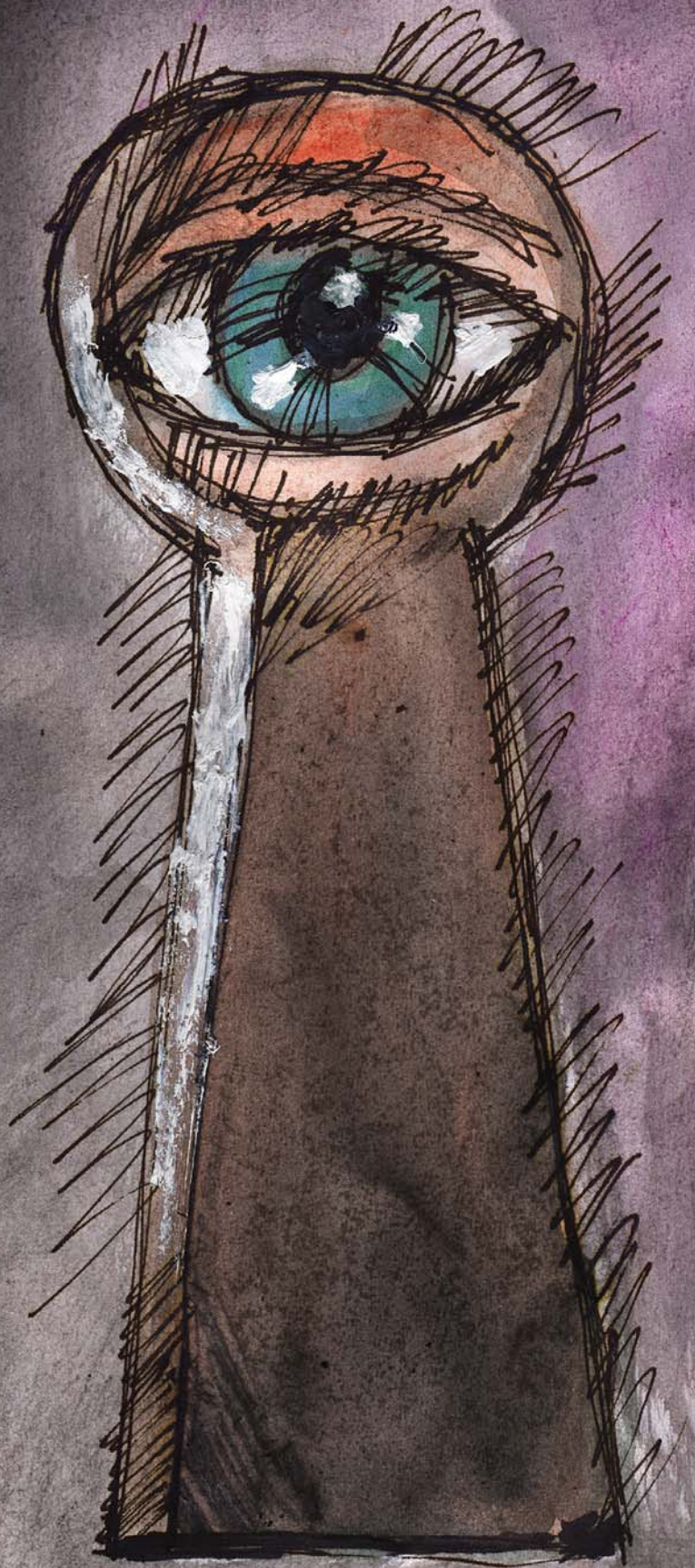


View your  
facility through  
the eyes of your  
consumer



## What you learn from a mystery member/resident program may help you improve your clients' experiences, resulting in better sales and retention

by Colin Milner and Michael Voloudakis, PhD, MPH

*It's not my job.* These 4 words can be the downfall of any customer-driven business. Think about it. How often do you frequent a business that reluctantly offers you service?

Perhaps a restaurant you just visited provides a good example. The host walked you to your table, and the server arrived at your table on time, took your order, and brought you your food while it was still hot. These workers gave you service. But they added nothing to your experience—not because they didn't do their jobs, but because that's *all* they did. Creating an experience for you wasn't in their job descriptions. Or so they thought.

Today's consumers want more than services, according to Joe Pine and Jim Gilmore, authors of *The Experience Economy* (1999). Customers, they write, seek experiences. So how do you ensure that older adults enjoy experiences in your health or wellness facility that will bring them back again and again, helping them adhere to exercise? One way is to use customer satisfaction questionnaires. But these tools may not give you all the information you need. To assess the experiences your clients have, you must become a client yourself. A mystery member/resident program offers you a means of achieving this objective.

[Ed. Turn to page 39 for some suggested ways to encourage people to continue participating in your programs and enhance their experiences in your facility.]

## How to evaluate the consumer's experience

Implementing a mystery member/resident program enables you to *experience* your facility as your clients do. Older adults have different concerns than younger people about exercise and the health or wellness environment. A mystery member/resident program can paint a more realistic picture of how your age 50-plus customers perceive your programs and services, allowing you to improve your offerings as well as the experiences you offer. These improvements, in turn, will help increase your facility's sales and retention.

So where do you start? The first step in implementing a mystery member/resident program involves hiring the right people for the job. You will need to find individuals who fit the makeup of your potential clients and who can ask the right questions, which you will provide. These secret employees must be able to retain not only the feedback they receive, but also their experiences as a whole. After visiting your facility, each mystery client should talk about the actual experience, as well as write a complete report answering the questions outlined below:

- Did you feel welcomed and at home?
- Was the staff friendly?
- Was the environment intimidating?
- Was the sales person's presentation nonthreatening, positive and informative? And did this individual outline the experience you could achieve by being a member?

But these questions are just the beginning.

Once you have hired and trained people as mystery members/residents, send them into action with a checklist, such as the one below. You may want to adjust or replace some questions, to

better meet the needs of your organization.

## The marketing

Odds are that the first thing a potential member/resident learns about your organization will come from an advertisement, direct mail piece, poster, billboard, lecture, sales call or website. So you should ensure your mystery clients start their evaluation with your marketing.

### Sample questions

- Did marketing pieces speak to your needs? (i.e., using appropriate models, copy, type size, white space)
- Did marketing pieces tell a story, setting the stage for your experience?
- Did marketing pieces communicate that the facility welcomes everyone? Or did they create barriers to participation?
- Were marketing pieces engaging? Did they encourage you to call for some reason? (e.g., to get a book)

## The call

The next step is for your mystery members/residents to call your organization and arrange a visit, then assess how your staff responded to the call.

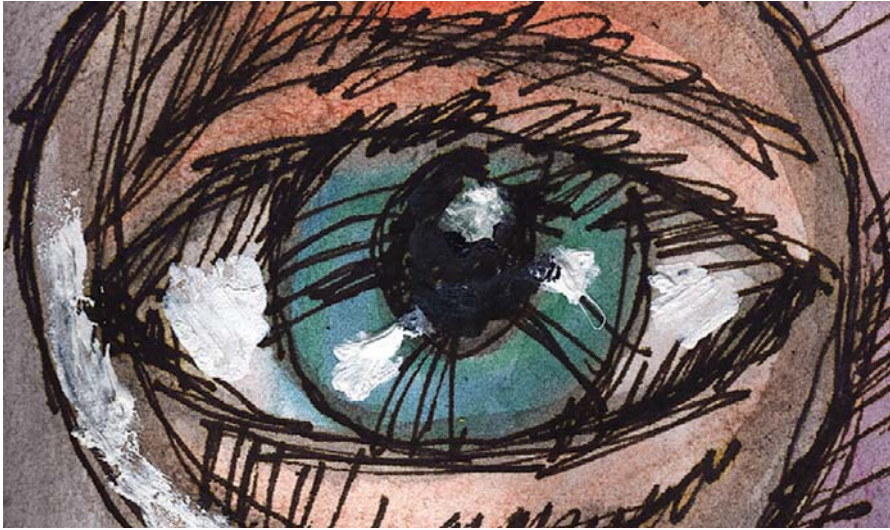
### Sample questions

- Was the staff member who answered the call friendly, polite and welcoming?
- Did this person treat you with respect?
- Did this individual pass you on to a person who could answer your questions? Or did he or she answer your questions?
- Did this staff member give you the information you requested, inspiring you to learn more about the organization and the experience you will have?

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- Did this individual arrange a time for you to visit?
- Did this person ask how you found out about the organization?

## *The walk*

As soon as your mystery members/residents arrive at your location, they should start assessing the experience.

### *Sample questions*

- Were the directions to the facility accurate?
- Was it easy to find parking?
- How far away did you have to park?
- Was the path to the building clean or dirty? (i.e., full of litter or other items)
- Was there enough lighting? (for evening evaluations)
- Did you feel safe? (for evening evaluations)
- Was it easy to find the entrance?

These questions may sound trivial. However, the frustration created by a negative experience with these elements can affect the rest of a person's visit.

## *The entry*

If your mystery clients make it as far as your facility's front door without being turned off, their experiences in the next

30–60 minutes may dictate whether or not they will (in theory) become a member/resident. Their business is yours to lose or gain.

### *Sample questions*

- Was the staff member at the front desk welcoming, polite and friendly?
- Did this individual recognize your presence immediately and tell you how long it would be until he or she could get to you?
- Did this person call the sales staff to help you right away?
- Was the staff member at the front desk able to answer your questions to your satisfaction?
- Was literature in the front lobby up to date?
- Was the area clean?

## *The tour and sales presentation*

Potential members/residents generally want the straight facts, with the data to support them. They also respond poorly to pressure tactics, which in their view reduce your credibility. Your mystery clients should keep these points in mind as they evaluate the tour and sales presentation in your facility.

### *Sample questions*

- Was the sales person friendly, polite and welcoming?

- Did this person introduce himself or herself to you?
- Was this individual able to answer your questions?
- Did the sales person take you on a tour of the facility, asking questions throughout about your goals and past experiences?
- Did this person introduce you to existing members/residents who could share their experiences?
- Did this individual give you options and/or choices throughout the tour and presentation?
- Was the sales person knowledgeable, instilling a feeling of confidence?
- Did this individual provide information on the facility's fitness or wellness center experience? (i.e., giving information about appropriate dress, behavior, amenities, etc.)
- Was this person able to *enroll* you? If yes, how? If no, why not?

## *The facilities and services*

Initially, older adults may feel ambivalent or uncomfortable in a wellness or fitness environment. They may doubt their ability to function in this setting, and question whether or not they can use the equipment and use it safely. A comfortable, welcoming atmosphere will encourage potential members/residents to join your facility, so ask your mystery clients to pay close attention to your facilities and services in their assessments.

### *Sample questions*

- Was the facility intimidating? If so, how did it intimidate you?
- Was the music loud or inappropriate?
- Did you feel as though you would fit into the facility's culture? If not, why?
- Was the facility clean and tidy?
- Were the machines in good working order?
- Were the bathrooms clean and tidy?

- Were the signs in the facility up to date and easy to read?

### *The programs*

By demonstrating that programs exist for your potential members/residents, you may persuade these individuals to visit your facility. Your task is to communicate *successfully* that your programs are not only appropriate for older adults, but also flexible enough to include most people who want to participate. Your mystery clients can shed much light about your facility's effectiveness in this area.

### *Sample questions*

- Did the facility offer exercise classes specially tailored to different levels of function or health?
- Did the facility highlight equipment considered especially appropriate for older adults? (e.g., low weight options, easily adjustable, etc.)
- Did the organization encourage you to meet with a fitness or wellness professional to assess your fitness level and begin a program appropriate for you?
- Did the organization provide literature on ways to avoid overuse injuries, such as stretching, warming up before exercise and cooling down afterwards?
- Did the facility offer you personal training services to create a more tailored fitness program?
- Did the facility offer you training about how to monitor your exertion, so you could learn to exercise at safe levels only?
- Did the organization encourage you to talk to your physician about exercise?
- Did the organization provide staff members who could consult with you about physical activity and the facility's programs, and refer you to health or community resources, if needed?

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## **Encouraging adherence**

*by Michael Voloudakis, PhD, MPH*

Once you have succeeded in signing up members/residents in your programs, your challenge becomes ensuring their continued participation. Activity programs should include both support and reinforcement from social networks and the program itself (Cress et al., 2005). The following suggestions offer straightforward, yet effective, ways to encourage social relationships, as well as approaches that support and reinforce program participation:

- Organize and/or host non-fitness-related social events, such as birthday parties, holiday meals, and dances.
- Organize and/or host fitness-related social events, such as health screenings and educational seminars.
- Help create fitness-related social groups (such as a workout buddy group) by providing a bulletin board, so that individuals with similar goals can connect.
- Encourage members/residents to take part in community events such as charity walks as a team, to encourage socialization outside your facility.
- Provide opportunities for members/residents to bring guests to the facility.
- Contact members/residents when participation slows or stops, encouraging them to continue participation. Communicate through a phone call, postcard or letter.
- Provide incentives for participation such as prizes for attendance.
- Acknowledge achievement through awards, certificates, and public recognition.
- Ask members/residents to send your facility a postcard from wherever they travel, to display for others to see.

Encouraging older adults to lead a physically active lifestyle is not a simple task. Ultimately, you want to convince individuals that physical activity is not only healthy, but also enjoyable, so they will keep participating in your programs. The above approaches will enhance the experiences people have in your facility and encourage your members/residents to stay involved, helping them adhere to exercise for the long term.

*Michael Voloudakis, PhD, MPH, is a senior outcomes analyst with Axia Health Management, a leading national provider of integrated preventive health solutions.*

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To ensure that your mystery members/residents offer you an accurate picture of their experiences, ask them to consider each element on your questionnaire, then answer the following question: *How did you feel about ...?* Their responses will help you understand where your facility must do better.

## Create a storyboard of the experience

Once you read the reports from your mystery members/residents, go through your facility using a camera to capture their experiences. Place these pictures, along with the reports, on a storyboard in your office for all to see. Once this task is done, hold a staff meeting and walk your staff members through your clients' experiences. When you complete this process, you should have a task list

for each department to use to improve the experiences offered—this may involve anything from the way your facility lays out equipment to the way staff treat a client.

The bottom line: Unless you know what your age 50-plus clients are experiencing, you will never be able to give them the experiences they desire. Remember, what's good for your members/residents is good for your business. Someone who has good experiences in your facility is someone who will feel more inclined to return. ☺

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*Management, a leading national provider of integrated preventive health solutions. Axia's proprietary suite of prevention programs and networks engage members in health improvement behaviors such as physical activity, weight management, complementary and alternative medicine, lifestyle and disease management and smoking cessation. For more information, visit [www.axiahealth.com](http://www.axiahealth.com).*

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