Site visited: _____

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. Add a note to that item if you'd like to discuss it later.

3. Be sure to base your answers on what you can actually observe, not on what you know from other sources (or remember from 7th grade ☺).

4. Please be an observer only. Do not interview or otherwise engage customers or staff at the site.

5. Video instructions for this Walkabout activity are available at: http://www.youtube.com/watch?v=k8Xl0NNobII

A. Welcoming Service Checklist

	Yes	No	If yes, how?
A1. Is the facility well marked/easy to identify?			
A2. Can you see inside before entering?			
A3. Is this site accessible for people in wheelchairs, scooters, or pushing baby strollers?			
A4. Do staff acknowledge/ welcome customers on arrival?			
A5. Do staff reflect the local community in terms of age, race, gender, language?			
A6. Is this site inviting?			
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 the lighting good?			
B3. Are the aisles or other public spaces comfortably proportioned?			
B4. Do customers have a choice of seating?			
B5. Are there pleasing views from inside the facility to the outdoors?			
B6. Are quiet areas separated from livelier/ noisier 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 customers to figure out how or where to get started?			
C3. Is it easy to identify staff?			
C4. Do staff seem to be knowledgeable about the products/services?			
C5. Are the products/ services easy to see/get to?			
C6. Does the site feel uncluttered?			
C7. Do the signs describe what customers can do, rather than what staff do? *E.g. "pay here" not "cashier"*			
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 customers?			
D2. Are the facilities in good repair?			
D3. Do the customers appear to be satisfied with the products/services?			
D4. Do staff appear to be committed to the success of the organization and its customers?			
D5. Do staff behave as if this is a great place to work?			

D6. 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 customers allowed to help themselves rather than "go through" staff to get to products and services?			
E2. Does this site offer express service?			
E3. Does the organization that operates this site also offer its products/services online?			
E4. Is there minimal waiting for service?			
E5. Do staff empower customers rather than regulate them?			

E6. 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. Does this organization project a consistent brand image?			

F7. 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 sites/services likely to interest its customers?			
G3. Does this site take reservations or appointments?			
G4. Does this site offer "walk in" service?			
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 may 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.

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 bring with them to the library.

Based on your observations:

I1. What audience(s) is the site you visited trying to appeal to?

I2. Is the same audience also shared by your library?

I3. What service expectations are people likely to take away from the site you visited?

I4. How are those expectations likely to affect your library?