Maximizing Your Profits & Minimizing Your Expenses as an Independent Contractor

Presented by Adrienne Dobson
Customer Impact, LLC.
Time Saving Tips
Getting and Staying Organized
1) Plan ahead.
- Use a planner, calendar, or smart phone to track shops, due dates, payments, etc.
2) Use your smart phone wisely.

- Calendar, Voice Recorder, Stopwatch, etc.
- Use your phone to take notes, if the shop allows for it.
- You can use a notepad-type app, or just text/email yourself.
3) Keep track of your MSPs

• What is unique about each company:
  – report requirements, schedulers, type of shop, shop dates and due dates, pay schedule.
• Bookmark the MSPs you are registered with
• Use a password manager (like LastPass) to keep track of your usernames/passwords.
4) Take *good* photos of your receipts.

- Take clear, good resolution photos of receipts as soon as possible, in case they are misplaced.
- Be sure that all important information, such as the location, the items purchased, and the price, are clearly readable.
5) Use Dropbox and/or Google Drive

- You can save copies of your surveys/notes so that you can access them from any computer/phone.
- Sync them with your phone. Then when you take photos, they are instantly backed up to the cloud, and are also downloaded onto your computer at home!
Time Saving Tips

Report Writing
1) Write using Microsoft Word or something similar
   • Catch typos and potential grammar errors
   • Save a copy of your comments to your computer
2) Use Grammarly to edit your reports

- Grammarly checks your text for spelling, grammar, and usage mistakes, and uses the context of the text you input to intelligently offer those suggestions and corrections.
- Can be added FOR FREE to Google Chrome
- Premium version available for monthly/quarterly/annual fees

www.Grammarly.com
Time Saving Tips

Routes
1) Self-assign or apply for pre-existing routes, or build your own!

2) What makes an out-of-the-way shop worth it? MORE SHOPS!
   - Ask your scheduler for more shops in the area
   - Check with your other MSPs.
3) How to find more: Presto InstaShopper
4) How to plan for more:
   - Route4Me and other similar apps have free or cheap routing capabilities so you can better plan your day.
   - Google Maps
5) **Other tips for routes**

- If you’re not shopping restaurants, bring water and snacks.
- If you’re not shopping gas stations, be sure to fill up on gas ahead of time.
- Be sure to factor in time for travel, including traffic.
  - Allow yourself time to collect your notes, write things down, refresh your memory on the next shop, and take time to clear your head!
- Communicate with your scheduler if you need flexible deadlines.
- Take GOOD notes!
- Keep your paperwork organized, but out of sight in your vehicle.
- Prepare for shops ahead of time
  - Make lists of things you need for each shop.
  - Make a checklist on your phone
    - Save your checklists for the future!
Maximize Your Profits!

Getting more shops
1) Stay connected with your schedulers by checking email and job boards.
   - Don’t be afraid to contact a scheduler directly
   - 2:30 PM with Angela Megasko: The Mystery Shopping Scheduler - Finding Ways to Connect with Your New BFF
Maximize your profits!
Getting More Shops

2) MSPA Opportunity Board
- MSPA members have access to postings on the opportunity board 24 hours before non-members.
Maximize your profits!
Getting More Shops

3) Connect Socially!
Maximize your profits!
Getting More Shops

4) **Accept a variety of shops** (Retail, fine dining, casual dining, fast food, audits, banks, etc.)

   – **Get higher paying shops.** Start by attending the roundtable today: Landing the Highest Paying Gigs

<table>
<thead>
<tr>
<th>Time</th>
<th>Event Details</th>
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<tbody>
<tr>
<td>3:30 pm - 4:20 pm</td>
<td>MSP Roundtable - Landing the Highest Paying Gigs</td>
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<td></td>
<td>Adrienne Dobson, Customer Impact</td>
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<td>David Hartley, Elite CX Solutions</td>
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Maximize your profits! Getting More Shops

4) **Accept a variety of shops** (Retail, fine dining, casual dining, fast food, audits, banks, etc.)
   - **Get higher paying shops.** Attend the video certification course tomorrow:

<table>
<thead>
<tr>
<th>9:00 am - 10:25 am</th>
<th>Video Shopping I - On Site Certification - $50</th>
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<tbody>
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<td>Track One</td>
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More industries and MSP companies are requesting and embracing hidden video shopping. There are logistics and legalities to be aware of to both protect your own interests and to help you provide the best possible video shop results that you can, and thereby earn you more work at some of the industry’s highest pay rates.

MSPA-NA Video Shopping-I covers the basics of conducting hidden video mystery shops, particularly in the industries of new homes, multi-family (apartment) homes, automotive and education. You’ll learn about client expectations, camera positioning, common errors and the laws surrounding the recording and use of hidden video. Passage of a written exam is required to become certified.
Maximize your profits!
Getting More Shops

5) Make the most of MSP Platforms

• From SASSIE:
  – JobSlinger allows you to search all your SASSIE Job Boards at once.
    1. Update all Sassie Shopper Profiles at once.
    2. Get shops emailed and texted to you.
    3. Shop Notifier is a FREE mobile app for Sassie Mystery Shoppers. Download the app to get SASSIE shop offer emails delivered directly to your Android or Apple device.
5) Make the most of MSP Platforms

- **SASSIE**: PRESTOMAP will show you all Sassie shops available, including InstaShops
  1. InstaShops are mobile friendly surveys you can pick up on the go
  2. Get paid by TangoCard, Amazon Gift Card, or PayPal. You choose!
5) Make the most of MSP Platforms

• Shopmetrics:
5) Make the most of MSP Platforms

- **i Secret Shop:**
  - One-stop portal for shoppers to see, review, and accept assignments from all MSPs on the platform. Shoppers can see and interact with everyone’s shops in one convenient place.
  - Quickly sign up with new MSPs
  - iSS APP: Fully integrated! Uses push notifications to show you shops right away.
  - iSS automatically generates shopper invoices and submits them to the MSP on the shopper’s behalf.
  - Over two dozen MSPs and MRCs currently on the system including NWLPC, Goodwin Hospitality, Intouch Insight, Mystery Shopper Services, and Dynamic Advantage, to name a few.
6) Incorporate Crowdsourcing into your shopping routine.

- When you are already at a retail location, to increase payment when on-site or at the mall doing a shop.

  - Gigwalk
  - Field Agent
  - EasyShift
  - Presto Insta-Shopper app
General Tips
1) Do good work.
   - Always complete shops at the appropriate times.
   - Follow all guidelines provided.
   - Submit your work on time and communicate with your scheduler.
   - If you cannot follow through with an assignment, communicate with your scheduler as soon as possible.
2) Be responsive if the MSP has any questions or needs clarifications on your surveys.
   – Remember to have your work saved, to make answering questions easier.
3) Educate yourself on taxes, and what your role is as an Independent Contractor.

– Attend the **Stop Feeling Taxed** session this morning:

<table>
<thead>
<tr>
<th>Time</th>
<th>Event Title</th>
<th>Speaker</th>
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<tbody>
<tr>
<td>10:00 am–10:55 am</td>
<td>Stop Feeling Taxed - How to Get the Most Out of Legitimate Business Deductions</td>
<td>Michael R Stevenson, CPA MBT LLC</td>
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4) **Keep a spreadsheet to track your shopping:** shops, mileage, payments vs. reimbursements, etc.

   – Be sure to note the date(s), MSP, client, expected payment dates, etc. on the spreadsheet.

   – You can also mark when you’ve received payment and/or reimbursement from the MSP.
5) Is a shop worth it to you?
   – Keep notes on various shops and companies, to help identify the shops that are and are not profitable for you.
   – Don’t be afraid to say “No.”
6) Set a goal.

– Do you just want to earn some spending money?
– Are you saving up for something?
  Are you supplementing a portion of your income with
  mystery shopping?
– How much time do you want to devote to mystery
  shopping?

• Make sure to track your goal, and evaluate
  how the shops you’re performing are helping
  you reach that goal.
General Tips

7) Avoid having shops excluded.
   – ALWAYS FOLLOW INSTRUCTIONS!
   – If you’re in doubt, ask questions to ensure the shop is done correctly and to ensure that you get paid.

8) As an Independent Contractor, you are the face of your business.
   – Make sure to represent yourself in a professional manner so that your business has a good image!
9) Don’t forget about the value of the shop itself.

– Save on items you need anyway: Oil changes, groceries, shipping packages, car washes, trips/hotels, home improvement, haircuts, family meals, massages, etc!

– Help locations improve their customer service and their products, and help great employees get recognition for their hard work.

– Your shop makes a difference!