

Evaluating Reference Customer Service with Secret Shoppers

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Inspiration

Benjes-Small, C., Kocevar-Weidinger, E. (2011).
Secrets to successful mystery shopping: A
case study. *College and Research Libraries
News* 72(5), 274-276, 287.

Assessment History

- Reference Service Satisfaction Survey
- 2 week interval in fall and spring semester, time frame based on statistics collected year before

Reference Service Satisfaction Survey

- Fall & Spring
- 2 weeks
- Allows for comparison of librarian/patron viewpoints of transaction
- Customer service oriented
- Little qualitative data

Status (check one)

Undergraduate Graduate Faculty Staff Other

Please rate the following statements by circling a number or not applicable (N/A).

(1 is strongly disagree.....5 is strongly agree)

I got the information I needed.

1 2 3 4 5 N/A

I am more confident in my ability to find information.

1 2 3 4 5 N/A

I am satisfied with the service I received at the reference desk today.

1 2 3 4 5 N/A

I would recommend this service to others.

1 2 3 4 5 N/A

If you have comments, please write them on the back of this card. Please place the completed survey in the box. Thank you!!!

Status (check one)

Librarian PRC Intern

Please rate the following statements by circling a number or not applicable (N/A).

(1 is strongly disagree.....5 is strongly agree)

The user got the information he or she needed.

1 2 3 4 5 N/A

The user has a better understanding of how to find information.

1 2 3 4 5 N/A

I am satisfied with this reference transaction.

1 2 3 4 5 N/A

If you have comments, please write them on the back of this card. Please place the completed survey in the box. Thank you!!!

Why Secret Shoppers?

- Qualitative data
- Curiosity - What can we learn from it?
- Individual feedback

Preliminary Questions



- How many times/person?
- Include chat?
- Full report: all together, or PRC/librarian?
- How to recognize individual librarians?

Preliminary Questions

- Just customer service? Quality of information?
- Any impact on annual evaluations?
- Dealing with negative individual comments?
- Only reference department?

Planning: Reference Department

- **Why** do it?
- **How** to use the data?
 - Self improvement
 - Departmental training
 - Establish base-line customer service expectations
- **What** measures? RUSA guidelines.
- **Procedure**? Same survey for student workers, LTA, interns, and librarians
- **Ask Office of Employee & Organizational Development to work with us**

Planning: Office of Employee & Organizational Development

- Handled logistics of student recruitment, training, data collection
- Internship project
- Created survey questions based on RUSA guidelines
- Used sample questions from reference librarians

Planning

- Sample scripts made shoppers more comfortable
- SurveyMonkey
- Original plan to do fall only
- Survey anonymous in fall – changed for spring

Sample Survey Questions

Reference Librarian Rating Form

LISTENING / INQUIRING

The librarian must be effective in identifying the shopper's information needs and must do so in a manner that keeps shoppers at ease.

***23. Did the librarian communicate in a receptive, cordial and encouraging manner?**

Yes

No

***24. Did the librarian use an appropriate tone of voice? E.g. not demeaning, not too loud or harsh, not monotone, etc.**

Yes

No

***25. Did the librarian use open-ended questions to encourage you to expand on your request? Examples include: Please tell me more about your topic; What additional information can you give me; How much information do you need?**

Yes

No

Does not apply

***26. Did the librarian use closed and/or clarifying questions to refine your search? Examples include: What have you already found; What type of information do you need (books, articles, etc.); Do you need current or historical information?**

Yes

No

Does not apply

***27. What did you like about the librarian's listening/inquiry?**

***28. What did you NOT like?**

***29. What could the librarian have done to make it better?**

Process: Bumps in the Road

- Students shopped the wrong librarians
- One student blew his cover
- Student no-shows
- Unequal sampling → extend through spring semester

Revisions to the Process

- Spring semester:
 - Student contact information collected in survey to allow for prize drawings and follow-up by graduate student coordinator
 - Change recruitment process

Results

- Individual reports for every librarian and student
- Compiled report for all librarians and students

Individual Results: Ginger

- One big fan, one skeptic
- Skeptic hoped for a more personal connection
 - “That sounds interesting...”
 - “If you have any questions, I’m Ginger Williams, and I’ll be here from [specified times]. If you can’t contact me, [another librarian’s name] will be here afterwards.”

Group Results: Strengths

- Approachability- greeted students, made them feel comfortable
- Interest- maintaining eye contact, focused on student
- Listening/inquiring- librarians were cordial and encouraging, asked clarifying questions
- Searching- constructing a search strategy, teaching students a new technique
- Follow-up- asking if students understood everything, suggesting coming back if further assistance is needed

Group Results: Areas for Improvement

- Approachability- smiling more
- Interest- showing more curiosity about the subject, assessing familiarity with resources
- Listening/inquiring- asking more questions
- Searching- asking what students have already tried, narrowing/broadening topic as needed
- Follow-up- more personal touches, such as walking the student to the book they need

Next Steps: Implementation

- Customized Customer Service training
- Considering written customer service guidelines
- Discussion of results in reference
 - Name tags
 - Juggling multiple patrons
 - Self improvement

Things to Consider...

...when planning your Secret Shopper experience.

- Why?
- How?
 - Recruitment
- What measure?
- Challenges!

Questions?

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