Help Me Help You Libraries

Framework for Change in Customer Service

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Introduction

The Help Me Help You (HMHY) Libraries team tackled the topic of customer service in libraries due to their own experiences as well as the input from other colleagues and library professionals on the topic. The general experiences and insight gathered were that customer service within the libraries was inconsistent; not only between different libraries but within the institutions themselves. Due to the varying and flexible nature of libraries, their services, and their customers (or patrons–the terms used throughout this document interchangeably), the HMHY team believes addressing customer service consistency and quality may be best accomplished by developing a solution from within rather than applying anything from without.

The HMHY framework focuses on developing customer service principles within the library. It involves the whole library staff in developing, applying, maintaining, and improving those principles, and it depends on administrative investment in long-term success. The team approached customer service with the belief that it is not a set of lines to say or rote procedures that are delivered from the top down but, instead, a mindset that can guide all aspects of work in the library. From patron interactions to cataloging materials to cleaning the building, a customer service mindset can guide staff to successfully meeting customer needs. Through discussions and conceptualizations that involved working with a library's own particular goals and circumstances, the team developed the HMHY framework for change in customer service.

This framework works with what the library already has with regard to outreach, services, programs, staffing, etc. and does not attempt to address the need for any change or development in those areas. However, the team believes a need for change or adjustment may be discerned through the process of applying this framework within the library and a library's customer service team would benefit from considering these factors as it takes feedback from staff and works to support them in achieving the library's customer service goals.

While presented as a conceptual framework, not yet fully tested or applied, it consists of elements that team members have either tried in their workplace with success or have developed with realistic application in mind, using their own libraries as examples. The team hopes this framework proves useful, either in part or as a whole, and welcomes feedback from any library that considers it.

Build a Customer Service Team

A foundational piece of the HMHY framework is the customer service team, which exists to lead and coordinate the work, facilitate library-wide collaboration, and keep the work going. Ideally, the team should consist of staff from as many different areas of the library as possible. Importantly, the team should consist not just of administration and managers who are leaders by a matter of their position in the library, but also include staff who lead through their work and relationships with other staff. Some more factors to consider when selecting team members:

- Staff with an interest in the topic of customer service–those who think it is important.

- Staff with time and ability to engage in the team (this may mean providing more work hours if necessary and/or possible). Don't make this "one more thing" for already overloaded staff.
- Staff who have the potential to be engaged in this process on a long-term basis.

Once the team is formed, the work can begin. As many library staff know, sometimes committees and teams are formed with great intentions but the work ends up going "nowhere." To avoid this, it is helpful to consider milestones and develop timeline goals very early in the process. Any timeline is likely to change, but plotting things on the calendar may help keep the process moving.

Identify the Baseline of Customer Service in the Library

As the library's team gets started with working towards customer service improvement, it is helpful to determine the "baseline" within the specific library. To make this determination, the customer service team should reach out to their staff as well as consider reaching out to their customers/patrons in order to find out what they feel about the state of customer service in the library.

With regard to staff, the team should utilize whatever method or methods of information gathering that best suits their library and they may find that using multiple gets the clearest picture. Methods to consider include: questionnaires, group or individual discussions, process audits, and more. The HMHY team believes no one method is better than another and that multiple may be used in complementary fashion.

Questionnaires are helpful particularly when staffing schedules make it difficult to meet, when quantifiable questions are posed, to allow staff to weigh in anonymously, to allow for more time in answering, etc. Questionnaires are ideally easy to complete and not too lengthy to encourage accuracy and completion.The HMHY team has provided a questionnaire example in this document that could be adapted for digital or printed use and that may also be adaptable as a starting point for in-person discussions.

Benefits of discussions include the fluidity of the information gathering session, with a facilitator able to meaningfully guide discussion and draw out information that might otherwise not be captured through other means. Conversations and discussions may be particularly useful in this case as the phrase "customer service" can be constraining for some individuals with preconceived ideas of what that means. In a library, "customer service" can mean many things and extend into areas and processes that individuals may not think of when asked a question such as "what is customer service in the library?"

Sometimes, group discussions can lead to more information than individual conversations would, as people may build on one another's thoughts and ideas. However, some individuals are not comfortable sharing thoughts and ideas in a group setting, either due to personal reasons or due to a workplace culture that makes them feel "unsafe" to share.

Individual conversations can be helpful if a staff member is uncomfortable sharing thoughts and ideas in a group.

Throughout this process, keep in mind there are likely areas in which the library is already providing good customer service and has good approaches that can be built upon, and these deserve to be named. Complaints and negative talk tend to surface more quickly than compliments and positive talk, so it can be easy for a discussion to drift toward what is wrong. Intentionally asking about and focusing on the positive lets everyone know that it isn't all bad, and strengths identified at this stage can become examples to share with other departments.

Identify Areas of Service in the Library

Once the team has a sense of the baseline, it can turn to mapping what the library actually does. As noted earlier, customer service in a library extends well beyond the service desk, and a full picture of the areas where service takes place helps ensure the principles developed in the next step apply to all of them. As people who work in libraries know, the actual, day to day work for a staff member is often difficult to capture in a job description so an intentional look at the work done in the library can be useful. Some questions to consider include:

- What do we do here at the library?
- What services do we offer?
- What functions do our staff conduct in order to do their work?
- What spaces do we provide?
- Tell me about what you do on a typical day.
- What do you think the most important part of your job is?
- What is something you do regularly that might surprise non-library people?
- What is one of the most difficult things you do at work?
- Can you think of something you do at work that makes patrons particularly happy?

Answers to these questions may come from the staff conversations already held, as well as from existing materials such as service lists, program calendars, and the library's website. The team can organize what it finds in whatever way is most useful, such as a simple list or chart grouped by department, service, or space. The aim is to make sure that areas that are easy to overlook, such as technical services, buildings and grounds, and other behind the scenes work, are included. Consistent with the rest of this framework, this is an exercise in understanding what the library already offers and not in deciding what it should add or remove.

Process audits can also provide insight into how things are done at the library. These can be as simple as a staff member from a different department shadowing another staff member as they go about their work, asking questions and gathering observations. As with any method, the library's customer service team should do their best to gauge whether or not this method will be useful and welcome for their staff or perceived as punitive or received with suspicion. Throughout the process, it will be easiest to make progress when there is buy-in and trust.

Develop the Library's Customer Service Principles

The library's customer service principles are its shared answer to the question of what it promises its patrons and how staff act on that promise. They should reflect the library itself rather than something brought in from elsewhere. Most libraries have already put a great deal of thought into who they serve and what they hope to accomplish for their communities, so the team's first step is to look at what is already there in the library's guiding documents. Consider:

- Mission Statement
- Vision Statement
- Long Range Strategic Plan
- Policies
- Anything else that is relevant

Take these items as a team and draw out the important themes and promises or goals to the community. How do those translate into intentions and principles?

To illustrate, a mission statement that speaks of welcoming everyone in the community might lead to a principle such as "Every patron made to feel welcome, whatever their reason for coming in." A policy on equitable access might lead to a principle such as "We explain the reasons behind our rules and look for ways to help." These are examples only; each library's principles will, and should, look different. Principles tend to be most useful when there are few enough to remember, when they are written in plain language, and when they describe an attitude or intention rather than a script. The team may wish to draft the principles and share them with staff for feedback before they are considered final, as the next step depends on staff seeing themselves in them.

Engage Staff in Applying the Principles

Principles on paper do little unless staff can see how they apply to their own work. This step is about taking the principles from the conceptual to the practical. The team should use what it learned from staff about what they do in the library and come up with ideas for applications of the principles. Think through the principles and job functions, services, etc and apply them in examples and procedures if applicable. The goal will not be to cover every single thing at the library at this point, but instead to apply the principles to areas in which staff can tangibly act on them.

Staff should ideally have the chance to provide feedback or input into these applications, as well. Discussions may be held with departments, teams, or individuals and should include staff who do not work directly with patrons; technical services staff, a custodian, and a children's librarian may each see a principle very differently. The goal is for each group to provide feedback on what the team has already developed and, if possible, describe what a principle "looks" like for themselves. Whether that is how a phone call is answered, how a record is created so patrons can find what they are looking for, or how a space is kept ready for the day. Examples gathered can be shared across the library so staff can learn from one another.

The team should also listen for and provide means of feedback regarding obstacles, such as time, training, or tools, that make it difficult to apply a principle. These will be important in the maintenance step and may point to the areas of change or adjustment mentioned in the introduction.

Develop a Plan for Continued Engagement and Maintenance

Continued Engagement

Even a well-developed set of principles and intentions can fade if they are not kept in front of staff. There are many ways to keep customer service present in the everyday work of the library, however, the HMHY team believes accountability is the foundation. Accountability should come from the top and extend throughout the library. Leadership and administration should model and visibly support the principles, and every staff member, regardless of position, shares responsibility for them. One way to make this concrete is to integrate elements of the customer service principles and developed procedures or actions into the organization's performance reviews, or other goal setting modes, identifying areas and opportunities for growth while acknowledging areas of success.

Accountability also works laterally. Peer to peer empowerment and responsibility "in the moment" can keep goals and principles top of mind and present in everyday work, so staff should feel comfortable, and be encouraged, to gently remind one another of the principles and to recognize one another when they are met. Mentor moments after good and bad interactions can support this: these are brief, informal conversations in which a colleague or supervisor talks through what happened, what went well, and what might be done differently next time.

Positive feedback is motivating and can demonstrate accountability as a result of actions—staff are unlikely to get positive feedback from bad service. Consider making a place to capture positive feedback from patrons and peers. This could be a bulletin board, shoutouts through team chats, or a standing item at meetings, and it serves as a good reminder of why the work matters.

Maintenance

The HMHY framework is not a one-time project. As the library, its patrons, and its staff change, the principles and the ways staff apply them may need to change as well.

To keep the work current, the customer service team should periodically come back together to review how the process is going as a whole. An annual review may be a good starting point, with a lighter check-in once or twice in between if the library is early in the work. Whatever schedule is chosen, plot it on the calendar so that it happens.

Each review is a chance to discuss lessons learned: what has worked, what has not, and what has been surprising. From there, the team can decide what to adjust, being honest about

what is realistic and what is not given the library's staffing, budget, and schedule. The team should also consider how to support staff as they try to implement the principles, since training, time, and clear ways to raise obstacles or concerns may all help.

The staff and patron surveys may be repeated at regular intervals to compare against the baseline. The team should also consider bringing in new members over time so the work stays fresh and does not depend on one or two people.

Finally, staff need the means to succeed. The library should provide de-escalation training, general customer service training, user experience training and whatever other resources or training necessary to make sure staff have the skills needed to do their work and accomplish library goals. Asking staff to meet a standard without giving them the tools to do so is unlikely to work. This is a prominent area in which library leadership and administration buy-in shows. Tangible support, including time, resources, and participation, is vital for success.

Example Surveys

Staff Survey

- Staff Customer Service Survey

Patron Survey

- Patron Customer Service Survey

References and Resources

References and Resources that helped the HMHY Team

Human Centered Design Thinking

"What Is Human-Centered Design? Definition & Process." *Syracuse University School of Information Studies*, ischool.syracuse.edu/what-is-human-centered-design/.

Customer Service

Dowd, Nancy. "Ideas from Customer Service Is the New Marketing Conference." *The M Word-Marketing Libraries*, 6 Feb. 2008, themwordblog.blogspot.com/2008/02/ideas-from-customer-service-is-new.html.

Koontz, Christie. "Customer-Based Marketing: Stores and Libraries: Both Serve Customers!" *Marketing Library Services*, vol. 16, no. 1, Jan.-Feb. 2002, www.infotoday.com/mls/jan02/koontz.htm.

Schachter, Debbie. "Customer Service Planning Is Essential to Developing Info Center Procedures: Your Staff Needs to Know How to Work with Clients, and Your Clients Need to Know What to Expect." *Information Outlook*, vol. 11, no. 6, June 2007, pp. 88+. *Gale Academic OneFile*, link.gale.com/apps/doc/A165167296/AONE?u=nysl_me_wls&sid=bookmark-AONE&xid=667426cf.

---. "The True Value of Customer Service." *Information Outlook*, vol. 10, no. 8, Aug. 2006, pp. 8+. *Gale Academic OneFile*, link.gale.com/apps/doc/A151397369/AONE?u=nysl_me_wls&sid=bookmark-AONE&xid=a6584f1c.

Wehmeyer, S., et al. "Saying What We Will Do, and Doing What We Say: Implementing a Customer Service Plan." *Journal of Academic Librarianship*, vol. 2Customer-Based Marketing: Stores and Libraries: Both Serve Customers!2, no. 3, 1996, p. 173, corescholar.libraries.wright.edu/ul_pub/155.

Training Links and Resources

De-escalation

- **HomelessTraining**

    - https://homelesstraining.com/free-training-101

Communication

- **Webinar: Strengthening Your Communication Skills**
    - https://www.nicheacademy.com/blog/strengthening-your-communication-skills

User Experience (UX)

- User Experience in the Library, A Routledge Free Book
    - https://www.routledge.com/rsc/downloads/FreeBook_User_Experience_in_The_Library.pdf
- UX in Libraries
    - https://uxlib.org/

EXAMPLE:
Customer Service Guide 2026
Empire Public Library

Established January

Members

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Mission Statement

To provide equal access to materials, programs, and services that enrich, connect, and inspire our community for lifelong learning, cultural enrichment, and enjoyment.

Customer Service Principles

1) Have consistency
2) Connect patrons with the resources and materials to “do life things”
3) Make sure a patron never leaves without some sort of solution provided, need met, or referral given
4) Be a reliable source of help and knowledge
5) Be inclusive and welcoming
6) Stay inquisitive
7) Be responsive to and reflective of the community’s evolving needs
8) Create healthy expectations for interactions between staff and patrons

Timeline

January

-Create Task Force

-Start "initial" guide

-Identify ideal goals and timeline

-Connect with management for future for support

-Review library's mission/vision statements

-Create a proposed list of principles

February

-Create online surveys and in person questionnaires

-Send out staff and patron online surveys with deadline

-Plan 2 in person meetings

-Review data and align with initial proposals created in January

March

-Continue to align data with initial proposals created in January

-Move forward with a concrete guide

-Create the year's mission/vision statements and principles

-Establish the timeline

-Introduce the guide to staff via email AND in person meeting

April

-Begin to implement new protocols

-Check in with management end of the month for status updates

May/June/July

-Continue with monthly meetings

-Check-ins with management at the end of the month

-Leave communication open with staff with any updates/comments/questions

August

-Assess the strengths and weaknesses of the Customer Service guide with staff via in person meetings and online survey

-Evaluate findings and make necessary adjustments

-Communicate with staff all amendments

September/October/November

-Continue with monthly meetings

-Check-ins with management at the end of the month

-Leave communication open with staff for any updates/comments/questions

December

-Final reassessment of the year

-Note the successes, and areas that still need attention.

-Give out patron survey for year's evaluation

-Offer final comments from staff for the upcoming new guide

Implementation of Principles

1) Have consistency

a) All staff are following **building-wide** protocols. Including:

i) **No more guest passes:** Encouragement of library cards or internet card usage & signups to use computers. Refer patrons to the Circulation Desk for cards. Assure Reference Librarians and Pages are sending them that way and not issuing guest passes.

ii) **Program setup:** Librarians need to have program setup instructions noted in the system a week prior to the program date. Custodial in turns must set up earlier than the start time of the program, and likewise clean up the area afterwards.

iii) **The 4 Ws**: every staff member should be able to answer who/what/when/where of a program and/or event occurring in the library. Any further questions should be directed to the Reference Area.

b) All staff are following **departmenta**l protocols. Including:

i) **Reference**: During busy times, computer usage is limited to ½ hour increments. Time can be renewed if there are computers available for other patrons.

ii) **Circulation:** Staff are responsible for issuing library cards and discussing fines or book damage with patrons

iii) **Maintenance:** A maintenance ticket should be submitted for non-emergency needs; radio for immediate needs: room set-up or clean-up, bathroom supplies or emergencies

iv) **IT:** Any IT request must be submitted via email including printer/copier supplies

v) **Technical Services:** Patrons should be able to easily and predictably locate materials and understand their labels. Think about patrons, not library professionals, and their experience when devising or revising labeling practices. If labeling has been inconsistent, document and implement standards to create consistency and consider a long-term relabeling initiative.

2) Connect patrons with the resources and materials to “do life things”

a) **Printing/Copying/Faxing/Scanning**- Signage at printers, handouts with instructions to keep- all with the same message; staff talk through instructions first time and encourage patron to try the process

i) **Community Resources**- Page on website for patrons to access local resources: GPL'S Affirming Resources Page (the plus mark opens information to agencies

ii) **E-resources:** E-resources may be a good fit to meet some patron needs at the Empire Library. They are free, portable, and may provide a helpful alternative to print or in-person resources. Staff should be familiar with e-resource offerings at the library so they can easily refer patrons to them with some explanation or, at a minimum, refer patrons to another staff member to learn more.

3) Make sure a patron never leaves without some sort of solution provided, need met, or referral given

a) **Reinforcement of the 4 Ws protocol**

i) Beyond these answers, patrons need to be directed to the appropriate staff for certain questions, Reference Librarians as default.

b) **No more than 2**

i) A patron should not need to talk to more than 2 people to get an answer to a *general* question (excludes questions that only a specific staff member can answer). At this point, the second staff member to interact with the patron should take it upon themself to go and talk to others for further assistance. *No more hearing: "You're the fourth person I've talked to about this"* ***or*** *"They keep transferring me!"*

c) **Avoid nonanswers**

i) -Never leave a patron with "I don't know, sorry" or similar statements. Give a patron something tangible to walk away with, such as the contact info for an outside source that can help with the situation.

9) Be a reliable source of help and knowledge

a) **Teach not tell**

i) Instead of doing tasks for a patron, guide the patron to do it themselves, teaching the process rather than telling.

b) **Refer to sources**

i) Give patrons the source of your answer. This provides validity and also allows them to refer to it on their own for further research. If possible, also provide other possible sources for the topic.

ii) **Maintain a high level of information literacy and source evaluation:** Ensure that library staff are maintaining a high

standard for the information they provide patrons. Ensure that staff know how to evaluate sources, are provided training and resources for emerging technologies or trends that may impact information gathering, etc.

10) Be inclusive and welcoming

a) **It's all about Access**

i) Getting material and services to patrons: Refers back to the 4 W's and avoiding nonanswers. If there is information our library does not have access to, we should be able to refer them to another establishment that does.

(1) Librarians: ILLs should also be suggested should a title not be in the catalogue.

b) **Consider the spaces:** Ensure that public spaces are inclusive and welcoming to patrons. Consider cleanliness, layout, noise, light, safety, etc. Don't get "stuck" and be open to change. Adjust spaces when possible to meet the needs and habits of patrons over time. Create separate areas for different activities or noise levels as needed to ensure there is a "space to be" for everyone. Prioritize cleaning and organization of heavily used spaces.

11) Stay inquisitive

a) **Use Reference Interview for Answers**

i) Assist patrons with asking questions to meet their needs. We don't know everything, but we can help narrow the scope of general questions to meet the needs of the patron. Refers back to Principle 3.

b) **Continue to educate yourself**

i) Attend conferences & trainings: All staff should attend at least <u>two</u> trainings a month (virtual or in-person) and have notes to report back to the department (department head's discretion how this information should be distributed and/or implemented).

ii) Read outside of your genre: We don't have to know every book in the collection, but striking up conversations with patrons or giving advice helps foster relationships and show our knowledge.

iii) Familiarize yourself with NoveList, Fantastic Fiction, other online offerings to assist with read-alikes, suggestions, & recommendations.

iv) Read journals & publications: keep up to date with the latest trends in your department and working in libraries in general.

c) **Be curious about observed habits**
    i) If you clean the building and find that garbage always gets left in a certain area, think about why and/or how you can positively affect the situation. Does the trashcan need to be moved? Another added? An object or activity moved near in order to change the dynamic in that area?
    ii) If you work at a service desk and notice a service or resource being increasingly requested, be curious: ask questions if appropriate, research when possible, and see what you can find out about this need to make sure the library can best meet demand.
    iii) Leaders and department heads should encourage this practice through modeling, discussion, and receptiveness to consider feedback and ideas.

12) Be responsive to and reflective of the community's evolving needs.

a) As a Department
    i) Department meetings should include brief (or more extended time depending on the topic) conversations regarding local events and patron behavior.
    ii) Comments, positive or negative, given to any staff should be passed off to the department head. The staff member themself can handle it (if possible and appropriate) but it should still be reported in case it is an issue that keeps occurring (or a compliment on the great work you're doing!).

b) **As a Staff Member of the Library**
    i) Always have a group ready to attend local events with tabling and library materials (or have a rotation of staff/volunteers).
    ii) Communication is key. While it is important to have open lines with your department, some conversations go beyond that to other members of the staff. If the topic affects more than your department, refer to your Head or other management on how to proceed.

13) Create healthy expectations for interactions between staff and patrons.

a) **Patron Relations is Important for all Staff**
    i) Always be friendly and respectful. We should have positive attitudes when interacting with patrons.

ii) However, if a patron is being inappropriate or disrespectful, staff should not escalate the conversation. Protect your own boundaries and walking away is the easiest option if the patron persists. The staff member should find a colleague or management to help with the matter at that point (or security if the situation calls for it).

iii) Do not “shrug off” a question if it does not pertain to you. Refer to the 4 W’s protocol and the No More Than Two protocol in Principle 3.

iv) If a patron makes a comment that another staff member has spoken to them inappropriately or disrespectfully, please bring the matter to your Department Head.

v) If Department Heads are noticing a recurring comment/critique from patrons (which falls under Customer Service), please also notify the Customer Service Team. It could possibly be connected to other departments or is showing a fault (or lack of attention) to Customer Service protocols.

b) **Staff are here to help you and to help you learn**

i) While some things require staff assistance, other things can be taught to patrons so they can help themselves. This can empower patrons and lessen the burden on staff for tasks that don’t *need* library staff to accomplish. Think of printing, basic ILS searches, navigating the stacks, etc. Consider phrases such as “let’s go take a look, together” or “I’d be happy to show you how to do that” and explain, when appropriate, how you are approaching a problem so patrons can be empowered for the future. Leave the door open for patrons to seek assistance: “please let me know if you need any help!”