Re-thinking customer service training: A curricular solution to a familiar problem

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Customer Service Training at UMD

- Why?
- Buy in from staff
- Course development
- Navigation
- Lessons learned & next steps
- Questions
Why a Customer Service Training Program?

- Standardized & unified training
- Baseline level of job skills, knowledge
- Positively meet customer expectations
- Effectively deal with customers in stressful situations
Why a Customer Service Training Program? cont’d

- Excellent service = Library highly valued
- Job satisfaction, motivation, innovation
- Greater staff recognition
Staff Buy-In

- Customer Service Forums
- Staff Survey
- Stakeholder Meetings
- Reports: Senior Leadership, Staff Assembly
- Digital Badge
Course Development

Committee Final Report
• Communication
• Job skills
• Job knowledge

Module Format
• Content
• Quizzes

Blended Learning Approach
• Online
• In-person workshops
Navigation & Implementation

- Consistency & Branding
- Testing links
- User support
Consistency & Branding

UMD Libraries Training

Table of contents
- Module 1: Introduction
- Module 2: Effective communication
- Module 3: Job knowledge
- Module 4: Job skills
Module 4: Job skills

This module includes:
- Aleph
- Borrowing privileges
- Equipment loan
- Guest accounts
- Reference and referrals
- Course reserves
- Inter library loan
- Using Lib Answers
- Quiz
Outcomes
This section will take you through some of the common issues with Aleph. We'll look at the patron and item tabs. At the end you should be able to issue and return an item (book, cd etc), check the status of an item and know where the patron expiration dates are. You will also be able to identify a book that is on hold for a patron.

Aleph
Aleph is the bibliographic database that holds both patron and book information for all of the USM/UM libraries. Student workers have C2 account access which limits them to basic issue/discharge and item/patron information. Staff have a higher level of access and can deal with missing items amongst other things.

The following video takes you through issue and discharge:

Issue/discharge 101
- make sure you are in the correct tab
- press F4 on your keyboard to clear the screen between patrons (this is to make sure that items are not checked out accidentally to the wrong patron)
- De-sensitize books after issue so they don't set off the alarms
- See a staff member to clear items with a missing status
- Printers automatically print slips of paper to be put in books that are going to other libraries or are on hold for patrons
- Remember to "double discharge" if no paper is printed
- Local routines will apply to where discharged books are held
Quizzes

Aleph Quiz

Quiz Instructions
Please answer these questions on Aleph, our bibliographic database.

Question 1

Aleph is the name of the bibliographic database that holds:

- both book and patron information for UMD Libraries.
- both patron and book information for all USMAI libraries.
- student details of courses and books checked out.
- records of books recommended by professors.
Testing & User Support

• Testing Links
• Staff/student User Guide
• Supervisor Guide
Lessons Learned

• Varied preferences for delivery of training
• Campus environments & cultures
• Communication: Progress Reports
• Field test all course aspects
• Ensure accessibility to all content
Lessons Learned cont’d

- Diversity of tech literacy
- Realistic timeframe for course development
- Plan logistics for implementation
- Technical expertise
Next Steps

• Assessment
  – Improve staff performance
  – Better service to users
  – Completion rates

• Sustainability
Thank you

Questions?

Please contact us:
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