
How do others see us? - mystery visiting as a tool for service evaluation



Philippa Jones
*Head of Customer Services,
Leeds University Library,
Leeds, LS2 9JT
Tel: 0113 343 5573*

E-mail: p.f.jones@leeds.ac.uk



Jill Woodman
*Customer Services Manager,
Enquiries, Leeds University
Library, Leeds LS2 9JT
Tel: 0113 343 7027*

E-mail: g.w.woodman@leeds.ac.uk

BACKGROUND

University libraries are constantly seeking new ways of evaluating the quality of service provided to their customers. Public libraries have taken the lead in the use of mystery visiting where an unidentified member of staff from one library visits another to assess the levels of service received, using a carefully prepared proforma which clearly outlines the service areas to be evaluated. Feedback from these visits provides very useful information on how a library is functioning from the perspective of first time users.

In autumn 2003, Leeds Library and Information Services (LLIS) invited the libraries of the University of Leeds (LUL) and Leeds Metropolitan University (LeedsMet) to join them in a mystery visiting project. The public library service, LLIS, was already well acquainted with this means of evaluating library services, having carried out their own internal mystery shopper exercise early in 2003. For the university libraries this was uncharted territory. The result was a very successful cross-sectoral project, the first in the UK, which provided a wealth of qualitative information about each library service.

METHODOLOGY

Mystery visiting is an ideal tool for management to discover the real customer experience. It can be used to identify the strengths and weakness of an organisation, particularly the experience of customer care. It provides an opportunity to praise work well done and make suggestions for areas of improvement. Using visitors from similar organisations ensures that they can make objective assessments while having some prior knowledge of the environment. In addition, the visitors are able to look round another organisation's library, bring back good ideas to be used at their own workplace and learn some new skills.

The project required a great deal of planning and coordination. The participating institutions had to decide which areas of service they wished their mystery visitors to assess. After much discussion we agreed that visitors from one library would assess the following services at another

- External environment – signposting, directions to premises, ease of access, cleanliness
- Internal environment – overall feel of the environment, noise, lighting, furniture, appropriate layout
- Documentation available – leaflets, notices
- Use of computers (public libraries), self-service facilities (university libraries),
- Service experience / Customer care – via enquiries at desks and by telephone
- Overall experience of the visit

Detailed documentation was prepared for all these. We were fortunate that LLIS had run their own project and were willing to use the paperwork from that as a model for the new project. The mystery visitors were to ask questions at enquiry desks and over the telephone. These had to be written and model answers provided. Each service area was graded as commendable, satisfactory or unsatisfactory, but far more important than any grading are the comments made about services. The mystery visit is very much a qualitative tool, and volunteers were urged to write up their visits as comprehensively as possible.

VOLUNTEERS

While the planning was taking place volunteers were recruited from the staff at each institution and allocated a library to visit. Thirty-five volunteers were recruited across all three services. We had initial worries that library staff would

be apprehensive about being part of the project, not wishing to be subjected to mystery visits themselves. These fears proved unfounded and at Leeds University Library we had 22 volunteers from all levels of the organisation, from portering staff to middle managers.

The project organisers and some of the volunteers attended a cross-sectoral training session given by a professional mystery visitor. They then cascaded the training to the volunteers at their own institutions.

VISITS

Each visitor carried out one visit and made one telephone phone call. The university libraries specified the time of day the visit should take place: weekday, evening, or at the weekend, so that all levels of service would be covered. Visits took place over two months in the spring of 2004. To ensure confidentiality, the evaluation sheets were sent straight back from the visitor to the project managers of the visited institution where detailed analysis took place.

RESULTS

The project provided all three libraries with some very useful information on the services they offer, from the view point of a new user. In some cases these have resulted in changes to services. At Leeds University Library a new library telephone enquiry office was put in place at the beginning of session 2004/5 as the mystery phone calls demonstrated what had long been suspected, that phones were often left ringing for long periods, or were not answered at all.

Debriefing sessions were held for the volunteers when the visits were completed in April 2004. This allowed staff to report back on their experience, identify details of good practice from other libraries, some of which have been adopted by their own libraries, highlight any problems with the documentation and make recommendations for how to improve the project for next session.

Although the results identified some areas for improvement, they also provided evidence of high quality service in all the libraries visited. The praise for the high level of customer care experienced by some visitors was passed on to staff and has resulted in many positive comments about the process. New volunteers have come forward for a repeat of the project this academic session.

CONCLUSION

The 2004 mystery visiting project was very successful. It provided all participants with some very useful feedback on the services they offer. It confirmed that all three libraries are providing high quality services, some areas of customer care receiving particular praise. Some scores and comments confirmed suspicions about areas that we already knew needed improvement. Other comments highlighted specific areas where more training is necessary.

All the participants gained something from the experience. Volunteers found visiting another library a challenging but useful experience. Many of our staff came back with ideas from other libraries on how to do things better.

It demonstrated that cross-sectoral collaboration can be efficient and useful to all concerned. It has provided us with the contacts to continue working with colleagues in both the public library and higher education sectors. We have already had several enquiries from other higher education libraries about the project.

The second year of the project is already under way, new mystery visits will take place in spring 2005. The results will provide us with two sets of comparable data and indicate any improvements in service.