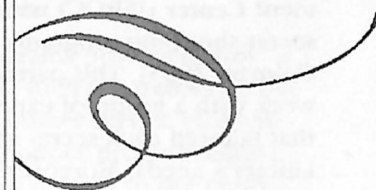


SECRET SHOPPING AT THE MONROE COUNTY PUBLIC LIBRARY

by Steven M. Backs with Tim Kinder



INTRODUCTION

There are several ways to research an organization's customer service effectiveness. Encouraging patrons to communicate with the library via comment cards, web surveys, or focus groups are all methods that should be used to get feedback on customer satisfaction. However, while these types of customer input result in information about "customer satisfaction," the addition of a secret shopping program is a potentially valuable tool for evaluating the "customer experience" in an objective, unobtrusive way. In a secret shopper evaluation "shoppers" are sent into an establishment to carry out real transactions in return for some combination of cash, store credit, purchase discounts, or the goods or services purchased. Secret shoppers may be trained or coached with a list of questions to ask, items to purchase, or interactions to initiate. After completing their visit shoppers record their impressions, such as the time it takes to receive attention from an employee or receive a service, the responses given to questions, and other factors related to the experience they had during their shop. Secret shopping is known by several other names, including mystery shopping, experience evaluation, fulfillment assessment, anonymous audits or virtual shopping and it can also be done in person, via internet chat sessions or over the telephone.

Secret shopping allows an organization to measure specific customer service attributes such as the appearance of the physical surroundings, the approachability of staff members, adherence to displaying and merchandising principles, and customer perceptions of processes and systems (Hall, 2004). Additionally, secret shopping is an ideal way to gather regular, controlled measurements of customer service from the point of the intentions of the organization so that management and staff may recognize opportunities to make improvements ahead of time rather than after customer dissatisfaction becomes apparent through the customer comment system (Van Der Wiele, Hesselink, & Van Iwaarden, 2005).

CUSTOMER SERVICE – AN ORGANIZATIONAL PERSPECTIVE

Getting unbiased and honest feedback about an organization's customer service responses is tremen-

dously valuable. Not only should such feedback provide a general sense of how satisfied (or not) the customers are, but it should also provide insight about organizational flaws that may be barriers to providing the best service possible, such as poorly positioned service points, confusing physical layouts, or overly complicated policies and procedures. Many of these factors affect customer experiences and perceptions and it is simply not fair to front-line staff to focus solely on their performance and their interactions with patrons. On the contrary, the goal of engaging patrons and seeking their impressions and feedback should also be to expose flaws that management can address in order to improve the service environment and put staff in the best possible position to provide high quality services.

Staff members must also be encouraged to cooperate in examining the customer service environment and to participate in the process of using patron input to create improved outcomes. When it comes to secret shopping this is especially important, because there is a likelihood that staff will resist the program unless they are fully aware of the goals and benefits that management hopes to attain. After all, staff have every right to suspect that secret shopping is "spying" and without a high level of trust and a commitment on the part of management to use the results to improve organizational performance rather than to penalize individuals, there is a real danger that staff will not buy into the potential gains of the program. Furthermore, it has been shown that secret shopping programs work best when staff members feel positive about them and when they are encouraged to participate as partners in creating improvements (Van Der Wiele et al., 2005).

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Secret shopping programs do occur in public libraries, although not at the same rate as in the retail world (Burkamp & Virbick, 2002). During the initial stages of researching this program, the authors found several library administrators in Indiana who were interested in the concept, but most reported that limited resources and lack of initial expertise had made it impossible to get anything off the ground.

For this project, the Monroe County Public Library (MCPL), was fortunate to partner with the South Central office of the Indiana Small Business Development Center (ISBDC) which specializes in developing secret shopping programs for local businesses (Martin Colman, 2005). This partnership allowed the Library to work with a group of experts to develop a program that tailored each secret shopping experience to the Library's needs. Moreover, since the professionals of ISBDC are experienced at consulting with a variety of retail businesses on customer service issues, the Library benefited greatly from having their guidance. We felt that, even though libraries may differ from retail stores in many ways, the core principles of customer service are the same for both kinds of organizations. People expect to be treated with respect, they want to find what they need easily, they expect staff members to be helpful and they would like their visit to be pleasant.

The Monroe County Public Library and ISBDC began developing the library's secret shopper program in November 2005. In our initial discussions, we defined the Library's aims for the program and outlined an agreement to create a program in four phases, starting with public service desks at the Main Library and the Ellettsville Branch, then continuing on to support units and Library administration. We also decided to include repeat "shops" during every phase.

Library managers were asked to collaborate by offering suggestions on the aspects of public service they were most interested in evaluating. The Library's main contribution in developing the shops was to consult on developing scenarios for each shop. Managers felt that shoppers would be less likely to be identified by Library staff if the questions they brought to the Library were somewhat typical for the given service points. Nevertheless, each shopper was encouraged to develop a scenario that he/she felt comfortable with and had a personal interest in pursuing so that the interactions could be true "reference interviews."

ISBDC maintains a corps of shoppers in Monroe County and was especially interested in finding shoppers who matched the demographics of the patron base of MCPL. The resulting group was a cross section of the local community, including patrons whose first language was not English, university students, disabled shoppers, elderly individuals, both experienced and new library users, and parents with children. ISBDC also oriented, trained, scheduled and personally debriefed the shoppers. Kinder spent time with each shopper to develop a shop scenario and to interview them about the shop experience.

ISBDC shopped the Main Library reference points (Adult Services, Indiana Room, Audiovisual Services, and Children's Service) and the Ellettsville Branch (Information Desk) during December 2005. Each point

was visited five times by shoppers who spent an average of 45 minutes at each location. Shoppers were instructed to record their impressions of the buildings, the layout, ease of navigation, the friendliness and approachability of staff, and the thoroughness of the reference interviews they encountered. Scoring was tabulated by ISBDC staff, and reports were generated for each point and for the library in general.

MCPL staff had reservations about the secret shopper program. One major concern was that individual shopping experiences might not provide input that was reliable or that could be generalized to overall public services. Staff commented that differences in work loads, time of day, complexity of questions, and other factors would make it impossible to create conclusions that would be meaningful or actionable. Additionally, staff members were concerned about being singled out by this project.

The planners responded to staff concerns by making the following decisions:

- To control for variations, multiple shopping experiences were scheduled for each service point with varying times and days.
- To prevent staff from being singled out, all references to names and descriptions in shop reports would remain confidential.

RESULTS

Once the reports were ready, Backs and Kinder met to discuss the results and possible recommendations for improvements. These results of this meeting and of the reports were then distilled into reports made by Backs to Library administration, managers, and the Library board of trustees.

Generally, the results of the initial shopping experiences showed that the Library's staff performed very well at the things managers expect from experienced reference personnel. They answered questions thoroughly and conveyed high levels of expertise, friendliness, and professionalism. Some shoppers commented that the service they received would make them want to return to the Library or that they were even surprised by how well they were treated at MCPL. Staff did not perform as well on matters of approachability. Some of the shoppers commented that staff seemed preoccupied (working on a computer) or that they were not initiating contact with patrons. In some cases, the shoppers reported that they had to initiate contact themselves, even though there were multiple people at a desk who seemed free to answer questions.

These results are not overly surprising; anyone who works in public libraries knows that staff usually multitask at our service points. Workloads often require that they bring materials, papers, book carts, etc., to

public desks. Additionally, computer screens can be barriers to approachability because they take attention away from the surrounding area. There are several possibly legitimate reasons why a staff member may be preoccupied at a service desk. In the follow-up meetings, managers and staff discussed these issues. They agreed that they could never eliminate all distractions and that they could not possibly reduce staff workloads to the point that they could be completely unencumbered while at public service points. Nevertheless, having the patron perceptions pointed out by the secret shoppers did cause Library managers and staff to examine and discuss their activities and procedures at the public desks. The advantage of having the results of the shopping experiences was in obtaining tangible evidence that people who do not wish to initiate contact with staff may in fact not get the valuable services that staff are able to provide.

With this new knowledge of patrons' perceptions MCPL managers now encourage staff to become more proactive in approaching customers and to be mindful of the workloads they bring to the reference desk. Staff in the Adult Services Department have had several robust departmental conversations about developing their sense of our surroundings, about being approachable, friendly and welcoming. In response to the program, staff members have made productive suggestions about the physical infrastructure, workplace communications, and scheduling that we believe will improve secret shopper results in the future.

The Library plans to continue the secret shopping program. Additional shopping will be conducted with Library administrative and support units, and we will continue to schedule follow-up shops with public desks. We are also committed to using the program as a way to create positive discussions about customer service with Library staff and to check our progress with specific issues that have been uncovered by the shoppers.

CONCLUSIONS

Gaining an accurate understanding of patrons' experiences is an extremely valuable aspect of any customer service environment. Secret shopping programs are useful for gauging insight into library operations from the perspective of those who closely mirror library patrons, thus providing critical information about the way the library's people, services, and processes are perceived and understood. Secret shopper programs also allow managers to target their research to specific attributes of the library such as cleanliness, layout, whether or not patrons are greeted, and of course, whether or not the questions they ask are answered to their satisfaction. And unlike patron comment forms, a secret shopper program allows the

library to create a deliberate and controlled stream of information about its public service performance that can be repeated regularly to spot potential problems before they appear as complaints.

While secret shopper programs provide useful input about library operations, such programs must be integrated into the overall customer service environment of the library. A secret shopper program allows the collection of data; however it is up to the entire library to contribute to using that information to identify infrastructural barriers and improvements to services. Additionally, any such program must be accompanied by reassurances to staff that the goals of the program are positive. Management must be committed to examining all aspects of customer service and to seeking solutions and improvements collaboratively with staff in an open and positive manner.

Public service performance is ultimately the responsibility of the entire library staff. A secret shopper program provides a way to examine services directly and objectively and to identify customer experience problems that would otherwise be unrecognized until a patron complains. A high quality customer service environment also requires a constant commitment on the part of management to create the conditions where staff can deliver the highest quality service. To that end, a secret shopper program has the potential to provide reliable information that the library can use to keep all staff members aware of patron expectations, perceptions, and experiences.

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