

Shop Your Way to Service Excellence: Secret Shopping for Academic Libraries

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Shop Your Way to Service Excellence: Secret Shopping for Academic Libraries

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Abstract

Secret or mystery shopping is a standard method of evaluating customer service in the retail and hospitality world. While many public libraries have implemented mystery shopping practices few academic institutions have done so. The University Libraries at the University of North Carolina at Greensboro conducted two mystery shopper exercises in 2010 and 2012. Students were recruited from a Hospitality Management class to serve as the secret shoppers. They attended a 90 minute training session and received scripted questions to use. "Shoppers" completed a rating sheet for each encounter that was based on customer service values established by the Libraries. Averages of the overall results of the first exercise in 2010 were shared with the entire library and more specific departmental information shared with the appropriate supervisor. 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 students and all public services students 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. In the interim the Special Collections unit added a service point so it was added to the study. The results in the second study indicated improvement.

Introduction

The University of North Carolina at Greensboro (UNCG), part of the 17-campus University of North Carolina (UNC) system, is a publicly-supported university with High Research Activity Carnegie classification. In 2012 the total enrollment was 18,175 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 Checkout (Access Services) on the first floor. Later, the Special Collections and University Archives (SCUA) department added a service point on the second floor. The Schiffman Music Library has one combined service point. These service desks are staffed by professional librarians, support staff and student employees. The Reference Desk in Jackson and the Schiffman service point both employ graduate students from the Libraries and Information Studies program as interns. In fall 2012, a Digital Media Commons was added in Jackson Library, so was not included in this assessment project.

Previous assessments conducted by the University Libraries provided 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 two 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 was a newly revised survey we don't have longitudinal data for it.¹

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.

In recent years academic libraries are increasingly emphasizing services and access over building legacy collections and the UNCG libraries are following this trend. 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, e-mail 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 one 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 Reference 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 LibQUAL+ 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 when completed.² 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."³ It should be noted that 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."⁴

The literature reveals that the earliest 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.⁵ Subsequent use of mystery shopping in libraries has been to measure the quality of the customer service experience; however there is not 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 résumé writing and computer workshops at public libraries in response to the needs of the local community?⁶ Another factor that must be considered is that in many instances, the library can be considered a "self-service" organization; patrons can come into the library, and in many instances find what they are looking for without requesting assistance from library personnel. Even those that don't find what they are seeking still may not approach a service point 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.⁷ There are those 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.⁸ Another use of mystery shopping is the assessment and development of customer service training needs. The assessment for training needs is not just confined to the front-line public

services staff (for example Reference and Access Services/Circulation department staffs) but internal departments as well, such as the human resources department. In areas that are profit driven, mystery shopping has been used to measure up-selling offers⁹ and identify employees with promotional potential.¹⁰ 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 they could get a better idea of the needs of various populations (e.g. patrons whose first language was not English, parents with children, etc. Their shoppers used repeat visits (five times) in order to get to relieve employee concerns about the impact of workload variability on the customer service encounter and consistency of responses.¹¹

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 need to get permission of the university's Institutional Review Board (IRB) will probably be required.¹² Benjes-Small and Kocevar-Weidinger also discussed the importance of using written guidelines of appropriate behavior to which all staff are exposed as a way to judge or 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.¹³

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 service output as a function of a retail operation.¹⁴ 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 cataloging, acquisitions, administration, etc.

The literature indicates that 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 to be used 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, unlike retail establishments, they 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) recently announced the "Top Ten Trends for Academic Libraries." Two of the trends were "staffing" and "user behaviors and expectations."¹⁵ Fair or not, library users often base their expectations of customer service on customer service that is provided in non-library environments. As stated by Sillipigni, et al., "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."¹⁶ 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. We established as the outcome of the study "customer service will reflect the values and standards established by the University Libraries." The study completed at Radford and Longwood Universities in 2010 was an excellent model and we adapted their protocol for our project.¹⁷ 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 (Appendix A) 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 behaviors: 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 behavior 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 for "very good:" "A 'very good' for greeting for in-person service was defined as 'Employee made eye contact and greeted me in a positive manner,'" while "poor" was "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," and "Employee went the extra mile." Guidelines for these questions were covered during their training. Space for additional comments was also included.

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 but we did not 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 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 we developed for the survey centered on the feedback that we received from the initial LibQUAL+ results indicating that some patrons did not feel they were treated respectfully by staff. We collaborated with heads of the Reference, Access Services and Schiffman Music Library to obtain some of the most 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?" (Appendix B). 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 (although that was a concern, it 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 students and faculty. For other patrons, the library closes at 12:00 AM.

For questions that would be asked at the Reference Desk, the head of the Department of Reference and Instructional Services 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 B for additional 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 behavioral examples of them) that staff were expected to demonstrate and we provided instruction on what to look for when observing staff behaviors. 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 Qualtrix form created by the team. They also submitted paper sheets as a backup.

Behavior	Average rating (1= Poor, 2=Satisfactory, 3=Very good) n=40
Greeting	2.71
Follow up	2.24
Confirmed satisfaction	1.68
Referral	2.73

Yes/No questions	% Yes n=40
Treated with respect	97%
Avoided jargon	92%
Went the extra mile	36%

In addition to the averages, charts helped us see how each type of service (Desk, Phone, Chat) was rated. For example, below is a chart for greeting for all types:

We also compiled results for each department broken down by type of service.

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 e-mail. 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 for how to do a referral or transfer a phone call to another department [Appendix C].

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.

- Develop customer service training for staff that focused on “going the extra mile.” 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 students. Our students work many shifts in two buildings, and it’s impossible to get them all together for training.
- Conduct the assessment again after training to see if there was improvement.

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 not under the organizational control of the library. However, since the lab is located in the library, students often make an (incorrect) connection between the computing lab staff and the library staff. Sessions were staggered so that those staff members that work during evening hours were able to attend.

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 didn't feel the customer service being provided went far enough; it didn't "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 Librarian 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'd 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.¹⁸ Once the LibGuide was completed, student supervisors asked to include videos on general basic success skills such as attitude, attire and professional image. For this 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'd completed them. Some comments from students include:

- "These skills seem like common sense, but it's amazing how 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 told that mystery shopping would happen sometime during the spring semester of 2012, but were not given a specific timeframe. During the second study, we again reached out 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 changes to them. Because our Special Collections and Archives (SCUA) had added a formal service point it was included in the assessment. For this study a Library and Information Studies graduate student assisted us. She helped with the training sessions, prepared the question sheets and entered data into Qualtrics.

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.

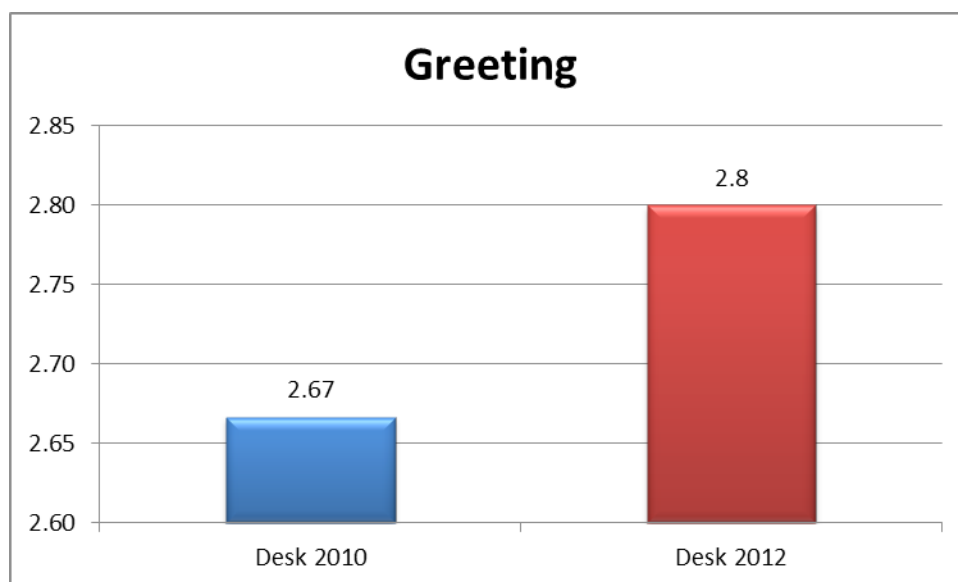
Results from the 2012 assessment indicate that improvement occurred for all behaviors and questions:

Behavior	Average rating (1= Poor, 2=Satisfactory, 3=Very good) n=40	N=70
	2010	2012
Greeting	2.71	2.76
Follow up	2.24	2.73
Confirmed satisfaction	1.68	2.44
Referral	2.73	2.84

Yes/No questions	% Yes n=40	N=70
	2010	2012
Treated with respect	97%	97%
Avoided jargon	92%	92%
Went the extra mile	36%	59% (no=61)

We were particularly glad to see that the two problem areas, “confirmed satisfaction” and “went the extra mile,” improved quite a bit.

Again, we created graphs to help us learn how each behavior for each type of service scored with comparisons between 2010 and 2012. Here is a graph for greeting for desk service:



We shared the overall results again with all Libraries’ staff and posted comparison graphs on our assessment LibGuide.¹⁹

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 new students that the online training was useful for them.

Next Steps

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 a campus customer service workshop conducted by our Human Resources Department. 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're meeting the needs of our patrons. Presently we have a task force examining the role of our public service desks that is charged with making recommendations for the future. 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.

The Libraries conducted LibQUAL+ again in fall 2012. We are pleased to report that scores on "Affect of Service" rose from 7.5 in 2008 to 7.92. In addition, we will compare 2012 UNC sophomore and senior survey scores when they are posted. As mentioned above our services must respond to changes in academic libraries and higher education and we need to ensure that assessments correspond accordingly. As an example, we will assess the quality of services of the newly opened DMC and its impact on students.

Conclusion

The mystery shopper exercises provided the UNCG University Libraries 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 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. While we can't categorically state that the standards and training were a causal effect on score improvement in the second study, we can hope there was a correlation. 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's 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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Notes

1. For more information on these surveys see the University Libraries' assessment Libguide, <http://uncg.libguides.com/libassessment>.
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18. "Customer Service Skills," The University of North Carolina Greensboro, <http://uncg.libguides.com/customerservice>.
19. "UNCG University Libraries Assessment Information," The University of North Carolina Greensboro, <http://uncg.libguides.com/libassessment>.

Appendix A

**UNCG University Libraries
Mystery Shopper Rating Sheet**

Date and time of shop: _____

Service Shopped: Desk (in-person) Phone Chat

Desk Shopped: Access Services Reference Music SCUA

Your "Shopper Code" number: _____

Question asked: _____

Behavior	1 — Poor	2 — Satisfactory	3 — Very Good	Score
<p>1.a. Desk. Employee made eye contact and acknowledged you (e.g. "May I help you?")</p> <p>1.b. Phone. Employee stated their department and asked if they could help me.</p> <p>1.c. Chat. Employee provided a greeting and asked if they could help.</p>	<p>a. Employee was distracted and did not acknowledge me.</p> <p>b. Employee did not state name of department and did not ask if they could help me.</p> <p>c. Employee did not provide a greeting or ask if they could help</p>	<p>a. Employee greeted me but not with great enthusiasm</p> <p>b. Employee stated name of the dept but did not ask if they could help me.</p> <p>c. Employee greeted me but did not ask if they could help me.</p>	<p>a. Employee made eye contact and acknowledged me and greeted me in a positive manner</p> <p>b. Employee stated their department and asked if they could help me.</p> <p>c. Employee provided a greeting and asked if they could help.</p>	<p><input type="checkbox"/> 1</p> <p><input type="checkbox"/> 2</p> <p><input type="checkbox"/> 3</p>
<p>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?")</p>	<p>Did not ask any follow up questions.</p>	<p>Asked questions but still didn't seem to understand what I needed</p>	<p>Asked questions until they understood my inquiry</p>	<p><input type="checkbox"/> 1</p> <p><input type="checkbox"/> 2</p> <p><input type="checkbox"/> 3</p>
<p>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?")</p>	<p>Did not ask me if I was satisfied</p>	<p>Asked if I was satisfied</p>	<p>Asked if I was satisfied and encouraged me to come back or suggested other contact methods (e.g. chat, phone, come in)</p>	<p><input type="checkbox"/> 1</p> <p><input type="checkbox"/> 2</p> <p><input type="checkbox"/> 3</p>
<p>4. If the employee was unable to help you s/he referred you to another office or person</p>	<p>Was told that referral needed but no assistance offered.</p>	<p>Was told referral needed and offered some assistance.</p>	<p>Was told referral needed and directed to other resource. Went the "extra mile". < OR > Did not need referral</p>	<p><input type="checkbox"/> 1</p> <p><input type="checkbox"/> 2</p> <p><input type="checkbox"/> 3</p>

Question **No** **Yes**

5. Employee treated me with respect

6. Employee avoided jargon or technical language

7. Employee "went the extra mile"

Briefly summarize the answer you received: _____

Additional Comments (use reverse side if necessary): _____

Appendix B

Selected Mystery Shopper Questions

Access Services

In person questions

1. How long can I check out items? (Staff should if you are a grad or undergrad student at UNCG or not. A good follow up question is to ask if you can renew items, how to renew and for how long.)
2. Can I make copies here? How can I pay for copies?
3. I need help with my laptop. Where can I go? (Student laptop, not one owned by the Library)
4. Where are the DVDs? How long can I check one out? How many can I take out at once?
5. I need to find some statistics on unemployment rates. (This question should be referred to the Reference department.)

Phone questions

1. I'm a student at ECU and I'll be in Greensboro next weekend. May I borrow from your library? What do I need to do? How do I get your books back? (Staff might also offer ILL as an option.)
2. How long can I check out items? (Staff should ask if you're a grad or undergrad student at UNCG or not. A good follow up question for you to ask is if you can renew items, how to renew and for how long.)
3. I'm checking to see if you have my textbook. (Use a textbook title from one of your classes. Staff should explain our textbook policy.)
4. I'm in a wheelchair and want to come to the Library. Where can I park and how do I get into the building?
5. I graduated from UNCG in 2008. Can I check out materials?

Reference

In person Questions

1. What Supreme Court case desegregated public schools in the United States and who was the lawyer who argued the case for the plaintiffs? (Brown vs. the Board of Education of the City of Topeka, KS filed in 1951, decided by the Supreme Court in 1953, is the court case that is normally considered to have led to the desegregation of public schools. Thurgood Marshall was the lawyer.)
2. I'm doing a persuasive speech (CST 105) on (stem cell research, socialized health care,

gun control,) and need to find some resources. (I can't remember how to get to the online guide.) (Would've attended a library instruction class. Names of teachers: Ms. McCall, Ms. Digh, Mr. Cook.)

3. I need to find financial information on the Hilton chain. (Quarterly earnings for the past year.)
4. I need to cite this article in APA citation style. (Use a citation you have for class.)

Phone

1. My grandmother graduated from UNCG in 1945. I'd like to find her picture in the yearbook. (Yearbooks are online.)
2. I think my grandmother has something in the Women's Veterans Collection. How can I find that? (Pretend your grandmother is Ann K. Watters from Wilmington.)
3. I graduated from UNCG in 2008. Can I check out materials?
4. I'm a student at Page High School. Can I check out from your library? Can I use your computers and print?
5. I need the book *Animals Make Us Human*. Do you have it? Who wrote it, I'm not sure? Do you have this book? (We don't have it—how can I get it?)

Chat

1. I found this article, but I can't get the full text on the computer—what's wrong? (Use Therapeutic Recreation Journal before 1995; online begins that year.)
2. I'm looking for a book that I think was an all-campus read—*Zeitoun*. Do you have copies I can check out?
3. I need to make a color print. Where can I do that?
4. How long can I check out items? (Staff should ask if you're a grad or undergrad student at UNCG or not. A good follow-up question for you to ask is if you can renew items, how to renew and for how long.)
5. Can I see if you have my textbook? (Use a textbook title from one of your classes. Staff should explain our textbook policy.)

Music Library

In person

1. I'd like this CD please c/DISC 00055 (you'll need to request it at the desk). How can I listen to it here?
2. My teacher told me to get music for a song called *Solitude*. I think it's by Count Basie. (The song is actually by Duke Ellington.)

3. Do you have a score of Beethoven's *Eroica* symphony? (This is Beethoven's *Symphony No. 3* in E flat Major, Op. 55, which is commonly known as the *Eroica*—Italian for “heroic.”)
4. I found this citation but I can't get the full text on the computer—what's wrong? Patricia E. Riley “Video-conferenced music teaching,” *Music Education Journal* V. 11 #2. (It should be # 3.)
5. I need to find a song called *September Song*,” (it is from the Broadway show *Knickerbocker Holiday* (1930)), with lyrics by Maxwell Anderson and music by Kurt Weill. I'd like a recording of it please.

Phone

1. Do you take donations of LPs?
2. I'm looking for a song: *My Irreplaceable You* by the Gershwins. (Should be *Embraceable You*.)
3. I'm looking for an article from the *NATS Journal* from 1994 and I can't find it online. (It's not available online; you should be offered to get the article via document delivery.)
4. I just heard a symphony called *Witches' Sabbath*. Do you have a recording of this on CD? “Dreams of a Witches Sabbath” is actually the fifth movement of the *Symphonie Fantastique*, by Hector Berlioz.
5. I'm looking for *Die Kunst der Fuge*. Can you help me find it? (This is the title of a monumental work by J.S. Bach, which translates to English as *The Art of Fugue*.)

SCUA Questions

In Person Questions:

1. Can I check out items from Special Collections and University Archives? Do you have your policies posted online? If so, can you show me where on the Library site?
2. My family has a large collection of “old” papers that seem to be related to Greensboro and UNCG. Who should I talk to about a possible donation? What is the actual procedure to donate items to UNCG? Is there anything online about what and how you collect?
3. When was the school founded and who was the first president of the college? Are there any online sources that you can show me that explain the history of the school?
4. When was the campus desegregated?
5. When did UNCG change from being the Women's College to a co-educational University?

Phone Questions:

1. I inherited a number of items from my grandparents. There seem to be some old books

included. Do you do appraisals?

2. In looking at your homepage, I came across the term “finding aid.” What is it? How do I use in my planned research?
3. I am looking to do a research paper on the Civil Rights Movement here in Greensboro. What types of material do you have? Are there any oral histories of students?
4. I am planning to become a librarian. Before I apply to grad school, I was looking to volunteer at a university library. Do you take volunteers? Are there internship opportunities?
5. I see that your hours are Monday–Friday 9-5. I am unable to get away from work during the hours that you are open. How can I access your research materials? Can you make photocopies or scanners of specific items that I might want to review? Is there a cost?

Appendix C

Public Services Standards University Libraries University of North Carolina at Greensboro

Greetings

In Person

- Staff working at a public services desk should be attentive and alert at all times. When patrons come near the desk, look up, make eye contact, smile and greet them: “Hello (Hi), how may I help you?”

Telephone

- Telephones should be answered within three rings by identifying the library/department and “may I help you” or “how may I help you?”
- When transferring a call to another phone number, always first give the patron the destination number in case the call gets disconnected. Wait for one ring and then hang up. If time permits, wait for the phone to be answered and identify yourself, indicate you’re transferring the call and very briefly what it’s about. If the call isn’t answered get back with the caller and give them the number to call back.
- When receiving a referred call, staff should pick it up by saying “Hello, this is (your first name, last name), how may I help you?” If you know the context of the patron’s call, to speed the transaction by recapping what you know, such as “. . . I understand you can’t renew your books online, is that right?”

Interacting with Patrons

- If you are uncertain what the patron is asking, rephrase the question and ask for confirmation that you understand what the patron needs.
- Develop a rapport by asking open-ended and follow-up questions to make sure the patron has the information he/she needs.
Question: I need information on non-verbal communication
Response: Is there a particular type of non-verbal communication you’re interested in such as body language?
- Find out what the patron has already tried, and encourage the patron to contribute ideas.
- Allow the patron to finish asking the question before commenting.
- Give the patron frequent positive feedback, and show interest in their question or problem
- Never say “No” or say the library doesn’t have something without offering positive alternatives. For example, if we don’t have an item tell the patron about ILL or offer to check the public library catalog. Students should refer questions to a staff member if they’re uncertain.

- Avoid library jargon.
 - Never hesitate to ask for help from a colleague if you feel that you are unable to answer the question on your own.
 - If you are unable to answer a question completely ask for contact information to follow up.
 - Always trying to make people feel as if the question they ask isn't a stupid one—patrons frequently say things like “you'll probably think this is a dumb question” and we always reassure them we don't expect them to know everything.
 - When referring to another department, be sure to verify that the material/resource/person is appropriate.
 - UNCG and Greensboro have very diverse populations and it's important to be sensitive to working with patrons from a wide range of cultures, ethnicities, orientations and disabilities.

Follow Up/ending the interview

- Ask in some way if their need has been fulfilled—e.g. “Does that answer your question?” “Is there something else I can help you with?” “Is that all you need right now?” “Need anything else?”
- Remind them to get back in touch if they need something else in the future. Remind them of the multiple ways they can contact us—give them an AskUs bookmark!

Going the extra mile

- Whenever possible, walk a patron to a destination rather than pointing. This includes going to the stacks if they have been there and are unable to find something or if the call numbers might be difficult to locate such as in the basement.
- If you're referring a patron to another part of the Library, either walk them there or call ahead to make sure someone is ready to help him/her.
- Feel empowered to be flexible in order to provide service. For example, pulling a book for someone who is disabled or who is coming into the library from out of town to use a single item is certainly appropriate service.
- Going the extra mile does not include offering help that verges on doing a person's assignment for them. We should be teaching people to use the resources, not doing the work for them, but this can be a tough call sometimes.
- Recognize some needs cannot be fulfilled.

General tips

Staff should not engage in loud non-work-related conversations that may be overheard by patrons. If you are chatting with a colleague when a patron approaches be sure to discontinue the conversation. Staff should not have their cell phones when they're at the desk unless they have an emergency and have discussed it with their supervisor. Staff should not be surfing the internet, doing social media or personal e-mail while at the desk.