Creating Customer Service Training for the Academic Library

Access Services Conference
November 12, 2015

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Information Delivery and Library Access, MIT Libraries
Who we are

- Library Storage Annex
- Lewis Music Library
- Rotch Library
- Barker Library
- Dewey Library
- Hayden Library
Who we serve

At MIT, we have ~11,000 students:
• 40% undergraduate, 60% graduate
• ~3,600 international students representing 116 countries
• 46 majors and 49 minors
• Interdisciplinary research across departments and schools

We also serve:
• 1,800 faculty
• 3,750 researchers across disciplines
• Staff across departments
• Partner institutions
• Non-MIT communities

Information gathered by brightspot, February 2015
Identified customer services skill gap & determined a need for benchmarking these skills

Customer Service Training Team (CSTT) 2012

Reshaping Mediated Services (RMS) Team #8 2013

Automated & Scripted Messages Review Team (ASMRT) 2014

Public Services Image Training Team (PSITT) 2014

Evaluation
ID&LA’s Customer Service Training Team

Photo credit: L. Barry Hetherington
Our Service Philosophy

No matter where a user starts, he or she should have a great experience.

The services and staff of the MIT Libraries always seek to meet users’ needs in a timely way.

We value personal connections with users.

Beyond value to the user, each service transaction is important because it provides an opportunity to broaden and deepen engagement with the MIT community.
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Evaluation
Automated & Scripted Messages Review Team (ASMRT)

- Review scripted & automated messages for:
  - Circulation notices (courtesy, fine, holds, etc.)
  - Ask ILB and ILB Requests
  - Research Consultations
  - Circulation RT
  - Ask Us
- Recommend changes & work w/ stakeholders to implement
- Create best practices for customer service messages
- Develop sustainable review process for messages
- Members from Access Services, formerly Resource Sharing, Liaison, Instruction & Reference, and User Experience
Locate messages

Access & seek permissions from Administrators & Stakeholders

Inventory messages

Message review for accuracy & positive impression

Defining automated & scripted

Understanding composition & training practices of staff from different services

Evaluating impact & priority

Training & enlisting help from stakeholders

Composing & implementing updated messages
Message Types

• AUTOMATED
  ▪ Automatically triggered and sent without staff intervention
  ▪ Comprised of ~ 10% of total messages inventoried

• SCRIPTED
  ▪ Built by staff using pre-defined scripts/templates & manually sent
  ▪ More than 200 scripted messages

• MIXED
  ▪ Uses multiple pre-defined scripts and/or custom messages
  ▪ Majority of total messages fell into this category
Best Practices

- Professional and human in every interaction
- Keep goals and actions clear
- Aware that it's easier to convey approachability and engagement in-person than via email
- Format text for clarity
- Friendly, efficient, knowledgeable, approachable, engaged, and thorough
- Soften language when delivering "bad" news
- Keep lines of communication open
- Try to end with a positive (i.e., path to resource)
Patron claimed return, but item isn’t found after search:

“We will continue to search for the book throughout the MIT Libraries, however in almost all cases where the item does not appear on the first search, it is never found, except when the patron discovers they had the book after all.”

“We will continue to look for the item throughout the MIT Libraries. In case the item isn’t found when we look again, we ask that you please double-check your home, office, car, or any other place it may have been overlooked.”
Challenges & Solutions

- Saying “no” all the time
- Lack of human tone and personalization
- Unwieldy documentation and/or templates
- Losing or not sharing messages
- Unknown origins or date of last update
- Inaccurate policy
- Time spent writing individual complicated replies

- Using Best Practices to deliver news
- Empowering and training staff
- Archiving, deleting, or organizing messages
- Centralizing information
- Systematic annual review process by each service
- Scheduled policy reviews
- Identifying new messages for scripts/templates
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Evaluation
Delivering great customer service
Positive Service Image Training Team (PSITT)

• Tied to Service Philosophy
  • Purpose: “To reinforce and build skills and knowledge for all mediated services staff about how to create a positive service image as well as in key customer service skills needed to serve a diverse community in an ever changing environment.”

• Who goes
  • Mandatory for all staff servicing in-person, chat, email, teaching, consultations
  • Academic and Community Engagement directorate + opt-ins

• Worked with brightspotstrategy to develop training
<table>
<thead>
<tr>
<th>Deliverables</th>
<th>Original Timeline</th>
<th>Actual Time &amp; Extras</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Develop Scope</td>
<td>6 months</td>
<td>9 months • Also had to develop Request for Proposal (RFP)</td>
</tr>
<tr>
<td>• Identify possible consultants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Also had to develop Request for Proposal (RFP)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Review RFP’s</td>
<td>1 month</td>
<td>3 ½ months • Revise expectations • Get updated quote • Final approval</td>
</tr>
<tr>
<td>• Interview potential consultants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Make recommendation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Decision made to delay the training until the</td>
<td></td>
<td>Due to: • Semester commitments • Staffing priorities • Internal vendor approval</td>
</tr>
<tr>
<td>following Spring</td>
<td></td>
<td>process • Weather...</td>
</tr>
<tr>
<td>• Develop training content</td>
<td>3 months</td>
<td>3 months • Testing the training • Training the trainers</td>
</tr>
<tr>
<td>• Implement training</td>
<td>3 months</td>
<td>4 months • Complex scheduling</td>
</tr>
<tr>
<td>• Estimated vs. Actual Time</td>
<td>13 months</td>
<td>• 19 ½ + delay</td>
</tr>
</tbody>
</table>
Logistics

• Two Sessions
  • 3-4 hours each
  • 3-4 trainers for each session – leading and floating
  • Each session offered multiple times
  • Mixture of support & professional staff as trainers

• Content
  • Mixture of activities to increase engagement
    • Large group, small group, individual work, poster boards, post-its, role play, video clips, audio clip

• Prep work & assessment
  • Homework before each session
  • Pre & post workshop surveys
Pre-workshop activity

entice book appt. and fill out forms online
enter quickly review forms at check-in
engage check-up with doctor and lab tests
exit review rec’s with nurse
Extend emailed reminder for next appt.

Image from brightspot, August 2015 / 5E’s framework by Conifer Research
What is great service?

Reflecting on a personal experience where you were a user and interacted with a staff member (either in person or online): (1) Discuss what made for a great service experience in each box, then (2) look across the 5 E’s and distill some general principles for providing great service.

1. What made for a positive or negative service experience?

<table>
<thead>
<tr>
<th>Phase</th>
<th>Positive</th>
<th>Negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entice</td>
<td>Piques interest</td>
<td>Too obtrusive</td>
</tr>
<tr>
<td>Enter</td>
<td>Clear directions</td>
<td>Confusion re: who to ask: unavailable</td>
</tr>
<tr>
<td>Engage</td>
<td>Taking personal interest to understand need</td>
<td>&quot;I can’t help you&quot;</td>
</tr>
<tr>
<td>Exit</td>
<td>Affirmation need met</td>
<td>Not scripted</td>
</tr>
<tr>
<td>Extend</td>
<td>Personal follow-up</td>
<td>Formula follow-up online survey that appears to be end in itself</td>
</tr>
</tbody>
</table>

(2) Looking across the E’s, what might be some guiding principles for providing great service?
- Acknowledge users when they enter.
- Assessment of needs and learning style.
- Engaged, personal (smile).

Non formulaic
Role-playing

Scenario:
A graduate student would like to check out a book, but has found that it's already checked out. S/he wants to know who has checked it out.

Your challenge is to explain that borrowing records are confidential to protect all users and show them how to request what they want through BD, BLC or ILB.

From brightspot training, February 2015
Turnaround times activity
### The Service Philosophy

<table>
<thead>
<tr>
<th>Message</th>
<th>Personal Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>We know information and we know MIT.</td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>We have the services, content, and expertise to meet the needs of</td>
<td></td>
</tr>
<tr>
<td>individuals and MIT as a whole.</td>
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</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>We are here to support our users and maximize the productivity of our</td>
<td></td>
</tr>
<tr>
<td>community.</td>
<td></td>
</tr>
</tbody>
</table>

Activity created by brightspot, August 2015
Challenges

- Scheduling trainings around 90+ staff
- Buy-In
- Working with an outside vendor
- Finding space/rooms for training
- Budget constraints
- Opt-In
- Competing priorities
- Staff time investment
- Developing curriculum to address diverse needs
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Evaluation
Keys to our success

• Support
  • Must have solid support from administration and supervisors

• Time
  • Large time investment by staff who are on the teams

• Teams
  • Mixture of staff from all levels and areas of the organization is important

• Carry it forward
  • This cannot be a one-time only training or review of messages. Build it into the organizational culture and value the work it takes to do these tasks.
Participant feedback

• Confidence Levels
  • Higher in “engagement in a positive manner” and in “defusing an incident by referring or taking other action”
  • Less so in “referrals outside of their purview”

• General Comments
  • Sessions were engaging
  • Liked the new instruction methods we used
  • Staff liked meeting colleagues outside of their departments
  • Some questioned the relevancy to their own work

• Future Desires
  • Brown bags & other opportunities to practice what was learned
  • More training on referrals & conflict resolution

• Logistical feedback
  • Sessions were too long
  • More food
  • Define the audience and continue to make it mandatory
Overall Impressions

- Need for documentation
- Opportunity to share
- Humbled by scope of work we all do
- Training must be repeated
- Staff enjoyed talking to new people??
- Inconsistent practices/policies discovered
- More understanding of others work
- Humbled by scope of work we all do
RMS Projects

- #3 Referrals (new Quick Referral Form)
- #4 Synchronous Help (2\textsuperscript{nd} round of beta chat service)
- #5 Making Help More Contextual (recommendations shared to reach virtual users by embedding links to expertise)
- #6 Learn More About Untracked Interactions (results from desk study)
- #7 Increase Self-Service (re-casing DVDs, behind the desk collections, including reserves)
- #9 Reduce Barriers to Collections (60 day loans, auto-renew)