**SHARE Mystery Shopper Pilot 2015 – Highlights**

**Overview**

The SHARE Mystery Shopper Pilot Scheme 2015 was put together following evaluation of the launch pilot in 2014, following recommendations from that scheme. The evaluation of the 2015 scheme has enabled SHARE to further refine the scheme in order to roll it out to more museums.

In 2014, the steering group recommended that the scheme should be trialled on a larger scale. The 2014 model collaborated with 8 museums across the Eastern region. In response the 2015 model was more ambitious, and collaborated with 15 museum services across the region, these were made up of 21 museums.

A total of *102* visits were made over a 6 month period between the months of May to October 2015.

A designated scheme administrator funded by SHARE Museums East was employed to administer and coordinate the scheme on a part-time basis throughout.

Comprehensive evaluation took place throughout and at the end of the scheme to assess the strengths of the scheme and what could be changed, to help create a new scheme for 2016. This report reflects upon the aims of the scheme and shows the results of the 2015 scheme evaluation, and recommends potential improvements to move the scheme forward.

# Introduction to the Scheme

The SHARE Front of House Forum aimed to create a better understanding and delivery of visitor services across the Eastern Region making use of professional expertise in the region. Recognising that Mystery shopper schemes have been effective in looking at visitor experience and improving visitor services, and that industry schemes can be expensive for smaller volunteer run museums, SHARE developed its own reciprocal mystery shopping scheme.

The SHARE Mystery Shopper Scheme is as beneficial to the museums receiving feedback from the scheme as it is to the shoppers rating museums, because a by-product of taking part is encouraging reflection and thought in what constitutes good visitor service, in that shoppers consider their own museums in relation to the museum they are assessing. The scheme is reciprocal in that a museum gives and receives the same number of visits, but also the reflection, and learning and development that takes place in comparing museums benefits those carrying out the visits and is a real positive of the scheme.

# Aims

* Improve visitor offer
* Develop front of house staff and volunteers
* Generate ideas, income and insight
* Interrogate the viability and feasibility of a sustainable larger mystery shopper scheme across the region.
* Put together a robust mystery shopper scheme model with potential to be marketed outside the Eastern region.
* Ensure the model is effective, as well as cost effective for museums taking part.
* Provide comprehensive feedback and help evidence issues which affect visitor experience in museums and develop services.

**17 museum sites took part:**

Braintree District Museum

Beecroft Art Gallery and Central Museum, Southend Museum Service

 Chelmsford Museum

Ely Museum

 Gressenhall Farm & Workhouse, Norfolk Museums Service

Halesworth Museum

 Ipswich Transport Museum

John Bunyan Museum

 Lowewood Museum

Mill Green Mill Museum & Roman Baths, Welwyn Hatfield Museums Service

 Museum of London

Museum of London Docklands

 Southchurch Hall and Prittlewell Priory, Southend Museum Service

Stained Glass Museum, Ely

 The Fitzwilliam Museum, UCM

The Shuttleworth Collection & Swiss Garden

 Time & Tide Museum, Norfolk Museums Service

**Organisation and staffing**

**Steering Group members:**

Simon Floyd SHARE Coordinator, SHARE Museums East

Amanda Lightstone Opening Doors Project Coordinator, UCM

Jane Felstead Head of Visitor Services, UCM

Linda Dobbs Manager, Welwyn Hatfield Museums Service

Graham Stratfold Head of Visitor Services, Museum of London

A new administrator joined the scheme in March 2015.

SHARE recruited museums to take part in the scheme through SHARE networks. Museums put forward a lead staff member who would represent their museum and be responsible for coordinating shoppers and ensuring expenses were paid. This role was termed Museum Lead for the project, and they were responsible for recruiting volunteer shoppers from within their organisation/their museums to take part in the scheme. Numbers of shoppers varied from museum to museum, with up to as many as 8 in some museum taking part and 2 in others.

Each museum would make and receive 6 mystery shopper visits, which was an increase from the original pilot, there were 2 visits were made

# Funding

Shoppers were recruited by museums on a voluntary basis, they were not paid to shop but Museum Leads were responsible for ensuring the shoppers expenses from visiting the museums were paid following visits.

A shoppers budget is intended to cover the following:

* Travel costs to and from the museum
* Purchasing something from the museum café/ restaurant
* Purchasing something from the museum shop
* Paying for any additional exhibitions/ events/ special features at the museum

Costs were limited to £100.00

# Objectives

The scheme sought to meet the aims through these objectives:

* Recruit accredited museums or those working towards accreditation who wish to participate in the scheme.
* Establish mystery shoppers from within these organisations.
* Recruit an administrator within the SHARE Museums East Team, to ensure smooth running of the mystery shopper scheme
* Ensure timely return of feedback to museums to enable them to make changes rapidly in response to data.

# Scheme analysis

The scheme has functioned well with all visits being completed up to the end of October 2015.

Administration of the scheme has been on an as and when basis as well as on designated days - most Mondays and Tuesdays and available to contact shoppers at weekends and evenings throughout the 6 months of the scheme. This flexibility enabled the scheme to move quickly and for issues to be resolved swiftly.

On the whole volunteers taking part in the scheme were very enthusiastic, general feedback from shoppers has been incredibly positive, and reflect the recipricol learning and reflection opportunities of the scheme.

For example:

*‘I am enjoying visiting other museums and reflecting on our own’.[[1]](#endnote-1)*

*‘It is a great way to see how other museum services function when it comes to front of house etc. The visit allows you to spend the whole day taking in the service icluding what is good or bad.’[[2]](#endnote-2)*

*‘Took back many tips back to our museum’[[3]](#endnote-3)*

Museums taking part in scheme have commented on how they have found the feedback from the scheme:

*‘It is very useful to have such detailed feedback covering many areas of the Museum form a visitor perspective. It was helpful none of our Mystery Shoppers appear to have visited the Museum before and were coming to it with fresh eyes.’[[4]](#endnote-4)*

*‘We will use the information to justify thinking about improvements to the Museum’[[5]](#endnote-5)*

*‘Data helps evidence ‘improvement’ budget requests’[[6]](#endnote-6)*

*‘The results will be feeding into our forward plan and HLF bid’[[7]](#endnote-7)*

The new survey system introduced in 2015 pilot scheme has been an improvement to the previous pilot, with participants reporting that ‘with the new online system you can return to the form at any time and continue answering the question’[[8]](#endnote-8)

Throughout the scheme the administrator sought to keep the enthusiasm seen in participants at the Training Day in Cambridge, with regular contact and being available to offer support. Participants noted in the midterm evaluation that they were ‘Still feeling enthusiastic about the project’[[9]](#endnote-9)at the halfway point.

Overall feedback from museums taking part was been positive:

‘Data provided has highlighted what we visibly do well and what we need to improve on’[[10]](#endnote-10)

*‘Funding the scheme initially was a struggle. At the end of the scheme the benefits are valued and felt to be worthwhile.’[[11]](#endnote-11)*

*‘I like the data good or bad. In fact poor results tend to make us react quicker and make change’[[12]](#endnote-12)*

# Training

All shoppers participating in the scheme were invited to attend training with Graham Stratfold, Head of Visitor Services at Museum of London, the SHARE Coordinator and the Scheme Administrator.

Two successful training days were held at the Fitzwilliam Museum in Cambridge as well as a smaller session for those who missed the training run by the scheme administrator at Norwich Castle Museum & Art Gallery.

Participants were provided with handout notes, a list of survey questions a hard copy of the survey and given the opportunity to see the survey live online and invited to make recommendations for changes to the survey where necessary. SHARE also collected useful information about when people can visit/ where/ and any holidays planned.

Volunteers left the training day with a very clear idea of what was expected of them in their role and what to expect from their museum lead and SHARE.

# Finance

The pilot scheme in 2014 was funded jointly through MoL, NMS, SHARE and UCM. The 2015 pilot has been solely funded by SHARE. Museum visit expenses were covered by participant museums.

# Survey

In the 2014 pilot scheme the survey was administered by another company, this survey tool is no longer used by the host. As a result this pilot of the scheme was also an opportunity to pilot a new survey system. However there were limitations in the survey format making the reporting functions difficult to enable, however there were positive outcomes for shoppers in that it was easy to use and partially complete and return to saved data. The survey has been redeveloped following on from the recommendations made from the evaluation of the scheme.

# Scheme Administration

The role of the administrator was to ensure the smooth and efficient running of the scheme.

The role involved being the first point of contact for all mystery shoppers and museum leads for the scheme and oversaw the process of a visit from inception to completion.

The administrator was flexible, working evenings, weekends, as well as set days in a week and as and when reactively.

# Communication with participant museums

The administrator contacted museum leads by copying them into museum allocation correspondence. The administrator would then send on feedback from recent mystery shopper visits to their museum. All other correspondence with participant museums was around enquiries or evaluation. Proposed for 2016 a SHARE Mystery Shopper scheme Museum Lead guidance booklet will be published, to equip museum leads to allocate and monitor visits of their staff, and general guidance and ‘how -tos’.

# Communication with shoppers

Throughout the Scheme the administrator has been the first contact for shoppers, usually by email, and sometimes by telephone, aiming to resolve issues there and then, as required.

All communication was standardised using template formats for allocating visits and sending out survey links. All communication received was acknowledged and thanked, participant shoppers being thanked for being part of the SHARE Mystery Shopper scheme in all correspondence. Shoppers have been happy with correspondence and administration of the scheme and problem solving:

*‘Communication with people managing the scheme is very smooth and prompt. That left me worried about nothing but how I perform my own task. My every enquiry was met with help and consideration. Very professional!’[[13]](#endnote-13)*

*‘Helpful information and links received’[[14]](#endnote-14)*

*‘Communication with the Mystery Shopper Lead is clear and prompt’[[15]](#endnote-15)*

# Visit Allocation

Visits were allocated by the scheme administrator using the information provided by participant shoppers on their distances able to travel, places where their impartiality could be compromised, and any mobility considerations, matching these against the participating museums. Visit allocations took time to finalise because of all the different factors. The administrator spent a lot of time looking at round trips, quickest travel routes, to ensure that shoppers could carry out the visit. 103 visits were allocated, with 102 being completed, because one museum received only 5 visits because they left the scheme and were unable to fulfil their allocation and due to illness during a visit to another site, a repeat visit was allocated. Only 1 visit was allocated to a shopper outside of the range they had specified in a round trip, which was easily swapped around to create a shorter visit.

# Results from mystery shops

Participant shopper responses were captured through completing the survey which they returned through the Smart Survey software. On the whole this process ran smoothly with some limited administrator intervention.

# Evaluation

Informal feedback from shoppers and museum leads has been disseminated throughout the scheme. There was also a formal Mid term evaluation of the scheme for all involved.

An end of scheme Evaluation Day at the Fitzwilliam Museum was held on Thursday 22nd October 2015 enabling further analysis and focus group research opportunities. In addition to this it was a space for reflecting on the practice of mystery shopping, the aims of visitor services in museums and sharing of best practice amongst participants in the focus groups.

**Evaluation Day at the Fitzwilliam Museum, Cambridge**

X participants took part.

Focus groups were made up between 6 - 8 participants

Participants were a mix of museum leads and mystery shopping volunteers.

Three areas for discussion were identified from the mid-term evaluation for further analysis through the focus groups. Participants were encouraged to use post-its to capture their feedback and a nominated representative fed back to the floor their main discussion points.

# Reflections

The SHARE Mystery Shopper Scheme 2015 Pilot has been successful - all visits were carried out within the timeframe, and following evaluation, recommendations to the Steering Group to improve the scheme design will be made. There is value in the feedback received from the SHARE Mystery Shopper Scheme and it has been useful to museums taking part.

Overall many of the points raised and discussed at the Evaluation Day had been put forward through the midterm evaluation.

A number of ideas for future schemes were generated as a result of focus group discussion, and the following will be presented to the Steering Group as recommendations for the 2016 scheme:

**Recommendations**

1. Changes to survey questions, asking why graded in a particular way. Enhancing the question which refers to the website, as well as including social media.

2.Recommendation to subdivide the region when enough museums are recruited to enable this to happen.

1.If there are 2 museums on a site to have the option to split the 6 visits into 3 per museum at the site.

3.Enhance Museum Leads role description to take on responsibility for allocating visits to individual shoppers in their teams. Proposal for the scheme administrator to allocate 6 shops to a museum with set timeframes and the lead will select from their pool of volunteers who is best suited. This will mean more administrator time upfront, putting everything in place and having a complete schedule available prior to visits commencing. This option doesn’t leave much in the way of tolerance should a museum leave the scheme part of the way through, however it would equate to fewer hours spent administering the scheme and managing visits while the scheme is running.

1. Ensure that all participants have a better understanding of the level of engagement and the response parameters required in completing a mystery shop, recommend the development of a go to handbook or notes following on from the training around how to complete a mystery shop: including phonecalls, what constitutes a special feature, what is a score 6 for example or what constitutes a 4, along with guidance on how to complete a form and parameters of acceptable phraseology.

## Notes and references

1. Extract taken from an anonymous participant’s response in the Share Mystery Shopper Scheme Midterm Evaluation, which took place between July and August 2015. [↑](#endnote-ref-1)
2. Ibid [↑](#endnote-ref-2)
3. Taken from focus group feedback post-it note exercise, Scheme Evaluation Day, held at the Fitzwilliam Museum on 22nd October 2015. [↑](#endnote-ref-3)
4. Extract taken from an anonymous participant’s response in the SHARE Mystery Shopper Museum Leads Midterm Evaluation, which took place between August and September 2015. [↑](#endnote-ref-4)
5. Ibid [↑](#endnote-ref-5)
6. Ibid. [↑](#endnote-ref-6)
7. Ibid [↑](#endnote-ref-7)
8. Extract taken from an anonymous participant’s response in the Share Mystery Shopper Scheme Midterm Evaluation, which took place between July and August 2015. [↑](#endnote-ref-8)
9. Ibid [↑](#endnote-ref-9)
10. Taken from focus group feedback post-it note exercise, Scheme Evaluation Day, held at the Fitzwilliam Museum on 22nd October 2015. [↑](#endnote-ref-10)
11. Taken from focus group feedback post-it note exercise, Scheme Evaluation Day, held at the Fitzwilliam Museum on 22nd October 2015. [↑](#endnote-ref-11)
12. Taken from focus group feedback post-it note exercise, Scheme Evaluation Day, held at the Fitzwilliam Museum on 22nd October 2015. [↑](#endnote-ref-12)
13. Extract taken from an anonymous participant’s response in the Share Mystery Shopper Scheme Midterm Evaluation, which took place between July and August 2015. [↑](#endnote-ref-13)
14. Ibid [↑](#endnote-ref-14)
15. Ibid [↑](#endnote-ref-15)