

Customer Service Excellence (CSE) in Library Services, Queen's University Belfast



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Introduction

When Queen's won the SCONUL Library Design Award in 2013 it marked the end of our first four years of service delivery in the new McClay Library – effectively, the end of the beginning. During this period, we had developed the service in a number of ways in response to increased levels of usage and feedback from our customers. Seeking external accreditation for the quality of our customer service seemed a logical next step and we were attracted to CSE because of the clear focus on the customer and the fact that a number of other higher education libraries in the UK had gone down the same route. Other standards and awards were considered briefly but were never very serious contenders.

Getting started

In terms of getting started on CSE, our first step was to select our assessment centre, which we did by reviewing the options and inviting a couple of local representatives to speak to library staff. Ultimately, we selected G4S – largely because they offer an online system for collating and storing evidence and justification statements. We felt that this would avoid the need for paper records, help us to monitor our progress and generally be an efficient way to work. Overall, this has proven to be the case despite the inevitable niggles with the system itself and a couple of false starts in terms of adding our evidence in a consistent way.

The next step was to identify how the project would be carried forward, which staff would be involved and what structures we needed to put in place to monitor progress, make decisions, etc. We spoke to colleagues in several other institutions at this point and then tried to marry their advice with local requirements. One piece of good advice we received was the importance of the management team being closely involved in the process, so library managers undertook evidence collection for criterion 2, which is all about the culture of the organisation, and this worked quite well.

We then selected team leaders for each of the other criteria – these staff were assistant librarians from a range of service areas. The team leaders were not press-ganged but nor did we leave it to the vagaries of volunteering! We sought volunteers from library staff generally to work with each of the team leaders, and over twenty came forward to help. These staff were then assigned to one of the four teams, based on their background and skills, in an attempt to get a good mix in each team. In the event, through no fault of the staff members involved, this worked less well than some other aspects of the project, as some of the teams struggled to identify appropriate evidence in the early stages; we found that much of this needed to be done by more senior staff with a good overview of policies and procedures across the library.

In order to manage the project, our management team plus the CSE team leaders constituted the CSE project group and we met regularly throughout the 18-month period between initiation and our assessment visit. While there will be many ways of achieving the same end result, we found it beneficial to meet monthly, set targets and review our approaches together on a regular basis.

Ten months to pre-assessment

Working towards the standard and evidence collection was initially quite daunting in terms of both scale and complexity, and we struggled to make headway in the early stages. However, an early approach was to focus on areas of strength and weakness – 'It's good and it's a gap' – to identify what we had already done that would serve us well and areas where there were gaps / issues to address. We then set about creating the 'building blocks' that would go towards filling these gaps – creating policy documents or putting key procedures in place where these did not exist already. While we did this, we set

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actual evidence collection aside. This worked well as we could see the progress we were making and the gap areas diminishing. During the 10-month period leading up to our pre-assessment in summer 2014, we

- produced a 'mission statement' and 'values' document to demonstrate how our service focuses on the needs of the customer;
- produced a comprehensive 'communication strategy' addressing all forms of interaction with our customers;
- formalised our feedback and complaints procedures and made them more accessible;
- carried out a number of surveys;
- created a CSE website to handle feedback from both customers and library staff and as a vehicle for managing the relevant policy documents and making them available to everyone;
- began using some new consultation methods such as 'customer journey mapping' (CJM) which is a way of capturing every aspect of the customer's experience of using our service, including the emotional responses provoked. This helps us to identify weaknesses in the service and take remedial action.
- created an electronic staff handbook to make sure that staff have ready access to all the support and policy documents we have produced;
- arranged customer service training for front-line staff to help them to deal with difficult situations.

Pre-assessment to full assessment (eight months)

By summer 2014, after working towards the standard for 9–10 months, we went forward for pre-assessment in the optimistic belief that we were pretty close to meeting the requirements in most areas. However, the pre-assessment proved to be a rather dispiriting exercise as we realised that we had not really interpreted criterion 4 and criterion 5 correctly. Both rely very heavily on having appropriate standards of service in place as well as robust monitoring and benchmarking systems for each. While we already had standards of service, there were critical areas such as 'satisfaction' where we had no specific standard and had not measured our performance in any scientific way before – relying instead on the NSS and other institutional satisfaction surveys. While we carried out regular consultation exercises, these tended to be closely focused on what we might or might not do to develop a particular service as opposed to satisfaction with the library and whether users found staff friendly, helpful and knowledgeable or not. While we had many examples of ad hoc praise for staff from library users, we did not ask customers regularly about levels of satisfaction and so had no real data to present here.

In the subsequent eight-month period prior to our full assessment in March 2015, we

- produced new standards of service in consultation with our customers, set up procedures to measure our performance against each of these on a regular basis and published the outcomes on our website for the first time;
- carried out a customer satisfaction survey which we plan to repeat annually to monitor ongoing performance.

We also completed evidence gathering. The pre-assessment, while rather disheartening, did crystallise our understanding of the CSE standard and we embarked on the latter stages of evidence gathering with a much clearer picture of what is required.

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Assessment visit & accreditation

By January 2015 we were ready for assessment and our two-day visit was arranged for early March. The first day was devoted to presentation of the evidence and the second to the assessor meeting customers, partners, stakeholders and library staff. We put a lot of effort into setting up a number of meetings and opportunities for the assessor to speak to a range of groups on the second day. While this went very well, we probably made the schedule unduly demanding (for us and the assessor), and a more leisurely opportunity for in-depth discussion with a smaller number of customers and partners would probably have been better for everyone. While by the time the assessment arrived we were very confident about the quality of our evidence, it remains a stressful experience for the staff involved and it was great to have the extent of our success announced to the entire CSE project team at the end of the second day. While we still discuss our one 'partial compliance' with a little mild resentment, overall, we were delighted with the outcome and felt that all the hard work was fully justified.

Next steps

Following our assessment visit, the assessor concluded that we had successfully achieved compliance against 49 (out of 57) criteria, 'compliance plus' against seven criteria and partial compliance against only one criterion. This represents a high level of achievement, and the assessor was particularly impressed with the extent of staff engagement and involvement, with the variety and number of surveys we had conducted and with the quality of our systems in terms of sharing data and avoiding the need for customers to intervene to ensure that the library has relevant information about them (e.g. the fact that they have dyslexia, which enhances their borrowing entitlement).

We now have our CSE certificate proudly on display in every branch library, we have the CSE logo on the library website, in library staff e-mail signatures and on our social media banners and have started to think about next steps. Moving forward towards the first year's rolling programme (a partial assessment based on presenting evidence against one third of the elements in the standard), we have decided to keep most of the same structures in place. However, the individual criterion teams will not continue to operate; instead, we will rely on the team leaders updating the evidence and on setting up ad hoc working groups involving a wider group of staff as necessary.

Our priorities are to consider working with a standing student engagement group, to further develop our use of CJMs, to consolidate our data-gathering in support of our standards of service and to continue the work of embedding CSE culture with staff across the library.