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# **"Real customer"** mystery shopper

A highly effective method for measuring  
customer perception

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A portrait of Christian Watier, a man with dark hair, smiling, wearing a white shirt and a grey blazer. The portrait is set against a teal circular background.

Speaker  
Consultant  
Trainer



## Christian Watier

Chief Scientific Officer, MBA, Ph.D.

Christian Watier holds a Ph.D. from Université Laval and completed a postdoctoral fellowship at Carleton University in experimental psychology. He is the author of numerous scientific publications and has a robust specialization in customer and employee experience. His expertise ranges from understanding the needs of target customers to establishing the necessary structures for evaluation, including setting and leveraging corporate goals and creating effective measurement tools to achieve objectives.

A sought-after speaker and lecturer, Mr. Watier has delivered over 1,000 conferences and training sessions across Canada, focusing on customer and employee experience measurement and management. Currently, he assists several companies in defining their customer experience strategies, including SSQ Insurance, Investissement Québec, Intact Insurance, Groupe Metro Richelieu, Discount, Jean Coutu, and the ChAD. His expertise and knowledge make him a key resource for ensuring the implementation and coordination of projects and effectively communicating results to relevant stakeholders.

Well-versed in network presentations and known for his adaptability, Mr. Watier is the ideal person for delivering network addresses and presentations to various stakeholders.



# Measuring customer perception

In today's economy, customer orientation is the major concern for managers operating in a B2C business context.

Many authors assert that the current North American economy has moved beyond the service economy to what is now called the experience economy. Although the importance of measuring customer experience is widely recognized, there is still confusion among many about the distinct concepts of service quality (conformity), customer satisfaction, and customer perception. As a result, many companies either poorly measure or fail to measure the critically important customer experience. Here are the latest developments in this science that benefits to managers who can master it.

**Several research methodologies allow for measuring customer experience, but few offer the ability to measure customer perception.** One such method is the "real customer" mystery shopper approach. Often confused with the "classic" mystery shopper approach, mystery shopper has a somewhat tarnished reputation.

**However, when the "real customer" mystery shopper approach is used rigorously, it not only effectively measures conformity but also captures customer perception. This allows companies that use it to significantly enhance their profitability by increasing sales and/or reducing operational costs.**



## Service quality, customer satisfaction, or customer experience?

Until the early 21<sup>st</sup> century (and still today for many companies), only the measurement of service quality (also known as conformity measurement) or customer satisfaction (measuring expectations and satisfaction) was used.

Indeed, many companies worldwide employ standardized tests to measure service quality (e.g., SERVQUAL, developed by Parasuraman, Zeithaml, and Berry in 1988), primarily through the "classic" mystery shopper method or audits (e.g., in hotels). It's important to note that this approach, which measures the gap between the standards set by management and the company's performance, is a form of one-dimensional customer experience measurement and does not measure customer perception (see Figure 1, right section).

In parallel with these service quality measurement activities, surveys are the most commonly used marketing research method to measure customer satisfaction (very popular in the 1980s and 1990s in the form of telephone surveys, and more digitally since the early 2010s). Again, it's important to note that this approach, which measures the gap between customers' expectations and their perceptions, is a form of one-dimensional customer experience measurement that does not measure customer perception (see Figure 1, left section).

In the early 2000s, a new research trend emerged. Several authors suggested that, due to certain methodological problems associated with the isolated measurement of each concept of service quality and customer satisfaction, customer service should also include the simultaneous measurement of both concepts (Shaw, 2002; Reichheld, 2001, 2006, 2009, and 2011; Gagné, 2018). This marked the birth of the customer experience concept. It is worth noting that performance indicators measured in isolation or using only one of the two approaches (satisfaction measurement vs. conformity measurement) are at the root of the eternal debates between the marketing and operations departments. This explains why many companies find that, although they seem to be doing everything right for the customer (conformity measurement), the customer still seems dissatisfied (satisfaction measurement). These companies would benefit from integrating the concept of customer perception, which is the simultaneous interaction between what the company does for its customer and what the customer perceives is being done for them. Customer perception, therefore, consists of simultaneously measuring service quality and customer satisfaction (see Figure 1, bottom section).

Figure 1





The preferred research method among marketing research companies, which proves to be **the most effective for measuring customer perception, is the “real customer” mystery shopper method.**

- What is a “real customer” mystery shopper?
- How does it differ from a “classic” mystery shopper?
- What are the advantages and disadvantages of using “real customer” mystery shoppers?
- What are the key success factors in implementing a customer experience measurement program with this type of mystery shopper?

These questions deserve to be addressed to shed light on the subject. sur le sujet.



## The “classic” mystery shopper and the “real customer” mystery shopper: definitions

First and foremost, it should be noted that a mystery shopper, regardless of type, is conducted by an anonymous, compensated provider (either through salary for a classic mystery shopper or reimbursement for a customer mystery shopper), who evaluates without disclosing their identity and real role to the business manager.

This differs completely from an audit, which is performed by clearly announcing the purpose and necessary means, such as in the restaurant industry where professionals (internal or external) analyze hygiene and take samples of raw materials.

## "Classic" mystery shopper

A "classic" mystery shopper is a fake customer sent by a specialized provider to exclusively measure compliance at a point of sale and/or with customer-facing individuals.

Not representative of the evaluated business, the mystery shopper is an employee (it's their job) commissioned by the company they work for to primarily audit heavily regulated sectors such as financial services, transportation and public services, and government departments. They are also used to evaluate businesses in the retail sector that have a low "maturity" in customer experience or young companies in the "standardization" stage. They conduct hundreds of evaluations per year. Despite lacking the motivation of a real customer, this form still constitutes participatory observation. The mystery shopper typically follows systematic evaluation instructions, according to quality standards predefined by the company (known to the mystery shopper). The emphasis is on the service experience as it unfolds, observing which activities or standards are or aren't followed, rather than obtaining perceptions based on lived experience.

## "Real customer" mystery shopper

In contrast, as the term implies, a "real customer" mystery shopper is an actual customer with genuine purchasing intent.

Depending on the assignment type, the shopper is rigorously selected and professionally trained to conduct mystery shopper evaluations while maintaining their "naive" perception as a real customer. This type of mystery shopper must therefore perform evaluations discreetly, voluntarily, and without knowledge of the company's standards, ensuring maximum representativeness of the evaluated business's real customer base. The "real customer" mystery shopper typically receives instructions to behave naturally, evaluating not only what was done for them but also reporting their perception of what was done for them (lived experience). The focus is therefore on customer perception rather than the normative provision of service by staff. By rigorously applying recognized methods of statistical analysis, the analysis of collected results allows understanding of customer perceptions and satisfaction levels, prioritizing important elements, and thereby enabling the business to improve high-value-added elements that have the greatest impact on customer perception (often referred to as moments of truth).

Figure 2

This graph indicates where both mystery shopper methods should be used.







## Evolution of methods

The method of participatory observation dates back to the early days of anthropological studies. The concept of the mystery shopper itself has existed for over 80 years and was highly popular in the 1960s.

From the 1940s to the late 1960s, mystery shoppers were primarily used by banks to monitor the integrity of their employees. During this time, mystery shoppers were few in number and employed a highly structured approach (binary checklist of yes/no norms) to collect and measure specific information about service performance.



The results of these evaluations were used to achieve three main objectives:

1. As a diagnostic tool to identify strengths and weaknesses in service delivery.
2. To penalize personnel through performance evaluation metrics.
3. To assess the competitiveness of an organization's service by comparing it to competitors within the industry.

In most organizations, managers would collect information, interpret it, and intervene with employees to inform them of areas needing improvement to meet management's expectations. Employees were often disengaged from this process, viewing it as inappropriate, punitive, ineffective, unrepresentative, distorted by observational errors, etc. Additionally, frontline staff frequently misunderstood performance expectations due to poor communication between management and employees.

During the 1970s, mystery shopper programs were primarily used in the fields of financial services, fast food, and in the hospitality industry. While the practice of mystery shopper still aimed to formally verify adherence to standards, the first positive objectives began to emerge, such as fostering team spirit (employee mobilization) and linking program performance to a reward system for staff.

It wasn't until the mid-1980s that we began to see some fatigue in the mystery shopper methodology. Because they were often recognized as fake customers (e.g., a mystery shopper who is single without children and dressed in a suit and tie evaluating

the service of a company that sells children's shoes, or the same shopper frequently evaluating the same establishments), leading to a shift towards customer satisfaction surveys. Indeed, there is a noticeable trend towards paying more attention to customers, as developing a strong relationship with customers can become a competitive advantage for a business. Several researchers during this time also recognize the importance of customer satisfaction and its impact on business longevity. Nevertheless, during this period, the approach is considered "informational" since no intervention is made with dissatisfied customers.

However, at the beginning of the 21<sup>st</sup> century, managers recognize that customer satisfaction surveys are not sufficient to provide detailed information to identify and correct weaknesses in service processes, as respondents only have a very general impression of the service. It is also observed that respondents do not represent overall customer satisfaction because it is mainly the "extremes" of the distribution curve (the most satisfied and the most dissatisfied) who agree to respond to the survey. Thus, achieving service excellence by emphasizing the customer is no longer solely reliant on satisfaction surveys. It is recognized that the goal is not just to achieve service excellence, but to achieve excellence in "customer experience." Therefore, organizations must focus more on understanding customer expectations and implementing a variety of methods to measure customer perception. It is at this juncture, coinciding with the rise of the Internet, that "real customer" mystery shoppers emerge to meet this demand by simultaneously collecting facts and their perceptions of these facts.



To ensure the reliability of this new type of mystery shopper, who conducts a very small number of evaluations (3 to 5 per year compared to several tens or even hundreds annually for the traditional approach), firms focus on effective training and guidance of mystery shoppers, in addition to constant, credible, and representative recruitment of new mystery shoppers. It is also emphasized the importance of having real customers with a neutral attitude, who typically conduct only one evaluation per company per year. Effective training involves setting up clear scenarios including questions to ask and behaviors to adopt. All of this must be done while ensuring the anonymity of the real customer as a mystery shopper, since they will certainly visit the evaluated establishment again.

Today, the mystery shopper (both "classic" and "real customer" types) is a global industry worth several billion dollars. Indeed, interest in mystery shopper appears to be strong, particularly in retail. This interest is reflected, among other things, by the fact that the mystery shopper industry in North America alone generated estimated revenues of over \$1.5 billion USD for the year 2023 (Mystery Shopping Providers Association, 2024). "Real customer" mystery shoppers, for their part, contribute to motivating local teams and are no longer just surveillance devices. They have

become a tool for analysis, motivation, and strategic evolution in the entire customer relationship. This tool is used in all sectors with commercial relationships (franchise networks, hospitals, administrative services, transportation, etc.).

Increasingly, managers have shifted from discipline to employee coaching, for example, by providing more recurrent feedback. However, it is challenging for them to find a credible methodology with employees. Many are therefore turning to "real customer" mystery shopper programs. The authors also emphasize the importance of feedback among employees so that they understand the relationship between what they do and what customers perceive of their actions for them.

DID YOU KNOW THAT

**85%**

of companies believe they offer personalized experiences, but

**only 60% of customers share this view?**

Source :  
Salesforce



# Advantages of mystery shopper

The mystery shopper methodology offers several advantages compared to other methods, regardless of the approach used. Indeed, it provides a clear and specific picture of the service received (both classic mystery shopper and real customer mystery shopper) as well as the service perceived by the real customer (real customer mystery shopper approach only) at a specific moment. Both approaches also allow for comparative studies of certain competitors. Finally, they facilitate feedback to employees that can be integrated into a reward and/or consequence program based on performance.

## Advantages of the “classic” approach

Although the “classic” mystery shopper approach has declined in popularity in several sectors, it remains practical in situations where measuring the perception of the real customer is not desirable and no qualitative feedback is required (e.g., measuring normative performance in a binary yes/no mode without comments). It effectively measures adherence to processes, which can be crucial when a “young” network is growing and needs to ensure standardization of practices across its various outlets. It is also a less costly approach, both for the purchasing company and the service provider firm, provided that evaluations are conducted in large urban centers.

Indeed, since the number of mystery shoppers required for evaluations is very small (the same mystery shopper can conduct multiple evaluations for the same company in each measurement period), recruitment efforts are less significant. However, it should be noted that this financial advantage quickly diminishes when evaluations take place in rural areas, as the low number of mystery shoppers usually forces the service provider to charge travel expenses.

Finally, it is worth noting that this approach has the advantage of measuring a greater number of elements since the measurement of qualitative information is very limited, or sometimes nonexistent.

### DID YOU KNOW THAT

Companies that have implemented mystery shopper programs have observed **a reduction in customer complaints of**

# 20%

**a notable improvement in customer satisfaction**

Source : Ipsos

## Advantages of the “real customer” approach

The primary advantage of the “real customer” mystery shopper methodology is undoubtedly the ability to measure in real time the perception that the customer had of the service provided to them, thus measuring the real customer experience.

**Additionally, this approach allows for the measurement of the 5 major customer experience indices:**



Apart from this major advantage, evaluations are often conducted much more quickly since each evaluation is performed by a different customer. Furthermore, another significant advantage lies in the quality and richness of qualitative information provided by customer mystery shoppers. Studies have shown that questionnaires filled out by “real customer” mystery shoppers typically contain more comments on average, and each comment is longer on average (more words per comment).

Therefore, programs implemented using this approach become powerful management tools that enable business owners and their staff to better understand their customers’ expectations.

# The disadvantages of mystery shopper

One of the main weaknesses of the mystery shopper methodology, regardless of the approach used, is the total quantity of evaluations per evaluated service point. Indeed, while the overall sample within the measured network is statistically significant, it is often challenging to conduct valid analyses and statistics for each service point. Therefore, given the limitations of this method, several organizations seek to increase the frequency of evaluations to provide more insightful feedback (some up to 10 times per month). The costs per evaluation are higher for a mystery shopper program compared to continuous surveys (like Voice of Customer), but it is a more effective method to obtain a realistic portrait of the entire customer journey.

## Disadvantages of the “classic” approach

The main disadvantage of the “classic” mystery shopper methodology is the inability to measure customer perception. Consequently, it also does not allow for the measurement of key customer perception indices mentioned earlier. Therefore, only the process is being evaluated, not the outcomes.

Furthermore, studies demonstrate that this type of mystery shopper is much easier to identify, as they are not representative of the evaluated company, or because they frequently evaluate the same business.

Another significant disadvantage is the quality and richness of the qualitative information provided by this type of mystery shopper. Due to the large number of questionnaires that mystery shoppers fill out each week, sometimes even in a single evening, users of this approach often complain about the lack of qualitative data. Finally, it should be noted that this approach simply cannot be applied in cases where a real customer is required (e.g., the same mystery shopper cannot open multiple bank accounts or subscribe to multiple networked sports centers).

## Disadvantages of the “real customer” approach

There are two notable disadvantages of this approach.

**The first is the recruitment challenge.** Indeed, to ensure adequate representation and to avoid duplicate missions or too many evaluations conducted by the same mystery shopper, it is necessary to constantly recruit and maintain a pool of credible mystery shoppers with varied profiles (often tens or even hundreds of thousands), which can be difficult and costly.

Moreover, it is essential to provide effective training to a large number of mystery shoppers. Therefore, it is a significant challenge to find the right customers according to the planned scenarios, ensure they have the right motivations (not attempting to find fault), and provide them with effective training.

**The second disadvantage lies in the maximum amount of information that can be obtained from this type of mystery shopper.** Indeed, since customers often have several questions for which they must or choose to provide detailed comments, users of this approach sometimes complain about the lack of quantitative data (around 30 questions rather than 80, 100, or even 120 questions and more). However, the literature indicates that shorter questionnaires generally yield better results in mystery shopper programs.

DID YOU KNOW THAT TODAY,

**the one-dimensional approach is no longer sufficient to manage customer experience effectively**

Businesses typically combine their mystery shopper programs with other customer experience measurement and management programs (Voice of Customer surveys (VOC), online review management, and more).

Source : Lanla



# How to successfully implement a mystery shopper program?

Several issues related to the implementation of mystery shopper programs (compliance or real customers) can also be identified. Firstly, it's important to understand that humans fundamentally fear being evaluated. They are afraid of being "labeled" as not performing well based on a negative evaluation by an assessor. Thus, when poorly implemented, these programs are often perceived as confrontational by many franchisees and employees, who will do everything to ensure the program fails and is eventually discontinued, regardless of the type of measurement.

## Creating the program

The literature first emphasizes the importance of establishing a structured process for implementing a customer experience program. Many businesses recognize the importance of customer experience without allocating dedicated resources for it. These programs are often implemented by departments such as marketing, operations, or human resources. Therefore, it's crucial to create a customer experience committee composed of employees from various departments within the company, led by a decision-maker and influencer whose sole responsibility is to improve the company's profitability through customer experience. It is also highly recommended to have one or more employees (franchisee, territory manager, manager, etc.) sit on this committee, either periodically or permanently.

Employee participation is indeed considered essential for the program's success at every stage of its development. This approach prevents employees from viewing the program as a "weapon" of the headquarters and ensures they do not perceive it as a threat, a spying technique, or a disciplinary tool.



## Communication

Next, it's crucial to adopt an attitude of transparency towards all staff regarding the program. Everyone should first be informed about the presence of a mystery shopper program, which allows them to understand what is expected of them. Employees need to know the specific areas on which they will be evaluated and the performance standards of the company. Therefore, clearly communicate the objectives of all types of measurements in the program and ensure that all employees are familiar with the measurement tools and standards to be adhered to before the program becomes active.

An address during an annual event serving as the "official launch" of the program often garners considerable success.

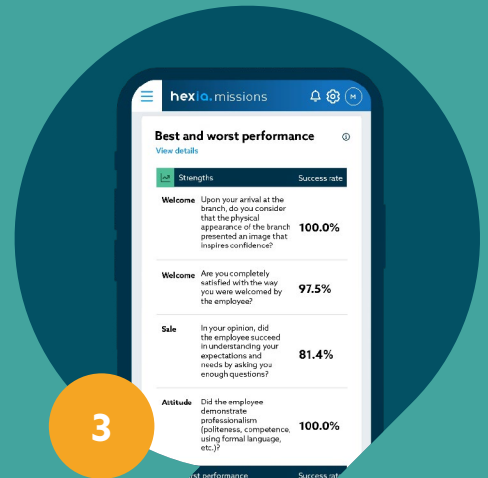


## Management values

**One of the key points to the success of a customer experience program: the program must be constructive and not punitive!**

As mentioned earlier, employees fear being evaluated. It is therefore essential to remind them frequently that the program is not used for disciplinary purposes, but rather to improve the overall customer experience. For example, a mystery shopper program should be used to diagnose the customer experience, not as a tool for individual employee evaluation (focused evaluations for specific employee needs can be conducted separately from the annual customer experience measurement and management program). Studies show that employees' initial reaction to this approach may be negative, but their behavior always changes when the program is managed in a positive and constructive manner rather than a punitive one.

It is also much easier to implement a "real customer" mystery shopper program because its goal is not to measure what is done for the customer, but rather what the customer perceives is being done for them. This approach is perceived as much less threatening by the evaluated employees.



The screenshot shows a questionnaire form on a smartphone screen. The form has several sections with questions and multiple-choice options. A large orange circle with the number '4' is overlaid on the bottom right of the screenshot.

1. Indicate the amount of your bill including taxes and tip: €

2. Enter the date of your visit: 2023-04-22

3. Enter the time you arrived in this restaurant / coffee shop: 10:00 PM

4. Indicate the moment of your visit:

- a) Before 9:00 a.m. and 9:59 a.m.
- b) Between 10:00 a.m. and 3:59 p.m.
- c) Between 4:00 p.m. and 9:59 p.m.
- d) Between 10:00 p.m. and 3:59 a.m.

5. To determine the level of customer traffic during your visit, indicate the approximate number of clients that were in the waiting line when you arrived (you must include yourself in the number of clients):

- a) 1-5 clients
- b) 6-10 clients
- c) 11-15 clients
- d) 16-20 clients
- e) More than 21 clients

6. Considering the level of customer traffic, when you arrived in the waiting line, did an employee take your order in a timely and fast enough way?

- a) Yes

## Creation of questionnaire(s)

**The psychometric properties of questionnaires and mystery shopper scenarios also play a crucial role in the success of a customer experience measurement and management program.**

Indeed, questions must be well formulated to avoid biasing respondents' judgments (e.g., "How bad was the greeting?"). In the context of a program involving real customers, it is also important to ask specific and open-ended questions to obtain clear and comprehensive information from the mystery shopper.

Furthermore, scenarios must be relevant and reflect the natural transactional behavior of real customers (hence the advantage of a "real customer" program). This enhances the program's credibility perceived by the staff. Additionally, in cases where multiple sectors are evaluated (e.g., dining room service and delivery, cosmetics and laboratory department, etc.), it is preferable to opt for more than one questionnaire. Lastly, it is important to note that the questionnaire(s) should be accessible to mystery shoppers on all types of platforms (computer, tablet, smartphone, etc.) to facilitate their completion.

## Management of the program

Once evaluations have begun, it is important to mention that employees will attempt to identify the mystery shoppers, highlighting the importance of using different mystery shoppers as much as possible each time and ensuring they are credible and representative of the evaluated business.

Moreover, completed evaluations must be promptly communicated to those involved (frontline employees, managers, franchisees, etc.). Some companies display the information on a poster in the employee area, while others meet with employees in groups, etc. It is crucial to “depersonalize” evaluations to prevent identification of the evaluated employee(s) or the mystery shopper. Furthermore, it is important to reinforce positive points and take action on areas needing improvement. The use of personalized dashboards for each user level is also highly recommended to track real-time progress of key program indices, accessible on all types of platforms (computer, tablet, smartphone, etc.).

In this regard, it is also important to compare oneself to the broader network and not just individual results. Finally, the frequency of evaluations also influences the program's credibility: the more regular mystery shopper visits are, the more alert and aware employees become, making the program an effective operational management tool.

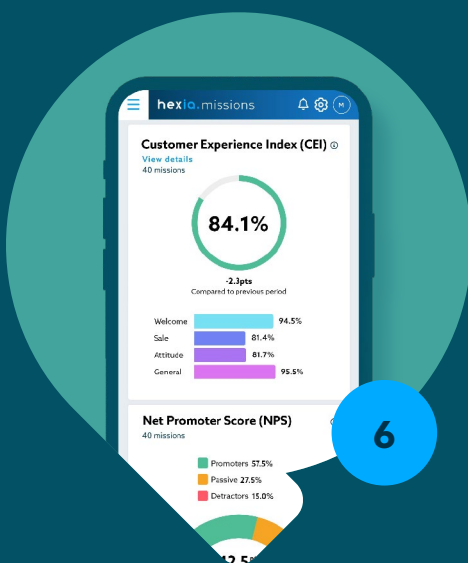


## Analysis and recommendations

After several evaluations, a report should be produced and communicated to senior management. Once again, results must be interpreted at a global level, and the anonymity of employees must be protected. Findings should be appropriately written, accessible, and communicated to the right individuals. Subsequently, it is crucial to present the results to managers and employees whenever possible, emphasizing the evolution over time, strengths and weaknesses, successful actions implemented, comparison with comparable points of sale (competition), etc.

To maximize the success of the program, training programs should be based on evaluation findings, focusing on weaker elements (compliance) or elements deemed important by the real customer (commonly known as Moments of Truth) where the network has performed least effectively (customer perception). Training should target frontline employees, managers responsible, and franchisees.

Studies demonstrate that employee acceptance of a mystery shopper program is crucial for results to be considered by them. Therefore, it is important to put in the necessary effort to be well-structured and transparent by informing all stakeholders about the role of the program(s), the elements measured, and the evaluation results. It should also be noted that these programs have a significant impact initially, but the impact diminishes over the long term, highlighting the importance of periodically updating the program(s).



# "Real customer" mystery shopper: it pays off!

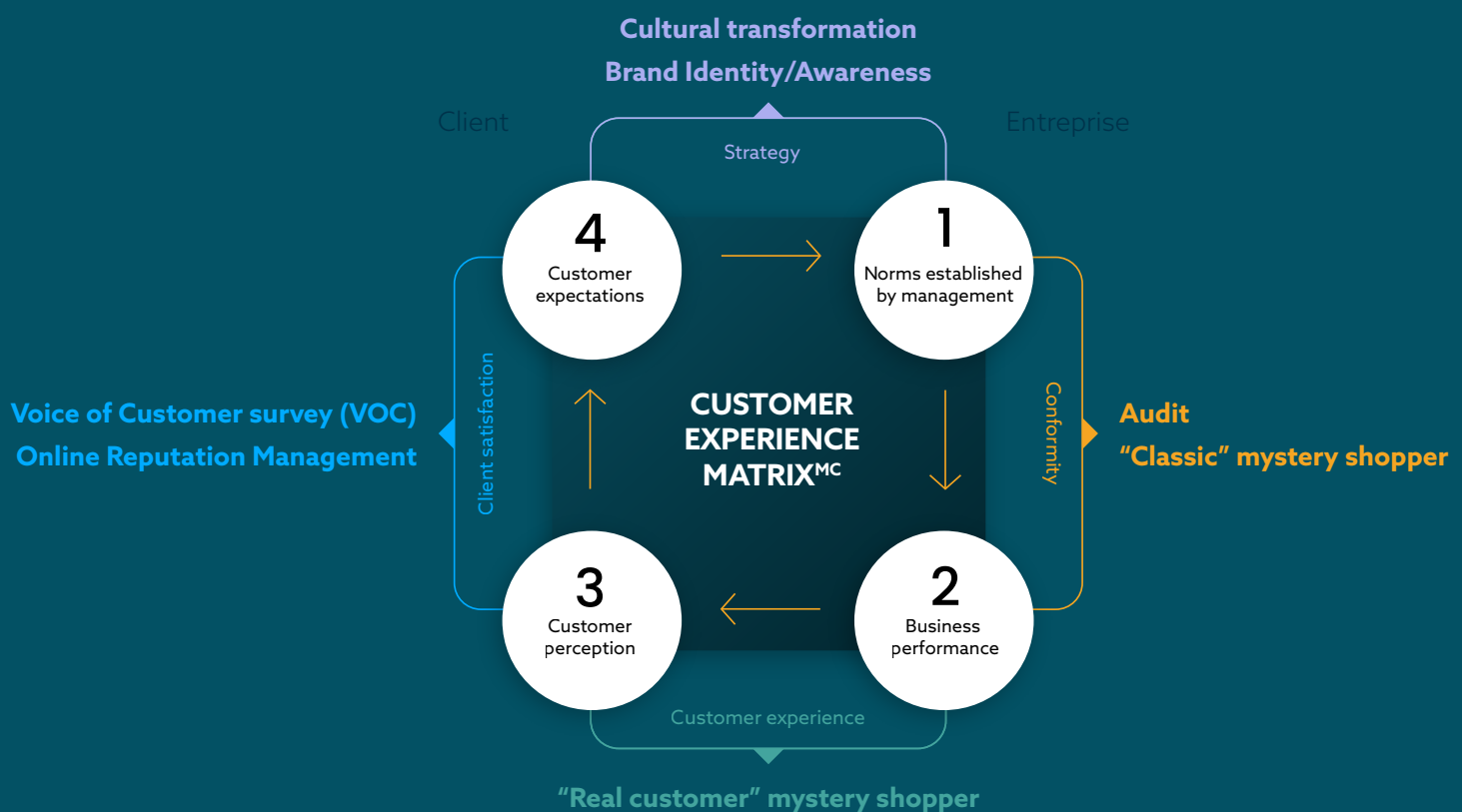
In industries where products are often very similar from one company to another, the quality of the customer experience makes the difference. If the experience offered does not meet expectations, customers will not hesitate to switch to a competitor.

**That's why mystery shopper programs, especially those using real customers, are very popular. Moreover, when these programs are successfully implemented, they greatly contribute to the sustainability of the business.**

Over the past 20 years, "real customer" mystery shopper programs have proven their worth. Studies show that the most successful companies that maximize the potential of their "real customer" mystery shopper programs typically see profitability increase by 1% to 4% per service point.

Nevertheless, no method is perfect. It would be wrong to claim that mystery shopper methodology (both compliance and real customer approaches) is self-sufficient. While the real customer approach allows for more specific analysis of the services offered, it should be used in conjunction with other more "interventionist" methods, such as satisfaction surveys (with alert systems) to manage detractors, or Online Reputation Management (e.g., Google My Business, Facebook, etc.) as illustrated in Figure 3 (left section).

Figure 3



One thing is certain, with statistics  
like these:

## **1 out of 3 customers**

will leave a brand they love after just one  
bad experience, while

**92% will completely abandon a company after  
two or three negative interactions;**

---

## **46 %**

of customers will abandon a brand if employees do not  
have good knowledge of the product or service;

---

## **1 out of 6 buyers**

will forgo a purchase a purchase due to a poor  
customer experience.

**It is imperative to  
prioritize the customer experience,**  
regardless of the methodology used!





Create and measure the experience  
**with solutions focused on your needs.**

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