Mystery visiting in Lincoln: the visitor's point of view

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Background

The idea of undertaking mystery visits arose at several library group meetings held locally during 2007/2008 and, following discussions, it was decided to carry out a collaborative project between University of Lincoln library, the Friary learning centre at Lincoln College and the Sibthorp library at Bishop Grosseteste University College Lincoln during the 2008/2009 academic year, with the mystery visits taking place in spring 2009.

As documented in previous SCONUL articles,[1] the rationale for mystery visiting includes learning about your library from a customer perspective and discovering its strengths and weaknesses. Other advantages are that it is a low-cost, struc-

tured and repeatable process that complements quantitative assessments.

PREPARATION

Invaluable assistance with planning the project and developing the documentation was provided by Jill Woodman and Pippa Jones from the University of Leeds library and we chose to evaluate the same areas of service established by them, such as external and internal environment, leaflets and guides, customer care and overall impression.

With many competing demands on our time we wrote a timeline for the project and planned all meetings in advance to ensure that we stayed on track. Time was allowed to recruit, select and train volunteers and to create identity cards and library accounts for them at the libraries to be visited. We each adapted the paperwork to suit our own institutions and wrote briefing packs for the volunteers, which included instructions, task sheets (including questions to be asked, with model answers) and record sheets. The visits were carried out over a two-week period, followed shortly afterwards by a debriefing session.

DEBRIEFING

The debriefing, which involved the organisers of the project and those who carried out the visits, provided the following useful feedback on the visiting process:

- Each participating library had asked its mystery visitors to find a book on a chosen subject and provided a short list of subjects for the mystery visitors to choose from (e.g. 'use the catalogue to look for a book on Thomas Hardy OR church architecture OR reflective learning') but during the feedback it emerged that some visitors felt uncomfortable with this because of their limited knowledge of the given subjects. It was thus suggested that a list of subjects taught at each institution could be provided to enable the visitors to choose one that they were more familiar with.

- In our paperwork the instruction sheet and feedback sheet were separate documents but our mystery visitors found this inconvenient and suggested that it would be beneficial to combine them into one document.

- Most of the mystery visitors made their own checklist or ways of recording information beforehand so that they could use this

rather than having to look at the documentation during the visit. It should therefore be emphasised in training that visitors should allow plenty of time to prepare and make notes before the visit and that it can be a time-consuming process.

- The actual visits and paperwork took longer to do than anticipated. In future years the visitors should be advised in the training that more time should be allowed (probably 2–3 hours for the visit).

- Visitors found it difficult to use the scoring criteria on the feedback forms because it was hard to define some criteria as either 'commendable', 'satisfactory' or 'unsatisfactory'. It was suggested that in future it would be preferable to score on a scale from 1 to 10.

- Some guidance should be devised to help visitors to decide on what basis a judgement should be made. It was acknowledged that judgements tend to be made on personal experience.

- In additional to judging facilities and services as 'commendable', 'satisfactory' or 'unsatisfactory', we asked our mystery visitors to make general comments. We ultimately found the comments more valuable than the actual scores, so it was suggested that the importance of including comments should be stressed in the training.

- To prevent the feedback from being identifiable to particular individuals, it was suggested that the area at the top of the feedback forms should be changed so that the exact time of the visit does not have to be provided.

- It was requested that it should be emphasised in the training that comments that could identify specific individuals working in the libraries being visited should not be made, since the exercise is not intended to be personal.

- It was suggested that the exercise did not necessarily need to be carried out at a fixed time of year or at the same time for each institution. Volunteers could potentially be identified at the start of the academic year and could then carry out the visit at any time during the year. The visited institution would not then expect the visit during a specific time period and this would avoid

the issue of the visit being anticipated. Dates when it would not be convenient to visit could be identified.

- All of the mystery visitors felt nervous and conspicuous and that they had been spotted when this was not actually the case. Library staff were nervous too, as they felt that every customer might be a mystery visitor!

- All the volunteers present said that they would be happy to share their experience with others in future years. They also felt that they had benefited from the process on a personal developmental level and had picked up ideas they had brought back to their own institution.

OUTCOMES

At Bishop Grosseteste University College we identified the areas where we could practically act on the comments made and have taken steps to address these. For example, we now have an enquiries 'crib sheet' by the telephone so that all staff are quickly able to respond to frequently asked questions. We have increased the visibility of our opening-hours notices and improved some of our signage. We were also able to pass on positive feedback and comments to staff both in the library and in other parts of the university college (to our estates department about the campus, for example).

At the University of Lincoln, we analysed the visitor feedback and proposed actions to address the comments where this was necessary. These actions were initially discussed by the library's customer services group and are now being addressed by individuals and groups in the library. For example, a project group in the library is currently reviewing the provision of help guides.

At Lincoln College we worked by a similar process to the university and produced a short action plan to make improvements in the areas of accessibility and service features to give some facilities a higher profile and visibility. More floorwalking or roving should address a few customer-care issues and indeed more regular and committed observation of student areas by all levels of staff. To counter this, we were also delighted to pass on to our hard-working staff in the Friary learning centre the many words of praise and encouragement from our visitors.

As a group we have received valuable feedback from our volunteers on how to improve the mystery-visiting process in the future. We have also agreed that the project was extremely worthwhile and that it should be repeated every two years. We will therefore start planning at the beginning of 2010 with a view to the next round of visits taking place in the academic year 2010/2011.

REFERENCE

1   E.g. Philippa Jones and Jill Woodman, *SCONUL Focus*, 34, spring 2005, pp.51–3