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Customer Service in the Libraries

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ELUNA 2010

Topics of Discussion

- Why Customer Service?
- Early Stages of Custo
- Customer Service Pr

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Topics of Discussion

- **Customer Service Training**

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Topics of Discussion

- **Process Improvements**
- **Tips for Implementin**

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Why Customer Service?

“We will provide efficient, friendly service, creating a comfortable, welcoming environment. We will make ourselves available as valuable resources to our customers and will not be satisfied until we have met their needs and exceeded their expectations. By assisting our customers in their research, we are educating and enriching society through the advancement of knowledge and the innovations of those we help.”

- *Access Services Customer Service Philosophy*

Why Customer Service?

- The library competes for user attention with other methods of information delivery
- A growing belief that without excellent service, users will seek out alternatives to libraries
- University Libraries' Access Services departments agreed on providing a high and consistent level of customer service to users

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Why Customer Service?

- Prior to the Customer Service Project, there were no unified service expectations or training components

- Each unit supervisor determined appropriate levels of service and training; within individual libraries different service desks provided differing levels of service

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Why Customer Service?

- Access Services is heavily reliant on student employees – for many, the library is their first job and they have no prior experience in workplace behavior

Early Stages

- Department staff volunteered to work on a project which resulted in a web-based training tutorial for students
- Web-based training module created with 20 slides of instruction, tips, charts, and video of examples of both good and bad service

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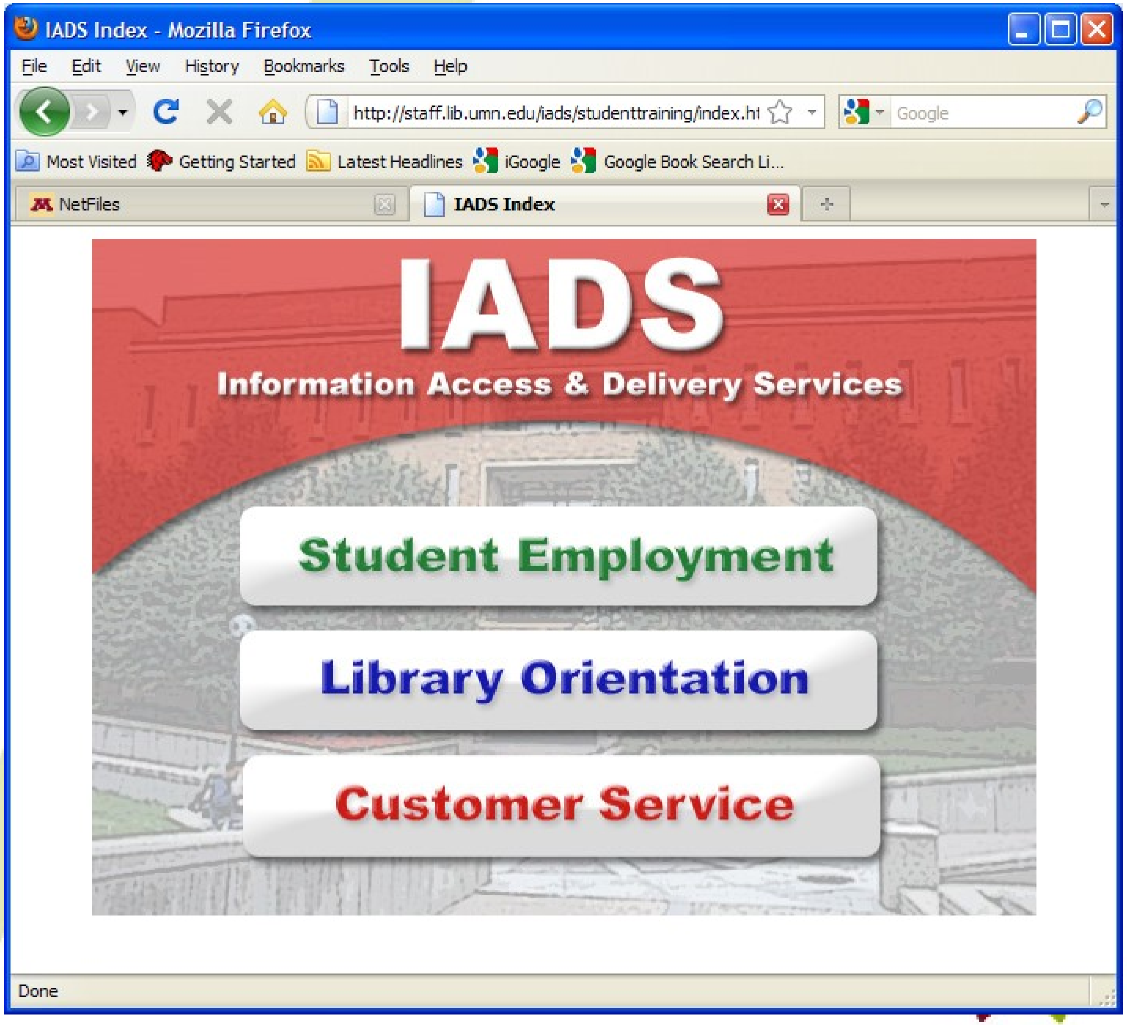
LIVE DEMO


IADS Index - Mozilla Firefox
File Edit View History Bookmarks Tools Help
http://staff.lib.umn.edu/iads/studenttraining/index.ht
Google
Most Visited
Getting Started
Latest Headlines
iGoogle
Google Book Search Li...
NetFiles
IADS Index
IADS
Information Access & Delivery Services
Student Employment
Library Orientation
Customer Service
Done

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Early Stages

- The web-based project was considered a success and the project was expanded to support a live training curriculum for all staff that provide direct service to users
- Project team was formed to develop an approach to customer service training that focused on performance standards and observable outcomes

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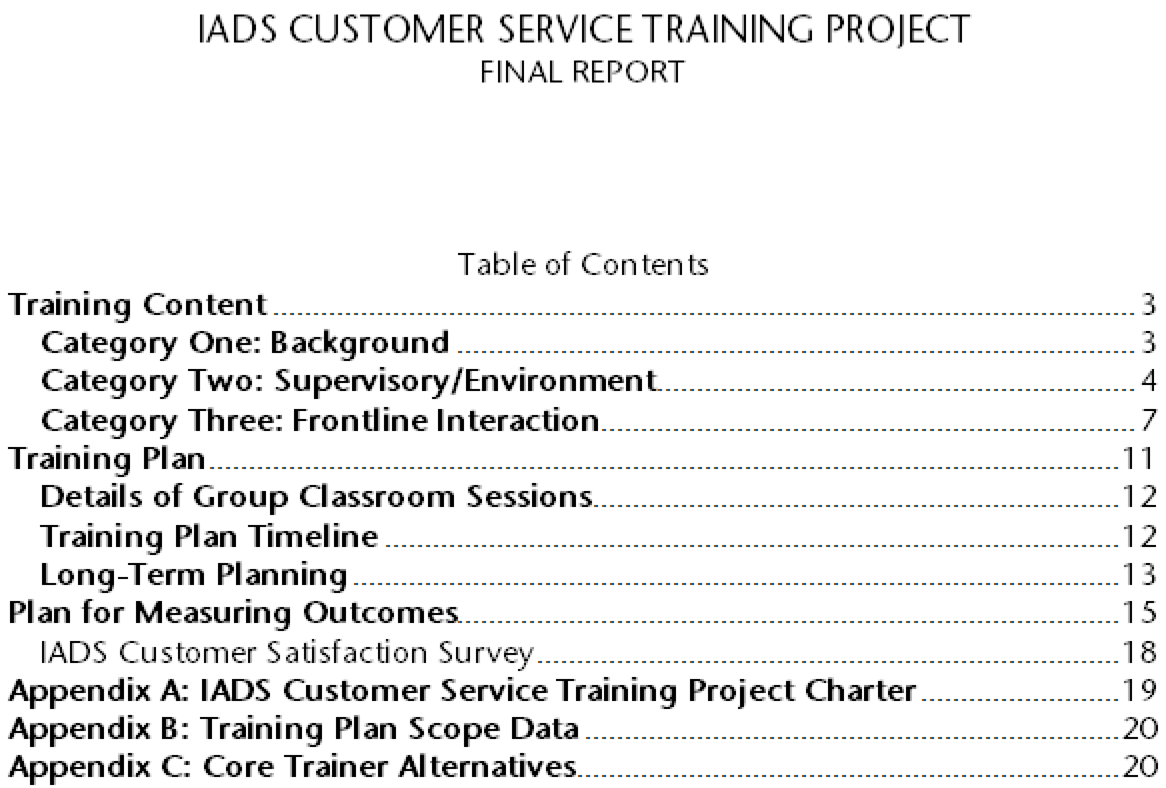
Early Stages

- In addition to training, the project team was charted to design a system for measuring the quality of service provided to users

Project Report

- Report concep topics
  - **Critic**
    - **P**
    - **O**



IADS CUSTOMER SERVICE TRAINING PROJECT
FINAL REPORT

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Project Report

- Report acknowledged successful customer service cannot be provided only through training; a successful approach to customer service requires:
  - **Library Background** (Overview of library beyond the unit)
  - **Supervisory Environment** (Unit culture)
  - **Frontline Interaction** (Customer service training)

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Project Report:
Library Background

- Providing excellent customer service requires a depth of knowledge of the library’s services
  - **Orientation**: Providing staff with library tours
  - **Training**: Staff have knowledge of all unit policies and procedures
  - **Resource Guide**: System-wide information about services beyond the unit

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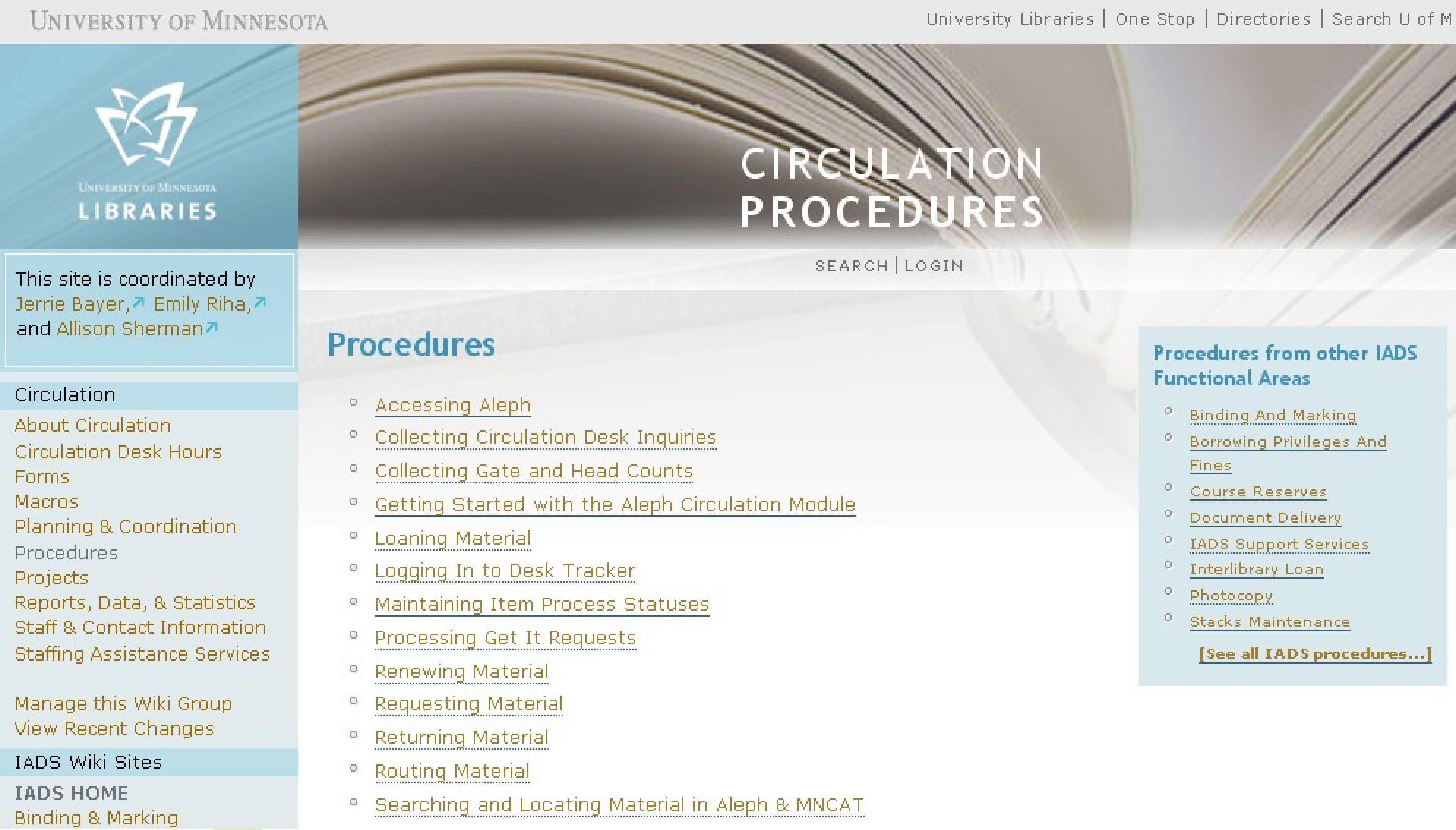
Project Report:
Library Background



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University Libraries | One Stop | Directories | Search U of M

CIRCULATION PROCEDURES

SEARCH | LOGIN

This site is coordinated by Jerrie Bayer, Emily Riha, and Allison Sherman

Circulation
About Circulation
Circulation Desk Hours
Forms
Macros
Planning & Coordination
Procedures
Projects
Reports, Data, & Statistics
Staff & Contact Information
Staffing Assistance Services

Manage this Wiki Group
View Recent Changes

IADS Wiki Sites
IADS HOME
Binding & Marking

Procedures

- Accessing Aleph
- Collecting Circulation Desk Inquiries
- Collecting Gate and Head Counts
- Getting Started with the Aleph Circulation Module
- Loaning Material
- Logging In to Desk Tracker
- Maintaining Item Process Statuses
- Processing Get It Requests
- Renewing Material
- Requesting Material
- Returning Material
- Routing Material
- Searching and Locating Material in Aleph & MNCAT

Procedures from other IADS Functional Areas

- Binding And Marking
- Borrowing Privileges And Fines
- Course Reserves
- Document Delivery
- IADS Support Services
- Interlibrary Loan
- Photocopy
- Stacks Maintenance

[See all IADS procedures...]

Project Report: Library Background

- Providing excellent customer service requires a depth of knowledge of the library’s services
  - **Contact Lists**: Units provide accurate contact lists to provide users with efficient referrals
  - **Emergency Contact Lists**: Maintain up-to-date emergency contact lists

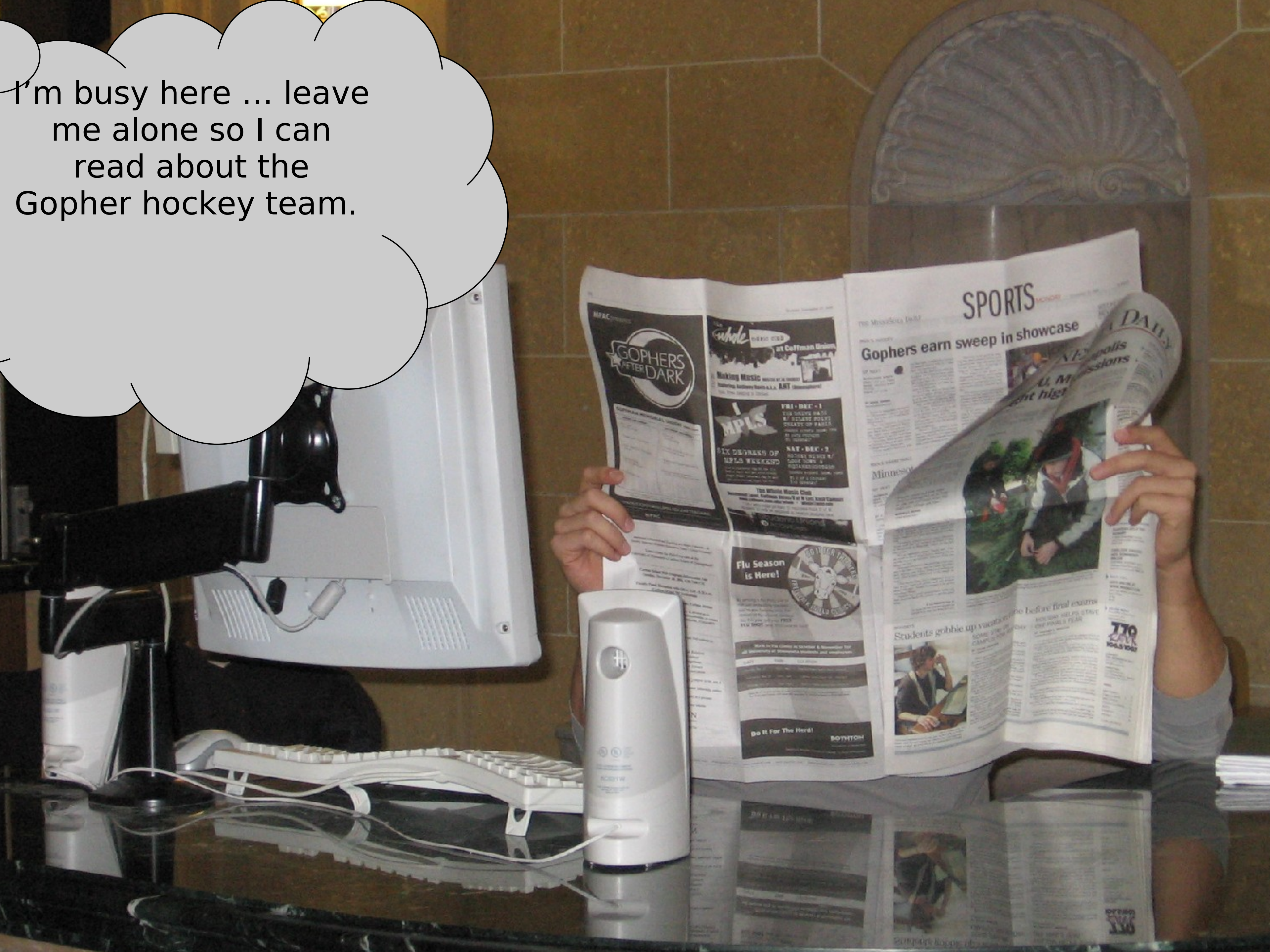
Project Report:
Supervisory Environment

- Providing excellent customer service requires supervisors promoting a culture of service
  - **Communication**: Keeping staff aware of the most current information and procedures
  - **Performance Standards**: All positions reflect a commitment to service which is also incorporated in job descriptions and performance reviews

Project Report:
Supervisory Environment

- Providing excellent customer service requires supervisors promoting a culture of service
  - **User Feedback**: Measure and improve quality of customer service by soliciting feedback from internal and external customers via survey
  - **Staff Motivation**: Provide a welcoming work environment to ensure the highest level of service

Where do I find my course reading?


I'm busy here … leave me alone so I can read about the Gopher hockey team.
SPORTS
Gophers earn sweep in showcase
GOPHERS AFTER DARK
MPLS
Flu Season is Here!
Do It For The Herd!

When does my shift end?

Project Report:
Frontline Interaction

- Providing excellent customer service requires staff to be well trained in service
  - **Approachability**: Appear helpful and friendly so that users are encouraged to approach staff for help
  - **Greetings**: Greet approaching users in a friendly and welcoming manner
  - **Approach users**: Inquire and provide assistance to users who appear confused

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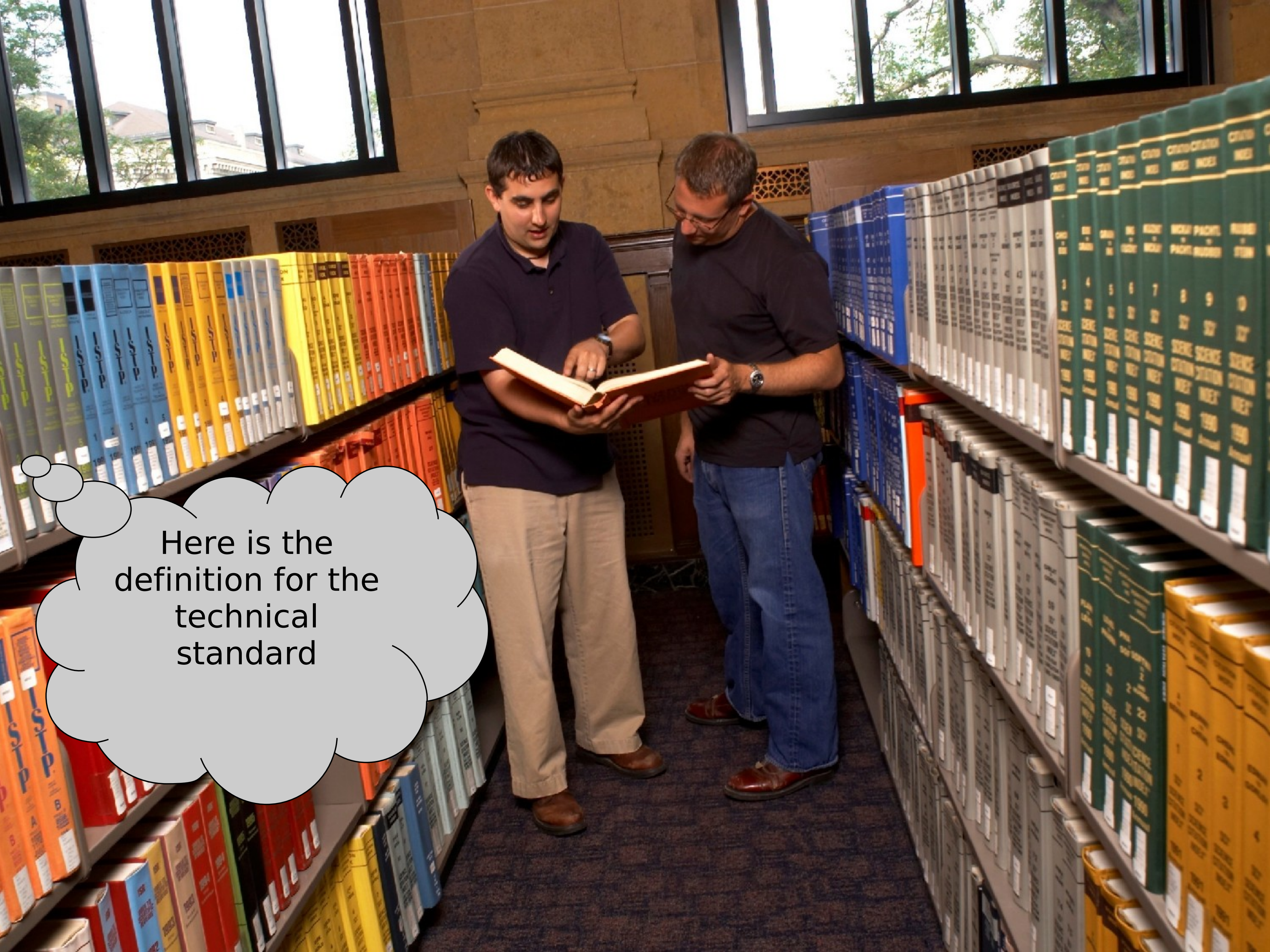
Hello, how may I help you?

Project Report: Frontline Interaction

- Providing excellent customer service requires staff to be well trained in service
  - **Post Standards**: Assure users of quality customer service and hold units accountable
  - **Anticipate User Needs**: Ensure users do not leave confused or frustrated by providing explanations of policies and procedures as well as providing alternative options to meet user needs when possible

WOMEN
Ready to be Shelved
Synthesis, Functionalization and Surface Treatment of NANOPARTICLES

Push this button
for two-sided
copies



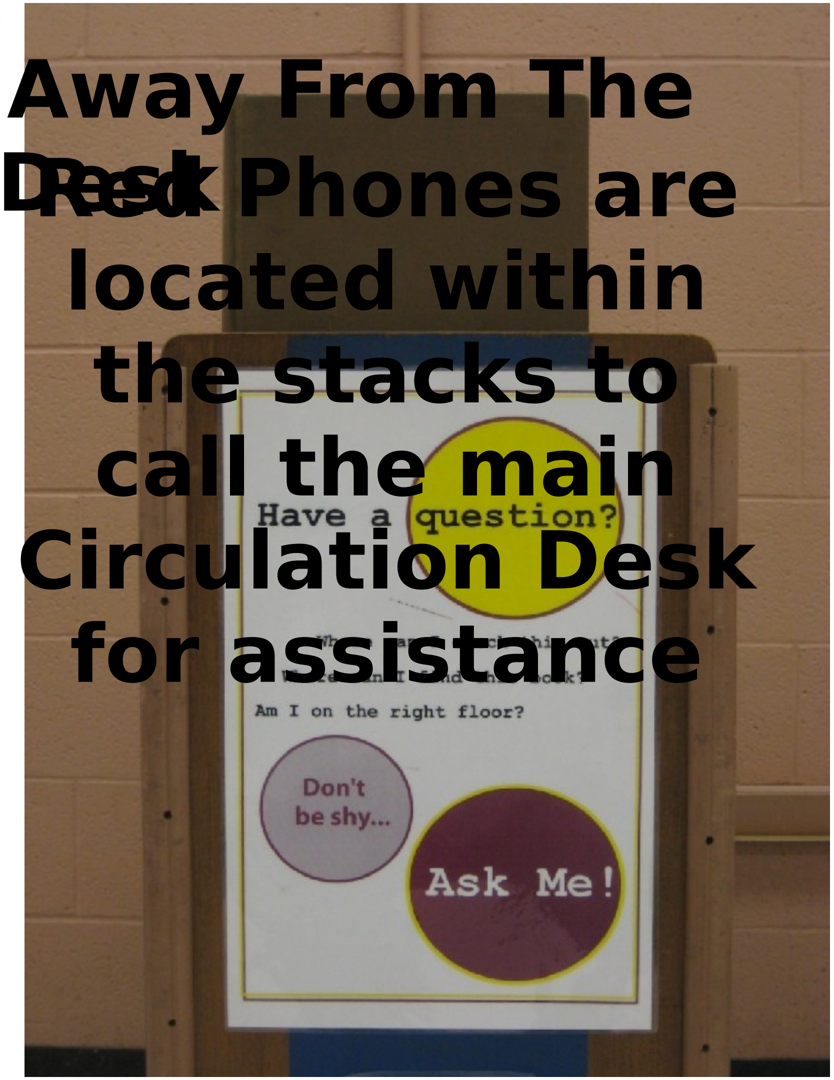
Here is the definition for the technical standard

Offer Help … Even Away From The Service Desk

All shelving trucks have signs informing users to ask if help is needed

LIBRARIES
Need Help?
Library Questions 4-3321
Emergency 911
For general research questions,
You are on the 3rd Floor

Red Phones are located within the stacks to call the main Circulation Desk for assistance


Have a question?
Am I on the right floor?
Don't be shy...
Ask Me!

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Project Report: Frontline Interaction

- Providing excellent customer service requires staff to be well trained in service
  - **Phone Protocol**: Develop standards for appropriate greetings, responses, referrals, and timing for callback
  - **Email Protocol**: Develop standards and templates for content and format, standards for response time

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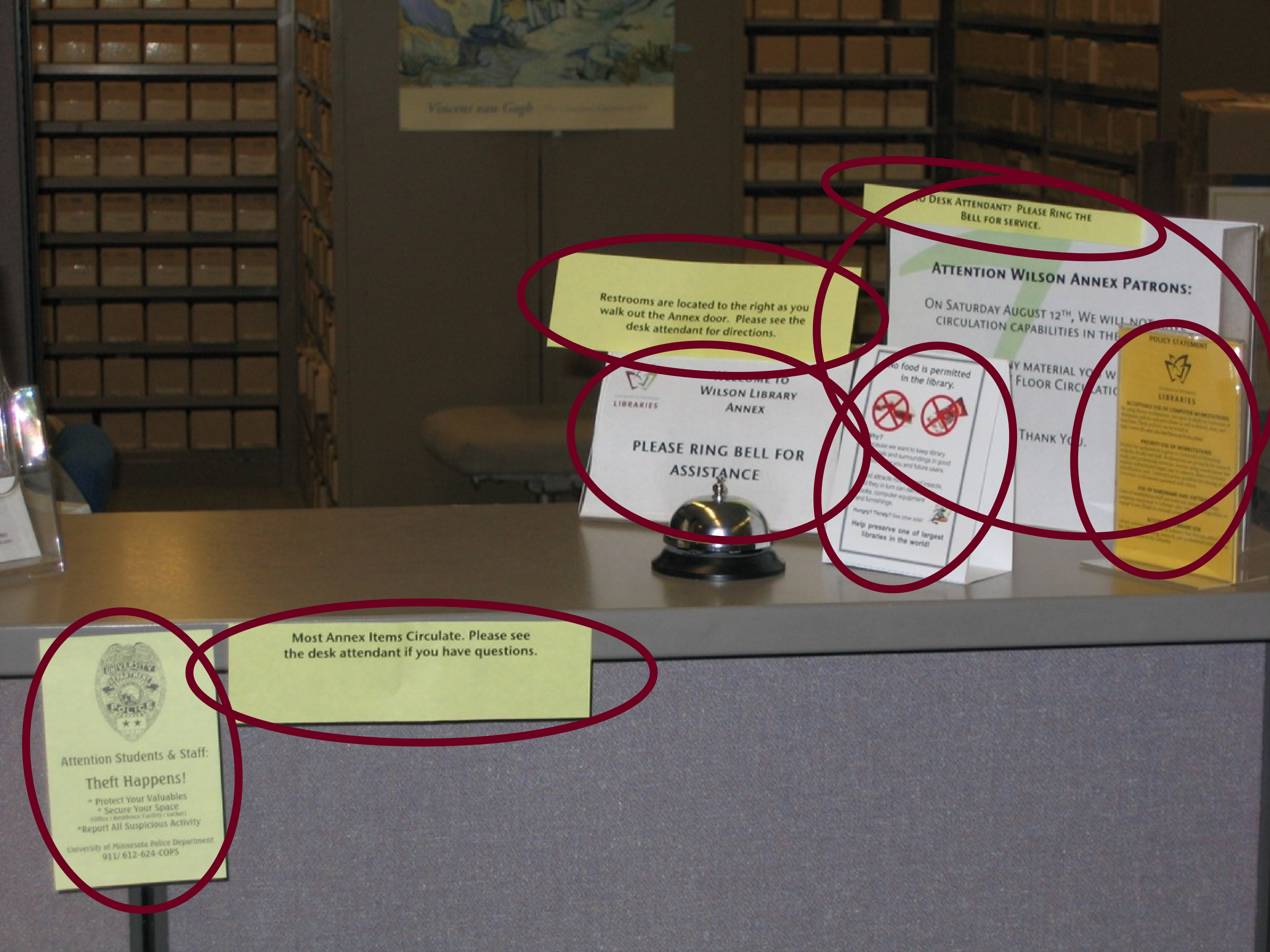
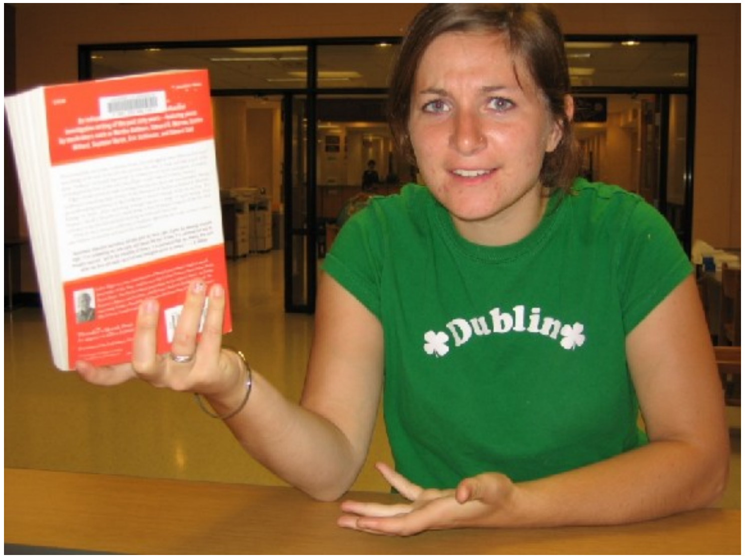
Project Report: Frontline Interaction

- Providing excellent customer service requires staff to be well trained in service
  - **User Priority Management**: Acknowledge users waiting in line; units determine plans to provide staffing assistance
  - **Keep Commitments to Users**: Maintain user satisfaction by following up on promised actions
  - **Signage**: Keep signage accurate and up-to-date


Vincent van Gogh
Desk Attendant? Please Ring the Bell for service.
Attention Wilson Annex Patrons:
On Saturday August 12th, We will not
circulation capabilities in the
ny material yo
Floor Circulati
Thank You.
Restrooms are located to the right as you walk out the Annex door. Please see the desk attendant for directions.
Libraries
Welcome to Wilson Library Annex
Please ring bell for assistance
No food is permitted in the library.
Why?
Help preserve one of largest libraries in the world!
Policy Statement
Libraries
Most Annex Items Circulate. Please see the desk attendant if you have questions.
University Police
Attention Students & Staff:
Theft Happens!
* Protect Your Valuables
* Secure Your Space
*Report All Suspicious Activity
University of Minnesota Police Department
911/ 612-624-COPS

Project Report:
Frontline Interaction

- Providing excellent customer service requires staff to be well trained in service
  - **Diffusing Difficult Situations**: Train staff in remaining calm while encountering difficult situations and providing service by listening to complaints and working with users to provide alternatives and options to resolve the situation



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Project Report:
Frontline Interaction

- Providing excellent customer service requires staff to be well trained in service
  - **Referrals**: Provide users with necessary referrals to meet their needs including detailed information about the referral and encouraging users to return if their needs were not met

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Training Implementation

- Training provided in group classroom settings and taught by a core group of full-time staff
- Trainers worked with University HR’s Training Services to “train the trainers”
- Users surveyed to determine baseline perception of service

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Training Classes

- Trainers paired into 4 teams of 2 each
- 3 hour training sessions; each session limited to 15 attendees
- 26 initial sessions over a mix of day times and night sessions; 221 full-time and student employees participated

Training Classes

- Attendees provided feedback on sessions addressing content, length of session, etc.
- Debriefing sessions held by trainers to discuss both parts that worked well and also areas that needed improvement

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Training Classes

- Continuous improvement made to courses:
  - Content revised to include additional information on dealing with difficult situations
  - Activities reworked to get everyone involved
  - More routine information provided in handout form instead of lecture
  - More visual content through slides

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Measuring Outcomes

- Users are surveyed on a yearly basis

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Rate Your Library!

1. What did you come to the Library for today?

Check Out Item	Reference Help	Study	Photocopy	Other

2. You are a(n):

Undergraduate	Graduate	Faculty	Staff	Unaffiliated

3. How satisfied are you with your service experience at the Library?

Very Dissatisfied	Dissatisfied	Unsure	Satisfied	Very Satisfied

Comments ______________________________

____

4. Did you find the library staff approachable?

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree

Comments ______________________________

____

5. Did the library staff help you in a timely manner?

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree

Comments ______________________________

____

6. Did you find the library staff helpful?

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree

Comments

____

7. If the library staff gave you a referral, did you find the referral accurate?

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree

Comments ______________________________

____

8. Did you find the signage in the library informative?

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree

Comments ______________________________

____

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Rate Your Library!

1. What did you come to the Library for today?

Check Out Item | Reference Help | Study | Photocopy | Other

2. You are a(n):

Undergraduate | Graduate | Faculty | Staff | Unaffiliated

3. How satisfied are you with your service experience at the Library?

Very Dissatisfied | Dissatisfied | Unsure | Satisfied | Very Satisfied

Comments ______________________________

____

4. Did you find the library staff approachable?

Strongly Disagree | Disagree | Unsure | Agree | Strongly Agree

Comments ______________________________

____

5. Did the library staff help you in a timely manner?

Strongly Disagree | Disagree | Unsure | Agree | Strongly Agree

Comments ______________________________

____

6. Did you find the library staff helpful?

Strongly Disagree | Disagree | Unsure | Agree | Strongly Agree

Comments

____

7. If the library staff gave you a referral, did you find the referral accurate?

Strongly Disagree | Disagree | Unsure | Agree | Strongly Agree

Comments ______________________________

____

8. Did you find the signage in the library informative?

Strongly Disagree | Disagree | Unsure | Agree | Strongly Agree

Comments ______________________________

____

Measuring Outcomes

- Users are surveyed on a yearly basis
- Results are shared on a yearly basis

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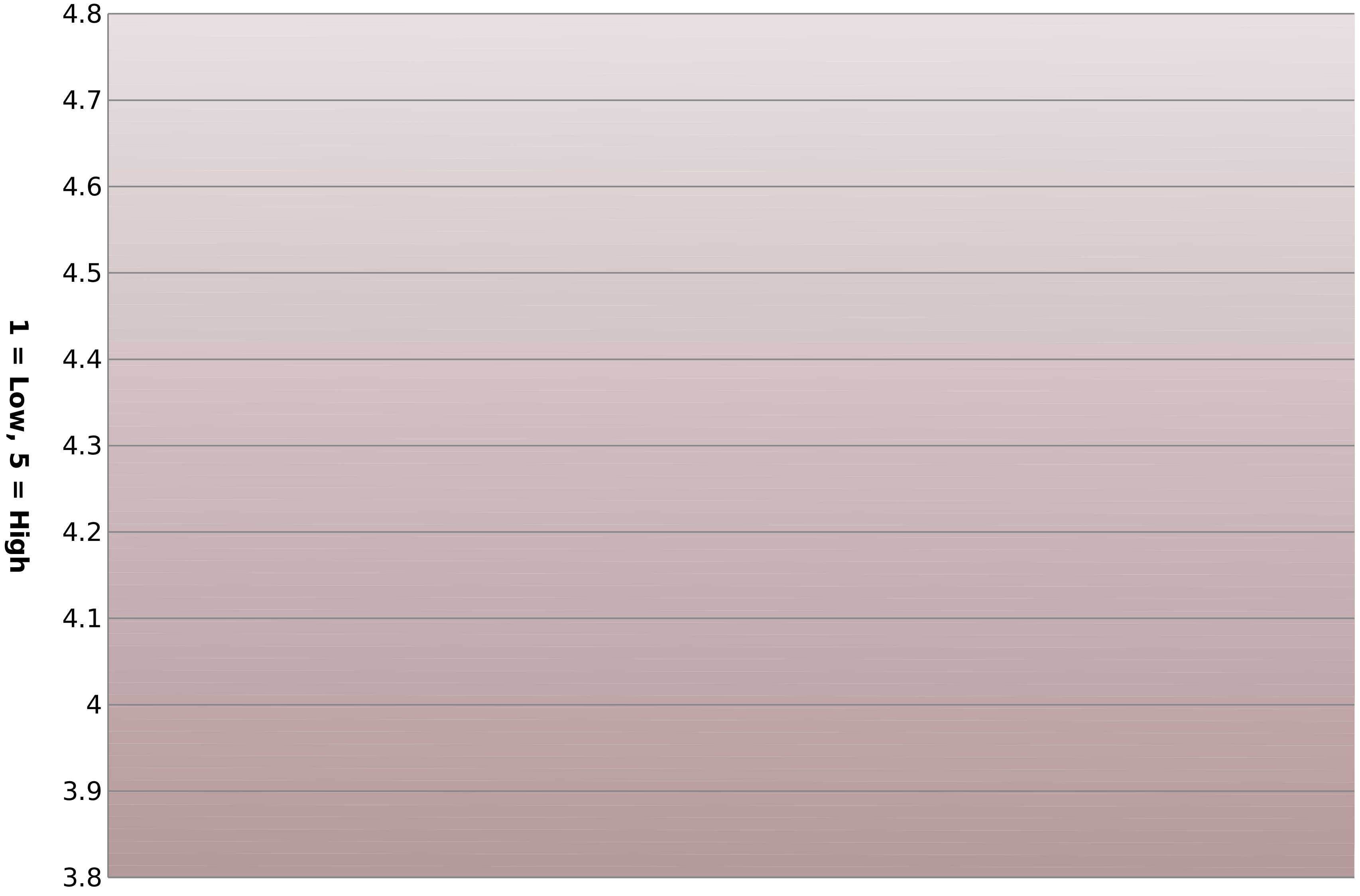
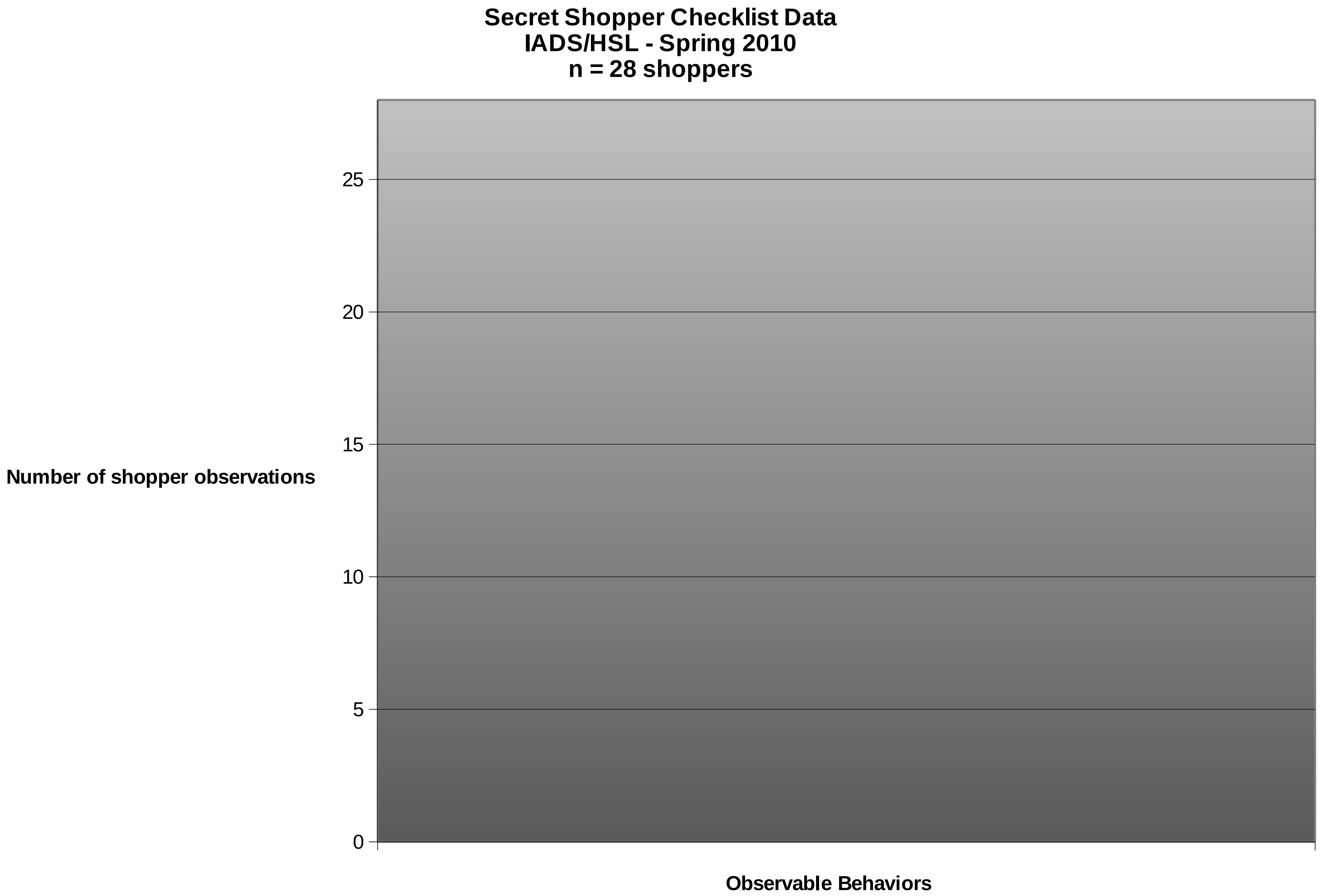


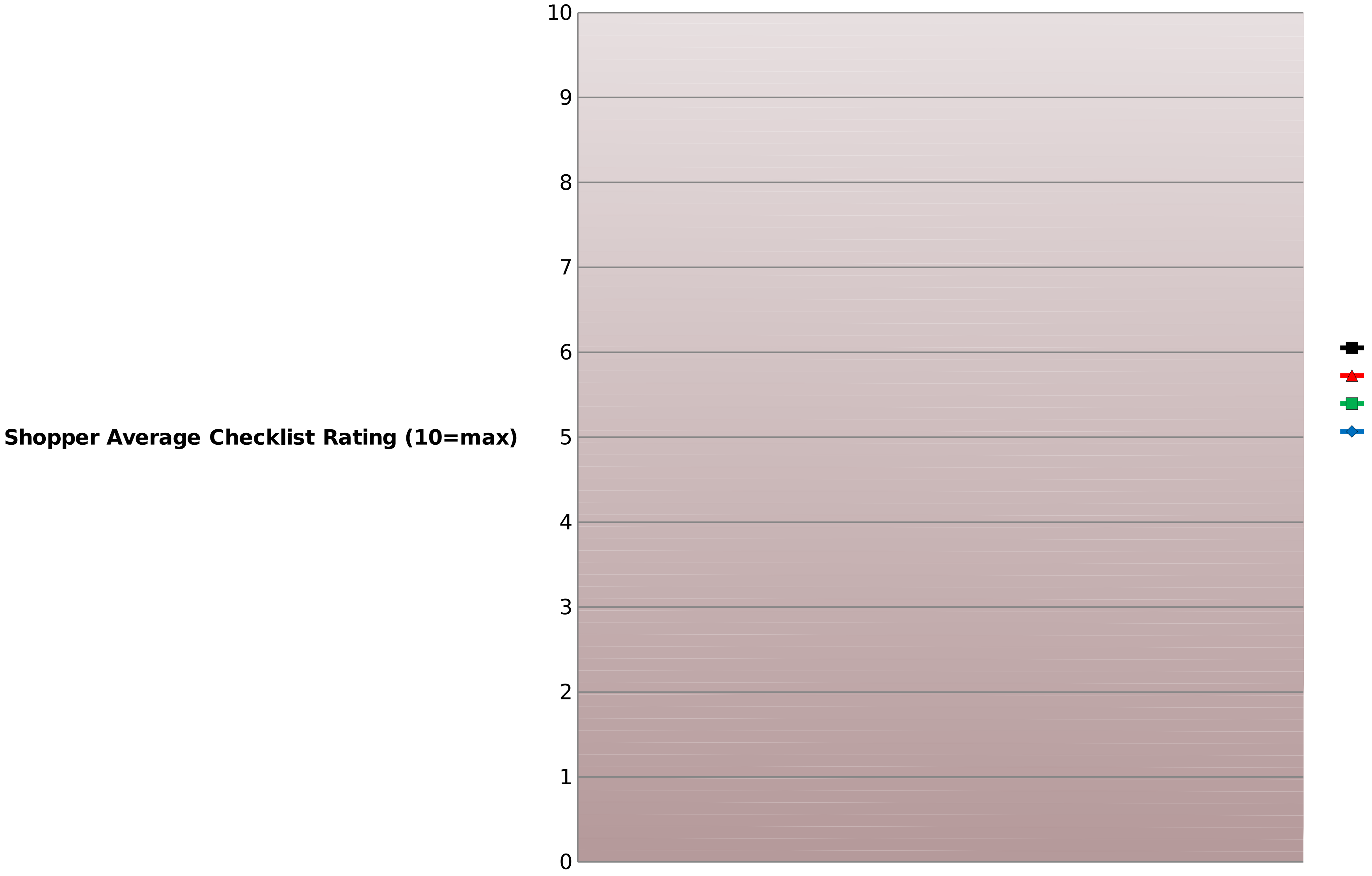
IADS Customer Service Survey - Spring 2010
Bio-Med, Magrath, Walter Sci/Eng, Wilson Combined

Measuring Outcomes

- Users are surveyed on a yearly basis
- Results are shared on a yearly basis
- “Mystery/Secret Shopper” program implemented


Secret Shopper Checklist Data
IADS/HSL - Spring 2010
n = 28 shoppers
Number of shopper observations
25
20
15
10
5
0
Observable Behaviors

Secret Shopper Visit Averages
2010 Compared to Prior Years



Process Improvements

- In-person classroom training no longer offered
  - Three hours away from the unit was a significant commitment, especially for student employees
  - Scheduling everybody was problematic due to timing of work shifts and rolling hiring dates
- Replacement of outgoing trainers was challenging

Process Improvements

- Content provided in classroom training has been transformed into three interactive online presentations

- Presentation are self-paced and can be taken independently

- Each presentation is approximately 15 minutes

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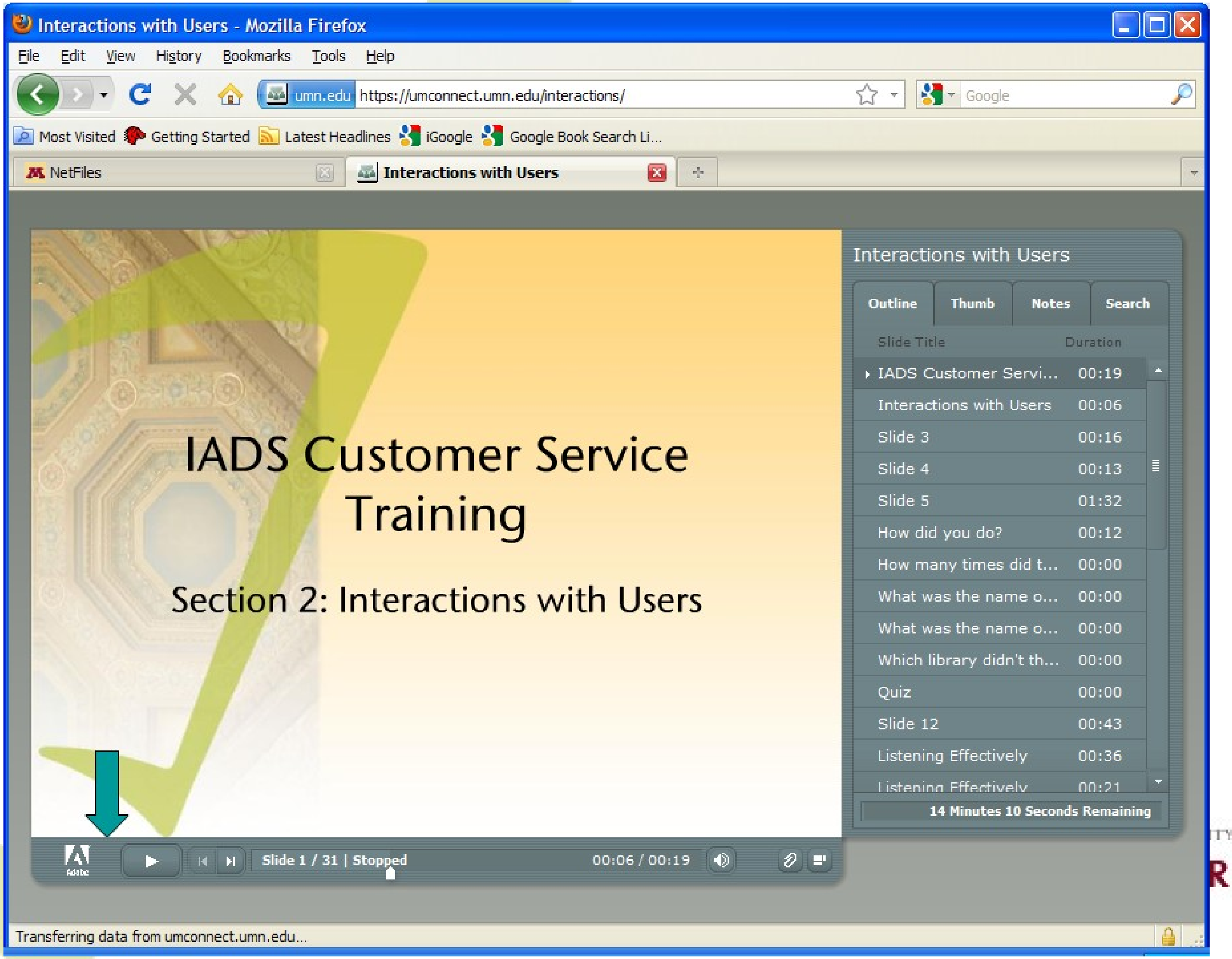
LIVE DEMO


Interactions with Users - Mozilla Firefox
File
Edit
View
History
Bookmarks
Tools
Help
umn.edu
Google
Most Visited
Getting Started
Latest Headlines
iGoogle
Google Book Search Li...
NetFiles
Interactions with Users
Outline
Thumb
Notes
Search
Slide 1 / 31 | Stopped
00:06 / 00:19

https://umconnect.umn.edu/interactions/

IADS Customer Service Training

Section 2: Interactions with Users

Interactions with Users

Slide Title	Duration
IADS Customer Servi...	00:19
Interactions with Users	00:06
Slide 3	00:16
Slide 4	00:13
Slide 5	01:32
How did you do?	00:12
How many times did t...	00:00
What was the name o...	00:00
What was the name o...	00:00
Which library didn't th...	00:00
Quiz	00:00
Slide 12	00:43
Listening Effectively	00:36
Listening Effectively	00:21

14 Minutes 10 Seconds Remaining

Transferring data from umconnect.umn.edu...

Process Improvements

- After each presentation, viewers are asked to submit an evaluation for content improvement
- Viewer participation is recorded and sent to supervisors

Tips for Implementing a Program

- Determine level of institutional support
- Buy in from front-line staff
- Expectations of participation
- Take advantage of available resources beyond your organization in developing content and skills

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Tips for Implementing a Program

- Begin with a baseline of service expectations and continue to grow
- Continuously seek improvements
- Consider scalability when creating and implementing

Resources

- Both “old” and “new” online presentations available at https://wiki.lib.umn.edu/IADS/OnlineTraining

- Contacts
  - Jerrie Bayer, j-baye@umn.edu
  - Chris Rose, rosex051@umn.edu

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Questions?

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