The Customer Comes First: Implementing a Customer Service Program at the University of Minnesota, Twin Cities Libraries

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Access Services Conference 2010
Topics of Discussion

• Why Customer Service?

• Early Stages of Customer Service Project

• Customer Service Project Report
Topics of Discussion

• Customer Service
  Training
  Implementation

• Training Classes

• Measuring Outcomes
Topics of Discussion

• Process Improvements

• Tips for Implementing a Program
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
Online Training

Orientation to Working at the University of Minnesota Libraries

These training modules were revised in 2010 and contains two parts: an introduction to the Libraries, an introduction to working at the Libraries. Slides include audio; headphones are recommended.

- Introduction to the Libraries
- Student Employment at the Libraries and the IADS Department

Customer Service

These three modules were developed in 2008 by IADS Customer Service Project trainers as an online customer service curriculum to replace classroom sessions offered since 2006. Slides include audio; headphones are recommended.

- Approachability
- Interactions with Users
- Dealing with Difficult Situations
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 charted 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

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)
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

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
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
• 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.
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
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
Push this button for two-sided copies
Here is the definition for the technical standard
All shelving trucks have signs informing users to ask if help is needed.

Red Phones are located within the stacks to call the main Circulation Desk for assistance.
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
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
Attention Students & Staff:

Theft Happens!
- Protect Your Valuables
- Secure Your Space
- Report Any Suspicious Activity

University of Minnesota Police Department
911/612-624-COPS

Most Annex Items Circulate. Please see the desk attendant if you have questions.

Welcome to Wilson Library Annex

Please ring bell for assistance

Restrooms are located to the right as you walk out the Annex door. Please see the desk attendant for directions.

Attention Wilson Annex Patrons:

On Saturday August 12th, we will not have circulation capabilities in the Annex.

No food is permitted in the library.

Thank you.

Policy Statement:

Help preserve one of the largest libraries in the world.

Respect the quiet environment.

No food or drink allowed.

Keep materials from blocking aisles.

Respect the right to use the library.

Respect others in the library.

Respect the library.
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
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
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

4. Did you find the library staff approachable?
   - Strongly Disagree
   - Disagree
   - Unsure
   - Agree
   - Strongly Agree

5. Did the library staff help you in a timely manner?
   - Strongly Disagree
   - Disagree
   - Unsure
   - Agree
   - Strongly Agree

6. Did you find the library staff helpful?
   - Strongly Disagree
   - Disagree
   - Unsure
   - Agree
   - Strongly Agree

7. If the library staff gave you a referral, did you find the referral accurate?
   - Strongly Disagree
   - Disagree
   - Unsure
   - Agree
   - Strongly Agree

8. Did you find the signage in the library informative?
   - Strongly Disagree
   - Disagree
   - Unsure
   - Agree
   - Strongly Agree
Measuring Outcomes

• Users are surveyed on a yearly basis

• Results are shared on a yearly basis
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<th>Q4 Approachable</th>
<th>Q5 Timely</th>
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<th>Q7 Referral</th>
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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
Spring 2010
n = 28 shoppers

number of shopper observations

1. Acknowledge
2. Greet
3. Nametag
4. Appropriate Clothing
5. Appropriate Language
6. Respect
7. Found OK
8. Explanations
9. Directions
10. Approach Users

Observable Behaviors
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
LIVE DEMO

IADS Customer Service Training

Section 2: Interactions with Users
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 online presentations available at https://wiki.lib.umn.edu/IADS/OnlineTraining

• Contacts
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Questions?