to describe, define and understand [Komor et al. 2010] their content rather than giving an exact, operational description of them. The measurement makes it unavoidable to ensure the measurability of comprehensive and abstract concepts and divide them into empirically understandable components.

Therefore we divided the examined competences into elements and we defined the elements as specific behaviour components and we called the observed behavioural elements as behaviour mosaics.

We considered every behavioural mosaic as a sign of a possessed or lacking competence. For some competences more mosaic groups can refer to, whereas for others maybe only one or two. For instance we considered smiling, eye contact and the direction of communication (towards the partner or into the air) as an expression of politeness in behaviour.

Of course the behavioural mosaics can be further expanded, particularly when we dig deeper into such types of personal sales that are less “mechanical,” such as consulting or agency. However, we would like to point out again that, in our research we examined only the most basic and most common expectations and competences.

The most important question of the examined sales discounts is, whether the buyer has left with satisfaction and good feelings. For the measurement of this two procedures have been adapted by the industry so far. On of these is when we ask for the opinions of the sales representatives or the customers in interviews or with the help of questionnaires about the realised purchase. This solution seems to be obvious but in terms of the examination it also has its disadvantages. The opinions may be based on post-purchase subjective impressions, they may be distorted and, which is the most important for us, they may be based on such impressions that make it not possible to identify the competences to be improved.

The other solution is when we send trained observers for the observation of the examined interactions. They can work as outsider observers (they only observe) or participating observers (active participants of the examined interactions), however it is the most important condition of the measurement in both cases that, these observations should be evaluated based on standardised, calibrated behavioural patterns and converted into comparable and measurable patterns with each other.

2. Behavioural mosaics that can be observed during mystery shopping

In our examination we chose the second option (participating observers), the so called mystery shopping. For the execution we found hardly any help from the Hungarian market research literature [i.e. Gordon & Langmaid 1997; Hoffmann 2000; Malhotra 2009]. The online terminology of the companies that offer mystery shopping emphasises the opportunities in this method but do not discuss the principles that ensure the objectivity and precision of mystery shopping. According to our knowledge the only scientific article in the topic of mystery shopping is the article of Árpád Ferenc Papp-Váry and Edina Kosztka [2006]. In spite of its title the article does not really discuss the theory of mystery shopping but rather its practical approach. This is not a surprise because the so called mystery shopping is a widely employed practice in the world but it lacks a generally approved theory and practice.

The literature considers the observation itself as such a “soft,” qualitative method whose point is the “understanding of the examined phenomenon and putting it into a wider social context” [Héra & Ligeti 2005: 136], and not making it to be measurable and to measure it. Therefore the practice of mystery shopping usually focuses on such easily observable factors like the tidiness of the retail shop, the freshness of the goods, the adherence to the regulations and not on the competences of the sales representatives manifested in their behaviour. Should it still consider behavioural factors, these are usually based on subjective general impressions and memories.

However, “since the majority of the shopping decisions [some people say it is around 80%] are made on site, the impressions that the buyers experience are not indifferent. Therefore everywhere where the customer service processes are standardised or where it is possible to standardise them, the execution must be [should be] controlled. Without these sort of standards I think it is a complete waste of money” – says one of the affected users on the mysteryvisit webpage.¹

¹ www.mysteryvisit.hu [access: 10.03.2017].

Dirk van Dusseldorp and Sarah Southwold [1994] provide useful advice for the “standardisation” i.e. categorisation and classification of the observed factors. Why do we need this standardisation? Because we can rarely observe social factors (including competences) directly, most of the time we can only approach these via indicators. For example, politeness can be observed via greeting and the method of communication.

In their article Papp-Váry and Kosztka quote Mark Michelson, president of the Mystery Shopping Providers Association, who believes that, in an ideal observation form we can choose only between „yes” and „no” answers and the “no” answer should be explained with the help of pre-defined categories [Papp-Váry & Kosztka 2006: 70]. Cathy Stucker has a more differentiated opinion when she says, “as a mystery shopper you do not need to tell your thoughts about the things you experienced there. All you need to tell is what really happened. Most of the questions you need to answer as a mystery shopper are yes/no questions. Were you greeted within 30 seconds? Was your order satisfied in an appropriate manner? Did you receive an invoice/receipt?” [Stucker 2013].

It is a question of our own determination whether we want to examine certain events by yes/no questions or by metric (to what extent, how soon, etc.) questions. According to two Australian researchers „some aspects of customer service can be measured the most by categorising tools like whether the sales representative gave a correct answer to the customer’s question. Others can be measured by scaling, such as friendliness” [Dawes & Sharp 2000]. Therefore they applied metric and category scales in their study.

In our study, as we will introduce it in the next chapter, we also gave up on the traditional categorisation practices. By the definition of behavioural mosaics and their levels we tried to eliminate the subjectivity of the observation method as much as possible. Because at the traditional mystery shopping the mystery shoppers can judge only by their own subjective assessments because they do not have such an exact gauge that helps them to judge the underlying behaviour and its scale. Furthermore, at the post-event judgement stage, their personal habits, needs and their dominant mood at the time of the shopping event play a significant role. We improved the objectivity of mystery shopping in practice by the categorisation of competences into elements and by the definition of behavioural mosaics calibrated by different levels.

3. The issue of measuring competence prints

Should we accept Michelson’s advice concluded from mystery shopping practices, on one hand it means that, the examination always contains subjective judgement elements that are based on general impressions, i.e. the measurement will be

unreliably subjective; on the other hand the result of the examination will be such a nominal scale that will not make it possible to conduct serious analyses. Let us take an example of a general requirement cited in every text book, the smiling. In the instance of smiling what do “yes” and “no” mean? Some people smile at greeting, some other at saying good bye and there are people smiling all the time through the interaction. There are pleasant smiles, sarcastic smiles or challenging smiles... When and what should be written according to the “it happened,” “it did not happen” instructions?

The other problem of “yes” and “no” answers is that they provide a nominal scale and by that no mathematical operation can be conducted. For instance, in 2010 a study [K.I. 2010] found that, „the findings of the research covering 14 countries are not too bright. Compared to 2008 last year the mood for smiling has plummeted internationally. Swedish sales representatives reached the best results with 87%, whereas Hungary achieved the 8th position on the smiling ranking.” Explanation to the percentage point value: 87% of Swedish sales representatives smiled at the customer when he/she entered the shop. 13% probably did not smile or smiled only after the greeting. Nominal scales, as most methodology books discuss it, are not really considered to be as scales. Even if we provide number codes for each of the categories, „in case of the nominal scales the numbers do not reflect quantity” [Malhotra 2009: 289].

For the measurement and deeper analysis it is of substantial importance that, we should obtain higher level analysable units – at least ordinal scales. Therefore we defined different levels for the time period, the required effort or intensity of the observed behaviours. Further discussing the question of smiling we can say that, levels number 1 and 2 mean the total lack of smiling, number 3 means an appearing smile at greeting, number 4 is for the smiling throughout the whole interaction whereas level 5 indicates an unnecessarily strong smiling or smiling that does not express kindness (e.g. ironic). Similarly, the first level of the so called problem recognition behavioural mosaic means that,² the sales representative did not want to deal with the problem indicated by the buyer at all; the second level shows that it was not the sales representative who personally tried to explore the problem but he/she sent the consumer to someone/somewhere else (e.g. information desk); levels number 3 and 4 mean that the sales representative asked the point and details of the problem whereas level 5 shows that he/she was saying irrelevant/intimidating things (gossiping).

² It is not to be mixed up with the competence of conflict management. This is about the problems of the consumer, e.g. he realises in the shop that the request of his wife (buy baker’s yeast) requires a decision from him due to the widely offered bakers’ yeasts (dry, fresh, instant, etc.). The reaction of the sales representatives can vary from “come back when you know what you want” to “if your wife wants to bake bread then you can buy the dry one but if she wants to bake croissant then you should take the fresh one.”

On one hand the derived scale still contains subjective judgment elements [which we were able to reduce by the thorough training of mystery shoppers]. On the other hand, and this meant a bigger concern from an analysis point of view, the derived scale was higher level than the nominal one but it was only possible to consider it as an ordinal scale at most. However there are attempts for the examination of the validity and reliability of these sort of procedures [Roberts & Campbell 2007; Liu et al. 2014].

4. Methods

Our observation form covered 5-5 levels of 14 factors (Table 1) that can be described by behavioural characteristics. Of course we are aware of the fact that, the subject of observation varies from case to case. We need to observe different things at customer service desks of public institutions, at a retail shop purchase, at being a client at a ticket desk or at negotiations with sales agents. However in this article we only deal with competences that are significant at all types of personal sales. In the table below we can see the individual observation aspects. The trained mystery shoppers had to evaluate the different factors of the individual acts on a scale of 1-5. We gave a description to each and every scale value according to the scale of effort. The individual scale values can also be considered as “reward points” where 1 = low effort/performance and 5 = high effort/performance. The results were based on 399 mystery shopping occasions and 1-5 grading of

Table 1. Observation factors

Observation factors
– receptiveness
– eye contact
– volume
– articulation
– direction of speech
– attention
– balance
– politeness
– problem understanding
– problem solving
– empathy
– smiling
– helpfulness
– saying goodbye

Source: own elaboration.

14 behavioural mosaics. The data recording had happened between January and September 2016 at customer service offices of public service organisations.

4.1. Training of mystery shoppers

After the standardisation of the scale the reification of the “gauge” – i.e. the mystery shoppers – followed. After the mystery shoppers received the list of behavioural mosaics, they had to grade a simulated situation according to their own judgment. The evaluations were matching in 75% in spite of the fact that, they were prepared on the basis of the subjective general impressions of the observers. It is fair to say however that, in the first simulation we only asked for a nominal (“it happened,” “it did not happen”) evaluation.

As part of the next stage of the training we gave them a list of individual behavioural mosaics with levels and “grades” and with the new list they had to evaluate a new, simulated purchase situation. We had repeated the process up to the point when we could reach 80% matching with the new, detailed evaluation.

We warned the mystery shoppers that, they will need to observe several things at the same time so they should memorise the behavioural mosaics and the evaluation factors of different levels. It is the consequence of the method that, during the purchase they do not have the opportunity to record the observed events, they need to do the grading afterwards. 90% of the behavioural mosaics related to concrete actions. We asked the mystery shoppers to record these in their memories and after they had finished the purchase start the evaluation with the grading of these actions. After this they can start dealing with the questions regarding general impressions (so that their observation evaluations will be influenced minimally).

4.2. Results of PCA

We tried to control the reliability, validity and consistency of the developed evaluation system by mathematical-statistical procedures. First we did the structural validation with the help of principal component analysis. We processed the data by IBM SPSS programme.

At the definition of the factors we considered the Kaiser criteria ($\lambda_k > 1$) at the first run. The KMO indicator value is at 0.892 whereas the Bartlett test significance level is at 0.000. Based on these things our system of variables is suitable for factor analysis. The values belonging to the main diagonal that is visible in the correlation section of the anti-image matrix are moving between 0.929 and 0.825 which just reinforces our previous assumption. The rotated factor structure after the first run is visible in the table below. We did not include factor weightings below 0.2. Amongst the 14 observation points 10 can be categorised clearly into factors, however in the cases of problem solving, problem understanding, smiling

Table 2. First result of PCA

Variables	Factor 1	Factor 2	Factor 3
Attention	0.751	–	–
Empathy	0.734	–	–
Problem solving	0.611	0.466	–
Helpfulness	0.601	–	–
Problem understanding	0.543	0.503	–
Balance	–	0.759	–
Saying goodbye	–	0.735	–
Politeness	–	0.678	–
Smiling	0.386	0.534	0.336
Direction of speech	–	–	0.753
Eye contact	–	–	0.690
Articulation	–	–	0.635
Volume	–	–	0.585
Receptiveness	0.433	–	0.572

Source: own elaboration.

and receptiveness we see that, these variables can be allocated to more than one factor.

We conducted a new analysis for the clarification of the factor structure. Starting from that point we excluded the “smiling” and “receptiveness” variables from the analysis. At the second run we ignored the basic rule for the selection of main components that were considered to be significant, $\lambda_k > 1$ i.e. we did not consider only the main components that have an own value larger than 1 but almost as many as necessary to explain the 75% of the total variance. Accordingly, four factors were defined. Our decision was reinforced by the „scree test” and by the „a priori” rule. According to the result of the main component analysis run in our indicator system the $KMO = 0.858$ and the empirical significance level belonging to the Bartlett-test is lower than 1%. The lowest value at the main diagonal in the anti-image matrix correlation section is 0.752. Considering all of these findings the indicator system is still suitable for multi-variable analysis. According to the results the four main components explain 73.37% of the total variance. The own value is 4.1 for the first main component, 1.4 for the second main component, 1.04 for the third main component and 0.8 for the fourth main component. For the clarification of the factor structure we used Varimax rotation. The results are in accordance with the initial expectations of the logical relationships. Four factors were created in total which we named as “customer management,” “problem management,” “service,” “communication.” We can see the rotated factor structure in the Table 3 as follows.

Table 3. Second result of PCA

Variables	Customer management	Problem management	Service	Communication
Attention	0.769	–	–	–
Empathy	0.730	–	–	–
Helpfulness	0.624	–	–	–
Problem solving	–	0.715	–	–
Problem understanding	–	0.669	–	–
Balance	–	–	0.767	–
Saying goodbye	–	–	0.738	–
Politeness	–	–	0.666	–
Direction of speech	–	–	–	0.767
Eye contact	–	–	–	0.674
Articulation	–	–	–	0.657
Volume	–	–	–	0.621

Source: own elaboration.

Conclusion

We defined the main components according to the definitions as follows: “Service”: The sales representative is ready for service and has a polite behaviour while interacting with the client. “Problem management”: The sales representative is trying to explore and solve the problem of the client while exercising such a behaviour that considers the emotions and mood of the client. “Communication”: The sales representative is using verbal and non-verbal tools that are appropriate in the situation. “Customer management”: The sales representative ready to pay attention, helps to customers and feels empathy.

Based on the results we assume that, the coherent observation variables are the indicators of the same competence. In the next steps we examined the internal consistency of the scales created by the coherent observation variables. As indicator we chose the α -Cronbach indicator. The value of α is 0.86 in case of the service factor, 0.89 for problem management, 0.75 for communication and 0.77 for customer management. We also examined how the value of α indicator changes when we exclude certain observation variables. The value of the indicator did not change substantially in any of the instances which refers to the internal stability of competences.

In this article we have discussed the fine-tuning of the gauge used for the data recording of mystery shopping and the measurement method of mystery shopping. We observed so called behavioural mosaics that can unfold whether the behaviour of sales representatives meets certain expected competences. At the

evaluation process we did not stop at determining one or the other points of dichotomies regarding “there was/there was not” or “he/she did it/he/she did not do it,” but we rather determined certain levels that make the measurement possible.

At the principal component analysis of the results we were able to develop a relatively stable factor structure, based on which we shall conclude the structural validity of the valuation. We measured the internal consistencies of the developed competences by the alpha indicator which showed us a relatively acceptable value with the exception of one competence. We were able to reclaim 73% of the information of the original observation variables.

Our research has shown that, mystery shopping, as a measurement methodology is a valid method, worth of further development efforts. One condition of the validity is the fine categorisation and appropriate calibration of the observed phenomena, i.e. the development of applicable measurement standards.

The limitations of our research are also worth noting. The sample taking was not based on probability calculation, it cannot be considered as representative. The validity and reliability of the individual competence scales should be checked by further measurements and examinations. Our aim for the future is to compare the introduced evaluation method with a standard competence measurement tool. Use of competency based mystery shopping, professionals could explore and survey training needs. Results of measurements support performance reviews and quality assurance of trainings.

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Wykorzystanie metody *mystery shopping* do pomiaru kompetencji i rozwoju osobowego – wyniki badania empirycznego na Węgrzech

Streszczenie. *Celem badania było zbadanie technik i możliwości, jakie oferuje metoda ‘mystery shopping’ (tajemniczych klientów) do pomiaru kompetencji sprzedawców. Uwaga autora skupia się na problemach pomiaru i możliwościach monitorowania, jakie stwarza metoda mystery shopping. W czasie badania zaobserwowano wzorce zachowań i określono ich poziomy umożliwiające pomiar, które następnie wykorzystano w celu przeprowadzenia analiz porównawczych. Dokonano również statystycznej oceny rzetelności, trafności i zgodności opracowanego systemu pomiaru.*

Słowa kluczowe: *kompetencje, pomiar, obserwacja, mystery shopping*