Using secret shopping to assess student assistant training

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Abstract

Purpose – This paper aims to describe the results of three rounds of secret shopping conducted at the Hubert Library of Florida International University, and how the results affected and were affected by changes made to circulation desk student training programs.

Design/methodology/approach – Volunteers from the campus community asked circulation desk work-study students preformulated questions, in person or by phone, and recorded both the answers and service quality perceptions for analysis.

Findings – Analysis of the results revealed that the program did what it was designed to do: highlight customer service strengths and weaknesses. A majority of shoppers reported favourable experiences, but identified problematic areas and situations to be addressed in student worker training.

Research limitations/implications – Some of the most valuable data came from secret shoppers’ comments, which made clear the need to revisit some of the questions. In some instances shoppers’ desires to highlight the positive and deemphasize the negative indicated apparent bias.

Originality/value – This study shows how a secret shopping program can guide and fine-tune a library student training program as opposed to a librarian or library staff training program.

Keywords Secret shopping, Student training, Mystery shoppers, Customer service, Training assessment, Training, Libraries

Paper type Research paper

Introduction

In retail, market research companies are hired to evaluate the quality of service in stores. The market research companies use secret shoppers to obtain the information anonymously. A secret shopper is assigned to make a particular purchase in a store or restaurant, for example, and then report on the experience. Typically, the shopper is reimbursed, and can keep the product or service.

Secret shopping is a form of participant observation (Wilson, 1998) and unlike traditional survey research, it can provide accurate and stable results with a small number of observations (Finn and Kayandé, 1999; Rood and Dziadkowiec, 2010; Van der Wiele et al., 2005). For example, a hotel may be shopped for a total of three times and assessed each of the three times to gather qualitative data (Wilson, 2001). In fact, Finn and Kayandé (1999) found that they received the same results when comparing the results of 16 shoppers with 69 respondents to a customer survey.
The secret shopper concept at the Glenn Hubert Library (HL) was based on the same concept as in retail. Using a small sample in each round of shopping, the HL secret shopping program focused on the experiential nature of service rather than the quantitative data. The secret shopping program was piloted in the HL in spring 2011. Due to limited funding, the library piloted the program using volunteers from the university community. Because HL moved to a consultation model for reference service in the spring of 2011 and a new training program was initiated, secret shopping was conducted again in summer and fall 2011. This paper compares results from the three information gathering sessions and the shoppers’ perceptions of service.

Secret shopping was selected as the method for gathering information for several reasons. First, the reference department was concerned with the misinformation the circulation department’s work-study students sometimes provided to patrons. Reference staff could overhear the responses to questions and when possible stepped in to assist the circulation staff but this was not always feasible. Additionally, it was seen as a method of improving customer service and comparing the self-perceptions of service to patrons’ perceptions. Through secret shopping it was expected that the shoppers would recognize the staff’s friendliness but also clearly identify the misinformation received.

This study involved three rounds of shopping each using a small sample size. The results of the shopping experience identified qualitative data to evaluate service at the Hubert Library. Future studies will involve larger sample sizes in order to obtain more quantifiable data. Furthermore, as Florida International University Libraries is currently undergoing a LibQual study, it will be instructive to compare the results of the participatory observation using secret shopping with the results of the qualitative and quantitative results of the LibQual survey instrument.

Literature review
Articles on secret shopping abound in the non-library professional literature, defining and describing how and why to perform secret shopping, assessing its efficacy as a service quality measurement tool, and offering examples of secret shopping programs and their results as proof of its efficacy. Wilson’s (2001) report on the results of secret shopping based on interviews with service company managers and market research agency directors defines secret shopping as “concealed participant observation in a public setting,” stating it should be used because “only mystery shopping has the potential to directly measure service performance across the full range of present quality standards.” An earlier article by Wilson (1998) lists factors to consider when designing secret shopper programs to ensure effectiveness and result reliability: the need for consistency of responses/reduction of subjective responses by/of shoppers through measurement area selection; recruiting credible shoppers with whose behavior and demeanor disguise their status as secret shoppers; the difficulty of supervising shoppers and verifying the “accuracy and reliability” of reactions; and the need to train shoppers in how to shop, what and how to observe, and how to remember and record information gleaned during their visits. In his later article Wilson (2001) noted another consideration: prior notification of employees of forthcoming secret shopper programs to avoid employee resentment and make the program’s results credible to employees. Finn and Kayande’s (1999) assessment of secret shopping’s effectiveness as a service quality technique notes a further caveat: secret shopping is a reasonably reliable.
service quality measurement technique, but more so when assessing objective factors as opposed to subjective ones. Latham’s et al. (2012) assessment of the effect of coaching of restaurant employees based on information on employee behavior gleaned by secret shoppers indicates that the secret shopper data-influenced coaching resulted in improved employee performance.

Like their counterparts in the non-library professional literature, articles in the library literature on secret shopping take several different tacks. Of these, case studies describing libraries’ or library systems’ secret shopping experiences, processes and results predominate. An early example is King and Berry’s (1973) study of the University of Minnesota Libraries telephone information service, which “attempted to evaluate: factual accuracy of responses, level of interviewing by the staff person, and attitude of the staff person” by having volunteers ask questions by telephone; the results were judged effective by the author. Childers (1980) describes a “hidden testing” (his words) evaluation of reference service at 57 libraries belonging to the Suffolk Cooperative Library System (SCLS). This study not only assessed response accuracy, but also staff willingness to follow up on the testers’ questions via three specially designed questions, dubbed “escalators.” It also assessed response accuracy of libraries/agencies to which the testers were referred by SCLS reference staff. Other case studies (Stein et al., 2008; Burkamp and Virbick, 2002; Czopek, 1998; Tesdell, 2000; Backs and Kinder, 2007) all conclude that secret shopping is a useful method for evaluating library customer services, including reference service. Stein et al. (2008) discuss secret shopping as one of 9 different data collection techniques at Villanova University as opposed to the exclusive emphasis on secret shopping of the other case studies. In contrast, in their article on secret shopping at the libraries at Radford and Longwood Universities, Kocveryar-Weidinger et al. (2010) focus on determining whether or not secret shopping is a useful tool for assessing reference desk service quality, though for context it also describes the rationale and methodology of the process as well as the analysis and dissemination of the results. A third approach in writing on library secret shopping is the “how-to” stressing technique rather than experiences or assessment. Benjes-Small and Kocveryar-Weidinger (2011) outline six “secrets” of secret shopping at the aforementioned Radford and Longwood libraries, and how each of these factors – “lay the groundwork,” “involve all stakeholders,” “establish model behaviors,” “design an effective mystery shopping instrument,” “set your shoppers up for success,” and “share the findings” made the secret shopping endeavor a success.

**Purpose and outcomes**

The purpose and outcomes in the current study shifted with each round of secret shopping. The focus of the Spring 2011 (round 1) pilot program was on customer service and adherence to standard policies in the library. The pilot program was seen as both a way to enhance the library’s image within the university community and a means to elevate customer service from good to exceptional.

Furthermore, the underlying rationale behind the secret shopper program was to compare our own perception of service to that of the perception of Biscayne Bay Campus (BBC) students, faculty, and staff.

The program was not implemented as a performance evaluation but rather as a constructive tool to help us establish benchmark standards and define customer service training needs by testing patron services. The pilot’s goals were:
To see our service through the eyes of our patrons.
To determine where additional training is needed.
To pinpoint areas needing improvement, based on patron’s perceptions and reactions.

When we started we weren’t sure how many rounds of secret shopping to conduct. However, in summer 2011 (round 2), the Hubert Library changed its service model. During the first round of secret shopping, the Reference staff was seated beside the circulation staff at a joint desk area. Subsequently, the library adopted a reference consultation model. Part of the reason for switching to a consultation model of reference service is the size of the Reference staff at HL. At the time, there were five librarians and one library assistant in reference. The library is open more than 112 hours with the Information and Research Services desk open more than 70 hours a week including nights and weekends. Under the consultation model, there was no traditional reference desk. The circulation work-study students were the first point of contact for all patrons. In addition to checking out library materials and helping with computer and printing issues, they now also had to evaluate patron questions, using critical thinking skills to determine the patron’s information needs and answering the patron’s questions themselves whenever possible. When necessary, they referred the patron to the reference librarian on duty in the consultation room. Referral was based on the question’s level of difficulty. Work-study students were supposed to answer level 1 and 2 questions. Level 1 questions require minimal effort, no special skills or knowledge, or resource consulting (for example, What are the hours? Where are the copiers?). Level 2 questions require minimal effort, skills and knowledge, resource consulting, and explanation (for example, explaining call numbers, how to connect to the library’s database from off-campus, and specific library policies).

Higher-level questions (levels 3 and 4) were to be referred to the librarian in the consultation room. Sample level 3 questions include How to search the web and how to search a database. Level 4 questions are those requiring in-depth research skills, consultation with a specialist through instruction, reference knowledge and skills, including refining a topic, exploring keywords, and cross-referencing resources.

Because of the shift in service models, the secret shopper program was conducted in the summer and fall to compare and see if and how the change in service models impacted the level of circulation and reference service. The ultimate aim remained unchanged: to see our service through the eyes of our patrons. However, in Round two the focus shifted from customer service to the type of information patrons received. The questions we wanted answered included:

- Are student employees answering level 1 and level 2 questions correctly?
- How much time are student employees spending answering level 1 and level 2 questions?
- Are level 1 and level 2 questions sometimes too difficult for student employees to answer?
- Are student employees referring patrons to reference librarians when they should be?
The second round of secret shopping showed that student employees were having difficulty answering basic known title questions using the library catalog. Additionally, several reference librarians complained that the student employees were not answering the basic “I have a title, where do I find this book” type questions correctly. As a result, at the beginning of the fall semester (round 3), we further developed a training program for student employees. Students had to read an online training guide that included instructional videos and customer service homework. Furthermore, they were required to take two quizzes to test their knowledge. Finally, all circulation students were required to attend two one-hour training sessions. The first one focused on role-playing and question negotiation. The second, held in the middle of the semester, was a bibliographic instruction session. It focused on how to search for items in the library catalog and how to find articles. Throughout the second training session, students were reminded that when in doubt, refer. Also, students were given the three-minute rule; if helping a patron find something took more than three minutes they should refer the question to a reference librarian.

Round three’s focus was similar to round two’s in that we wanted to evaluate the quality and type of information patrons received. Furthermore, we wanted to measure whether our student workers would refer patrons effectively. A recurring comment came up during the training sessions: students wanted to do what they could to help the patron. They felt that trying to answer questions offered better service to patrons. As a result, the majority of questions used during round three of secret shopping were designed to be referred. Consequently, round three not only served as a way to evaluate our service quality, but also as a means to evaluate our student employee training program. Many Reference Department staff were complaining about the lack of “business” in the consultation room and the missed opportunity to help patrons. Round three of secret shopping aimed to provide data on whether the reference consultation model should be continued.

Methodology
Due to budget constraints HL piloted a secret shopping program using volunteers from the campus community. All library employees, including student workers at HL, were notified by e-mail about the program and when it would begin and end. The announcement emphasized that the pilot should be seen not as a punitive measure but as a positive way to improve library service to the BBC community. Furthermore, the e-mail explained that the pilot’s purpose was to compare our self-perceived service quality to the perceptions of students, faculty, and staff at BBC. It was explained that the secret shopping program through all of its iterations was intended to see library customer service through the eyes of patrons, determine what areas need increase training and further clarification of policies, and help determine where to focus improvement goals (based on patrons’ perception and reactions). The employees were informed that the shoppers were volunteers from the campus community and would come in to ask questions and that the questions would not be unusual or tricky. Employees were told they didn’t need to prepare and that, as library employees, each should do his/her best to meet patrons’ needs.

The main recruitment method included personal relationships with BBC employees and students. Additionally, shoppers were recruited during different campus events (see Table I).
Volunteer training
The volunteer training program was the same for all three rounds of shopping. The secret shopping program was explained to the volunteers. This was done face-to-face or over the phone and via e-mail. The volunteers were asked if they had any questions about the program. Each secret shopper was given a question and asked if they would be comfortable asking it at one of the service desks in the library. The questionnaire was explained to each participant. Each question on the questionnaire was reviewed to ensure understanding by the volunteer.

Each volunteer was told repeatedly that the program was not intended to penalize anyone but as a means to improve library customer service. It was explained that the program was to help the library staff see the service quality through the eyes of patrons.

During the first round of secret shopping, the reference desk and circulation desk employees worked side-by-side. Secret shoppers were not told what desk to use. In rounds two and three, only the circulation desk was staffed.

The questionnaire included questions to identify the time and day of the shopping; this was used to identify the employee answering the question.

The steps of the secret shopper process were:

1. Go into the library or call the circulation desk and ask the following question: (each shopper had a different question).
2. Remain anonymous.
3. Fill out a questionnaire after the shopping experience. They were asked to note as many details including what was said, whether they were referred to another person, a book, article, etc. The last page of the questionnaire provided space for the details of the interaction.
4. Contact the program coordinators when the shopping was completed.
5. Meet with the coordinators for follow-up.

Volunteer incentive
Volunteers received a $5 Starbucks card for their participation.

Results
This section will analyze each question asked as well as look at general themes across all secret shopping interactions.

The questionnaire used a Likert-type scale where the shoppers specified how much they agreed or disagreed with a series of statements. The questionnaire was meant to capture the intensity of the individual shopper’s feelings (see Figure 1 and Table II).

<table>
<thead>
<tr>
<th>Round 1</th>
<th>Round 2</th>
<th>Round 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nine entered the library</td>
<td>Two entered the library</td>
<td>Five entered the library</td>
</tr>
<tr>
<td>Six called the circulation desk</td>
<td>One called the circulation desk</td>
<td></td>
</tr>
</tbody>
</table>

Table I. Method of shopping
1. What question did you ask?

2. What day and time did you secret shop?

3. What desk did you ask your question at?

4. Were you referred to another person for help with your question?
   Yes __________   No __________

5. How many people helped you answer your question(s)?
   1 person  2 people  More than 2 people

6. On a scale of 1 (not at all visible) to 5 (easily visible), how visible was library staff?
   1 2 3 4 5
   Not at all visible  Easily visible

7. On a scale of 1 (not at all enthusiastic) to 5 (very enthusiastic) how enthusiastic was the staff?
   1 2 3 4 5
   Not at all enthusiastic  Very enthusiastic

8. If the staff were talking when you approached the desk, did they immediately stop talking and attend to your question?
   Yes _____   No _____

9. On a scale of 1 (too much time) to 5 (no time at all), how much time did it take before you got the help you needed?
   1 2 3 4 5
   Too much time  No time at all

10. On a scale of 1 (not at all satisfied) to 5 (very satisfied), how satisfied were you with the answer/information you got?
    1 2 3 4 5
    Not at all satisfied  Very satisfied

11. On a scale of 1 (not happy at all) to 5 (very happy), how would you describe your experience at the library service desk?
    1 2 3 4 5
    Not happy at all  Very happy
12. On a scale of 1 (way too much information) to 5 (just enough information), how much information did you get?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Way too much information</td>
<td></td>
<td></td>
<td></td>
<td>Just enough information</td>
</tr>
</tbody>
</table>

13. On a scale of 1 (extremely overloaded) to 5 (no overload), did you experience information overload?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely overloaded</td>
<td></td>
<td></td>
<td></td>
<td>No overload</td>
</tr>
</tbody>
</table>

14. Did staff tell you to come back if you need more help?
Yes _______ No _______

Comments

Please jot down the details of your interaction with library staff. What did the staff say? Where were you referred? What did the staff show you on the computer?

Table II.
Number of shoppers and questions asked

<table>
<thead>
<tr>
<th>Round 1 = nine volunteers</th>
<th>Round 2 = eight volunteers</th>
<th>Round 3 = six volunteers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you carry the <em>New York Times</em>?</td>
<td>Does the library have any books online about suicide?</td>
<td>Can you show me how to renew my books online?</td>
</tr>
<tr>
<td>I need to find an e-journal on alcohol abuse</td>
<td>Where can I find information about Martin Luther King?</td>
<td>I need to find a book on mental illness</td>
</tr>
<tr>
<td>Need information about the Hilton Hotel</td>
<td>If I want a book that FIU does not have, can I get it?</td>
<td>I need information on distance education</td>
</tr>
<tr>
<td>I am looking for information on anorexia</td>
<td>Does the library have the video, “When I grow up?”</td>
<td>I need an article for my chemistry class about how chemical production contribute to the US economy</td>
</tr>
<tr>
<td>What are the pros and cons of the SAT and the ACT?</td>
<td>How do I search for videos?</td>
<td>I need to find a nursing article on high blood pressure</td>
</tr>
<tr>
<td>Need information about chronic depression</td>
<td>I need to find articles about birds.</td>
<td>I need to find information on diabetes</td>
</tr>
<tr>
<td>I need information about student engagement and student success</td>
<td>How do I do it?</td>
<td></td>
</tr>
<tr>
<td>Need biography on Malcolm X or any other black leaders</td>
<td>I need to do research on child abuse and neglect for my psychology development class</td>
<td></td>
</tr>
<tr>
<td>Do you have the book Romeo and Juliet?</td>
<td>How do I find an e-journal on the life stages of development?</td>
<td></td>
</tr>
</tbody>
</table>

Figure 1
**Analysis of questions across three rounds of shopping**

The shoppers were not directed to a specific desk. They were told to go to a service desk in the library or call the circulation desk (the number was provided) to ask their question. Of the nine participants, in round one, two called, one went to the Reference desk and six went to the circulation desk. In round two six of the eight participants called the library and two went to the circulation desk. In round three five of the six participants went to the circulation desk and one called (see Table III).

**Analysis:** This question was used to ascertain whether students and circulation staff are able to properly refer questions. In round one, of the seven questions that were not referred, three stated that the student at circulation tried to refer the question to reference but no one was available. Either the reference person was helping another patron or was not at the desk at the time of the transaction. This result does not reflect a positive shopping experience. It also clearly indicates that the reference staff is busy and it also stresses the importance of training students to know when to refer. Three questions should have been easily answered by the students working at the circulation desk. However, a seemingly simple question like “Do you carry the *New York Times*?” requires more than a yes or no answer. The student answered the question correctly. She said yes and the shopper stated that the person was helpful but clearly a simple yes answer is not sufficient as we have the *New York Times* in print and online. Furthermore, with some digging it is likely the patron would want something specific from the paper.

In round two, six questions were not referred. Of the six questions not referred, three should have been. The question, “Does the library have the video, “When I grow up?” was used because the library does not have the video but does have a book by the same title. The full-time employee searched the library catalog and told the patron, “No, we do not have the video.” He did not offer alternatives and according to the patron, the employee stated that they could not find anyone else to help or answer the question. The results of this question clearly show that not only do students need to be trained but so do full-time staff.

The question, “How do I find an e-journal on the life stages of development?” was meant to be referred to a reference librarian. However, it was not. Yet the secret shopper commended the service and stated that the employee was knowledgeable about the information and that the answer was prompt and complete. The student employee actually showed the shopper how to search the catalog, which does include journal titles, but it is assumed that the patron would be looking for articles on the topic. Reference librarians are trained to delve deeper into the question and would have determined that the patron was actually asking for articles on the topic. In this case, the shopper perceived the shopping experience as positive when in fact they were given incomplete information.

The shopper who asked, “Does the library have any books online about suicide?” mentioned that he was on hold for a while and was not taken through the steps of how to find online books. His comments included, “Kept me holding on for a while and I did not really get the answer I was looking for.”

**Table III.**

<table>
<thead>
<tr>
<th>How many people helped you answer your question(s)?</th>
<th>Round 1</th>
<th>Round 2</th>
<th>Round 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>One person</td>
<td>1</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Two people</td>
<td>7</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>More than two people</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>
Two questions were not meant to be referred. One on Interlibrary Loan was referred to the reference department when circulation staff could easily have answered it. The comment of the shopper on the question “How do I search for videos?” was enlightening in that she stated that the student showed her how to search for videos but did not tell her where the videos were located.

In round three, three of the shoppers who answered that only one person helped answer their question were referred to the librarian in the consulting room. Taking that into account, it appears that the intense training, role-playing, and testing of the students on when to refer paid off because all the correct questions were referred.

The work-study student on duty tried to refer the shopper of the question “I need to find nursing articles on high blood pressure” but unfortunately, a reference librarian was not on duty. The student followed proper protocol and gave the shopper a librarian’s business card and the referral form we developed. Furthermore, the shopper commented that the student apologized for the inconvenience and not being able to assist the shopper better (see Table IV).

**Analysis:** The service desk is easy to spot upon entering the library. The area tends to be overcrowded and somewhat of an eyesore. If a student is not sitting at the high desk, it is easy to understand why the shoppers did not find the library staff overly visible. There is a low desk behind the high service desks and sometimes students sit there. They cannot be seen unless you are directly in front of the desk. The support pillars in and around the desk also decrease visibility. Furthermore, it was thought that with the reference staff no longer sitting at the service desk, visibility would go down. However, it appears visibility is not an impediment to service (see Tables V and VI).

**Staff enthusiasm and time to get help needed**

**Analysis:** In round one, the shopper who rated the amount of time to get help a two (a lot of time) called the library. She asked about the pros and cons of the SAT and ACT. The student who answered the telephone followed proper protocol. She didn’t attempt to answer the question. She told the patron that a librarian was not available and

<table>
<thead>
<tr>
<th>Not at all visible 1</th>
<th>Barely visible 2</th>
<th>Somewhat visible 3</th>
<th>Visible 4</th>
<th>Easily visible 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Round 1</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Round 2a</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Round 3a</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

**Notes:** In rounds two and three some shoppers called the circulation desk so the numbers do not add up to the total number of shoppers

<table>
<thead>
<tr>
<th>Not at all enthusiastic 1</th>
<th>Barely enthusiastic 2</th>
<th>Somewhat enthusiastic 3</th>
<th>Enthusiastic 4</th>
<th>Very enthusiastic 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Round 1</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Round 2</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Round 3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
</tbody>
</table>
suggested the patron call back. The secret shopper commented, “Seemed like she did not know what she was doing. Was told to call back when a librarian was present cause there was no one free at the time.”

In comparison with round one, in round two, there is a decrease in staff enthusiasm and increased amount of time to get help. In round one, six of the nine shoppers rated the staff as enthusiastic as opposed to only four in this round. In round one, eight of the shoppers rated the amount of time to get help as very little time to no time at all compared with four of eight in round two.

Round two of shopping had a number of unhappy shoppers. The shopper who expected to get help finding the videos commented that the library “needs better customer service”. The shopper who asked whether we had the video “When I grow up?” commented that it was “a horrible experience” and that she could not “really understand what he was saying”. The shopper who asked about books online on suicide gave staff enthusiasm a low rating. He commented that it was a poor experience and the staff member was not very helpful. He also mentioned that the employee needed to work on his phone etiquette.

The shopper who asked about information on Martin Luther King commented that the phone was answered promptly and she was referred to another person for help. Her comments indicate that the shopping experience was pleasant yet she rated the staff enthusiasm a three. She did however give a higher rating on the time to get help, very little time.

Comparing the answers to these questions to round one’s responses clearly indicates it is taking patrons more time to get the help they need. Also, the staff enthusiasm is lower. More than likely it is because the circulation students are doing more without the assistance of the reference staff at the desk next to them. When the reference staff sat at the reference desk, they would answer the circulation phone and step in and help the student workers when needed.

The third round of secret shopping shows an increase in staff enthusiasm. It is highly possible that the shoppers rated staff enthusiasm based on their interaction with the reference librarian; four shoppers were referred. Furthermore, the increase in student training may have also led to better results.

One shopper told that no one was available and given a business card from a reference librarian as well as a form to fill out, rated the amount of time it took to get the information needed a five (no time at all). Technically however, this shopper didn’t get the information she needed.

One shopper rated the student employee who helped her as very enthusiastic and added the note, “professional” next to this question. She was extremely pleased that the employee went beyond searching and escorted her to the section where the books were located.

<table>
<thead>
<tr>
<th>Table VI.</th>
<th>How much time passed before you got the help you needed?</th>
<th>Too much time</th>
<th>More time than warranted</th>
<th>Some time</th>
<th>Very little time</th>
<th>No time at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Round 1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Round 2</td>
<td>0</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Round 3</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>3</td>
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</tbody>
</table>
The shopper who called to ask how to renew books online rated the amount of time on the Likert-scale a three (average). However, in fact, the shopper did not really learn how to renew her books online and had to figure it out herself. The shopper might have been trying to emphasize the positive part of the experience. She gave the staff a rating of very enthusiastic but commented “The staff could not directly answer my question [...] I also had to ask for the web site address; he did not automatically give it to me.”

One shopper rated the enthusiasm of the staff a three (average); however in the comments, he stated, “Librarian X was very enthusiastic” (see Table VII).

Analysis: In round one a shopper was extremely surprised that the librarian printed out the sources. In her comments, the shopper stated that librarian was very thorough and impressive. After helping her find some sources, the shopper was referred to the computers in the computer lab to search the library catalog and databases. The shopper stated, “All the information I obtained makes me wish I had to do a paper on The Hilton.”

However, there was one shopper who was not at all satisfied. This was a shopper who was told to call back because no one was available to answer his question. As a result of that interaction, the student training before round two of shopping focused on phone etiquette and when to refer and when to answer.

Unfortunately, the results in round 2 show that the training didn’t necessarily have the intended results. One shopper was told there wasn’t anyone around to help them answer the question. Another shopper mentioned that he didn’t really get the answer he was expecting.

In round three, the three average ratings were from shoppers who did not get their question answered, one experienced a power outage during the referral consultation; one mentioned that the interaction with the librarian was very positive but the initial contact at the front desk was not very helpful.

The question, “Can you show me how to renew my books online?” is one that all circulation staff should know how to answer. However, the shopper commented, “The staff could not directly answer my question; instead he sent me to Research Help on the web site. [...] I also had to ask for the web site address; he did not automatically give it to me” (see Table VIII).

<table>
<thead>
<tr>
<th>Not at all satisfied</th>
<th>Barely satisfied</th>
<th>Somewhat satisfied</th>
<th>Satisfied</th>
<th>Very satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Round 1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Round 2</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Round 3</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Not happy at all</th>
<th>Barely happy</th>
<th>Somewhat happy</th>
<th>Happy</th>
<th>Very happy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Round 1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Round 2</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Round 3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>4</td>
</tr>
</tbody>
</table>
Analysis: In round 1, the shopper who was told to call back was not at all happy. Another shopper commented, “There didn’t seem to be too many books on chronic depression.” In round 2, two shoppers did not answer this question; both called the circulation desk. The question needs to be reworded to include the telephone. Surprisingly one shopper who was extremely frustrated because of a language barrier rated this question a three. The not happy at all rating came from a shopper who was left on hold for a while and did not get the answer he wanted. One shopper mentioned that the library could benefit from better customer service; the employee showed her where the videos were but did not help her get them or refer her for more assistance.

In round three, even if the shopper did not get a correct answer to his/her question, they rated his/her experience as happy or very happy. One shopper was told to come back when the power went out; another was told the reference librarian was on break and a third did not get her question answered.

Amount of information received

Analysis: In round one, nobody experienced information overload (see Tables IX and X).

In round two, one shopper who was satisfied with her experience rated the amount of information as too much information. The shopper was referred to a librarian and said the following, “I was referred to a knowledgeable lady who answered all of my questions without hesitation. She walked me through accessing the online library and informed me of the e-books and journals available online. Overall, she was very helpful and told me to call back or come if I needed more assistance.” This interaction was the only one that was rated as receiving too much information.

In round three, the shopper who rated the amount of information received as a three was the shopper who was referred to a librarian but told to come back due to a power outage. The same shopper mentioned that she borrows laptop computers on a regular basis and that the library staff is usually fast and professional (see Table XI).

<table>
<thead>
<tr>
<th>Way too much information</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>Just enough information</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Round 1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Round 2</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Round 3</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Did you experience information overload?</th>
<th>Extremely overloaded – 1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>No overload – 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Did staff tell you to come back if you need more help?</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Round 1</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Round 2</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Round 3</td>
<td>4</td>
<td>2</td>
</tr>
</tbody>
</table>
Analysis: In round one, the comments were all positive. However, in round two, the three who were not told to come back for more help were the same three shoppers who rated their experience as not happy or neutral. Some of the comments included “Poor experience. Staff member was not helpful.”, and “Horrible experience.”.

In round three, the shopper who didn’t get her question about renewing books online answered was not told to call back. The shopper who was told there was not a librarian available but handed a business card and research question form answered that she was not told to come back. However, she commented that she was told to contact a research librarian.

Discussion
Analysis of the results of the secret shopping program reveals that the program did what it was designed to do: highlight what we do well, and most importantly, what we need to improve.

Customer service
Overall, the majority of shoppers had a favorable shopping experience. Comments such as “great customer service as always” indicate this. But the secret shopping did show some areas where the library can improve its service to patrons.

Reference librarians are busy but not being available to answer questions is a disservice to patrons. To address this issue work-study students were told to give the patron one of the librarian’s business cards and a research question form to fill out. Patrons were also told about the library’s Ask Us Instant Messaging service. However, the number of research question forms returned during the program was minimal, and when a question is asked, the patron is in the library and needs help at that moment. During the last round of secret shopping students were trained to call a librarian’s office if there was no one in the consulting room. This option seemed to be the best solution but it was not perfect. Hubert Library has hired two new reference librarians, which should help alleviate the problem of librarians being unavailable when needed.

One of the weakest areas of customer service is on the telephone. Students were trained in and practiced phone etiquette but it is still an area that needs more emphasis. Students’ preliminary training devoted insufficient time to how to properly answer the telephone. In light of the results of round one of secret shopping, training emphasized the importance of answering the phone correctly. However, the results of round two show that the training did not improve phone etiquette. In fact, after that third round of shopping, the Dean of the Libraries called the circulation desk and the student employee answered the phone with a simple, “Hello” instead of the correct “Good Afternoon, Florida International University Library, this is John Doe, how can I help you?”. This is unacceptable and stressing the importance of proper phone etiquette might need to be more than a simple reminder. It might require appropriate disciplinary action if the telephone is not answered with the standard address.

Similarly, student employees were not adequately trained on what to do when a patron calls and there’s no reference librarian available to answer the question. For example, the student who took the question “What are the pros and cons of the SAT and the ACT?”, followed proper protocol. She didn’t attempt to answer the question. She told the patron that a librarian was not available and suggested the patron call back later. For obvious reasons, the shopper was dissatisfied with the service. Patrons
do not want to be told to call back; this is bad customer service. When we moved to a consultation model, if a librarian was with a patron, student employees were told to ask the patron what they would like to do: wait (the consultation room is visible from the circulation desk), write down their question and e-mail address which would be passed on to the librarian on duty, or use the library’s instant messaging service. However, this does not translate over the phone. When a patron calls with a question, if there is not a librarian in the consultation room, the student worker should transfer the call to a reference librarian. The student must explain that if the reference librarian does not answer he/she will return the call as soon as possible. It is imperative that patrons are given some information. This information can be as little as an e-mail address, phone number, and/or name of a reference librarian and/or information about Ask a Librarian. Patrons should feel like they received some information; ideally it should be the correct information.

Interestingly but unsurprisingly, when a reference librarian helped the shopper, the amount of information received was more likely to lean towards overload. No one mentioned that they received way too much information; however, the shoppers who were helped by work-study students were more likely to rate the amount of information as just enough information. As reference librarians, we might want to start the reference interview with, “Please let me know if you are receiving too much information or when enough is enough.”

Training
The focus of round two on training was formulated from an analysis of round one results. Of the nine questions in the first iteration of secret shopping, the students working at the circulation desk should have easily answered three. However, a seemingly simple question like “Do you carry the New York Times?” requires more than a yes or no answer. The student answered the question correctly. She said yes and the shopper stated that the person was helpful but clearly a simple yes answer is not sufficient as we have the New York Times in print and online. Furthermore, with some digging it is likely the patron would want something specific from the paper.

From the first round of secret shopping, we also learned that there were key areas of training that needed additional attention. As a result, we implemented a formal training program for work-study students and focused on ensuring student employees knew when to refer the patron and when and how to answer the question. Students were trained and tested on different scenarios of when to refer and when to answer. But in reality, every interaction is different and cannot be predicted. Through role-playing scenarios it was emphasized that students needed to use their critical thinking skills to determine when to refer and when to answer.

Students role-played difference scenarios where they called customer service and were told to call back, left on hold or hung up on. It was assumed that after the training session and multiple assessments, students clearly understood the need to get the relevant information from the patron whether in person or on phone and tell the patron that a librarian would follow-up.

Still, after round two there were a few very unsatisfied shoppers, so a more intensive training program was implemented. The increased focus in training on when to refer paid off in the results of the third round of secret shopping. All four questions that should have been referred were. In one case, the student did an excellent job of asking
specifics of what the patron needed, such as “Would one book be enough?” When the shopper answered, “No, I need information”, the student immediately tried to refer the shopper but a reference librarian was not available.

Furthermore, student training that focused on how to search the library catalog seemed to pay off. However, because round three of secret shopping only had one library catalog search question, this may need to be revisited. Regardless, implementing a library instruction session is a valuable tool for the student employees who have to do research in their courses. It also made them more comfortable asking for help when they needed it.

Questionnaire
Some of the most valuable data came from the comments that secret shoppers made. The comments made it clear that some of the questions need to be revisited. For example, there is a question on information overload which does not fit nicely into the five point Likert-type scale. Additionally it lacks a question that addresses the lack of information received. Some patrons did not get their question answered. For example, one shopper was told to come back because of a power outage. Others were told that a reference librarian was not available to help.

Furthermore, the question, How much information did you get?, needs to be redesigned because it does not fit into the five-point Likert-type scale. Additionally a second question needs to be added that addresses too little information.

Finally, the question asking about the experience at the library service desk needs to include the telephone. A number of shoppers did not answer this question because they called on the telephone.

Bias
There were a few cases where it appears the shoppers wanted to highlight the positive and deemphasize the negative. One shopper who did not get her question answered still gave praise to the experience, “They did their best to help me even if they did not know the answer immediately.”

On the other hand a few shoppers were very direct and poignant about their experience. One shopper commented, “it was a horrible experience” and that she could not “really understand what he was saying”. Furthermore, another shopper mentioned that phone etiquette needed to be improved.

Conclusion
There are a few things that can be concluded. The implementation of a training program for work-study students has helped teach the students when to refer and when to answer. However, it does not help with the issue of incorrectly answered questions. Additionally, reference librarians often instinctively know that when a patron asks for a book, he/she really wants information and not a book but articles. Reference librarians have a graduate degree in library science; work-study students cannot be expected to learn how to conduct the reference interview in three one-hour training sessions.

The training program should be all-inclusive and all employees who work at the circulation desk can benefit from reviewing how to search for information in the catalog.
The quick fix method of handing a business card and giving the patron a research question form for when a reference librarian is not available does not work. Circulation students have a lot on their plates. They need to check out items, fix paper jams, answer computer questions, answer directional questions and be a mini detective to figure out if a question should be referred or not. Furthermore, the circulation desk telephone is a constant background noise. It is understandable albeit unacceptable that they often forget proper etiquette when answering the telephone.

Backed up with data from the secret shopping program reference service at Hubert Library is once again provided at the reference desk. However, the emphasis on training students will continue as not only are they earning a paycheck but they are also learning valuable skills that they can implement when they become proud graduates of Florida International University and enter the professional working world.

References


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