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# Customer Service in the Libraries

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# Topics of Discussion

- **Why Customer Service?**
- **Early Stages of Customer Service**
- **Customer Service Process**



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# Topics of Discussion

- **Customer Service Training**



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# Topics of Discussion

- **Process Improvements**
- **Tips for Implementing**



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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

# 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



# 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

# 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



# Early Stages

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

# Project Report

- Report focused on how to move from general concepts (Critical Practices) to more specific topics (Observable Behaviors)
  - **Critical Practices**
    - **Performance Measures**
    - **Observable Behaviors**



# 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)

# 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



# 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



# 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

# 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



# 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



# 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



# 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



# 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





# 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



# 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



# Measuring Outcomes

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



# 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
- Presentations are self-paced and can be taken independently
- Each presentation is approximately 15 minutes

# 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





# 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](mailto:j-baye@umn.edu)
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