

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

Jerrie Bayer & Steve Llewellyn  
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

# LIVE DEMO

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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](#) Revised September 2010
- [Student Employment at the Libraries and the IADS Department](#) Revised September 2010

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



## IADS CUSTOMER SERVICE TRAINING PROJECT FINAL REPORT

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cepts  
able

# 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

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PROCEDURES**

[SEARCH](#) | [LOGIN](#)

**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](#)
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# 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

A man with glasses and a brown and white jacket stands in a library hallway. A thought bubble above him contains the text "Where do I find my course reading?". The background shows a library interior with a wooden reception desk, a "REFERENCE COLLECTION" sign, and a "CIRCULATION" sign. A rug with a logo is on the floor.


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



A man with glasses and a beard, wearing a blue and white plaid shirt, stands behind a dark green marble desk in a library. He is smiling and has his hands on a white computer keyboard. To his left is a large, beige CRT monitor. In the background, there are wooden bookshelves filled with books and papers. A thought bubble is positioned above his head, containing the text "Hello, how may I help you?".

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

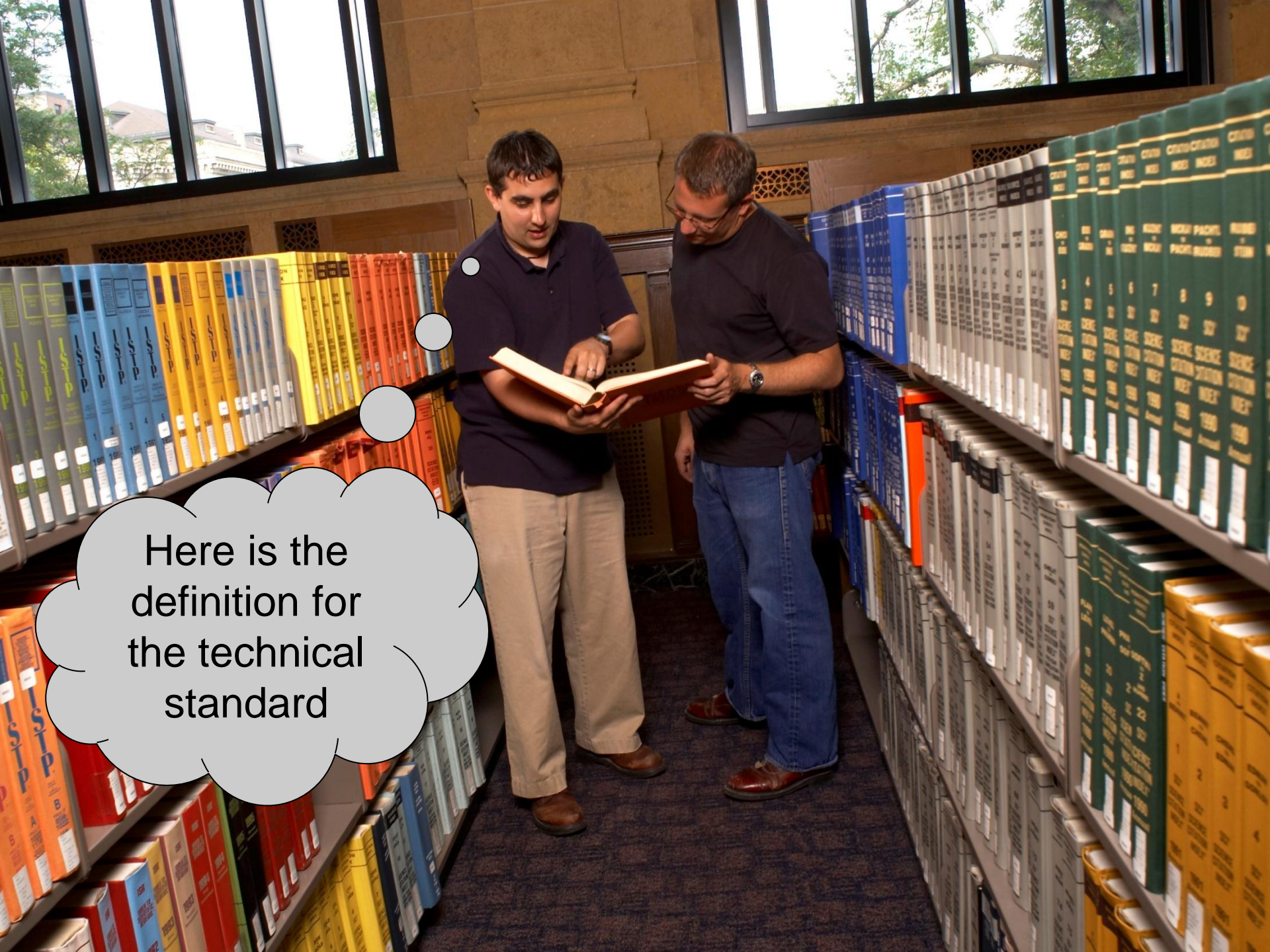


Push this button for two-sided copies

Ready to be Shelves  
Date: 11/11/10  
Time: 8:30 AM  
Name: [blank]  
Journal: [blank]

Synthesis, Functionalization and Surface Treatment of NANOPARTICLES  
Br  
P



A photograph of two men in a library. The man on the left, wearing a dark blue polo shirt and khaki pants, is holding an open book. The man on the right, wearing a black t-shirt and blue jeans, is looking at the book. They are standing in an aisle between tall bookshelves filled with books. The shelves are organized by color, with blue, yellow, and orange books on the left and green and white books on the right. Large windows are visible in the background, letting in natural light.

Here is the  
definition for  
the technical  
standard

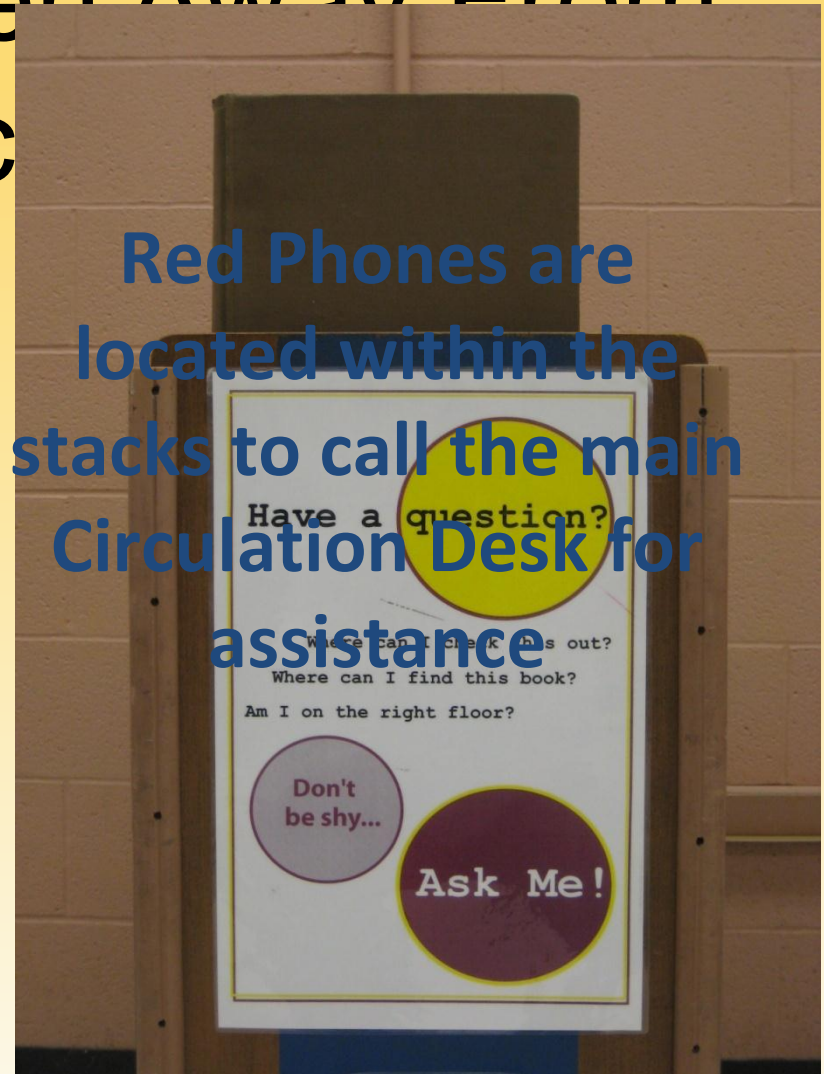


# Even Away From Service

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

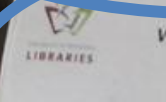
# Project Report:

## 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

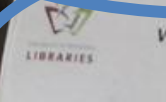
DESK ATTENDANT? PLEASE RING THE BELL FOR SERVICE.

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



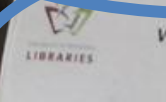
WELCOME TO  
WILSON LIBRARY  
ANNEX

PLEASE RING BELL FOR  
ASSISTANCE



WELCOME TO  
WILSON LIBRARY  
ANNEX

PLEASE RING BELL FOR  
ASSISTANCE



WELCOME TO  
WILSON LIBRARY  
ANNEX

PLEASE RING BELL FOR  
ASSISTANCE

ATTENTION WILSON ANNEX PATRONS:  
ON SATURDAY AUGUST 12<sup>TH</sup>, WE WILL NOT HAVE  
CIRCULATION CAPABILITIES IN THE

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ATTENTION WILSON ANNEX PATRONS:  
ON SATURDAY AUGUST 12<sup>TH</sup>, WE WILL NOT HAVE  
CIRCULATION CAPABILITIES IN THE

No food is permitted in the library.

No drink is permitted in the library.

No smoking is permitted in the library.

Why?

Because we want to keep library books and surroundings in good shape and safe for future users.

It is not allowed to bring in:

- Food and drink
- Smoking
- Firearms
- Flammable liquids
- Flammable solids
- Flammable gases
- Flammable dusts
- Flammable fumes
- Flammable vapors
- Flammable mists
- Flammable aerosols
- Flammable liquids
- Flammable solids
- Flammable gases
- Flammable dusts
- Flammable fumes
- Flammable vapors
- Flammable mists
- Flammable aerosols

Help preserve one of the largest libraries in the world!

[illegible][illegible]

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



MINNESOTA STATE POLICE  
UNIVERSITY OF MINNESOTA  
ST. PAUL, MN 55105  
1914

Attention Students & Staff:

**Theft Happens!**

- Protect Your Valuables
- Secure Your Space  
(Offices • Breakrooms Faculty • Lockers)
- Report All Suspicious Activity

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



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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





# 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  
Comments \_\_\_\_\_



Dissatisfied



Unsure



Satisfied



Very Satisfied

4. Did you find the library staff approachable?



Strongly Disagree  
Comments \_\_\_\_\_



Disagree



Unsure



Agree



Strongly Agree

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



Strongly Disagree  
Comments \_\_\_\_\_



Disagree



Unsure



Agree



Strongly Agree

6. Did you find the library staff helpful?



Strongly Disagree  
Comments \_\_\_\_\_



Disagree



Unsure



Agree



Strongly Agree

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



Strongly Disagree  
Comments \_\_\_\_\_



Disagree



Unsure



Agree



Strongly Agree

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



Strongly Disagree  
Comments \_\_\_\_\_



Disagree



Unsure



Agree



Strongly Agree

# Measuring Outcomes

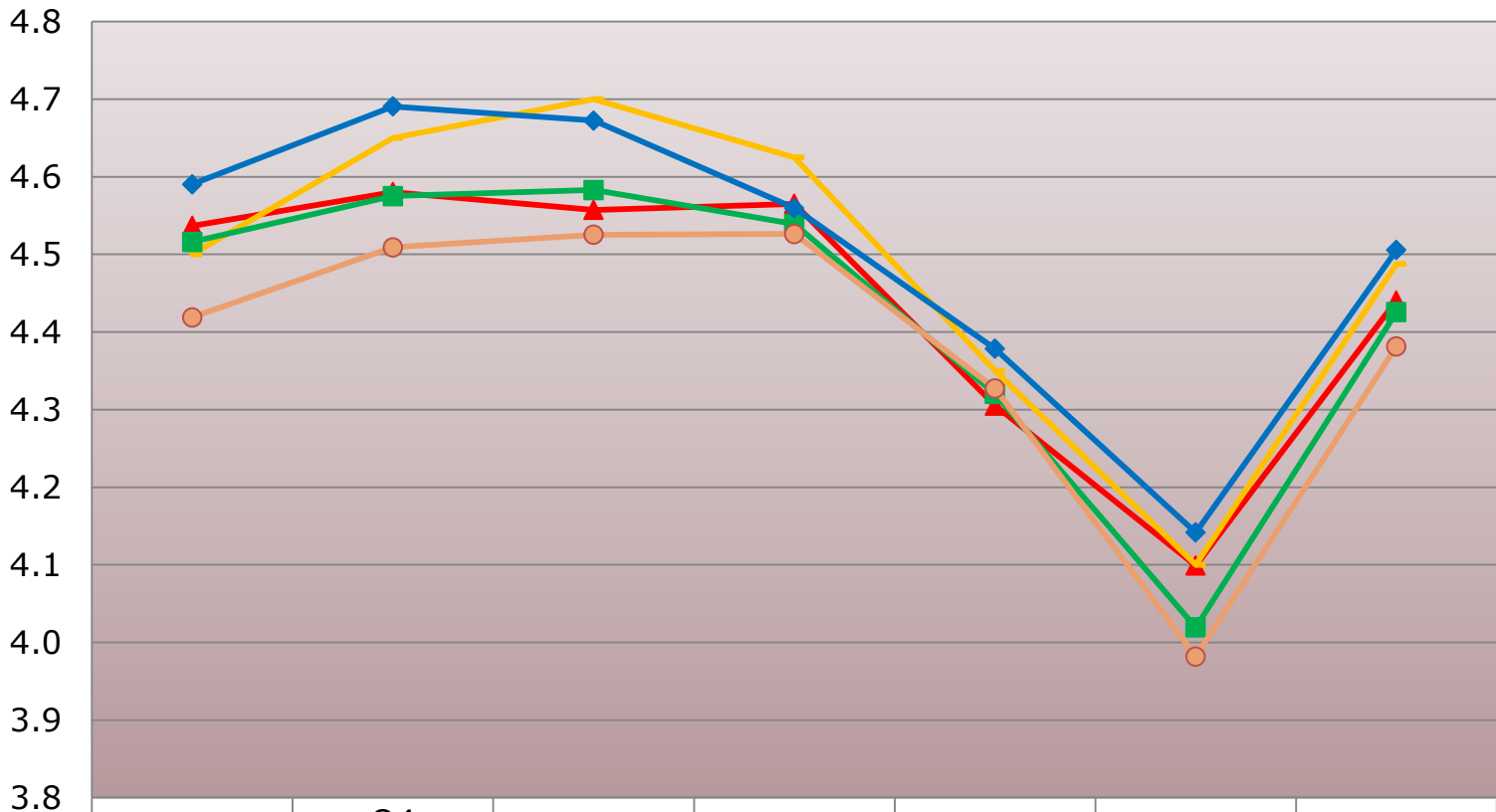
- Users are surveyed on a yearly basis
- Results are shared on a yearly basis



# Customer Service Survey - Spring 2010

Bio-Med, Magrath, Walter, Wilson Combined

1 = Low, 5 = High

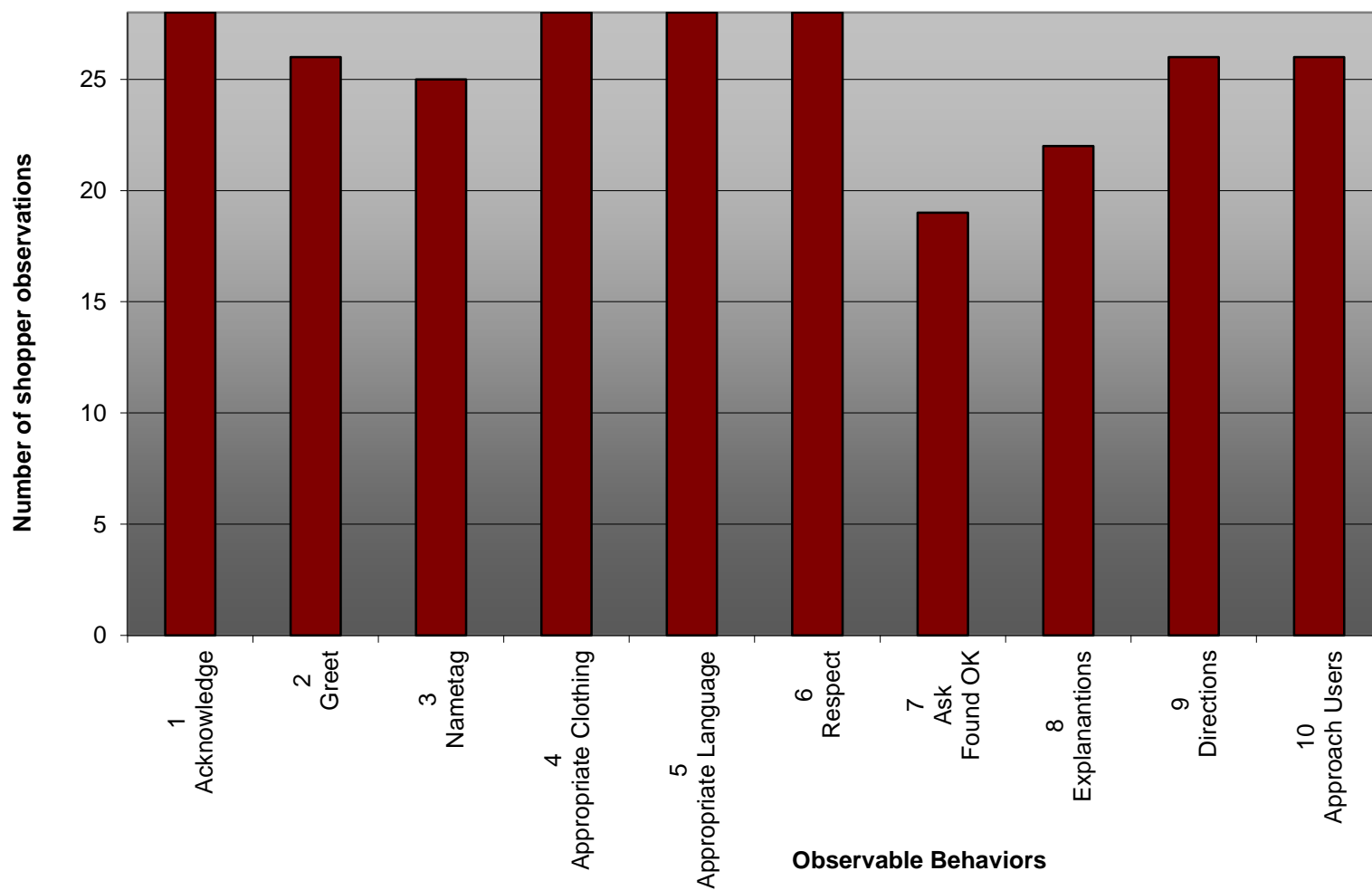


	Q3 Satisfied	Q4 Approach- able	Q5 Timely	Q6 Helpful	Q7 Referral	Q8 Signs	Library Average
2010 Overall	4.5	4.6	4.6	4.6	4.3	4.1	4.4
2009 Overall	4.5	4.7	4.7	4.6	4.4	4.1	4.5
2008 Overall	4.5	4.6	4.6	4.5	4.3	4.0	4.4
2007 Overall	4.6	4.7	4.7	4.6	4.4	4.1	4.5
2006 Overall	4.4	4.5	4.5	4.5	4.3	4.0	4.4

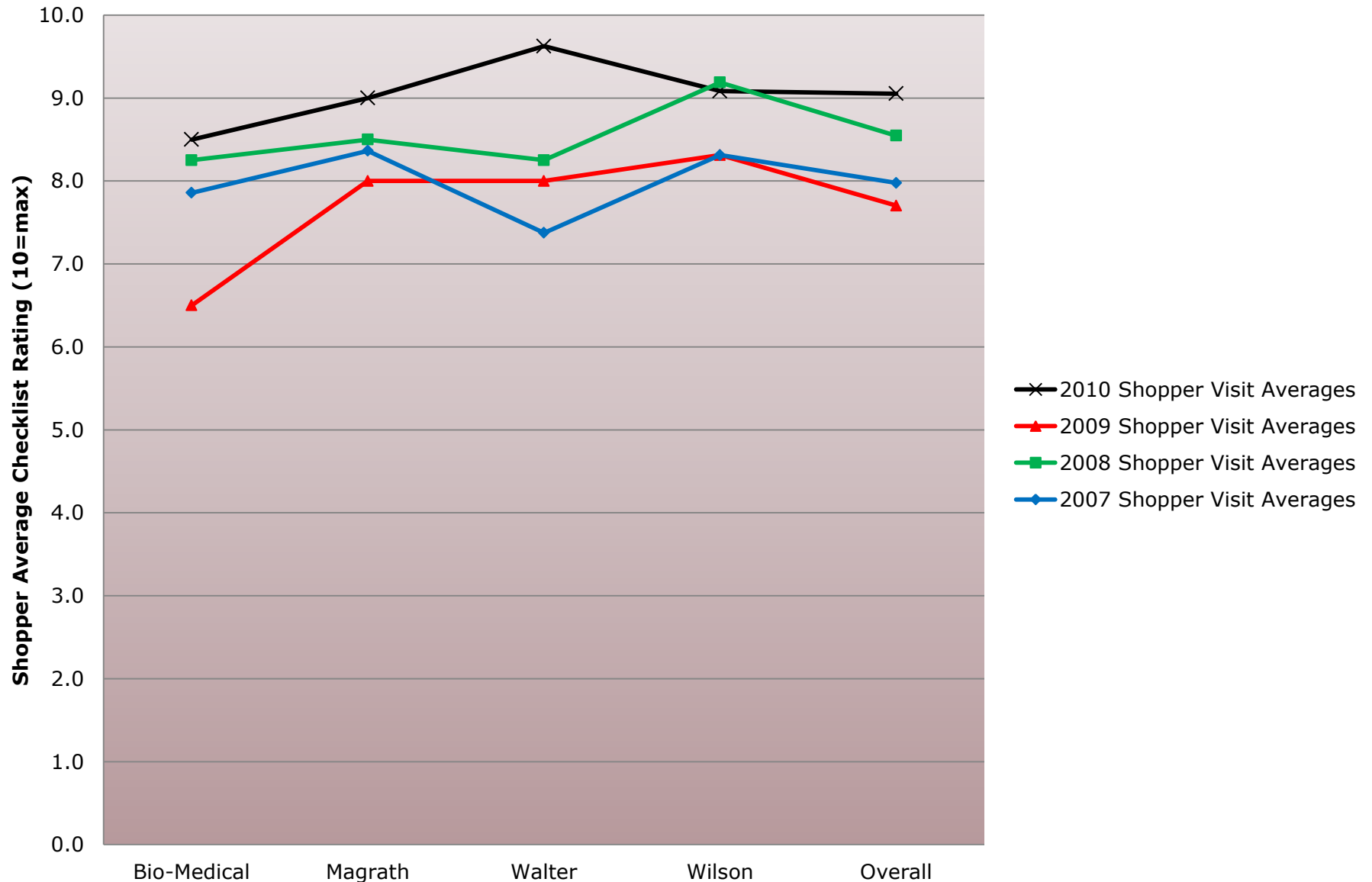
# Measuring Outcomes

- 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**



## 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

# LIVE DEMO

The screenshot shows a Mozilla Firefox browser window with the title bar 'Interactions with Users - Mozilla Firefox'. The address bar displays 'https://umconnect.umn.edu/interactions/'. The main content area shows a presentation slide titled 'IADS Customer Service Training' with the subtitle 'Section 2: Interactions with Users'. A large green arrow points to the bottom left of the slide. The presentation player at the bottom shows 'Slide 1 / 31 | Stopped' and a timer '00:06 / 00:19'. A sidebar on the right titled 'Interactions with Users' contains a table of contents.

Outline	Thumb	Notes	Search
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

# 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
  - Jerrie Bayer, [j-baye@umn.edu](mailto:j-baye@umn.edu)
  - Steve Llewellyn, [llewell@umn.edu](mailto:llewell@umn.edu)

# Questions?

