

**WISE Mystery Shopping  
Tasting Room Scorecard**

**Shopper Name:** \_\_\_\_\_  
**Winery Visited:** \_\_\_\_\_  
**Date / Day of Week:** \_\_\_\_\_  
**Time Entered / Exited:** \_\_\_\_\_  
**Visitor Volume:** \_\_\_\_\_  
**Number of staff:** \_\_\_\_\_  
**Weather:** \_\_\_\_\_  
**Name of Server/Description:** \_\_\_\_\_  
**Name of Tasting Selected:** \_\_\_\_\_  
**Specific Area of Tasting:** \_\_\_\_\_

*Rating System: Yes or No*

**BACKSTAGE**

	N	Y		N	Y
Physical - Entrance Clear Signage & Easy Access			Physical - Music Appropriate		
Physical - Parking Lot Tidy			Physical - Able to Hear, Not Too Loud		
Physical - Grounds Tidy			Physical - Temperature Appropriate		
Physical - Tasting Room Tidy (including merchandise)			Physical - Smells Appropriate		
Physical - Tasting Bar Tidy			Wine - Correct Temperature		
Physical - Seated Tasting Area			Wine - Not Corked, Flawed		
Physical - Glasses Clean, No Smell			Wine - Proper Size Pour (1oz to 1.5oz)		
Physical - Bathroom Tidy			Staff - No inappropriate discussions or attitude		
Physical - Lighting Appropriate			Staff - Brand appropriate style / dress		

**Customer Experience Scores**

*Rating System: Either binary (yes/no) OR 1 = poor, 2 = fair, 3 = good, 4 = very good and 5 = excellent.*

**SILENT SELLING**

	1	2	3	4	5		1	2	3	4	5
Materials - Tasting Menu Available, Clear & Effective						Physical - Separate Tasting Area for VIP or Club					
Materials - Price List Available, Clear & Effective						Materials - Other Club Mentions (Signs, Price List)					
Materials - Order Form Available, Clear & Effective						Merchandising - Effective & Good Brand Fit					
Materials - Did they offer you a pen or make one available?						Materials - Collateral in Bag?					
Materials - Club Brochure Available, Clear & Effective											

**SERVICE**

	1	2	3	4	5		1	2	3	4	5
Staff - Friendly Greeting w/eye contact within 15 sec.						Staff - Explain the Options for Experiences Available?					
Staff - Shipping Options Explained & used as a selling tool?						Staff - Provide Guidance in Selecting Wine Choices?					
Staff - Service Heart (Did they truly seem to want to help?)						Staff - Make any Recommendations of other Wineries?					
Staff - Surprise & Delight/ Exceed Expectations?						Staff - Would you Recommend this Experience?					
Staff - Quick Error Free Check Out											
Staff - Friendly Farewell											

**SALES**

	1	2	3	4	5		1	2	3	4	5
Server - Use an Effective Icebreaker						Server - Able to Tell a Memorable Brand Story					
Server - Ask for Referral Source (Why come to the winery?)						Server - Use of Open Ended Questions					
Server - Pour & Describe Wines w/ Enthusiasm						Server - Evaluate / Profile You as a Customer?					
Server - Knowledge of Wines & Winery						Server - Adjust Presentation to Your Profile?					
Server - Ability to Educate, Entertain & Entice						Server - Plant Sales Seeds throughout Experience					
Server - Use of Analogies						Server - Explain the Benefits (what's in it for you?)					
Server - Use of Story Telling						Server - Notice any Buying Signals?					

**WISE Triple Score**

	N	Y		1	2	3	4	5
Did they <b>Ask for the Order</b> ?			Did they ask for the sale naturally or just at the end?					
Did they <b>Sell Clubs</b> Effectively?			Did they present the benefits or just give you a brochure?					
Did they capture your <b>Contact Data</b> ?			Did they tempt you with reasons to stay in touch?					
<b>Overall Customer Experience / Satisfaction Score</b>			<< -- Score your experience out of 5.					

**Comments:** \_\_\_\_\_  
 \_\_\_\_\_  
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 \_\_\_\_\_  
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