Pre-Print - Secret Shopping as User Experience Assessment Tool

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Title
Secret Shopping as User Experience Assessment Tool

Abstract
Secret shopping is a form of unobtrusive evaluation that can be accomplished with minimal effort, but still produce rich results. With as few as eleven shoppers, the author was able to identify trends in user satisfaction with services provided across two entry-level desks at Illinois Wesleyan University’s The Ames Library. The focus of this secret shopping program was on user experiences, rather than whether correct answers were given by student employees working at the desks. Overall, users were satisfied or very satisfied with their experiences, though user feedback identified one desk as providing consistently better service.

Introduction
Data from the Ethnographic Research in Illinois Academic Librarians (ERIAL) project completed during the 2008-2009 academic year suggested that students were using the reference desk less and less (Duke & Asher, 2012). Prior to and during the ERIAL study, the reference desk was staffed by library faculty until late in the evening and for several hours each on Saturdays and Sundays. Following the study, library faculty slowly reduced the number of hours they were on the desk, until they were only present during business hours. Meanwhile, the campus information technology desk was staffed during business hours and was located near the edge of campus. An opportunity presented itself to combine these service points, providing the campus with much needed IT support after hours and on weekends.
When the desks combined on the library’s entry level, the decision was also made for library faculty to shift from an on-desk presence, to an on-call system during business hours. Starting in the fall of 2012, student employees were the primary service providers at both the circulation and research/IT support desks. The library had a basic student employee training program in which all student employees would participate, but otherwise training was significantly different in terms of content, focus, and delivery.

The circulation and research/IT support desks are located within 50 feet of each other, on alternate sides of the library’s entrance. The circulation desk is immediately to a user’s left, but isn’t immediately visible as it is tucked slightly behind the entrance gates. The research/IT support desk is to a user’s right as they enter, and is immediately visible. It is also directly on the way to the Information Commons, which is used heavily throughout the day for printing and checking email. Research/IT desk student employees receive all of the information technology support questions from campus, answering basic questions and directing more complicated issues to functional groups within IT. They also handle much of the library’s phone traffic.

Assessments of user satisfaction with library services to this point had been based on survey data, feedback from the Library Advisory Committee, and informal conversations with faculty, staff, and students. We had two years of data by which we understood when and for what reasons the campus community used the entry level service desks, but nothing had specifically focused on user satisfaction.

Secret shopping, also known as mystery shopping or unobtrusive evaluation, has been used in business and marketing sectors and is one method by which we can take a user-
centered approach to service design and assessment. The focus of secret shopping is often on measuring the quality of service received by the user (Van der Weile, Hesselink, & Van Iwaarden, 2005). Secret shopping programs may define the operational value of “quality” differently, choosing to focus on the accuracy of provided answers, the user’s overall experience, or some combination.

For this study, the library's User Experience (UX) Team wanted to conduct an assessment of both the entry level service desks in order to identify if and in what areas improvements to library services and employee training programs were needed. We felt that secret shopping was an ideal method by which to collect this data, as we wanted to understand a user’s feedback on a single interaction, rather than a summative evaluation of an entirety of experiences. Campus surveys often included questions directly related to satisfaction with library services, but we felt these insights were of limited value. Users with particularly positive or negative experiences were likely to respond, potentially skewing results. We felt the results of a secret shopping program would be useful comparisons to data collected in alternate methods. Our secret shopping program was piloted in the spring of 2014, with full-scale deployment during the fall of 2014.

Literature Review

Secret shopping has been a popular method by which to gather participant observations in the retail sector for some time; libraries began using it as early as 1970 (Crowley & Childers, 1971). A handful of college and university libraries have used it to assess various aspects of public services. Florida International University’s Hubert Library used secret shopping to assess
student employee training (Hammill & Fojo, 2013). Villanova University’s Falvey Memorial Library used secret shopping as part of mixed methods approach to service evaluation of co-located information and circulation/reserves desks (Stein, Edge, Kelley, Hewlett, & Trainer, 2008). Central Missouri State University used marketing students to mystery shop the library’s reference area (Tygett, Lawson, & Weessies, 1996). Longwood University and Radford University used the same secret shopper evaluation form during two rounds of secret shopping, in order to establish a baseline of user satisfaction, and to test changes made based on the first round of shopping (Kocevar-Weidinger, Benjes-Small, Ackermann, & Kinman, 2010).

Secret shopping is often used by public library districts to evaluate an entire district or region, or several branches of a large library system. Mystery shopping was determined to be a valuable tool for evaluating customer service in New Zealand public libraries (Calvert, 2005), though each of the four major cities involved designed their study differently and with different intentions. Secret shoppers visited each library in the Arapahoe Library District in Colorado (Burkamp & Virbick, 2002), the twelve branches of the Stanislaus County Free Library system (Czopek, 1998), the main library of nine participating districts in Michigan (Tesdell, 2000), and the reference points of the main library and a smaller branch library of the Monroe County Public Library (Backs & Kinder, 2007). Secret shopping has also been used by library and information scientists to test the accuracy of answers provided by reference staff in New York’s Long Island libraries (Childers, 1980) and across Maryland’s public libraries (Gers & Seward, 1985).

Benjes-Small and Kocevar-Weidinger (2011) suggest six secrets to a successful mystery shopping program, with the most important consideration being communication. Employees
being shopped should be aware of the shopping program and how results will be used, as this
creates buy-in and assuages any anxiety employees might have about being singled out (Benjes-
Small & Kocevar-Weidinger, 2011; Burkamp & Virbick, 2002; Calvert, 2005; Hammill & Fojo,
2013; Kocevar-Weidinger et al., 2010). Working with an Institutional Review Board will ensure
that both shoppers and employees are protected.

Special care should be given to deciding whether to recruit library users as shoppers or
to recruit outside the district or campus. There are companies that will organize, train, and
coordinate shoppers for you (Backs & Kinder, 2007; Childers, 1980; Czopek, 1998; Gers &
Seward, 1985), which can be an ideal option if timing is problematic, but funds are available to
pay for those services. Academic libraries often recruit shoppers from campus, finding this a
more financially feasible option (Hammill & Fojo, 2013; Kocevar-Weidinger et al., 2010; Stein at
al., 2008; Tygett, Lawson, & Weessies, 1996). Recruits from campus have institutional
knowledge, so researchers should consider how that knowledge might affect results. However,
campus recruits are also the library’s primary users, potentially making the results of a study
more applicable.

In addition to intentionally choosing to use specific shoppers, researchers should also be
clear as to the intent of the study. An effective evaluation tool for secret shoppers should be
paired with a training program where shoppers are instructed on the kind of feedback desired.
Do researchers need to know specific identities of library employees, every resource used to
answer a query, whether the answer provided was correct (Childers, 1980; Gers & Seward,
1985; Hammill & Fojo, 2013; Tesdell, 2000), how shoppers feel about library signage, to which
specific desk a query was addressed, or do researchers want a more holistic account of the
shoppers’ experiences (Backs & Kinder, 2007; Burkamp & Virbick, 2002; Calvert, 2005; Czopek, 1998; Kocevar-Weidinger et al., 2010; Stein et al., 2008; Tygett, Lawson, & Weessies, 1996)?

Methodology

Participants of this study were broken into two groups, library employees and secret shoppers. The first group was comprised of the student employees and staff assigned to the two service points. Librarians and IT staff with whom either desk might confer were not a part of this study. Each participant completed an informed consent form, acknowledging that they were aware the study was taking place and that they may be shopped. Employees were given the opportunity to opt out of participating; minors were not eligible to participate. The archives and special collections service desk was not included in this study.

All library staff were aware of the secret shopping program. The purpose and basic methodology was discussed during an all-staff meeting. Student employees were introduced to the program during meetings and emails. Employee participants were informed that the study was focusing on summative experiences at the entry level service desks and not on the performance of individual employees. Employees understood that shoppers might be faculty, staff, or students they knew, and that the questions being asked would be those normally asked at each service desk. Participants were asked to conduct business as usual in terms of providing basic services.

The second group of participants were the secret shoppers. We sought to recruit five faculty, five staff, and five student participants. These shoppers attended an initial training session, during which they completed an informed consent form and received training on the
purpose of the study, background on the staffing models, and instructions on how “shop.”

During this training session, shoppers chose two questions to ask, one for each service desk. A typical shopping experience took less than five minutes, as the shopper would make his/her inquiry, observe the interaction, and leave the area to fill out an evaluation form reflecting on the process and their satisfaction with the interaction. The evaluation form was delivered in the form of a Qualtrics survey.

Shoppers were recruited using emails to a general campus listserv, flyers, and directed requests. Shoppers were assigned a random identification (Fac1, Fac2, Stu1, Stu2, Stf1, Stf2, etc.) and used this ID to record their observations on the evaluation form. In this way, only the primary investigator knew the identities of the shoppers.

Shopper training

Due to the small sample size, faculty and staff shoppers were trained individually. The student shoppers were trained as a group. Training was completed face-to-face by the primary investigator in all cases. Shoppers were introduced to the concept of secret shopping, informed of the basic differences in staffing at the two service desks, and given a list of sample questions. Shoppers reviewed the list of questions and discussed their choice with the primary investigator. If a shopper had an actual question, they were encouraged to use that question for their shopping interaction, as it would lead to greater investment on the part of the shopper. Shoppers were given an overview of the evaluation form, and were instructed not to include any names in their feedback. While shoppers had to be aware of the student employees
who were not participating (they were given a list), the purpose of the study was to emphasize overall experiences, not to serve as a punitive assessment against specific employees.

Shoppers were told to ask different questions at each desk, but were not directed to ask specific questions to a specific desk. Likewise, shoppers were told to ask their questions at times that were convenient to them. The evaluation form captured whether the questions were asked during the week or on the weekend and whether questions were asked during the morning, afternoon, or evening. Shoppers were also asked to complete their two shopping interactions within two weeks of their training session. The complete secret shopping program took place during October and November, 2014.

The list of possible shopping questions included informational questions and research assistance questions. Information technology questions were not included in the possible list, due to the dispatching system used by the research/IT desk. If a shopper had a real information technology need, they were encouraged to address it, but we did not want IT staff to be dispatched to solve a fake problem; there was no way to identify fake questions and maintain shopper anonymity. As IT staff, library faculty, and library staff who did not staff the service desks were not a part of this study, shoppers were instructed to strategically end their interactions once an expert was involved. For example, if a shopper were asking a research question and was referred to a librarian, s/he was to thank the desk employee for their recommendation and act as if they either didn’t have the time to go into things further or to insist that they already knew how to get in contact with said librarian. Shopping volunteers received a $10 gift certificate to the campus bookstore.
Results

The evaluation form used a combination of yes/no and multiple choice questions, coupled with space for shoppers to elaborate on their answers. The evaluation form covered both the process of the inquiry and the satisfaction level of the service provided. Display logic was used if a shopper was referred to an alternate source for a final answer to their inquiry. See Appendix A for full evaluation form.

We sought to recruit five faculty, five staff, and five student volunteers to act as secret shoppers. Five faculty (two adjunct, two untenured, and one tenured), four staff (two from Information Technology Services, one office coordinator, and one from campus administration), and two first year students participated. Shoppers were not directed to address their question to a specific desk, but were required to ask a different question at each desk, though not in the same visit to the library. Twenty-one total interactions were evaluated, ten for the research/IT support desk, eleven for the circulation desk (one participant did not shop the research/IT support desk). Three interactions were conducted over the phone, with the remainder occurring in-person.

Shoppers were asked to identify at which desk they began their query. As directional and basic library questions can be addressed to either desk (where is the bathroom, how do I register for an interlibrary loan account), shoppers were simply instructed to choose which desk they might normally ask their question. Depending on their question, they might be referred to the other desk, and each was made aware of this possibility.

Analysis: There was only one situation in which a query was transferred to the other desk. The shopper asked the research/IT support desk about color printing, which is handled by
the circulation desk. Shoppers decided on the question they would ask and to which desk they would direct that question. With few exceptions, the choices mirrored those typically received by each desk. This question was asked in order to determine if there were expectations brought by the shoppers as to what services might be supported by which desk. This was of particular interest to the User Experience Team as we attempt to define and market services appropriately. In order to better understand whether a user addressed a question to a specific desk, we should have had a follow up discussion with shoppers. As it was, there was no way to determine whether a question was directed as it was by shopper choice or as a function of the study design.

Questions were primarily asked during business hours; two questions were asked on a weekend, one question was asked during the evening. Seven questions were asked during weekday mornings, eleven during weekday afternoons.

Analysis: These times mirror building visitor statistics as well as desk query statistics. Library faculty and IT staff are available during business hours; librarians do not have on-call hours during the evening and on the weekends.

Table 1: Number of shoppers, questions asked, and desk to which question was directed

<table>
<thead>
<tr>
<th>Faculty</th>
<th>Circulation Desk</th>
<th>Research/IT Support Desk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty</td>
<td>Can you help me locate the book that was recommended to me, <em>Quick Sand in Passing</em>?</td>
<td>Can you install Microsoft Office on faculty personal laptops?</td>
</tr>
<tr>
<td></td>
<td>Can I request theses through ILLiad just as I request journal articles?</td>
<td>Can you help me find anthropological sources on divorce? Also, I am looking for suicide rates broken down by gender following a divorce.</td>
</tr>
<tr>
<td></td>
<td>Can you help me find academic or scholarly reviews of the Indian</td>
<td>What should I do if my computer mouse is not working properly?</td>
</tr>
</tbody>
</table>
A total of twenty-one questions were asked between the circulation and research/IT support desks. Eight of those questions were based on actual needs of the shoppers, as discussed during the shopper training sessions. A majority of the questions were library related, eight were informational or directional in nature, and two were related to an information technology need. Shoppers were asked to rank their overall satisfaction with the answer they received on a scale of 1-5, with 1 being very dissatisfied and 5 being very satisfied.
Table 2: Users’ rank of satisfaction with the answer received, divided by desk at which the question was directed

<table>
<thead>
<tr>
<th></th>
<th>Circulation Desk</th>
<th>Research/IT Support Desk</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Very Satisfied</td>
<td>Satisfied</td>
</tr>
<tr>
<td>Faculty</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Staff</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Student</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

*Analysis*: Twenty interactions received either a satisfactory or very satisfactory rating. One interaction received a neutral score. When asked to comment on their satisfaction rating, faculty and staff were more likely to offer substantive feedback regarding their experience. The student shoppers were equally likely to offer critical feedback, but did not spend a considerable amount of time reflecting on the overall experience. For example, the faculty member asking for help locating a book stated, “I was satisfied because it very well could be that I wrote down the name of the book incorrectly. However, the clerk did spend a great deal of time attempting to locate the book.” The interaction was given an overall satisfactory rating. The title, had in fact, been written down incorrectly. Neither student offered any feedback as to the reasoning behind their scores.

Shoppers were asked to reflect on the approachability of the student employees. Shoppers indicated they felt the student employee was paying attention and ready to help in 13 interactions. In an additional six interactions, student employees were busy, but recognized the shopper’s presence and began to help him/her as soon as possible. In two instances, shoppers indicated that student employees at the circulation desk were not paying attention.
Analysis: Student employees at both desks are often assigned to work on projects, and may work on homework as time permits. Additionally, student employees at the research/IT support desk have a high volume of telephone inquiries, and often wrap up interactions once they’ve hung up the phone. The interaction receiving a neutral ranking occurred at the circulation desk. The staff shopper had this to say about the students’ approachability, “There were 2 students at the circ desk and I approached in the middle, as I wasn’t sure which one to go to. Both of them were busy staring at their computers and neither bothered to look up when I came to the desk. I politely said excuse me and at that point only one of them looked up at me.” In this case, the shopper indicated that they felt ignored. In all other interactions, shoppers indicated they were helped immediately. This was the only interaction which required significant improvement.

All shoppers indicated they were treated respectfully and that the student employees waited for the shopper to state their question completely. Shoppers were also asked clarifying questions by student employees and library staff when necessary. In one case, the shopper indicated the student employee “interpreted my question incorrectly,” but that a staff member stepped in and was able to fully answer the question.

Shoppers were referred to circulation staff twice, another desk once, and shown a display once (posted instructions on faxing/scanning). In no instance was a shopper asked whether they were satisfied with their answer, and shoppers only offered additional feedback in the case when they were given other options for fulfilling their needs.

Analysis: While completing the evaluation form, each participant was to be prompted with an opportunity to provide final feedback. Given that final feedback was not offered in all
cases, the display logic of that particular question on the survey instrument may have been faulty. Shoppers may have also been experiencing survey fatigue, as by this point they had answered between 22 and 24 questions.

During the training sessions, shoppers were instructed to consider their overall experience as the purpose of this study was not to analyze the answers provided by desk employees for accuracy. However, shoppers were informed that it was normal for their evaluation to be influenced should they receive an answer they knew to be incorrect. No shopper indicated that they walked away from an experience having received an incorrect answer. In two cases, circulation staff were brought in to complete an interaction as the student employees were unable to answer and/or interpret the question.

Table 3: Relationship between overall satisfaction with experience and initial approachability of student employees at the research/IT support desk

<table>
<thead>
<tr>
<th></th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paying attention and ready to help</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Busy, but recognized my presence</td>
<td>2</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Not paying attention</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 4: Relationship between overall satisfaction with experience and initial approachability of student employees at the circulation desk

<table>
<thead>
<tr>
<th></th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paying attention and ready to help</td>
<td>5</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Busy, but recognized my presence</td>
<td>5</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Not paying attention</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
Overall satisfaction with a shopping experience was more closely associated with the service desk at which they began the interaction than any other variable. Shoppers were very satisfied with their experience at the research/IT support desk nine out of ten times, with the tenth experience receiving a satisfactory rating. Alternately, shoppers were very satisfied with their experience at the circulation desk seven out of eleven times. Three experiences received a satisfactory rating and one received a neutral rating. The initial approachability of the student employee may have influenced the shoppers’ overall ratings, but there was not enough data to test this relationship.

Discussion

Analysis of the results indicates that secret shopping is a useful tool by which to evaluate user experiences. We were able to identify trends in what the two service desks do well, as well as identify areas in which we can improve.

Training for referrals

The focus of the assessment was to understand where and how to improve library services, and staff and student employee training programs in order to provide a better library user experience for students, faculty, and staff. While shoppers were not asked to consider the accuracy of their interaction, the responses were reviewed by investigators for accuracy and potential improvement. In five instances, the interaction would have been improved had library faculty been consulted. In one of these cases, the faculty member was referred to a librarian, and a lengthy information seeking session ensued. The following interactions were those where a librarian was not consulted;
faculty member asked the circulation desk for help locating the name of book, but had
written down the title incorrectly; the book was not found

faculty member asked the circulation desk for help locating academic/scholarly reviews
of a movie; some reviews were found, but after a significant amount of time

staff member asked the circulation desk about checking out DVDs; the shopper was
directed to a single location, while DVDs are fully integrated into the stacks

student asked the circulation desk where to find a book on Ancient Rome; the shopper
was directed to a general section

Circulation desk student employees have not received training in identifying when to
refer a question to a librarian, given that a full time circulation staff member is usually at the
desk during business hours, with the exception of lunch and meeting times. Library faculty were
consulted in the one instance when that question was directed to the research/IT support desk.
Student employees working at this desk receive explicit training in referring questions to library
faculty and IT staff. From this, we can see that student employees at the circulation desk need
additional training in identifying when, and how, to involve library faculty.

This will be especially critical as the library transitions from its current service model of
two service desks on the entry level, to a model with one on the entry level and one on the
third floor. Additionally, research support services and circulation services are being combined
into a single library service desk (not including the special collections and archives). IT support
services will still be available in the library, but at the third floor service desk. One tool, which
we believe will aid in this transition, is the recent adoption of LibAnswers 2 as the statistics
keeping system. For the past semester we have used it to record transactions (single-session
interactions) and tickets (multiple-session interactions) for both library and IT interactions. We anticipate the entry level service desk student employees will receive training in how to use LibAnswers 2, so that we can begin to see how the change in service models affects user traffic. Additionally, LibAnswers 2 allows service providers to easily refer questions to library faculty, ensuring the user and the librarian are connected.

Customer service

In three interactions, the shoppers’ language indicated that the experience went above and beyond his/her expectations.

- faculty member asked the research/IT support desk about software installation, was “enlightened” and was “even provided with extra information” as s/he “didn’t think about having” additional software installed
- faculty member asked the research/IT support desk about a non-functional computer mouse, “would not have thought about” additional considerations (wireless vs. wired mouse) has s/he “filed the work order from my computer”
- student asked the research/IT support desk about scanning a document to email, was taken to “scanner to show me rather than just telling me what to do and pointing”

In addition to these exemplary experiences, we found that users were generally satisfied with the customer service they received. “It was a very pleasant exchange. She thanked me for livening up her afternoon, and I felt the same,” and “Both desks were helpful and answered all my questions,” were common sentiments. However, there is room for improvement. Both desks are typically staffed by two student employees. Users may approach either desk from numerous directions as there are no stanchions to direct traffic. Separate shoppers mentioned
that when approaching the circulation and research/IT support desks, they were unsure of which student employee to approach, so chose the middle path. In both cases where this was mentioned, one student employee at the desk in question took the initiative to greet the shopper, while the other student employee did his/her best to seem unavailable. While shoppers indicated that student employees were paying attention and ready to help in 13 out of 21 shopping experiences, we should aim higher.

While shoppers indicated that having two student employees at the desk might create uncertainty in whom to approach, more critical language was used to describe the experiences at the circulation desk.

- “He didn’t start looking for movie reviews on his computer until the other desk assistant started looking.”
- “I stood in front of her and she said, “Um, hi.” There was no eye contact.”
- “I wouldn’t say I was treated disrespectfully, that seems a bit strong, but I did feel a little like they didn’t really want to be bothered.”

In addition to emphasizing referrals to library faculty, we now understand that circulation student employees need more training on customer service. Given our pending change in service desk arrangement, this is an ideal time to reinvigorate circulation desk student employee training. Customer service is emphasized as part of training for the research/IT support desk student employees. Student employees go through several modules to understand how different users have different needs when it comes to customer service, based on Robbins’s *How to Speak and Listen Effectively*. They also go through role-playing scenarios for library and IT related issues, where we emphasize how quickly an interaction can
go from a simple question to a complicated issue. We do not have statistics from the circulation desk to indicate whether potentially complicated questions are addressed to the circulation desk, but we do know that student employees are often challenged to see the bigger picture of library and IT services, often assuming that if it isn’t the case for them, it must not be the case for other users.

*Evaluation Form*

Shoppers completed their evaluations of their shopping experiences by way of a Qualtrics survey, delivered to them via email during their shopper training session. The form was used during an initial pilot study with three students, but it wasn’t until we had significant feedback that we were able to determine that some questions were more useful than others. For example, we asked whether name tags were worn. We tell student employees at each desk to wear name tags, but we don’t emphasize it equally. Student employees were equally unlikely to be wearing name tags at each desk, so while the question allowed us to see whether name tags were used, no shopper reflected on the use or disuse of names tags as related to their overall experience. This question may have proved useful were we interested in collecting identifying information of student employees, but we wanted to ensure our employee participants that this was not intended to single any one person out.

We also asked shoppers to comment on how quickly they were helped after we had already asked them about approachability. While these two questions ask different things, we weren’t sure that shoppers were able to make that distinction, likely seeing the second question as redundant. No significant feedback was offered related to the speed of assistance.
However, the information we hoped to glean from this question was addressed in the answers related to approachability.

The evaluation form was designed to ask a question quantitatively, then follow it immediately by a qualitative reflection. We will likely combine these questions in future iterations, to decrease survey fatigue and to, potentially, elicit more useful answers. Candidates for combination include questions on whether the shopper was treated respectfully, how questions was listened to by employees and whether follow up questions were asked, and whether the shopper understood the answer, explanation, or actions provided to them.

One additional problem that we had to overcome in designing the survey instrument was the choice of language used to describe our desk employees. Anecdotally, we feel that users do not understand the distinction between student employees, library staff, library faculty, and IT staff. We anticipated that shoppers would use language in their reflections to indicate whether they were assisted by someone they thought was not a student employee and this turned out to be the case. In order to minimize shopper confusion, we intentionally chose to refer to individuals working at either desk as staff members. Shoppers referred to students as “desk clerk,” “assistant,” “staff,” and “student,” and to the circulation desk full time staff directly by name. We did not find the ambiguity in the term to be confusing to shoppers.

Conclusion

Secret shopping can be used as an unobtrusive method of evaluating user experiences within the library and across service points. A secret shopping program can be instituted by any library, and can be adjusted to fit any evaluative scope. Usability testing can be accomplished
using only a small sample (Nielsen, 1993), as the aim is to identify patterns, rather than be able to say something definitively or that two variables are significantly related.

Secret shopping also does not have to be expensive. While there are professional organizations that will organize your study, recruit shoppers, and analyze results for you, we did not find the time required to be burdensome. Shopper training sessions took approximately 15 minutes each, follow up with shoppers can be managed through email, and data analysis is easily managed with a small sample size. We learned that faculty and staff will volunteer to help assess services more readily and without incentive than will student employees, as we realized that we did not advertise the financial incentive very well. Faculty and staff signed up with little provocation, while we had to actively recruit student participants. Rather than offer a $10.00 gift certificate to all participants, we might consider offering a drawing for a larger prize, or only incentivizing student participation.

In future iterations, we may consider asking student shoppers additional or different questions on the survey instrument or may follow up their shopping experiences with a face-to-face debriefing session, either as individuals or as a group. Faculty and staff are more likely to offer praise or criticism, but we do not want to lose sight of the needs of our largest user population. One idea is to follow up with students after the faculty/staff shopping experiences, so we might share those evaluations with students. Students may be more likely to offer substantive evaluations when presented with evidence from other shoppers.

This study sought to recruit 15 participants, ultimately 11 signed up. We felt we should have five participants from each of our primary user groups, being faculty, staff, and students. Though we only had two student participants, we realized that the reflections we received from
faculty and staff were much more useful. As stated above, we do not want to discount the views of our student users, but realize we may need to investigate alternate ways by which to gather student feedback.

Secret shopping is a valuable tool requiring minimal effort, from which rich results can be gained. Iterative shopping programs are ideal to determine effects over time, but even a single program can be useful for identifying trends in service. Small sample sizes are enough to gain insights; those who are truly limited in resources can accomplish a successful secret shopping evaluation with only five participants, so long as the evaluation tool is robust and the participants are chosen strategically.

**Works Cited**


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Appendix A: Evaluation form used by secret shoppers

1. Assigned ID:
2. At which desk did you begin your query?
   a. Help@Ames Desk
   b. Circulation Desk
3. At what time of day did you ask this question?
   a. Morning
   b. Afternoon
   c. Evening
4. What day of the week did you ask this question?
   a. Weekday
   b. Weekend (starting at 5pm Fridays, through Sundays)
5. Was the staff member who first started helping you wearing a name tag?
   a. Yes
   b. No
6. What question did you ask?
7. What was the answer that was provided to you? Give as much detail as possible.
8. Rank how satisfied you were with the answer you received.
   a. Very Dissatisfied
   b. Dissatisfied
   c. Neutral
   d. Satisfied
   e. Very Satisfied
9. Comment on why you were or were not satisfied with the provided answer.
10. As you approached the desk, the staff member you asked your question of was...
    a. Paying attention and ready to help
    b. Busy, but recognized my presence
    c. Not paying attention
11. Please comment on the staff member’s approachability.
12. Were you helped right away?
    a. I was helped immediately
    b. Others were being helped ahead of me.
    c. I felt ignored.
13. Please comment on how quickly you were helped.
14. Were you treated respectfully?
   a. Yes
   b. No
15. Please comment on how you were treated.
16. Did the staff member wait for you to state your question fully?
   a. Yes
   b. No
17. Please tell us more about how the staff member listened to your question.
18. Did the staff member ask you questions to help clarify your question?
   a. I was asked questions that helped identify my information need.
   b. I was asked questions, but they did not help identify my information need.
   c. I was not asked questions.
19. Please tell us more about the questions that were asked. If no additional questions were asked, did you feel the staff member understood your question?
20. When you were being helped, did you understand the staff member's explanations and actions?
   a. Yes
   b. No
21. Please elaborate on what you did or did not understand.
22. If the staff member was unable to fully assist you, were you provided other options for meeting your needs or referred to another person for further assistance?
   a. Yes
   b. No
23. IF the answer to question 22 was “No,” shoppers were asked:
24. Did the staff member ask if you were satisfied with the answer to your question?
   a. Yes
   b. No
25. Are there any additional observations about your experience that you would like to share?
26. IF the answer to question 22 was “Yes,” shoppers were asked:
27. Which of the following best describes the option you were given for meeting your needs?
   a. Referred to a website
   b. Given a handout
   c. Shown a display or sign in the building
   d. Referred to a desk
   e. Referred to a person
   f. Other
28. If you were referred to another desk, please describe your experience at that desk.
29. Are there any additional observations about your experience that you would like to share?