

# Mystery Visiting Guidelines

## What is Mystery Visiting?

Mystery visiting is one of a range of tools that can be used to evaluate the quality of services and identify areas requiring improvement, as well as evidence those already demonstrating high standards. As a form of observational research it can be used to validate and provide more detailed evidence of areas highlighted by other feedback mechanisms and alongside other tools such as customer journey mapping it offers an in-depth picture of customer service. It can provide “real time” snapshots and first impressions of service delivery, test new services or the impact of new recruitment or training practices. Using a cycle of mystery visits also enables improvements to services to be re-evaluated and the evidence can be used for quality assessments such as the Customer Service Excellence Standard.

## Mystery Visiting in Academic Libraries

Within academic libraries mystery visiting has not generally been used to test the performance levels of individuals. Staff should be informed that visits are taking place within a given timeframe, with the aims and objectives for running the project explained. It may also be appropriate to liaise with union representatives.

Mystery visiting does not necessarily require face-to-face visits which may need access arrangements and possibly risk assessments. Websites, telephone support, chat services, social media responses etc. could all be visited remotely.

Mystery visiting can be used to test the quality of facilities and services management eg

- the environment: signposting, ease of access, cleanliness, overall feel, noise, lighting, furniture.
- services such as printing/copying, vending machines, change machines, binders etc are all switched on, stocked and in working order.
- guiding / instructional documentation etc are current / appropriate.
- the ease of use etc of self service facilities

It can be used to test the quality of customer care / staff training eg

- whether published service standards for response times etc are being met
- identify gaps in knowledge
- referrals between different teams
- queue management techniques
- friendliness and helpfulness of staff

### Running a Mystery Visit Programme

Whether you use an external mystery shopping company, run the programme in-house with students or use volunteers from partner organisations you need to provide full briefing notes on your organisation, guidelines about what is to be visited and training as appropriate, for example the need for visitors to understand the value of qualitative as well as quantitative feedback. Other factors can also be taken into consideration when deciding which route to take (see table below).

	<b>Costs involved</b>	<b>Training issues</b>	<b>Visitors</b>	<b>Pros/Cons</b>
<b>Using an external company</b>	Costs can be high	Need to ensure they understand “library culture” and where it might differ from other sectors	Can be provided by external company or they can train your students	Staff may be less or more reluctant to accept the findings of an external company
<b>Running a programme in-house</b>	Staff time to prepare documentation / train visitors  Payment for visitors if not using volunteers		Use students – either paid or volunteers  Managing visitors can be time-consuming and problematic eg chasing documentation	Provides feedback from representatives of the main customer group / demographic  Can provide skills for students’ CVs/employability
<b>Working with partners</b>	Staff time to prepare documentation  Staff time to act as visitors if the programme is reciprocal	Training of volunteers will be done by partner so need to ensure your needs are communicated effectively	“Bias” from staff in other libraries but can also be presented as “peer review”	Can be sited within staff development programme for your own staff  Can provide benchmarking data if the same criteria used by each partner

## Further Help

Over the last decade a number of academic libraries have taken part in or run mystery visitor programmes, frequently reporting their experiences in articles and at networking events. CSGUK members interested in mystery visiting are welcome to contact the Service Improvement Group Chair ([h.loughran@leedsbeckett.auk](mailto:h.loughran@leedsbeckett.auk)) or [group members](#) who can offer advice or contact information. Draft documentation is also available via the CSGUK website which can be freely adapted.