



IASE Newsletter

DECEMBER 2010

PRESIDENT'S CORNER

Well we have finally figured it out and I will officially be assuming the office of President of the IASE on October 1, 2010. Janet will be staying around as our most immediate Past President and participating in a lot of different functions. I can assure you I will be call-

ing on her frequently. I am also sure that I speak for the Board of Directors and all the membership in thanking her for a great job. Her commitment and dedication to duty is sincerely appreciated.

Unlike political candidates who promise change and then don't deliver, I just want to promise more of the same. I think the IASE is in a good place right now thanks to Janet and previous Boards. I hope to be able to continue the trend and I hope to do so with a continued effort to increase membership. I believe the IASE offers a tremendous value for the money and I hope we can continue to grow. My goal is not to become so large that the organization is cumbersome and unmanageable, but to stay small while increasing membership and getting some new

and fresh ideas.

I want to make a few comments to add to Janet's article about the recent Independent Mystery Shopper Coalition Conference in Las Vegas. I believe those members who were in attendance had a good time and the IASE was very well received. The exposure and name recognition alone was worth the sponsor fee. Next year's IMSC Conferences will be May 13-15 in Orlando, FL and October 30-November 1 at the Tropicana Hotel in Las Vegas. I have already been scheduled to be the Speaker for the segment on shopping casino's for the fall conference.

Please mark your calendars for the IASE 2011 annual conference at Big Cedar Lodge from May 18-20. This is an easy to



*Chuck Kenerson
President
QSI Specialists*

get to place outside Branson, Mo and the room rates are outstanding. Check out www.bigcedar.com. We will be sending out additional details as soon as possible, but everyone should consider reserving their room as early as possible.

Finally, I look forward to working with all of you during the next couple of years. I hope they will be extremely successful for all of us.

Best Regards
Chuck Kenerson

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Are You Doing What You Truly Love To Do?

Angela V. Megasko, President/CEO
Market Viewpoint, LLC

A wonderful friend and mentor of mine once explained the difference of a job, career and calling to me. He explained that how we make a living can be the route to happiness especially when we are doing what we truly love and what we are meant to do. He said that our work generally falls into one of three categories:

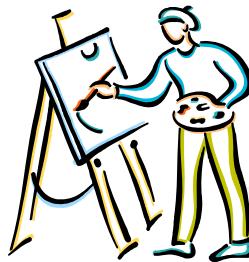
A job is something a person does strictly for the money. A career is something a person does for the perceived opportunity for advancement. But a calling is something one would do for the sheer love of doing it regardless of whether or not they got paid.

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Now here are the ramifications to your business. As the owner of your mystery shopping firm, if you are not doing what you truly love it will drain the life out of you and you will lose your passion for the business. Your clients

and prospects will be able to sense this and so will the people you meet at networking meetings. Your employees will know it too. They depend on you for your vision and leadership and they feed off the energy you share for new ideas, products, and services. When someone loves what they do, they exude a certain energy that is exciting and contagious. Others want to be around that energy so be sure to charge up your battery often by doing things that make you fall in love with this business all over again. Otherwise, you might as well just find something else to do to occupy your time.

Your employees and contractors need to love what they are doing too. As you look around and observe your staff next week, see if you can spot those who are there for the love of the work. If you are able to spot them, so can your customers and customers enjoy working with employees who have a passion for what they do. These are the employees who understand the value of offering customer service and what it means to customer retention. They are the employees who approach their jobs with a joy-



*Angela V. Megasko
President/CEO
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ful heart and a great sense of humor – and let's face it – having a sense of humor helps in this industry.

Ask yourself the following questions:

1. How can I keep myself and my employees and contractors motivated to serve and at the front of my operations and in touch with my customers as often as possible?
2. How can I create more opportunities for my contractors and employees to experience their "calling"?

To your profitability and may you always be one of the lucky ones who truly loves what you do for a living!

M
Market
Viewpoint

IASE PROUDLY WELCOMES OUR NEW MEMBERS



Strategic Reflections, Inc., a national mystery shopping company was formed in July of 2004 by John DeLuca and Karen Register.

From the very beginning, John, Karen and their key associates focused on utilizing their collective 45 plus years in the industry to build a mystery shopping company that would honor and deliver on five core promises:

1. To communicate effectively with both clients and mystery shoppers.
2. To offer a competitive pricing strategy that will attract new clients, so that more assignments will be available to our shoppers.
3. To remain accessible to our clients and shoppers by maintaining live schedulers available by phone during normal business hours.
4. To deliver the most accurate and timely mystery shopping reports possible to our clients.
5. To develop trust by compensating our shoppers as fairly as possible and on a consistent schedule, so that Strategic Reflections, Inc. will be a shopping company of choice by mystery shoppers.

Strategic Reflections, Inc. continues to grow and our core business remains to be the retail, restaurant, convenient store, grocery store industries, with plans to expand into the entertainment industry. Strategic Reflections, Inc. is proud to be a member of IASE.

Strategic Reflections, Inc.

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LP Innovations, Inc. is the leader in nationwide loss prevention solutions and field services. Since 1998, LPI has partnered with retailers in various industries to provide loss prevention programs that increase profitability. Services include audits, investigations, training & awareness, and exception based reporting (EBR). In 2005 LP Innovations purchased ICU Associates, adding customized mystery shop programs to the suite of services.

Marc MacGillivray heads up the mystery shop services for LP Innovations out of their Milford, Massachusetts offices. With over 11 years at LP Innovations, Marc has gained experience in various departments including auditing, field operations and exception based reporting. Marc enjoys coaching little league baseball and is engaged to be married in October of 2011.

Caitlyn Curley heads up scheduling for the shop division and is the company's most familiar name to hundreds of shoppers throughout the country. Caitlyn also handles a growing list of editors in her fourth year with LP Innovations. Caitlyn and her husband are looking forward to the birth of their first child in March of 2011.

LP Innovations, Inc

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IASE PROUDLY WELCOMES OUR NEW MEMBERS



UNDERCOVER ESSENTIALS, LLC

Undercover Essentials, LLC provides Certification for those shoppers who wish to take their skills to the next level. We provide nationwide workshops in undercover video mystery shopping and graduates receive the title of "Undercover Video Specialist." We also provide consulting services to MSCs who wish to move into video shops, the future of the shopping industry. We maintain a database of certified video shoppers and can help MSCs provide pilot programs for existing clients who would benefit greatly from seeing their shops happen on video. Consulting services range from training MSCs on the ins and outs of video shopping programs and helping to provide a quality product to the end user. Shopper referrals and scheduling are also available.

Owner, Carrie Porhammer, has a degree in International Business and many years of shopping experience. She began Undercover Essentials, LLC, when she saw a need for a certification program for shoppers. She also heard many horror stories about MSCs taking on small video projects and failing miserably because they did not have the proper in-house training, nor did they have access to a database of trained video shoppers in diverse geographical areas. The Nationwide Certification Workshops are supported and/or recognized by all large MSCs who have video shopping programs.

Undercover Essentials, LLC

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IASE PROUDLY WELCOMES OUR NEW MEMBERS



MYSTERY SHOPPING

My background is in hospital administration. I have a Master's degree from the University of Pittsburgh's Graduate School of Public Health in the Health Administration Program plus a Marketing Certificate from Pitt. Prior to forming Devon Hill Associates, I served as a senior executive at two hospitals in Pittsburgh, PA and have had extensive experience in strategic planning, hospital marketing, new program development, public relations, special events and physician recruitment.

I decided to head out on my own in 1987 and formed Devon Hill Associates. Hospital executives spend 70 percent of their time in meetings and I liked to do things.

Initially Devon Hill was comprised of myself and 3 affiliated consultants in Public Relations/Marketing Communication, Sales Training and Marketing Research. Initially we had two focus areas. We provided consulting services to hospitals that wanted to set up and market occupational health programs and we offered marketing and sales training to long-term care organizations. As part of our occupational health focus, I developed a syndicated occupational health marketing program called 'On the Job' which I sold to 11 hospitals. Along the way I co-authored chapters on marketing and communications in the University of Iowa 1989 *Series in Nursing Administration* and the American Hospital Association's book, *Occupational Health Services: Practical Strategies for Improving Quality and Controlling Costs*. At the same time, within the long-term care focus, I, personally became a mystery shopper in nursing homes, assisted living and retirement communities in order to prepare for our sales training.

Our marketing programs captured numerous awards including the *Marketing Excellence Award* in Health Care and *Marketer of the Year Award* for from the Pittsburgh Chapter of the American Marketing Association and the HCA Management Company's Northeast marketing and Public Relations Conference Administrator's Choice Award. Devon Hill and Kukovich & Associates' marketing brochure for Occupational Health Research was a finalist in the prestigious international *Mercury Awards*, and captured a silver award in the *Academy of Health Services Marketing Flashes of Brilliance Competition*.

Then, in about 1994 I became a hospital patient, and had an absolutely abysmal experience. Lying in my hospital bed (in those days, hospital stays were still more than 24 hours) I dreamed of how I might make the experience better for other hospital patients -- using mystery shopping as my tool. I knew it was risky because most hospital had never -- and would never -- consider the concept. Back then, if you said you offered hospital mystery shopping, people would say, "What is that?" But a Sunday *New York Times* in 1996 (?) featured our services and I have not looked back. So, we were pioneers, but now our "Secret Patient Service" is considered among the leading hospital mystery shopping services in the country. It has been featured on national television (the O'Reilly Hour) and in articles appearing in the *LA Times*, *San Diego Tribune*, *Pittsburgh Post Gazette*, *Detroit News*, *San Francisco Chronicle* and other national newspapers, as well as *California Medicine*, *Ambassador Magazine*, the American Hospital Association's *Hospital and Health Networks*, *Hospital Trustee*, *Healthcare Forum Journal* and other trade publications. I have written articles on mystery shopping and customer service which have appeared in the *Group Practice Journal*, *Assisted Living Today* and *Contemporary Long-Term Care*.

I am married to a retired Cardiovascular Surgeon who helps me create some of our scenarios, especially the ones for inpatient and outpatient surgery visits. We have three children and five grandchildren. We went from two to five in one month when my daughter and husband had a baby boy and my son and wife had twins. We also have a senior dog -- Mikey.

Devon Hill Associates, LLC
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IT'S THAT TIME AGAIN! TAX TIME – GOT IT ALL?

Here's a helpful list of items frequently missed:

Refinances. You'll need a settlement statement. Might be best to bring all the paperwork.

Child Care Expenses. You'll need full name, address, telephone and I.D. number of care providers.

Estimated Tax Payments. Find date and amount for payments. Look near April 15, June 15 and Sept. 15 of 2010, and January 15 of 2011. A January 2010 payment was used on your 2009 return.

Sales of Property. The most important thing is the settlement statement. Bring all your paperwork.

Student Loans. Form 1098-E reports interest. You'll need this plus information about the type of loan.

College Tuition. Form 1098-T lists college tuition paid. You'll need the form and full details on the courses, and who took them.

Sales of Stock. Form 1099-B shows sale price. You'll need data on the original purchase. Broker may give this. If not, find the "buy" slip.

Business Records. It's helpful to separate purchases of major equipment from other supplies.

Employer Reimbursements. If your employer reimburses any of your expenses you'll need records to ensure you claim only the excess.

Partnership Information. Schedule K-1 from partnerships and LLCs always seem to arrive late. Don't worry. It's a good idea to complete

the rest of your return and be ready to go when the K-1 arrives.

Social Security Benefits. Find the Form 1099-SSA. You'll need to declare the gross amount you were paid, not your net monthly benefit.

Special Accounts. Do you contribute to an IRA, Roth IRA, or Health Savings Account? These and others can cut your taxes.

Complex Transactions. Be proactive. Be sure and call your accountant early if you have an unusual or difficult transaction. Foreclosures, sales or exchanges of real estate, casualties, and such can take a lot of extra work. You may need to schedule a special meeting, and your accountant may need additional time.



YOUR TAX CALENDAR

Dec 31	A check mailed today counts for 2010. Last chance for deductions! State estimated tax paid today is deductible on 2010 Federal return.
Jan 17	4 th quarter estimated tax payments due.
Jan 31	Employers – Quarterly payroll & FUTA due. W-2's and 1099's due to recipients.
Feb 28	W-2's and 1099's due to IRS.
April 15	2010 tax returns due. Last day for 2010 IRA or Roth contributions.

TEN PEOPLE AND THINGS THAT GOT A BOOST IN 2010

Bloomberg Businessweek Year in Review

Corporate profits – While consumers pinch pennies, companies are rolling in cash.

Text message donations - Cell phone users give over \$40 million to Haiti relief.

Weird weather - Moscow burns while glaciers melt.

Vinyl records – New wave of appreciation sends people back to the record store.

Sarah Palin – Mama Grizzly hosts a reality show and gets a running start on 2012

Groupon – Reached \$1 billion in revenue faster than Facebook and Google did.

Privacy Anxiety – The Internet knows – and remembers –nearly everything.

Facebook – Blows past the 500 million user mark and keeps growing.

4G – High-speed wireless is coming soon to a city near you.

Online TV – Prepare to say goodbye to \$100 cable bills.



**MEMBER CONFERENCE
MAY 18-20, 2011
BIG CEDAR LODGE
RIDGEDALE, MISSOURI**



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Winter look
like?



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