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Institute Brief: Taking the Mystery Out of Customer Service

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TAKING THE MYSTERY OUT OF CUSTOMER SERVICE

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WHY USE MYSTERY SHOPPERS?

With the current emphasis on universal access to employment services for all members of the community, including people with disabilities, the workforce development field needs to evaluate service delivery. A "mystery shopper" program is one of many evaluation tools available to Workforce Investment Boards (WIBs) and One-Stop Career Centers to ensure continuous quality improvement and customer satisfaction. The program allows organizations to collect qualitative, "real-life" data on the experiences of One-Stop Career Center customers from the customer perspective. Through this technique, agencies can gain a more dynamic picture of customer service and identify key areas for improvement.

WHAT IS A "MYSTERY SHOPPER"?

The mystery shopper program aims to evaluate how a business responds to its customers. The idea is simple: would-be customers who have been previously trained regarding the areas to be evaluated enter a business, use the services available as any random customer would, and report on their experiences. To ensure that a typical experience is captured, the mystery shopper does not inform the employees of their special role. In fact, it is critical for the effectiveness of the program that staff be unaware of who the mystery shopper is. It is important to remember that a mystery shopper evaluates the system, not people.

WHO CAN USE THIS TOOL?

A mystery shopper program designed for One-Stop Career Centers is usually implemented by a WIB or an agency partnering with the One-Stop that is interested in this type of qualitative feedback. WIBs or agencies recruit and train a small number of people to evaluate the services customers receive at a particular One-Stop Career Center. Disability and other human services organizations can also implement mystery shopper programs.

HOW CAN ORGANIZATIONS PUT THIS TECHNIQUE INTO PRACTICE?

Implementing a mystery shopper program involves recruiting, selecting, and training people to serve as shoppers. After collecting and analyzing feedback, organizations can identify what changes to implement. WIBs and agencies also have to set shopper reimbursement and review and revise the mystery shopper process over time.

■ PLANNING ■

The first considerations for developing a mystery shopper program should include a discussion of what information will be useful, who will collect it, who will generate a report on the findings, and what will be done with the report. Other points that organizations should consider prior to recruiting include the number of shoppers, the frequency and timing of mystery shopper visits, total time spent per visit, and whether or not shoppers should use their personal information when registering for One-Stop Career Center services. Agencies implementing the program need to decide how many visits are necessary to get a comprehensive and accurate understanding of a particular One-Stop Career Center.

Once mystery shoppers begin procuring information, agencies need to have a process in place to document, summarize, and share the data. They need to decide who within the workforce system should receive this information. In some situations it may be the WIB, in other localities the One-Stop Career Center director or managing staff.

Mystery shopping in other service systems

Though it may be new for workforce and human services organizations, mystery shopping has been used in retail businesses and market research for a long time. As the concept spreads, it is being adapted by a variety of workforce and human service agencies. Groups in Philadelphia, New Mexico, and Michigan have combined public and nonprofit resources to develop mystery shopper programs to assess their One-Stop system.

■ RECRUITING SHOPPERS ■

Agencies should assign a staff member to screen potential mystery shoppers. Participants should feel comfortable shopping One-Stop Career Centers as they would typically do (e.g., on their own, with an assistant or translator) so that their experience is as natural as possible. Mystery shoppers should be able to communicate their experiences and impressions. To recruit representatives of certain audiences, such as persons with disabilities, agencies can contact local disability organizations and communicate shopper requirements.

Fairfax, Virginia staff contacted community service organizations, a mental health consumer-operated drop-in employment center, employment service providers, consumer associations, and advocacy groups in order to recruit individuals with disabilities for the mystery shopper program.

■ SELECTING SHOPPERS ■

Mystery shoppers should be chosen from the One-Stop Career Center's geographic area so that their expectations are the same as the average local customer. Agencies should use local shoppers who are representative of the population under study (similar age, gender, ethnicity, disability, and the like). This ensures that the shopper will not stand out and, in fact, will typify the average local customer and his/her experience. These parameters should be chosen early in the screening process since they inform shopper recruitment.

Prior to hiring mystery shoppers, the Fairfax WIB decided that it would be beneficial to hire persons who presented a full range of disabilities and had real interest in obtaining One-Stop Career Center services.

■ DEVELOPING AN ASSESSMENT CARD ■

Before orientation and training, organizations must choose or identify an instrument to be used by mystery shoppers to document their experiences. This instrument can be in a questionnaire/survey or a summary format, but it must be easy for a variety of shoppers to complete (with or without assistance). Performance rating questions should have detailed examples and operational definitions so all shoppers use the same definitions. A sample One-Stop Career Center customer report card is included in this brief.

■ ACCOMMODATION, DISCLOSURE, AND OTHER PRIVACY ISSUES ■

Agencies may want to find out more about One-Stop Career Center efforts to accommodate their customers, especially those with disabilities. To do so, program organizers can provide a way for the mystery shopper to make specific accommodation requests (e.g., what he/she asked for) prior to shopping and then have the participant follow up on his/her request (e.g., whether or not the request was met). For example, each mystery shopper with a disability could have two or three specific requests unique to their disability and circumstance. Issues around disclosing a disability could be assessed by the mystery shopper in similar ways.

■ TRAINING AND ORIENTATION ■

The next step in the process involves comprehensive training and orientation for mystery shoppers that outline detailed procedures and guidelines for each phase of the shopping process. When creating and presenting the orientation and trainings, agencies should make an effort to collaborate with other organizations that may have relevant resources and expertise such as community rehabilitation providers and One-Stop Career Center partners.

The initial training should include an item-by-item discussion of the survey tool. Mystery shoppers need to understand their responsibilities to keep the information obtained confidential, and be respectful of One-Stop Career Center staff in all instances. Agency staff should spend some time talking about how the program will obtain feedback from the shoppers, any reimbursement mechanisms and assistance that will be available to shoppers, and most importantly, how the program will protect shoppers' identities. Depending on the area, there may need to be discussion about transportation to and from

Universal design

The Workforce Investment Act of 1998 (WIA) requires One-Stop Career Centers to be universally accessible. To ensure accessibility, WIA subscribes to the principle of universal design. Universal design is the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialization. (Definition by Roy Mace of the Center for Universal Design.) The result benefits everyone, not only people with identified special needs. A simple example is a curb cut. Originally designed for wheelchair users, curb cuts benefit people pushing carts or strollers, riding bikes, skating, using canes, and pulling luggage.

the trainings and/or One-Stop Career Centers. Agency staff must decide what other topics need to be reviewed.

In addition to understanding their role and responsibilities as a mystery shopper, it is vital that shoppers have a good working knowledge of the general mission and operating standards of the local One-Stop. This information can be covered in a variety of different ways but should include some details about WIA and its implementation at the local level as well as an overview of the local One-Stops.

Given all the information that must be shared with new and seasoned shoppers, consideration should be made to how long each training session should last, how often sessions should occur, and who needs to attend each session.

■ COLLECTING INFORMATION FROM SHOPPERS ■

The "Guidelines for a Mystery Shopper One-Stop Career Center Visit" form is one example of an instrument to gather mystery shopper feedback. It is important to keep up regular communication with the mystery shoppers throughout the course of the evaluation and after, and to follow up on all information provided on the survey. Make sure to set a time frame for shoppers to return the completed surveys.

Although the instrument that shoppers will use to document their experiences is vital to the process, it may not be the best idea to have shoppers complete sections as they move through the One-Stop. This might make staff members and other customers feel uncomfortable and reduce the program's effectiveness. Therefore, each individual shopper should decide how to note important information as they observe, whether it be by memory or in a way that would appear commonplace such as using a notebook or a computer in the resource library to jot down impressions. These observations can be more formally documented after the visit.

Agency staff should consider some immediate method for shoppers to share the information they have obtained, either via a phone call to staff managing the shopper program or by going back to the mystery shopper home office to speak with someone. The sooner discussions can occur about the visit, the more accurate the information will be.

■ REIMBURSING SHOPPERS ■

Reimbursement strategies depend on the program budget and policies that help implement the mystery shopper program. Possible options include a stipend, an hourly rate, or volunteer activity. For example, Fairfax decided not to pay mystery shoppers, though the WIB did pay transportation expenses. They found that people who had an interest in using One-Stop services felt comfortable volunteering their time. Recruiting participants without reimbursing them for their services is especially useful when resources are scarce. However, although the Fairfax example is impressive, financial reimbursement should be encouraged and resources for the mystery shopping program should be made available by agencies.

Putting mystery shopper feedback into action

Feedback: A mystery shopper with a visual impairment reported that One-Stop Career Center staff members were very attentive to his needs. When he specifically asked about JAWS (a type of screen reader software) in order to better access the One-Stop resources, the shopper said that the resource room manager was able to explain in detail how to use the software. In addition, the manager provided him with an informational flyer in Braille with instructions on how to use JAWS.

Action step: Based on the mystery shopper feedback, One-Stop management decided to conduct a training session on JAWS for all One-Stop Career Center staff, and to use the resource room manager as an internal resource to make sure that all staff were as well informed as the manager.

What the mystery shopper found

Fairfax mystery shoppers had varying degrees of satisfaction with accessibility and staff assistance. All shoppers identified areas where capacity and service delivery needed to be improved. Some of the findings included:

- Not all the customers with disabilities were offered an orientation to the One-Stop.
- The signage outside the building and in the lobby could be made more visible, and signs to the building's accessible entrance could be added.
- Visitors were asked if they needed assistance with computer access, but One-Stop Career Centers were not routinely equipped with adaptive equipment such as screen readers for customers who were blind.
- Materials offered to visitors were not available in alternative formats.
- Staff in some One-Stop Career Centers offered personalized assistance such as reading materials to customers, making phone calls to a referral source, or identifying training options. However, staff assistance offers were not consistent across all visits. Program access could be improved with basic awareness and sensitivity training and a standard sequence of questions to customers to learn more about them, their needs, and strategies to respond effectively.

ONGOING REVIEW

Ongoing review of the mystery shopper strategy is important in order to ensure the program's effectiveness. The mystery shopper instrument may need to be modified and updated depending on changes in the area, One-Stop, partners, target population, service menu, and the like. Using shoppers at regular intervals can track progress over time by evaluating improvements that have been made regarding previously identified issues.

CONCLUSION

A mystery shopper program helps raise staff awareness of the need to serve a broad range of customers. Recruiting people with disabilities as mystery shoppers gives these individuals an opportunity to ensure that One-Stop Career Center service delivery provides access to all. Ultimately, the information collected from such a program can lead to a better experience for all One-Stop customers. Finally, customer feedback should not be limited to the mystery shopper program but should also be gathered through other methods, such as customer satisfaction surveys, as part of everyday service delivery.

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Sample One-Stop Career Center Customer Report Card

Please complete before site visit	
Name of customer	
Customer's telephone #	
Name of Career Center	
Address Street City State Zip code	
Purpose of visit (check as many as appropriate)	<input type="checkbox"/> Assistance with a resume <input type="checkbox"/> Assistance with job leads <input type="checkbox"/> Obtaining information on training opportunities <input type="checkbox"/> Assistance with a computerized job search <input type="checkbox"/> Finding employment related websites <input type="checkbox"/> Career counseling <input type="checkbox"/> Other
Please complete after site visit	
Arrival time	
Departure time	
Date of visit	

Guidelines for a Mystery Shopper One-Stop Career Center Visit

When you visit a One-Stop Career Center, note the type and quality of services provided to all customers and accommodations made for individuals. The following questions are designed to structure your evaluation. Please answer as many questions as possible. However, if you do bring this survey with you, you may reveal your mystery shopper status, so be discreet.

Building Accessibility	
Can you reach the One-Stop Career Center by public transportation?	Yes/No
Did you have any trouble finding the building location?	Yes/No
If you drive, was there accessible parking?	Yes/No
Were there signs for these parking spaces?	Yes/No
Were there adequate and safe curb cuts, ramps, automatic doors, elevators/lifts, and other access equipment?	Yes/No
Was there an accessible entrance?	Yes/No
Were there signs indicating the location of the accessible entrance?	Yes/No
Describe the location of the accessible entrance:	

Overall Environment	
When entering the One-Stop Career Center, did a friendly receptionist greet you?	Yes/No
Was the sign-in process clear and accessible?	Yes/No
Was it easy to locate the resources in the One-Stop Career Center?	Yes/No
Was it clear how to begin using the resources?	Yes/No
Was there a friendly, approachable person to ask for help?	Yes/No
Did you have trouble going from one area to another?	Yes/No
Did the furniture and room layout let you use the One-Stop Career Center?	Yes/No
Any difficulties using the facilities? (bathrooms, phones, water fountain)	Yes/No
Any trouble accessing or using the One-Stop Career Center's forms and materials?	Yes/No

Computers	
Did you have any trouble using the computer equipment? Describe:	Yes/No
Was help available if needed?	Yes/No
Did the computer resources meet your needs?	Yes/No

Orientation and Workshops	
Could you find and get into the meeting room?	Yes/No
Were the orientation and workshops welcoming to you?	Yes/No
Was your disability kept confidential?	Yes/No
Were you treated respectfully?	Yes/No
Was it clear how and where to request accommodations?	Yes/No
What accommodations (if any) did you request? Describe:	
Were your requests for accommodation met?	Yes/No
Was the presenter easy to understand and approachable for questions?	Yes/No
Were the written materials clear and accessible to you?	Yes/No

Services	
Was the range of services explained clearly to you?	Yes/No
Was the range of other public systems and services explained clearly?	Yes/No
Did you know how to proceed next to get what you needed?	Yes/No

Overall Comments	
What was your overall impression of the One-Stop Career Center you visited?	
Would the services benefit students/adults like you?	Yes/No
Was there a suggestion box?	Yes/No
What recommendations would you offer to make services more accessible?	