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

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- 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

<table>
<thead>
<tr>
<th></th>
<th>H-TML Circulation</th>
<th>H-TML Research Help</th>
<th>H-TML Media Services</th>
<th>Matas Info Services</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td><strong>In-person visit</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>8</td>
<td>11</td>
<td>6</td>
<td>5</td>
<td>30</td>
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<tr>
<td></td>
<td>(5 Check out, 2 Directional, 1 Miscellaneous)</td>
<td>(8 Directional, 3 Reference)</td>
<td>(2 Directional, 2 Tech help, 2 Reference)</td>
<td>(3 Resource, 1 Tech help, 1 Lit search)</td>
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</tr>
<tr>
<td><strong>Phone</strong></td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td>(1 Check out, 1 Miscellaneous)</td>
<td>(1 Directional, 1 Reference)</td>
<td>(1 Directional, 1 Reference)</td>
<td>(1 Directional)</td>
<td></td>
</tr>
<tr>
<td><strong>Chat</strong></td>
<td>3</td>
<td></td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>(1 Directional, 2 Reference)</td>
<td></td>
<td>(1 Resource)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Email</strong></td>
<td>2</td>
<td></td>
<td>2</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>(2 Reference)</td>
<td></td>
<td>(1 Resource, 1 Lit search)</td>
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<tr>
<td><strong>Total</strong></td>
<td>10</td>
<td>18</td>
<td>8</td>
<td>9</td>
<td>45</td>
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Scenario 2: HTML Circulation Desk – Check out

Background information and interaction mode:
In-person visit.
The Circulation Desk is open M-Th 7:30am-1am, Fri 7:30am-9:45pm, Sat 9am-9:45pm, Sun 9am-1am.

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

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 may show you how you can get to the Business Library.

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**

- **Introductory Session**
  - Provided an overview of the study
  - Assigned scenarios
  - Administered background questionnaire

- **Completion of Scenario**
  - Gave two weeks
  - Could visit or contact the service point at any time or day of the week

- **Completion of Evaluation Form**
  - Provided information about their experience
Findings
Participants

School Year

- Freshman: 5 (24%)
- Sophomore: 2 (10%)
- Junior: 6 (29%)
- Senior: 4 (19%)
- Graduate: 2 (10%)
- Medical professional: 2 (10%)

Affiliations

- Business: 1 (5%)
- Liberal Arts: 3 (14%)
- Public Health & Tropical Medicine: 3 (14%)
- Science & Engineering: 7 (33%)
- Medicine: 2 (10%)
- Business & Liberal Arts: 2 (10%)
- Liberal Arts & Public Health: 1 (5%)
- Liberal Arts & S&E: 1 (5%)
- Public Health & S&E: 1 (5%)
Distribution of Questions Asked

Day of the Week

<table>
<thead>
<tr>
<th>Day</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Mon</td>
<td>15%</td>
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<tr>
<td>Tue</td>
<td>18%</td>
</tr>
<tr>
<td>Wed</td>
<td>18%</td>
</tr>
<tr>
<td>Thu</td>
<td>21%</td>
</tr>
<tr>
<td>Fri</td>
<td>10%</td>
</tr>
<tr>
<td>Sat</td>
<td>5%</td>
</tr>
<tr>
<td>Sun</td>
<td>15%</td>
</tr>
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</table>

Time of the Day

<table>
<thead>
<tr>
<th>Time of the Day</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Morning (before noon)</td>
<td>27%</td>
</tr>
<tr>
<td>Afternoon (noon - 5pm)</td>
<td>52%</td>
</tr>
<tr>
<td>Evening (after 5 pm)</td>
<td>19%</td>
</tr>
<tr>
<td>Not available</td>
<td>2%</td>
</tr>
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</table>
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

Acknowledgement: I would like to thank Tricia Boucher and Jessica McClean at Texas State University for sharing their experience and instruments in relation to their secret shopper assessment.