

Secret Shopping as a Method to Understand User Experience: A Case Study

Grace YoungJoo Jeon

Assessment and User Experience Librarian





- Howard-Tilton Memorial Library (H-TML)
- Rudolph Matas Library of the Health Sciences
- The Latin American Library
- Tulane University Special Collections



Goals

- Understand how Tulane students experience our libraries at different service points
- Provide inputs for refining and developing training if necessary

Secret Shopping Method

Evaluate customer services by having trained people act as customers and rate their experience based on given criteria

Study Design: Scope

- H-TML Circulation
- H-TML Research Help
- H-TML Media Services
- Matas Information Services

Study Design: Instruments

- Scenarios
- Evaluation Form
- Background Questionnaire

Scenarios Development

Modes

- In-person visit
- Phone call
- Chat
- Email

Topics

- Check out
- Directional
- Literature search
- Reference
- Resource
- Technology help
- Miscellaneous

Scenarios Developed

	H-TML Circulation	H-TML Research Help	H-TML Media Services	Matas Info Services	Total	
In-person visit	8 (5 Check out, 2 Directional, 1 Miscellaneous)	11 (8 Directional, 3 Reference)	6 (2 Directional, 2 Tech help, 2 Reference)	5 (3 Resource, 1 Tech help, 1 Lit search)	30	
Phone	2 (1 Check out, 1 Miscellaneous)	2 (1 Directional, 1 Reference)	2 (1 Directional, 1 Reference)	1 (1 Directional)	8	
Chat		3 (1 Directional, 2 Reference)		1 (1 Resource)	4	
Email		2 (2 Reference)		2 (1 Resource, 1 Lit search)	3	
Total		10	18	8	9	45

Scenario 2: HTML Circulation Desk – Check out

Service Point
& Topic

Background information and interaction mode:

In-person visit.

The Circulation Desk is open Mon-Fri 7:30am-1am, Fri 7:30am-9:45pm, Sat 9am-9:45pm, Sun 9am-1am.

Interaction Mode

Question:

Ask if the library has the book, Essentials of negotiation.

Service
Hours

Details

Question

which you can reveal as the employee requests more information:

You are looking for the book, Essentials of negotiation by Roy Lewicki (2016). If the library has the book, you want to check it out. If the book is available for check out and you are going to check it out, you may also ask how long you can check out the book and if you can renew it, how to renew and for how long. The book is at the Business Library. The employee asks you how you can get to the Business Library.

When to stop

If the employee sends you to another service desk or another employee, suggests you make a research consultation appointment, or directs you to another area, the interaction is over and you do not need to continue.

Evaluation Form

- Information on interaction
Scenario number, Mode, Date and time
- Perception of answer provided
Satisfaction, Comprehension etc.
- Perception of library employee
Approachability, Attentiveness etc.

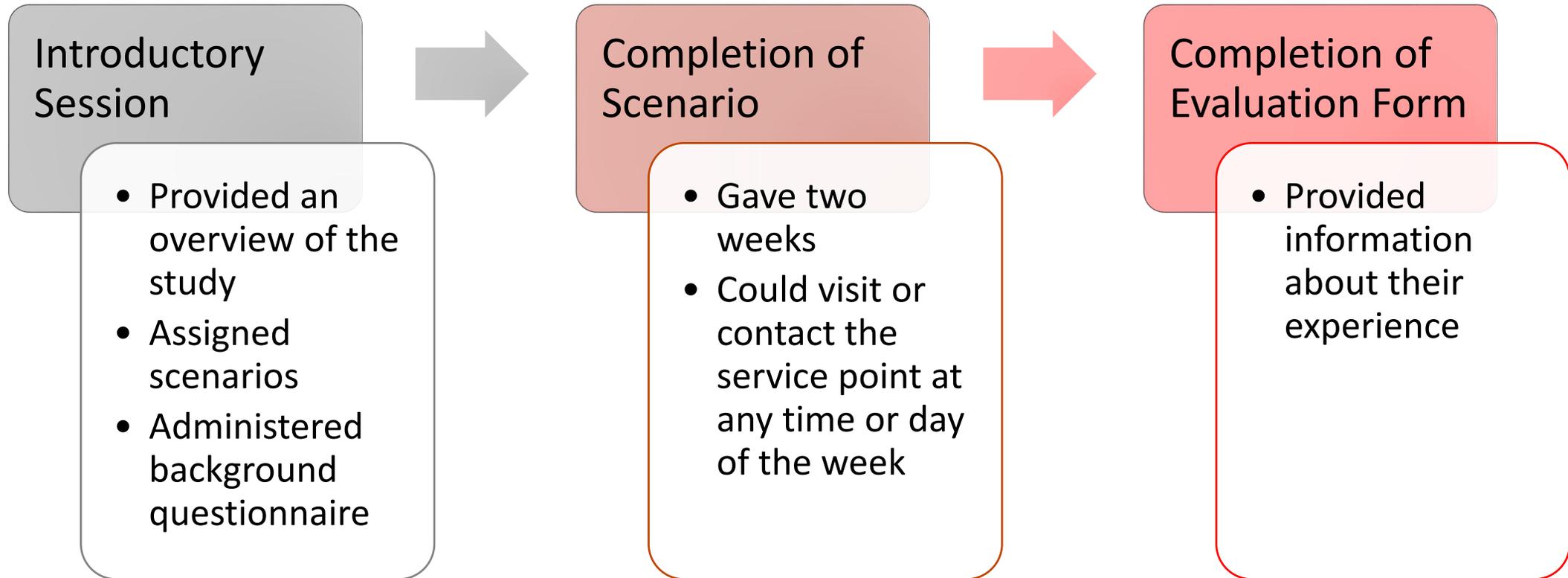
Background Questionnaire

- Gender
- School year
- Affiliations
- Previous experience with Tulane University Libraries

Recruitment Criteria

- Be at least 18 years old
- Be currently enrolled as an undergraduate or graduate student
- Be a first-time participant of TUL user studies in Spring 2019
- Be currently not employed as a student worker at TUL

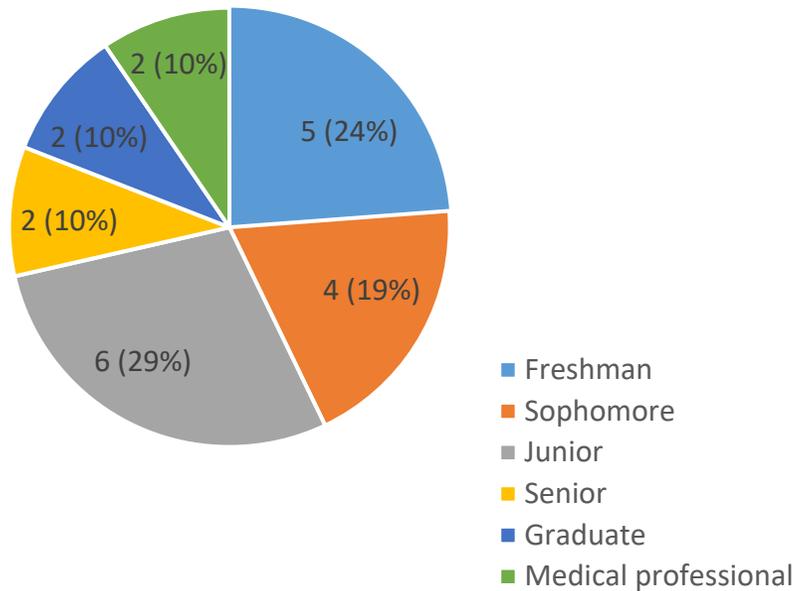
Procedure



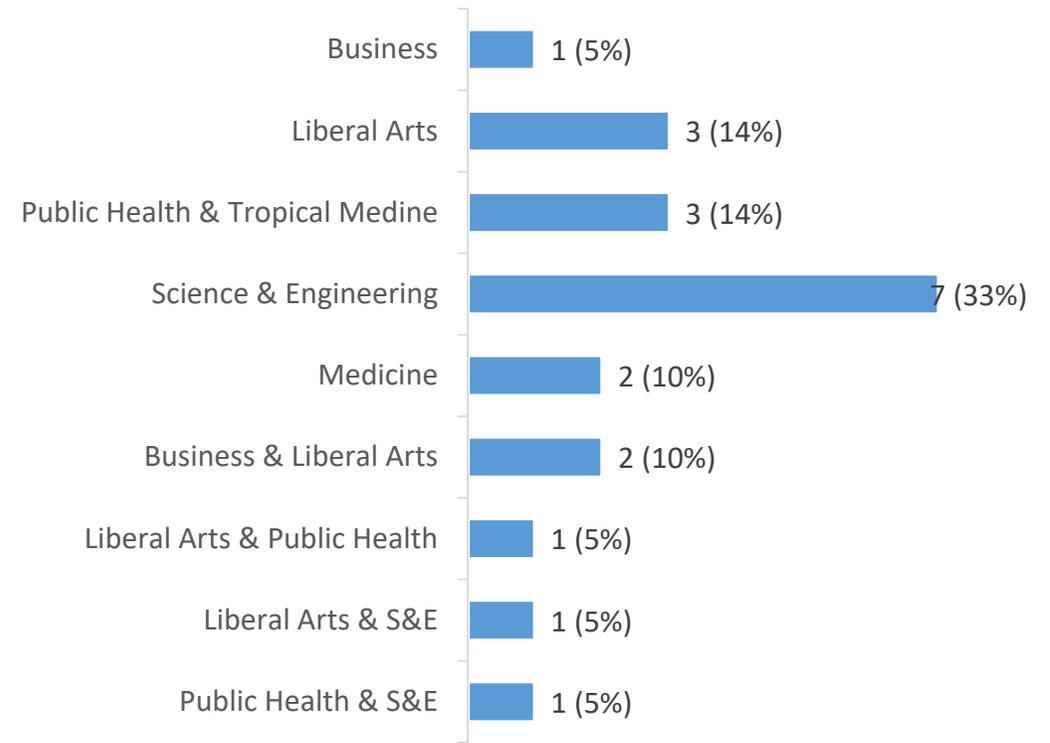
Findings

Participants

School Year

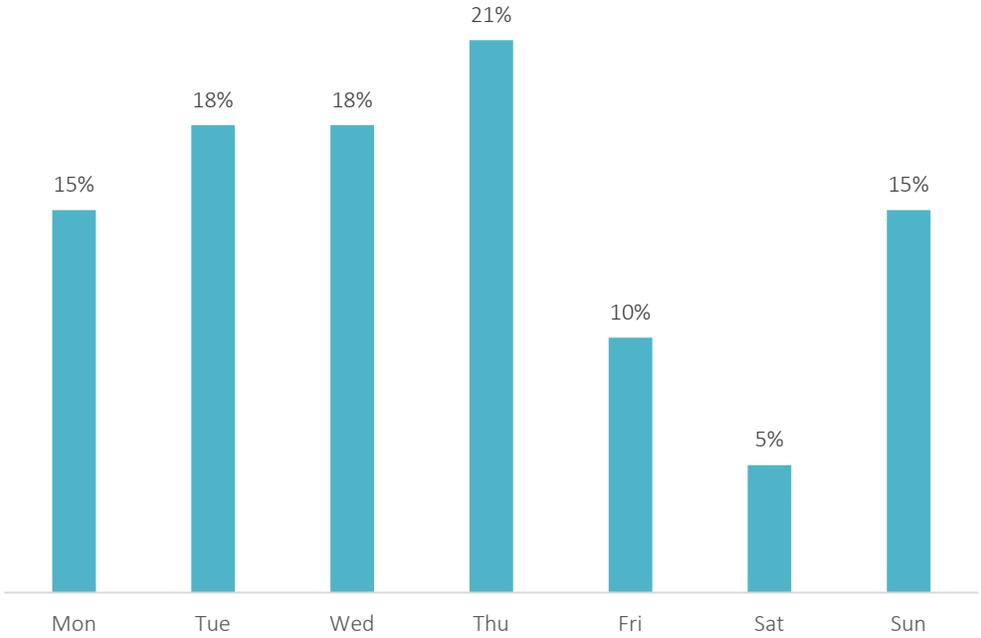


Affiliations

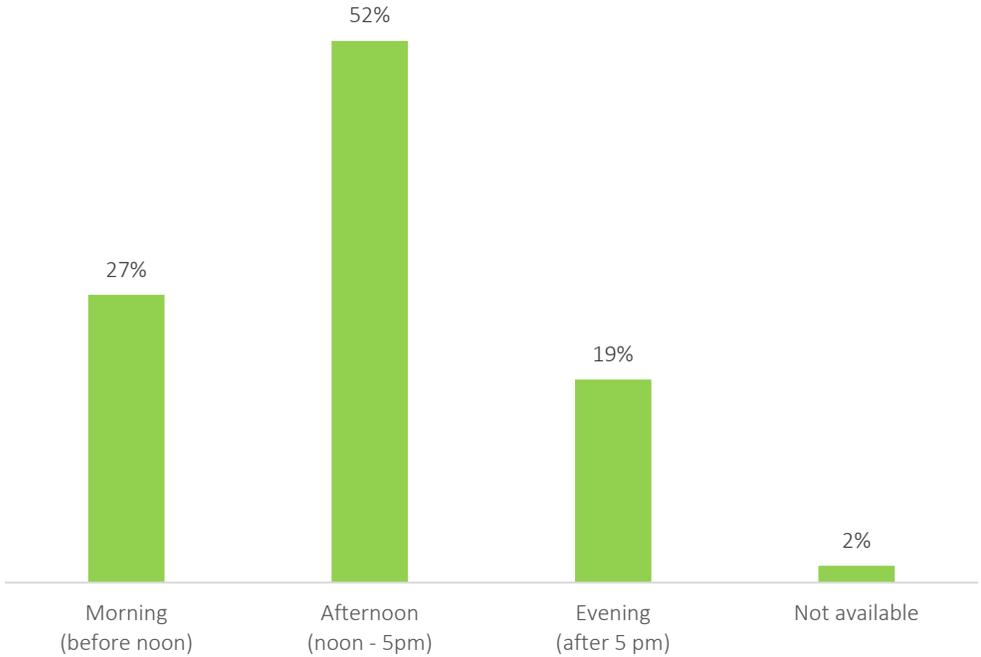


Distribution of Questions Asked

Day of the Week



Time of the Day



Overall Experience

- Satisfied with the answer provided
- Felt that the library employees
 - Attentive and approachable
 - Treated them respectfully
 - Answered their question in layperson's language

"The person who answered the phone was very helpful and gave so much extra information. In fact, she even made me want to visit the library right now!"
[P26, Interaction Mode: Phone]

"She (and the other desk staff member) were super friendly and definitely went above and beyond to help answer my question, even though I wasn't able to be super specific about what I was looking for."
[P15, Interaction Mode: In-person visit]

Non-face-to-face Interactions

- Lack of contextual cues in phone interaction
- Lack of personalization in an email response
- Difficulty in connecting to a chat

"The person on the phone put me on hold for a few minutes and returned having forgotten what my question was. She then proceeded to answer my question, but it was unclear whether I was on hold because she needed to consult someone else."

[P09, Interaction Mode: Phone]

"I tried multiple times and would connect to the chat and no one would ever respond. I was unable to get help."

[P11, Interaction Mode: Chat]

Takeaways

- Improvement of user experience at service points
- User studies as a way to promote awareness of library services and resources
- Benefits of sharing first-hand experiences among librarians in designing and implementing assessment activities
- Secret shopping as a robust user experience research method

Questions?

You can contact me at

yjeon@tulane.edu

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