

# Customer Service Walkabout

## Instructions:

1. Working with a partner, use the attached Customer Service Checklists to record your observations about how well this site responds to public expectations.
2. If you have trouble deciding on the answer to a particular question, skip it. If you have time after you complete the rest of the questions, go back to any that you skipped and see if they make more sense the second time around. If you're still having trouble at that point, ask your group leader for help.
3. Be sure to base your answers on what you can actually observe, not on what you think is true.
4. Return to the room within 30 minutes.



### A. Welcoming Service Checklist

	Yes	No	If yes, how?
A1. Is the facility well marked?			
A2. Can you see inside before entering?			
A3. Is this site accessible for people in wheelchairs or pushing baby strollers?			
A4. Does this site welcome people who speak languages other than English?			
A5. Do staff reflect the local community in terms of age, race, culture, gender?			
A6. Is this site inviting to new customers?			
A7. Are returning customers recognized?			
A8. Jot down your thoughts about how this site compares to your library in terms of being welcoming.			

## B. Comfortable Service Checklist

	Yes	No	If yes, how?
B1. Does the facility look clean?			
B2. Is there good lighting?			
B3. Are the aisles or other public spaces comfortably proportioned?			
B4. Do visitors have a choice of seating?			
B5. Are there views from inside the facility to the outdoors?			
B6. Are quiet areas separated from livelier zones?			
B7. Are food and drink allowed?			
B8. Jot down your thoughts about how this site compares to your library in terms of being comfortable.			

### C. Easy to Navigate Service Checklist

	Yes	No	If yes, how?
C1. Is facility/service set up to be simple on the surface?			
C2. Is it easy for visitors to know where to start?			
C3. Are the signs situational (i.e. about customer needs)?			
C4. Is the floor plan merchandised?			
C5. Are the products/services easy to see?			
C6. Does the site feel uncluttered?			
C7. Is it easy to identify staff?			
C8. Jot down your thoughts about how this site compares to your library in terms of being easy to navigate.			

### D. Successful Service Checklist

	Yes	No	If yes, how?
D1. Are there plenty of visitors?			
D2. Are the facilities well maintained?			
D3. Do the visitors appear to be satisfied with the service?			
D4. Do staff appear to be committed to the success of the organization and its visitors?			
D5. Do staff behave as if this is a great place to work?			
D6. Are there any extra touches, over and above the basic requirements?			
D7. Jot down your thoughts about how this site compares to your library in terms of being successful.			

### E. Efficient Service Checklist

	Yes	No	If yes, how?
E1. Are visitors allowed to help themselves rather than “go through” staff to get to products and services?			
E2. Does this site offer express service?			
E3. Does this site offer “point of sale” service?			
E4. Does the organization that operates this site also offer its products/services online?			
E5. Is there minimal waiting?			
E6. Do staff empower visitors rather than intimidate them?			
E7. Jot down your thoughts about how this site compares to your library in terms of being efficient.			

## F. Up-to-Date Service Checklist

	Yes	No	If yes, how?
F1. Does the exterior (or what you can see from outside) of this site change from time to time?			
F2. Do the computers or other technology used at this site look up-to-date?			
F3. Do staff seem to be knowledgeable about the technology they use?			
F4. If visitors also use technology here, do staff know how to assist them?			
F5. Is the décor up to date?			
F6. Do staff rove through the facility, helping visitors as needed?			
F7. Does this organization project a consistent brand image?			
F8. Jot down your thoughts about how this site compares to your library in terms of being up-to-date.			

## G. Convenient Service Checklist

	Yes	No	If yes, how?
G1. Are the hours of operation reasonably consistent from day to day?			
G2. Is this site located near other desirable services?			
G3. Does this site take reservations or appointments?			
G4. Do this site offer programs or services on a “continuous loop” basis?			
G5. Does this site accommodate visitors who want to use their own equipment – computers, cell phones, etc.?			
G6. Does this site accept credit and debit cards?			
G7. Jot down your thoughts about how this site compares to your library in terms of being convenient.			

## H. Fun Service Checklist

	Yes	No	If yes, how?
H1. Is this a pleasurable, even playful environment?			
H2. Do staff exhibit an upbeat attitude?			
H3. Does this site emphasize what visitors can do rather than what they may not do?			
H4. Is spontaneity part of this environment?			
H5. Is humor part of this environment?			
H6. Does this site offer free treats or giveaways?			
H7. Jot down your thoughts about how this site compares to your library in terms of being fun.			

## Customer Service Walkabout, Conclusions

Instructions:

5. Use the attached Checklist to record your conclusions about how the site you visited responds to public expectations, and how that compares to your library.
6. If you have trouble deciding on the answer to a particular question, skip it. If you have time after you complete the rest of the questions, go back to any that you skipped and see if they make more sense the second time around.
7. Feel free to consult your notes from the site visit and to confer with your partner.
8. At 3:15, the entire group will reconvene to share findings from the Walkabout.



## I. Conclusions

People form expectations and learn how to behave out in the real world. They bring those expectations and behaviors with them wherever they go, including into the library. That's just human nature, and it's unrealistic to expect anything else. Observing what happens at other sites can help you understand the kind of expectations people will take with them to the library.

Based on your observations today,

J1. What audience is the site you visited trying to appeal to?

J2. Is the same audience also shared by your library?

J3. What are the most important expectations people are likely to take with them from the site you visited?

J4. How are those expectations likely to affect your library?