

# UCL Main & Science Libraries

Serving customers  
at the point of  
need

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## Introduction

As with any service organisation, libraries need to understand and engage with their customers in order to meet their needs or, indeed, surpass expectations. As an academic library service, UCL Library Services serves the mission of the university.

'The primary determinant of a truly exceptional student experience is the quality of the interaction between academic staff and students' (<http://www.ucl.ac.uk/ucl-2034/key-enablers/students>).

This statement is an excerpt from UCL 2034, the institutional strategy outlining the 20-year vision for the university. This paper illustrates how UCL Library Services is developing the quality of interaction between library staff and users as the defining feature of an excellent user experience. One of UCL's objectives under the UCL 2034 Key Enabler entitled 'Giving our students the best support, facilities and opportunities' is to 'provide high-quality student services that... enable students to focus on their studies and so maximise... achievement'. The same Key Enabler prioritises 'use of technology to support learning, with a primary focus on students on campus'.

In response to UCL 2034, UCL Library Services launched a new Library Strategy for 2015–18, with objectives aligned to the priorities in the institutional strategy. Our first of six Key Performance Areas is focused on User Experience (<https://www.ucl.ac.uk/library/about/strategy/ue>), with 'User' rather than 'Student' experience reflecting the diverse user base of UCL's eighteen libraries, which serve not only UCL staff and students but also NHS and external communities of users. As part of our commitment to improving our services, we are rolling out RFID self-service across all libraries at UCL by October 2016. This in turn is releasing staff time formerly devoted to circulation transactions and enabling a transformation of our staffed services towards more customer-focused high-quality interactions.

Over the past few years there has been a change in student expectation and a need for academic libraries to provide value for money: 'This is becoming ever more important in a market place increasingly driven by fees, graduate contributions and the rising expectations that come with higher payments and student debt' (Young, 2011). At UCL, we have seen the need to change our customer focus, recognising that customers expect immediate answers to their enquiries; it has become clear that a 'one-stop shop' approach would be beneficial. In addition, UCL has an expanding global community that has an expectation of service that matches the best libraries from across the world. We have therefore developed a way of working that adopts the philosophy of 'serving the customer at the point of need'.

In 2014, UCL Library Services embarked on an ambitious three-year plan to install self-service in all libraries, replicating the equipment installed in the Science Library and Eastman Dental Library in 2009. Included in this initial phase was the UCL Main Library, one of the largest in the UCL family of libraries, and open 24 hours on weekdays, with over 5,000 visits per day at peak times of year. Before the self-service installation in the Main Library, customer services centred around a five-seat issue desk, with restrictive barriers and a queuing system. Staff spent large amounts of time stamping items in and out, which left little time or freedom for them to help customers where and when necessary and not enough opportunity to use their skills and knowledge to the full. The installation of self-service in the Main Library acted as a catalyst for reviewing the way we interacted with customers.

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## UCL Main Library: from a traditional issue desk to the 'meerkat approach' \_\_\_\_\_

During the summer of 2014, the Main Library issue desk space was replaced by three self-issue machines, a number of multifunctional devices (MFDs) enabling customers to print, copy and scan, a self-service collection point for reserved items and a separate self-service short loan collection. An automated returns unit in a separate room was also installed, with items sorted into material ready for shelving and exceptions. The team no longer had an issue desk and instead had two service points where customer queries could be dealt with. A project ensued to work out how to use the new space, focusing on staff responsibilities now that customers were able to carry out basic transactions by themselves. The work carried out was a genuine collaboration between managers and the team of assistants to determine new roles and working practices.

The team would still need to carry out advanced circulation enquiries, financial transactions, account queries, and the usual administrative tasks such as invoicing, missing books and claimed returns. However, they now had the opportunity to deal with more in-depth enquiries, troubleshooting MFD and laptop loan queries, location of material in the library, and 'anything else' that arose. The concept of answering enquiries on 'anything else' is important as staff now had the time and freedom to deal with any enquiry that came their way.



*New Main Library Help Point*

The team worked on customer journey mapping to see how customers naturally used the space, how they gravitated to different services available and what happened when they needed help from the team. Time was spent observing how the space was used at different times of day. Managers also spent time as prospective customers, finding natural pathways around the new furniture and facilities. This enabled the team to judge the best positions for staff to be visible and to ensure that they are always on hand to answer queries, without the customer having to search for help. From this observation and analysis, five new team roles were established (see below). Roles were

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numbered in order to distinguish them from one another, and to help create a clear rota.

### Description of roles

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**Role one** consisted of staff adopting a 'floating' approach, using one of the service points as a base, but effectively standing in the refurbished self-service area, looking out for customers and being on hand to help. Staff were also free to bring customers back to the service point to look up account information, take them to the office for any financial transactions, or help with MFDs, laptop loans or using Explore (online catalogues). In the Grade-1-listed Wilkins building, which hosts the Main Library, there used to be a risk that customers would fail to find their what they were looking for and walk away. Staff now have time to accompany them to different sections of the library to find material or subject librarians.

**Role two** was at the service point; the staff member was seated on a high stool, which gave them the advantageous position of being able to view the entire area, looking out for customers who may need help. This was a seated role to avoid team members having to stand for too long; however, it wasn't static, as it acted as a back-up for role one. The phrase 'meerkat approach' was adopted because the team make sure they look up every few seconds to keep an eye out for customers in need of help.

**Role three** was based in the self-service returns room, and was a predominantly administrative role. A new staff work-station was set up, which meant that this team member could also help customers with returns. Help was thus available over a larger physical area, rather than just at an issue desk.

**Role four** was based in the supervisor's office adjacent to the main self-service area. This is mainly used for carrying out any administrative tasks, including invoicing, answering email enquiries and social media updates.

**Role five** was assigned as a roving role, away from the self-service area, but in the near vicinity, identifying customers who have directional enquiries, without their having to look for a staff member. This role was trialled throughout the library but was found to be most effective if team members stayed near the library entrance and the Flaxman Gallery, which usually has the largest concentration of students gathering at any one time. Again, this role was flexible in that team members were free to accompany customers to other parts of the library, but could also support other roles.

In order to refine these roles and iron out any teething problems, a series of trial days involving all team members and managers was held between January and May 2015. All team members were given the opportunity to trial roles, and feedback was encouraged via email, in one-to-one meetings and in group sessions.

It was clear from the first trial day that role two needed to have the option of being seated. If a team member was on the rota for role one and two consecutively, it was too exhausting at busy times not to have a seated period. We found that even though the roles can be flexible in the way they support each other, we still needed a rota to make clear where staff were to be based, and to make sure all got the opportunity to undertake a variety of roles. A rota was also needed in order to plan for annual leave and contingencies. It was useful in effecting the transition from the rigid style of working at an issue desk to a more flexible approach.

Data protection was an important consideration, with customers free to roam behind the service points in an open-plan self-service area. It was decided that confidential transactions and payments would take place away from the service

points. The staff administration office next to the service points has been converted into a shared staff and user space. In order to create this space, we are in the process of redesigning the office to make it an appropriate staff work space, where customer transactions can also be dealt with. This reflects the practice that many businesses such as banks have adopted, where staff triage enquiries and take customers into a confidential space when necessary. This is a new way of working in UCL Library Services.

The series of trial days has recently come to an end for the time being, with roles and the culture of serving customers at the point of need established. The trial and feedback process has been integral to this project so that staff not only feel involved but also 'buy in' to the change. We found it essential to run this as a collaborative project as library assistants know their customers better than managers do and consequently are often more creative in their response to customer need.

### **UCL Science Library: empowering staff to deliver outstanding service**

While the work was being carried out in the Main Library the team started to look at the service areas in the Science Library. Self-service had been installed in the Science Library a few years earlier as part of a redevelopment of the ground floor into an IT-enabled social learning space called the Learning Lab. A satellite service point had been installed in the Learning Lab area, where the self-service facilities, MFDs and short loan collection were situated. This service point was underused, but in conjunction with the customer service work in the Main Library, the Science Library team started to look at how the service points could be better used to help customers beyond the issue desk. The journey mapping of customers in the Science Library found that they would always encounter the Learning Lab area first, and if they needed help, team members at the issue desk were difficult to find, behind a set of double doors. Clearly this way of working was contrary to serving the customer at the point of need. The set-up was changed so more staff were out in the Learning Lab, and the service point was used to triage customer enquiries, customers only going through to the issue desk area if they needed to collect inter-library loans or stores items, had to make financial transactions or had confidential account queries. This has had the effect of basing staff where the customers and facilities are, and enabling customers to find help when and where they need it, thus implementing a 'one-stop shop' approach.

Given these changes at the Main and Science libraries, service points and issue desks were re-named as 'help points', and new signage will be introduced in the near future. The change has made it easier for customers to know exactly where to look for help, rather than trying to decipher library terminology such as issue desk and service point.

The evening and Saturday teams have recently changed their work patterns and adopted the new roles in the Main Library, and they use the Learning Lab help point in the Science Library. The Head of Evening and Weekend services devised rotas for staffing these areas; this has been challenging as the number of staff is reduced after 17:00 during the week and on Saturdays. However, it was necessary to develop a consistent level of service at all times. (The evening and Saturday teams were formerly known as 'out-of-hours' staff, but are now called 'evening & Saturday teams' to de-construct the sense that service at these times is extraordinary.) To help make this change, the Head of evening and Weekend services was involved in the daytime trials, and daytime assistants were invited to talk to evening and Saturday staff about serving the customer at the point of need.

To help equip staff with the skills needed to deal with any type of customer enquiry, whether at a help point or in other parts of the library, we have introduced a number of training methods in addition to the usual refresher

and on-the-job training. From 09:00 till 10:00 on Fridays is set aside for staff training every week of the year. These sessions are invaluable for group training, and focus on refreshing skills, learning about new developments in the library, and for holding the monthly library Journal Club. This was started over a year ago to increase staff awareness of the wider academic library landscape and to discuss articles written about aspects of customer service, with a view to shaping the way we serve customers in the Main and Science libraries. Academic articles have recently focused on feedback, evaluation, the concept of charging fines, and serving customers. They have been very useful in illustrating and giving academic depth to new and innovative ideas, making the transition in customer service easier for the whole team. Team managers have recently introduced a self-directed learning tool called 'Ten things to do at the Help Point'. There are ten different tasks every two weeks, sent out to the whole team, with a view to up-skilling staff and reaching members of the team who can't attend Friday training. It also gives team members activities at the help points during quiet times. The tasks include refresher training on aspects of the library management system, reading Journal Club articles, and a research topic. Each member of staff has a space on the shared drive where they can mark what activities they have managed to complete and make any comments on research topics for managers. Whilst individuals are under no pressure to complete all ten tasks as customers always come first, it gives managers valuable information for completing skills audits and training needs analysis. It has also increased staff confidence in answering any enquiry.

### Future plans

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Our ambition is broadly set out in the Library Strategy 2015–18 as we start working towards the Customer Service Excellence accreditation. Further work is being carried out on creating a customer services mission statement to focus staff on team goals and to inform customers clearly how we can best serve them. But importantly, despite UCL Library Services having over 300 staff, the change was not dictated: it was developed and evolved by the teams responsible for front-line services locally. Training schemes have enabled a growing awareness of the literature and best practice to combine with the teams' existing extensive knowledge of serving library users. In order to deliver a truly outstanding user experience it is essential to make use of the expertise and experience of library staff and their knowledge of users. The concept of share staff–student spaces will be realised through the refurbishment of the administration office in the Main Library and thus we hope to break down the barriers of traditional issue desks.

By implementing this new way of working we have helped to establish the libraries as supportive environments. It is important for students to know that the library is a safe place to study and that they can get help whenever and wherever they need, given that for some it is the first time they have lived away from home, lived in London or in a foreign country. We now have time to spend with the individual whether they need help finding library resources, directions around campus, or where they can find the best cup of tea! This cohesive one-stop concept of customer service reflects what already happens at some smaller libraries in UCL, where staff have always had more freedom to help customers at the point of need. Through this project we have managed to adopt their good practice and replicate it with larger teams of staff, library space and customer numbers, creating a more personalised, individual and consistent service across UCL.

This project has been challenging at times, but the outcome shows that installing self-service can enable radical service improvement when it is embraced as a tool for user experience improvement rather than cost-cutting. We see customer service as a constantly changing environment, where approaches need to be challenged, revised and updated in order to provide the best service possible. We have started to collate regular feedback from

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customers, using updated suggestions forms, and feedback questions and answers have been made publicly available for the first time within these teams. We are working on creating a customer charter to inform customers about how we can help them. And whilst there is much talk of the importance of getting to know our customers and gaining insights from surveys, it is important to recognise the value of our customers knowing our staff. Excellent user experiences occur where both users and library staff can find opportunity, support and encouragement. UCL Library Services recognises the value of staff and our second key performance area based on 'Staffing Equality and Diversity' addresses those challenges and opportunities. In practice, the UCL model of shared staff–student space will showcase this approach, which focuses holistically on the user experience.

## Reference

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Young, D. (2011). Student expectations and the NSS: action planning at Northumbria University Library: a case study. *SCONUL Focus*, 52, pp. 9–10

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