

Taking a Page from Retail: Secret Shopping for Academic Libraries

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Methods – Two mystery shopper assessments were conducted in 2010 and 2012. Students were recruited from a Hospitality Management class to serve as the secret shoppers. “Shoppers” completed a rating sheet for each encounter based on customer service values established by the Libraries. Data was analyzed and presented to staff.

Results - Initial findings were generally quite positive but indicated that we could improve “going the extra mile” and “confirming satisfaction.” As a result, we developed training sessions for public services staff which were delivered during summer 2011. A LibGuide that included training videos was created for public services student employees who were required to view the videos and provide comments. In addition, we developed more specific public service standards for procedures such as answering the telephone, confirming satisfaction, and referring patrons to other offices. The Secret Shopper assessment was administered again in spring 2012 to see if scores improved. The results in the second study indicated improvement.

Conclusions - The mystery shopper exercises provided the UNCG University Libraries with the opportunity to examine our services and customer service goals more closely. Conducting the mystery shopper study identified several areas to address. We realized we needed more clearly defined standards for staff to follow. We saw that we needed to discuss what “going the extra mile” means to us as an organization. We also needed to develop a scalable training method for student employees.

Keywords: Customer service | Secret shopper | Mystery shopper | Assessment

Article:

*****Note: Full text of article below**



Article

Taking a Page from Retail: Secret Shopping for Academic Libraries

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Introduction

Academic libraries are increasingly emphasizing the entire user experience for their customers and seek to provide not only outstanding collections but also services and programs that contribute to student success and faculty research as well as facilities that provide learning spaces. Much of the user experience conversation focuses on efficient online accessibility and discovery. Recently, however, Bell called for academic libraries to “commit to a total, organization-wide effort to design and implement a systemic UX.” Bell also advocated for “shifting the academic library experience from *usability* to *totality*” (Bell, 2014, p. 370). Many libraries are hiring librarians with job titles such as “User Experience Librarian” and engage in a wide variety of assessments to gain knowledge about what students and faculty seek in library services. Much of this research employs ethnographic studies originating with the excellent University of Rochester work where they tracked students’ research patterns using a variety of methods such as photo surveys and mapping diaries (Foster & Gibbons, 2007; Foster, 2013). In 2011, the Association of Research Libraries (ARL) published a SPEC Kit, *Library User Experience* that outlined numerous types of user assessments employed at ARL libraries including surveys, facilities studies,

focus groups, and usability studies (Fox & Doshi, 2011).

One aspect of the user experience that remains crucial is excellent customer service both face-to-face and virtual. Although libraries seek to make the online and in-house user experience as self-service as possible, customers still require both directional and in-depth assistance to find the information and services they need. Furthermore, as libraries seek to become information hubs and learning centers it is necessary that students have a good customer experience so that they view the library as a comfortable and welcoming place. Fair or not, we are aware that users compare the customer service we provide in the library to that offered in retail shopping areas such as bricks and mortar book stores and by other retail services such as the Apple Store. In a 2011 study, Bell surveyed college students to compare their experiences in libraries to retail using an instrument from the *Study of Great Retail Shopping Experiences in North America*. Fortunately, libraries compared well! One factor in the survey includes “engagement” characterized by politeness, caring and listening. Bell recommended that academic librarians focus their efforts on less tangible “soft skills” such as eye contact, patience, and making customers feel important (Bell, 2011).

With these customer service issues in mind, The University Libraries at The University of North Carolina at Greensboro sought to assess the service experiences of students for both in-house and virtual services. The University of North Carolina at Greensboro, part of the 17-campus University of North Carolina system, is a publicly-supported university with a High Research Activity Carnegie classification. In 2015 the total enrollment was 19,398 with a faculty of approximately 1,000. The University Libraries include the Walter Clinton Jackson Main Library and the Harold Schiffman Music Library. At the time of the initial study, Jackson Library had two public service points; Reference and Access Services (Checkout) on the first floor. Later, the Special Collections and University Archives (SCUA) department added a service point on the second floor and was included in the second study. The Schiffman Music Library has one combined service point. These services desks are staffed by professional librarians, paraprofessional staff, and student employees. The two service points (the Reference Desk in Jackson and the front desk at Schiffman) both employ graduate students from the Libraries and Information Studies program as interns.

Previous assessments conducted by the University Libraries indicated positive results for services. In 2008 the Libraries conducted LibQual+® and the overall perceived mean for "Affect of Service" was 7.5 on the nine-point scale. Every three years the UNC system conducts surveys of all sophomores and seniors which include questions about library services. In the 2010 senior survey the Libraries scored 3.5 on a four-point scale for "staff responsiveness" and 3.6 for "library services overall".

Longitudinally, we showed improvement in these categories since 1998 when we scored 3.2 on both these questions. In the 2010 sophomore survey the Libraries received 4.1 out of 5 on "helpfulness of staff." Because this survey was newly revised that year we don't have longitudinal data for it (UNCG University Libraries, 2016).

Although the Libraries performed well on these assessments they were satisfaction surveys rather than in-depth studies focused on the user experience. And, while most qualitative comments on the 2008 LibQual+® survey were very positive, some indicated that users had less than satisfactory interactions at service desks:

"I sometimes find the student staff to be really annoyed at having to help me, even just checking out books."

"I cannot send my students to the library with confidence that they will be treated with the same respect."

Both Jackson and Schiffman offer computers with a wide variety of software, group and quiet study space and technology checkout as well as traditional print and AV materials. Chat, email, and texting are offered in addition to in-house service. Jackson Library has a 24/5 space that is very popular. Together the Libraries have over 1 million visitors each year. Like many academic libraries, we are realigning service staff to rely more on paraprofessionals for reference service so that librarians may focus on information literacy and specialized liaison services. Often these staff members are not part of the Research, Outreach and Instruction Department (ROI, formerly called the Reference & Instructional Services Department) which can present training challenges. The reliance on student employees with a high turnover rate can also make it difficult to provide consistent service. After administering the Association of Research Libraries' LibQual+® survey in 2008 the Libraries sought to enhance the quality of the customer experience at service desks and via phone and chat. To begin the process, the Associate Dean for Public Services charged a task force in 2009 to develop customer service values to serve as a guide for both external and internal service. These values were vetted among the public service departments and posted on the Libraries' web page along with the Libraries' mission statement, to indicate to both patrons and staff that we are committed to

quality service. (UNCG University Libraries, 2015a). The task force recommended a training program for customer service that “should be shaped through ongoing assessment.”

Literature Review

Mystery shopping is a term that is familiar in industries that are heavily focused on customer service such as financial services, retail, restaurants, and hospitality. In 2010, the mystery shopping business was “estimated to be a \$1.5 billion industry, up from roughly \$600 million in 2004” (Andruss, 2010). Many of the industries that use mystery shopping use professional services organizations that hire and train the shoppers. There have also been attempts to utilize the mystery shopping concept in other non-customer-service areas, such as patient satisfaction with health care services. And, while much of the literature once focused on mystery shopping done in person, work is now being conducted to evaluate the quality of services delivered in virtual environments. According to the 14th annual Mystery Shopping Study conducted by The E-Tailing Group... “the study confirms that merchants are refining online tactics to find, inform, personalize and connect with improved speed and efficiency, while diligently developing social and mobile initiatives” (Tierney, 2012). In areas that are profit-driven, mystery shopping has been used to measure up-selling offers (Peters, 2011) and identify employees with promotional potential (Cocheo, 2011).

An early use of mystery shopping in a library took place in 1996 in a public library in Modesto, California. Mystery shoppers were used to assess the library’s customer service, as part of the county’s quality service initiative (Czopek, 1998). Subsequent use of mystery shopping in libraries has been to measure the quality of the customer service experience; there is not, however, a universal definition of quality customer service. In addition, there is not a universal way to assess quality of customer service. Is it the amount of time a person has to

wait to speak with someone at the reference desk? Is it providing free coffee to students at exam time? Is it offering resume writing and computer workshops at public libraries in response to the needs of the local community (Roy, Bolfing & Brzozowski, 2010)? Another factor that must be considered is that, in many instances, the library may be considered a “self-service” organization; patrons can come into the library or visit the website, and in many instances find what they are looking for without requesting assistance from library personnel. Even those that do not find what they are seeking still may not approach a service point (in-house or virtual) for assistance.

The literature also shows that the use of mystery shoppers is as varied as the desired outcomes. For some libraries, when measuring customer service quality, the focus could be on the accuracy of answers received at the reference desk (e.g. Kocevar-Weidinger, Benjes-Small & Kinman, 2010; Tesdell, 2000). There are studies that use mystery shopping to judge the accuracy of answers received during a reference interview as well as an assessment of the appropriateness and accessibility of physical space and signage (Tesdell, 2000). Another use of mystery shopping is the assessment and development of customer service training needs. The assessment for training needs is not only confined to the front-line public services staff — Reference and Access Services/Circulation department staffs — but also internal departments as well, such as the human resources department. In one library, they worked with the state’s Small Business Development Center to tailor the mystery shopping process for the needs of their library. Various service points were “shopped” and they made sure to include a variety of customers so that they could get a better idea of the needs of diverse populations such as patrons whose first language was not English, parents with children, etc. Their shoppers used repeat visits (5 times) in order to relieve employee concerns about the impact of workload variability on the customer service encounter and consistency of responses (Backs & Kinder, 2007). At Florida

International University, mystery shopping was used on student employees initially as a way to assess how the service being provided “felt” to the patrons, to determine if additional training would be needed and to determine which areas needed improvement, based on patron feedback. Additional shopping trials were used after an organizational change resulted in combined service points. The later mystery shopping assessments focused not only on accuracy of the responses but also on service provider behaviour. (Hammill & Fojo, 2013)

Support and agreement by stakeholders is always crucial in implementing a mystery shopper initiative in a library. For public libraries, authorization by the library board or employee union may be required prior to implementing such a program. For academic libraries, the permission of the university’s Institutional Review Board (IRB) will probably be required (Benjes-Small & Kocevar-Weidinger, 2011). Benjes-Small and Kocevar-Weidinger also discuss the importance of using written guidelines of appropriate behaviour to which all staff are exposed as a way to measure whether or not customer services standards are being met. Both authors used students as mystery shoppers. At Longwood University, the results of the survey were used as a part of the employees’ performance review, which resulted in revised job descriptions and using the mystery shopper assessment to measure progress (Benjes-Small & Kocevar-Weidinger, 2011).

In some instances, the results of mystery shopper evaluations have been received as unwelcome surprises to the library staff. There are also instances in which library staff resist efforts to measure quality library customer service output in the same way as customer service is measured in a retail operation (e.g. Deane, 2003; Gavillet, 2011; Hernon, Nitecki & Altman, 1999). Most of the literature shows that mystery shopping efforts have been focused only on the delivery of customer service to external users and not internal customer service

providers, such as cataloguing, acquisitions, or administration.

The majority of efforts to use mystery shopping in libraries occur in the public library sector. Depending on the environment (unionized or civil service), there may be barriers to using mystery shopping as a measurement of job performance or as an assessment of promotional potential. Academic libraries and public libraries do have many commonalities, but also have differences in their missions as well as a different patron base. One of the commonalities of both academic and public libraries is that, unlike retail establishments, libraries do not have a vested interest in trying to get a patron to “buy” additional products and services; however, library employees should have a vested interest in ensuring that the patron is aware of the products and services that could be of assistance, either at the time of the visit, or during a future one. Both academic and public libraries should seek to create an environment where customers (or patrons) are comfortable seeking assistance within any service point. The Association of College and Research Libraries (ACRL) 2012 “Top Ten Trends for Academic Libraries” included “staffing” and “user behaviors and expectations” as important issues (ACRL, 2012). Library users often base their expectations of customer service on that which is provided in non-library environments. As stated by Connaway, Dickey, and Radford, “Librarians are finding that they must compete with other, more convenient, familiar, and easy-to-use information sources. The user once built workflows around the library systems and services, but now increasingly the library must build its services around user workflows” (Connaway et al., 2011). Failure to assess customer service delivery and the quality of that delivery would mean we are ignoring the needs of our users. Users who feel their needs are being ignored will turn to other, more welcoming, resources regardless if they are the best ones for their need.

Method and Procedures

After reviewing the literature, the Libraries determined that the mystery shopper protocol was the best method to assess our service interactions and accomplish our goal of determining if our customer service was indeed meeting the established customer service values. The study completed at Radford and Longwood Universities in 2010 was an excellent model and we adapted their protocol for our project (Benjes-Small & Kocevar-Weidinger, 2011). We conducted the first mystery shopper assessment in fall 2010 and included desk and phone service for all service points — Reference and Checkout in Jackson and the service desk in Schiffman — and chat service for Reference. The research team included the Associate Dean for Public Services, the Human Resources Librarian, and the Assessment Analyst. Because secret shopping is a standard in service industries we collaborated with UNCG's Hospitality and Tourism Management Department to recruit students as shoppers. A professor agreed to award extra credit to students who participated. We also gave them a \$10 credit for the campus food service. We developed a rating sheet (See Appendix 1) for the students to use based on the customer service values mentioned above. Although we certainly care about accuracy, the emphasis for this assessment was on the customer service *experience*. We included four behaviours: greeting, follow-up, confirmation of satisfaction and referral, with three levels of rating: 1(Poor), 2(Satisfactory) and 3(Very Good). Brief descriptions of each behaviour were included on the rating sheet along with criteria for each level and type of service. For example, for greeting at a service desk, the following guidance was provided:

- Very good – Employee made eye contact, acknowledged me and greeted me in a positive manner
- Satisfactory – Employee greeted me but not with great enthusiasm
- Poor – Employee was distracted and did not acknowledge me

We also had three yes/no questions:

- Employee treated me with respect
- Employee avoided jargon or technical language
- Employee went the extra mile

Because the yes/no questions were quite subjective, we discussed them extensively in the training and provided guidelines for what should be expected from the Libraries service staff. We also conducted role-playing and asked the shoppers to evaluate the mock transaction in order to prepare them better for the actual experience. Space for additional comments was also included and comments were encouraged

We sought to make the assessment as "real life" and anonymous as possible. We informed staff in the departments to be studied that the exercise would take place sometime during the semester. We did not, however, give exact dates. We met with each department to apprise them of the protocol and assure them it was not part of their performance review but rather an overall assessment of our service so that we could address any issues identified. To that end we did not include any date/time stamps in the results. The questions developed for the survey were constructed around the feedback received from the initial LibQual+® results that indicated some patrons did not feel they were treated respectfully by staff. We collaborated with the heads of the ROI, Access Services and Schiffman Music Library to obtain frequently asked questions considered "typical." Questions for the Checkout Desk emphasized service-related questions that could usually be answered with basic responses, such as: "how many books can I check out at one time?" or "where can I print something in color?" While certain categories of service related questions may seem easy to answer we wanted to ensure that shoppers were being asked the right clarifying questions by employees, not to see if the correct answer was provided since that was not the primary focus of this study. For example, it would be simple to tell a questioner that the library is open 24

hours, 5 days a week but, in reality, that schedule is only applicable to people with a UNCG ID. For other patrons, the library closes at 12:00 AM.

For questions to be asked at the Reference Desk, the head of the ROI provided a list of questions relating to common assignments and citation issues. Since often times the Reference Desk is staffed by paraprofessional staff, we did not want to present a difficult question that would require obtaining additional assistance, or place the questioner in a position which would require him/her to handle questions they could not answer. Examples of questions asked of Reference staff included: "can you help me find articles on identity theft?" and "I am a UNCG graduate, how do I access the databases from home?" or "How to do cite this in APA style?" (See Appendix 2 for sample questions).

We required the shoppers to attend a 90-minute training session. During the training, we provided an explanation of the importance of excellent customer service to the Libraries as well as the customer service values (and behavioural examples of them) that staff were expected to demonstrate, and we provided instruction on what to look for when observing staff behaviours. Each shopper was assigned a question for each service point (Reference Desk, Access Services Desk and the Schiffman Music Library) and type of service (in-person, telephone and chat) with the exception of the Schiffman Music Library and Access Services; chat service was not offered in Schiffman at the time of the initial survey and is still not available in the Access Services department. We requested that shoppers vary their times of contact to make their presence as anonymous and unobtrusive as possible. We also wanted to vary the time of contact to avoid staff members feeling as if they were being "targeted" if the questions were only asked during specific time periods.

One question was placed on each rating sheet used by the shoppers. Six students completed the exercise with each shopper asking a question

for each service. They entered their scores into a Qualtrics® form created by the team. Qualtrics is an online survey platform licensed on many campuses. They also submitted paper sheets as a backup.

Results

For the most part, the Libraries received very positive results. Scores were particularly high for "greeting" and "referral." "Follow-up" was rated slightly less well and "Confirming satisfaction" the lowest. For the Yes/No questions, shoppers rated staff well for "Treated with respect" and "Avoided jargon." There were, however, issues with "Going the extra mile." Below are overall averages for all service points and types of service (Figures 1 and 2).

We also compiled results for each department broken down by type of service (Figure 3).

Follow Up

The Assessment Analyst compiled the results and developed graphs for each question that indicated scores for desk, phone, and chat. The results for all services were shared with the entire staff through meetings and email. The Associate Dean shared results for individual departments with the appropriate department head for discussion among their staff. After examining the results, the team had the following recommendations:

- Develop "standards of service" that reflect the customer service values. Although we had the values we really had no specific standards or guidelines for interacting with staff. For example, we did not have guidelines on how to greet patrons, do a referral, transfer a phone call to another department, or best practices for chat service. Established standards are useful to train new staff, both full-time and student employees, so that they know what is expected of them. As our public service

desks are staffed by a variety of employees, we determined it was important to establish service standards that would be uniform across all service points to ensure a more consistent experience for users. These standards are based on both industry best practices and library staff input. They include not only procedural guidelines but also advice on how to "go the extra mile" which is subjective in nature and can be difficult to define. Advice here includes "walk a patron to a destination rather pointing them, including going to the stacks", "feel empowered to be flexible in order to provide service", and "be flexible about staying after hours to provide a consultation for a student who works full time". These standards are posted on the Customer Service Skills LibGuide under the "Customer Service Documents" tab (UNCG University Libraries, 2015b).

- Develop customer service training for full-time library staff that focused on "going the extra mile." The impetus for this was the feedback from users during the LibQual +® results. While the phrase "going the extra mile" is subjective and varies according to the individual being asked, we wanted to convey to staff members that being polite and helpful was not enough. We felt it was important for all staff members to ask enough questions and offer a level of assistance to ensure that all user needs were being met. Because that question received lower scores we decided that we needed the opportunity to discuss what we meant by going the extra mile and how we could achieve it.
- Develop online training for student employees. Because our students work many shifts in two buildings it is impossible to get them all together for training.
- Conduct the assessment again after training to see if there was improvement.

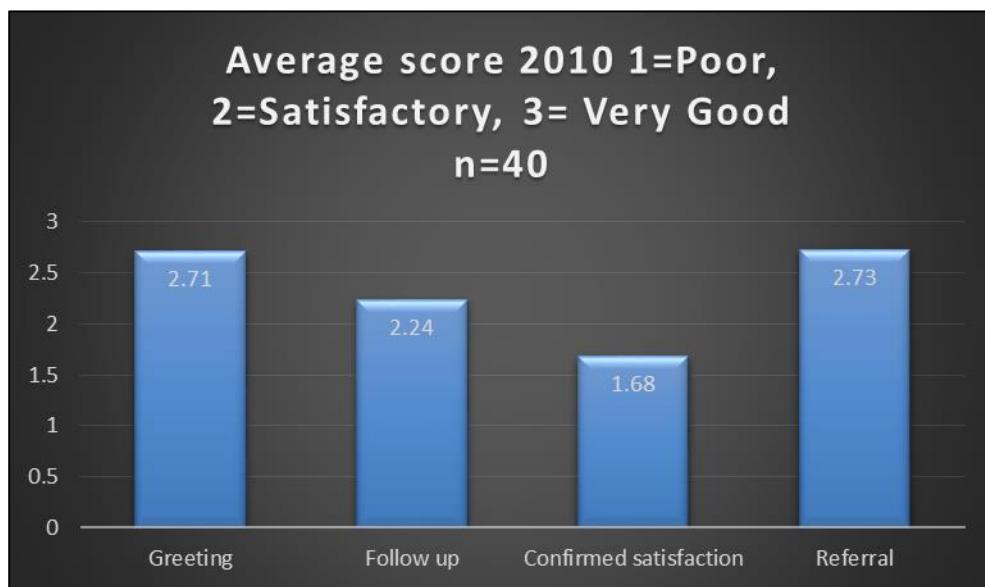


Figure 1
Results for the "four behaviours" questions.

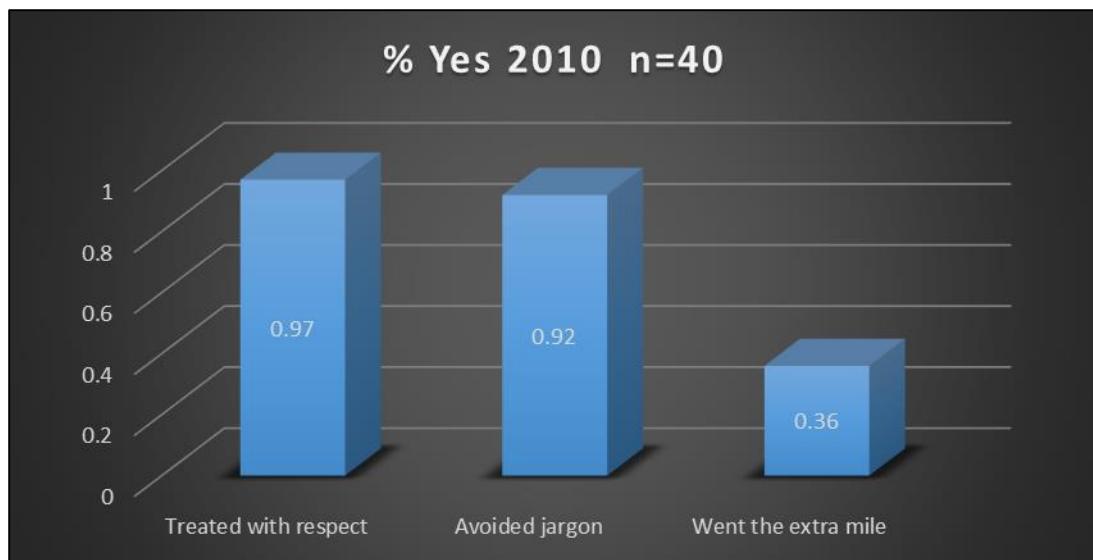


Figure 2
Results for the YES/NO questions.

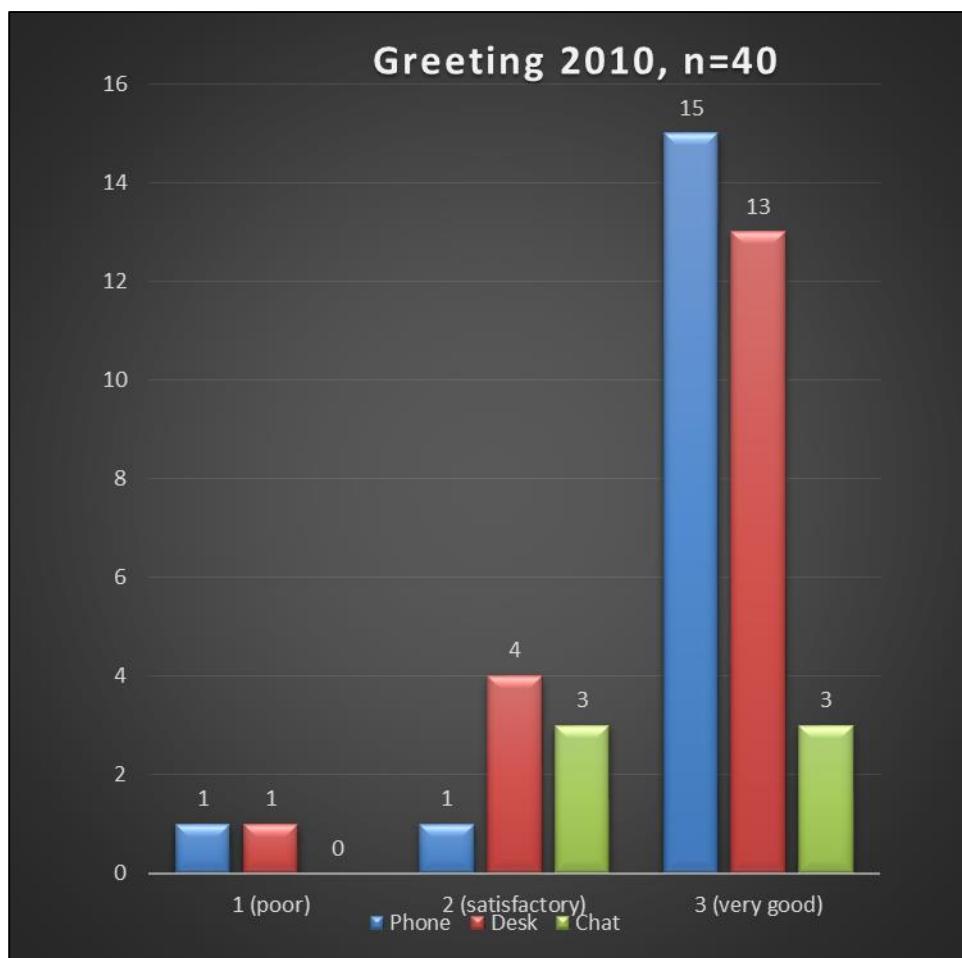


Figure 3
Results by type of service.

Staff Training

Training was provided for all library staff members including those that did not have contact with the public. We wanted to ensure that the customer service values we wanted to impart within the library were given to staff members that provided internal service, not just given to those who work at public services desks.

We conducted six sessions (4 hours each, with breaks) and extended an offer to attend training to the managers of the computer labs, which are housed in the library but are not under the organizational control of the library. Because the lab is located in the library, students often make an incorrect connection between the computing lab staff and the library staff. The managers of the computer labs were unable to attend, however. Sessions were staggered so that those staff members that work during evening hours were able to attend. All employees of the library, with the exception of the Dean and the Assistant Deans, were required to attend the sessions. Approximately 90% of the staff, including library faculty completed the training.

The training design was done by the Human Resources Librarian. She also conducted the training sessions, and developed a workbook to use in the training sessions. The program design focused on "Going the Extra Mile" which the team felt would allow the staff not to feel the training was remedial in nature or was being used as a punitive measure. The emphasis in the program design was to improve customer service and eliminate the feeling by patrons that they were not being treated respectfully. We were careful to point out that the LibQual+® scores reflected that good customer service was being provided. We let the staff know that the LibQual+® qualitative data included comments which said some respondents did not feel the customer service being provided went far enough; it did not "go the extra mile."

Although not planned, the training sessions gave some staff members new information about some of the services offered within the library; staff members who are considered to be internal service providers found the information to be extremely beneficial. The Libraries' customer service values were updated based on staff suggestions.

Student Training

As mentioned above we determined that online training was best for our student employees. The Libraries place great emphasis on providing our students with the opportunity to gain skills they can use in the future regardless of what profession they chose. The Distance Education Librarian and a Library and Information Studies (LIS) practicum student spent a semester developing customer service videos around the standards. These include basic skills such as approachability, the reference interview, telephone etiquette, referrals and handling a line of customers. Additional videos provide tips for dealing with angry customers. We used students in the videos and made them upbeat and humorous so that they would appeal to our employees. Libraries' documents such as the customer service values and standards are included as well. The videos and documents were organized into a LibGuide for easy access and editing ([UNCG University Libraries, 2015b](#)). Once the LibGuide was completed, student supervisors asked to include videos on general basic success skills such as attitude, attire, and professional image. For these segments we pulled videos from our *Films on Demand* subscription. Student supervisors were asked to require employees to view the videos and make comments to indicate they had completed them. Some comments from students include:

- "These skills seem like common sense, but it's amazing how many people you see that don't follow it. You should send this video to the workers in Subway."
- "I easily get flustered when a person is frustrated at me, however this video

- taught me how to properly handle the situation and remain calm and respectful"
- I've never thought to look for people who need help because I always assumed they would ask, now I know."

Second Study

In the second mystery shopping assessment, staff members were again told that mystery shopping would happen sometime during the spring semester, but were not given a specific timeframe. During the second study, we reached out again to the Department of Hospitality and Tourism Management for students to be mystery shoppers and recruited nine students. We reviewed the questions and made some minor changes to them. Because our Special Collections and Archives (SCUA) had added a formal service point it was included in the assessment and questions for that area were added. For this study an LIS graduate student assisted us. She helped with the training sessions, prepared the question sheets, and entered data into Qualtrics.

The same training was provided for the second group of secret shoppers that was provided for the first group of shoppers. As with the first group of student shoppers, we explained the importance that the library placed on customer service and that we were assessing the customer service experience rather than accuracy of the answers. We shared the newly developed Standards of Service as well as the Customer Service Values.

Results from the 2012 assessment indicate that improvement occurred for all behaviours and questions from the 2010 results (Figures 4 and 5).

We were particularly glad to see that the areas with the lowest scores in 2010, "follow up" (increase from 2.24 to 2.73), "confirmed satisfaction" (increase from 1.68 to 2.44 out of 3) and "went the extra mile," had the largest margin of improvement. In 2010 only 36% of respondents felt that their service went the extra mile; in 2012 that rose to 59%.



Figure 4
Results for 'four behaviour' questions, 2012.

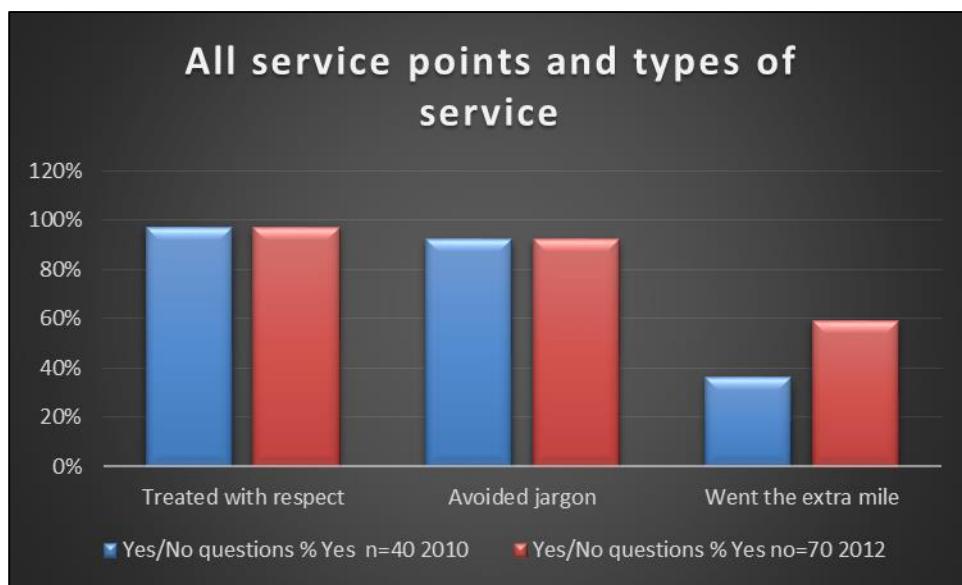


Figure 5
Results for YES/NO questions, 2012.

We shared the overall results again with all Libraries' staff and posted comparison graphs on our assessment LibGuide.

Similar graphs for each department were also developed and shared with the department heads. The Associate Dean discussed results in a Public Services Department Heads meeting and individually with department heads. She also visited department meetings to discuss the results with staff and gain their input. We also shared results with student employees during the fall 2012 student orientation to show returning students the improvement in their performance and to let new students know that the online training is very important information.

Discussion

The Libraries conducted LibQual+® again in fall 2012 with an increase in the "Affect of Service" score from 7.5 in 2008 to 7.92. These results, along with changes between the 2010 and 2012 mystery shopper results, indicate substantial improvements in service quality and satisfaction

for the Libraries. Developing standards and providing training reinforced the importance of customer service and the role that all staff members play so that users have a positive experience in the library. Staff comments received after the training indicate that the training was helpful and resulted in staff members viewing customer service and their own role as service providers in a different way; a role which is key to having a positive experience in the library. The Libraries continue to emphasize the importance of customer service. All new staff receive the customer service values and standards and are strongly encouraged to attend appropriate campus workshops conducted by the campus Human Resources Department to enhance their customer service skills. All new student employees are required to complete the videos on the Customer Service LibGuide.

We also continue to examine our services to ensure we are meeting the needs of our patrons. Because we are likely to continue staffing with paraprofessionals, future customer service training should include not only going the extra

mile, but also providing the skills and knowledge to answer questions accurately. While providing helpful, respectful, and courteous service is a requirement, we recognize that our training needs will shift also to enhancing skill development. Examples would include conducting reference interviews and ensuring competence with the wide variety of resources for those staffing the service desks. Training will also need to take into account the changing demographics of our customers. For example, we have an increasing number of international students, as well as larger numbers of what would be considered to be “adult students.” As our requests for virtual reference assistance increase, we anticipate that chat inquiries will also become more complex. As mentioned above, our services must respond to changes in academic libraries and higher education and we need to ensure that assessments correspond accordingly.

Conclusion

The mystery shopper exercises provided the UNCG University Libraries with the opportunity to examine our services and customer service goals more closely. The changing nature of our services with moving toward using more paraprofessional staff and the impact of technology on services provided some of the impetus for doing the study. We also wanted to gather additional evidence on issues identified in the 2008 LibQual+® survey. And finally, we sought more in-depth assessment of the user experience than that provided by satisfaction measures.

Conducting the mystery shopper study identified several areas to address. We realized we needed more clearly defined standards for staff to follow. We saw that we needed to discuss what “going the extra mile” means to us as an organization. We also needed to develop a scalable training method for student employees. Although our research design and methods did not include tests for validity, the results strongly suggest that standards and training had a

positive impact on improvement. It was also very useful to have specific evidence for staff to see where changes needed to be made. And it was equally important to celebrate with staff when there was improvement! The study provided an excellent opportunity for the Libraries’ staff to discuss what service means to us as an organization and helped enhance the already established culture of excellent customer service.

It is essential to get buy-in from staff before conducting a mystery shopper study and make the goals of the study clear and transparent. For some staff it may always be perceived as a threat and management needs to assure them that such assessment is necessary in order for the library to remain viable and current and to ensure that we are providing the services and resources that our customers need and desire.

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Appendix A

Mystery Shopper Questions

Access Services	Music	Reference (now Research Outreach and Instruction)	Special Collections and Archives (SCUA)
What are your hours today?	I just heard a symphony called Witches Sabbath. Do you have a recording of this on CD?	When were presidents only serving two terms and what law was that?	How many books can I check out at one time?
I'm in a wheelchair and I want to come to the library? Where can I park and how to I get into the building?	I'm not a music student, but I need biographical info on Stravinsky for my Russian History class. Can you help me?	I need to research the gaming industry.	I'd like to donate some books to the library. Who can I talk to about this?
I would like to check out an iPad. How long can I keep it and what downloads can I put on it?	What are your hours today?	I'm researching the travel industry as a possible career. Where can I look?	I'm looking at your homepage, and I came across the term "finding aid." What is that? How do I use it in my planned research?
How long can I check out items?	I need to fax something. Can I do that here?	I'm supposed to find some blues music for my African American history class. Is there something I can find online?	Can I scan something in the library?

Access Services	Music	Reference (now Research Outreach and Instruction)	Special Collections and Archives (SCUA)
I need to change my UNCG password. Where can I do that?	I'd like this CD please.	I need to fax something. Can I do that here?	Can I check out materials from Special Collections and University Archives? Do you have your policies posted online? If so, can you show me where they are on the Library site?
Is there a place I can meet my group in the library?	Do you take donations of LP's?	I need to find financial information about the Hilton hotel chain.	What are your hours today?
I need to make a color print. Where can I do that?	Do you have a score of Beethoven's Eroica symphony?	I'm looking for an article from the NATS journal from 1994 and I can't find it online.	When did UNCG change from being a women's college to a co-ed university?
I need help with my laptop. Where can I go?	How long can I check out items?	I need to cite this article in APA citation style.	My grandmother graduated in 1945; I'd like to find her picture in the yearbook.
How do I renew my books?	I'm looking for a recording of "Alexander's Ragtime Band" to use for an American Social History class. Is there a way I can get that online?	Which Supreme Court justice has been on the Court the longest and who appointed him or her?	My family has a large collection of old papers that seem to be related to Greensboro and UNCG.
Can I scan something in the library?	I need to find a recording of "Brahms Requiem." I'm not a music student. Can I check out the CD?	I need some films on how to prepare for a job interview.	I am completing a research paper for a history class. I used your University archives collection. Is there a specific way to cite my sources?

Appendix B

Mystery Shopper Rating Sheet

UNCG University Libraries Mystery Shopper Rating Sheet		Date and time of shop:	Service Shopped: <input type="checkbox"/> Desk (in-person) <input type="checkbox"/> Phone <input type="checkbox"/> Chat	Desk Shopped: <input type="checkbox"/> Access Services <input type="checkbox"/> Reference <input type="checkbox"/> Music <input type="checkbox"/> SCUA
Your "Shopper Code" number: _____	Question asked: _____			
Behavior	1— Poor	2— Satisfactory	3— Very Good	Score
1.a. Desk. Employee made eye contact and acknowledged you (e.g. "May I help you?") b. Phone. Employee stated their department and asked if they could help me. c. Chat. Employee provided a greeting and asked if they could help.	a. Employee was distracted and did not acknowledge me. b. Employee did not state name of department and did not ask if they could help me. c. Employee did not provide a greeting or ask if they could help	a. Employee greeted me but not with great enthusiasm b. Employee stated name of the dept but did not ask if they could help me. c. Employee greeted me but did not ask if they could help me.	a. Employee made eye contact and acknowledged me and greeted me in a positive manner b. Employee stated their department and asked if they could help me. c. Employee provided a greeting and asked if they could help.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
2. Employee asked follow up questions to clarify your request. (e.g. "What type of information do you need – books, articles, web page?" or "What exactly is your assignment?")	Did not ask any follow up questions.	Asked questions but still didn't seem to understand what I needed	Asked questions until they understood my inquiry	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
3. Employee confirmed that you got the information you needed. (e.g. "Does that answer your question" or "Is there anything else I can help you with?")	Did not ask me if I was satisfied	Asked if I was satisfied	Asked if I was satisfied and encouraged me to come back or suggested other contact methods (e.g. chat, phone, come in)	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
4. If the employee was unable to help you s/he referred you to another office or person	Was told that referral needed but no assistance offered.	Was told referral needed and offered some assistance.	Was told referral needed and directed to other resource. Went the "extra mile". < OR > Did not need referral	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
Question	No	Yes	Briefly summarize the answer you received: _____ _____ _____	
5. Employee treated me with respect	<input type="checkbox"/>	<input type="checkbox"/>	Additional Comments (use reverse side if necessary): _____ _____ _____	
6. Employee avoided jargon or technical language	<input type="checkbox"/>	<input type="checkbox"/>		
7. Employee "went the extra mile"	<input type="checkbox"/>	<input type="checkbox"/>		