

Dustin Fife

# Be Here

## Developing principle-based customer service

**M**uch has been written about customer service in libraries. Every story or case study that is shared is valuable. They help to identify what does and does not work in libraries and allow institutions to adjust to ever-changing expectations. Just as with technology, materials, and programming, expectations for customer service evolve and require a flexible and innovative staff that is willing to try new things.

Since so many articles have been written about customer service, no library needs to start from scratch. After reading about impactful changes at other libraries, Kim Rollins, assistant director for public services at Utah Valley University (UVU) library, assembled a small taskforce to revamp UVU library's customer service guidelines.

This group included stakeholders from most areas of the organization and was charged with building a new customer service program for every library employee, not just for public services. Rollins was especially impressed by Jacksonville Public Library's (JPL) the "Get To Yes" program,<sup>1</sup> and she encouraged the taskforce to read about JPL, and other libraries, before starting on a new program for UVU.

The taskforce almost immediately agreed that empathy is the paramount principle of strong customer service. From that point forward, the team worked to avoid overly specific rules and was committed to a principle-based approach. The taskforce met for

several weeks to define unique principles that engendered UVU library's desired customer service environment. UVU library's current slogan is "Find It Here." In order to connect to the slogan, other library goals, and initiatives, and especially to the principle of empathy, the new customer service guidelines were entitled "Be Here"—meaning, be present physically, but much more importantly, be present emotionally.

### UVU library's eight customer service principles

UVU library's customer service taskforce settled on eight principles of customer service and empathy with memorable titles and short explanations. The eight principles are the entirety of the guidelines, though individual departments can provide more structure, as necessary. However, it was recommended to keep them as intentionally broad as possible. The principles are as follows:

- **Engage in your range.** Be aware of your surroundings. Acknowledge patrons with eye contact, a smile, and positive body language. Be approachable.
- **Get them there.** Get the patron to the service, person, item, or information that they need. Get them there physically and intellec-

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tually. When it seems impossible, try to find alternatives, and create a positive experience.

- **We do windows.** There is no work beneath you, especially when a patron is involved. When they see you, they see the entire library.

- **Know our services/specialists.** If you do not know what we do and who does it, the patron will not know what we do and who does it.

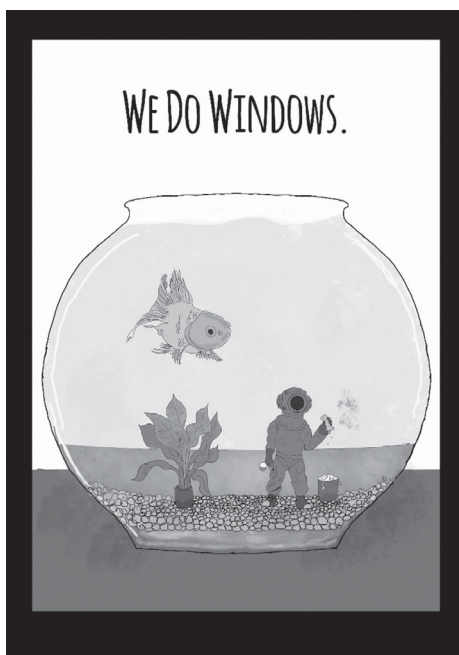
- **Know and grow your patrons.** Collect patrons. Let them know who you are and

Look for things we can do better and people we can help.

These eight principles and short definitions create a common language for discussing customer service and are now the backbone of UVU library's customer service program. Some are not unique, and you can easily see their antecedents in well-known statements such as "Get To Yes." More important than uniqueness, though, is their memorability and the ease with which they can be integrated into everyday conversation



Get Them There, J. Michael O'Day (2016).



We Do Windows, J. Michael O'Day (2016).

how you can help them. Listen and serve with empathy.

- **Remember the goal.** So much of your work is invisible to the public. Always remember, what you do impacts student and faculty success.

- **Be contagious.** You impact the environment of the library. Emotions are contagious, so spread goodwill with patrons and colleagues.

- **Conquer the campus.** Wherever you go represent the library. Be an ambassador.

and personal, departmental, and institutional goals.

### Creation and implementation

UVU library's taskforce officially worked on this project for six months. They spent several weeks reviewing customer service programs and library literature, and they then spent a few group sessions brainstorming and listing desirable qualities of customer service on a whiteboard. The brainstormed qualities were grouped and narrowed into as few ideas as

possible. Once they were narrowed down to eight, they became the proposed guiding principles for UVU library's customer service program. They were selected because they were memorable, and the team thought they would simplify customer service. The task force also thought that they would give employees as much flexibility as possible to focus on the needs of faculty, students and staff, along with the overall complexity of library life. The principles were selected and finalized with feedback from taskforce members and a few outside stakeholders. The principles were then presented to the library director for approval before being prepared and presented to the rest of the staff.

Preparation for the rest of the staff took several more months. Once the principles were chosen and approved, the taskforce spent several months preparing short training videos, activities, worksheets, imaginative posters, and two introductory presentations.<sup>2</sup> The program was introduced to the entire staff through two hour-long staff meetings, one month apart, with homework and thought exercises given for the interim.

The first presentation focused on the theory of the guidelines. Each principle was discussed individually, and feedback was solicited through group conversation. The principles were introduced through a PowerPoint presentation and short videos. After the first session, every staff member was given a worksheet to set individual goals and departments were asked to set group goals. This process was the same for library administration all the way down through library aides. The emphasis was that every employee has customer service opportunities and that every employee needs to set customer service goals.

During the second staff meeting, another short presentation about the principles was given and then everyone was asked to share their experiences of working with the new "Be Here" principles. This led to a lively conversation and overall positive assessments of how a principle-based approach to customer service can change the way staff members see their work. There was some conversation of

whether using principles, rather than specific rules, would allow people to simply do whatever they wanted. UVU library is governed by many campus-wide procedures and policies and other unavoidable library protocols outside of the customer service guidelines. It was emphasized that principles allowed employees to try and see what they could do, rather than focus on what they could not.

Once the second presentation was completed, the taskforce met one last time to debrief about what had been accomplished and to make recommendations for the program going forward. The final report was given to administration, and the taskforce was disbanded. Administration was supportive of the taskforce's recommendations and is working to further integrate the Be Here principles into the fabric of the library.

More than anything, this new system has created a mechanism for discussing customer service goals and experiences through a shared language. What we have seen so far is that these guidelines empower employees to be intelligent and flexible. This is not a perfect system, but it is a system that depends on the ingenuity and good-faith efforts of employees, rather than on a rule book that says yes or no.

Time is now set apart at monthly staff meetings to highlight the customer service principles and to do ongoing training. My Patron Services team sets a new "Be Here" goal each week. One team member selects a principle and either lays out a goal that he or she have been thinking about or asks the team to help set a team goal.

At the next team meeting we discuss how our goal went and select a new principle and goal. These goals have been simple, but engaging. They have been things like reaching out to a new faculty member, mentoring a library aide on a project, or getting to know a library specialist better. This process keeps the focus on patrons and allows our team to creatively problem solve. Several other departments follow a similar pattern. It has created a positive way to discuss customer service that does not simply focus on what we are doing wrong.

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variety of services, and knowledge of most library procedures can be instrumental in providing positive customer service at such service points. A well-executed cross-training program creates new teams among old colleagues working toward a common goal and opens new lines of communication between departments, sparking discussion of shared problems and potential resolutions.

## Notes

1. Shirley Duglin Kennedy, "Give the people what they want, but," *Information Today*, (2015): 8.

2. Stephanie L. Maata, "Renaissance librarians: traditional roles are increasingly

incorporated into broadly defined responsibilities that call for flexible skill sets," *Library Journal* 139, no. 17 (2014): 26-34.

3. Holly Flynn, "Creating Manuals for Job Duties," in *Library Management Tips That Work*, ed. Carol Smallwood (Chicago: American Library Association, 2011).

4. Sarah C. Michalak, "This Changes Everything: Transforming the Academic Library," *Journal of Library Administration* 52:5 (2012): 411-423.

5. Eleanor Gossen and Frances Reynolds, "Forging new communication links in an academic library: A.," *Journal of Academic Librarianship* 16, no. 1 (1990): 18.

6. Michalak, 415. *zz*

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("Employing field research...", continues from page 333)

5. Zara Wilkinson and Julie Skill, "The use of librarians as occupational study populations in social science research," *Library Review* 63 (2014): 2-14. Doi: 10.1108/LR-07-2013-0092.

6. ACRL Instruction Section ILBP Committee, "Information Literacy Best Practices: Exemplary Programs," [www.ala.org/acrl/aboutacrl/directoryofleadership/sections/is/iswebsite/projpubs/bestpractices-exemplary](http://www.ala.org/acrl/aboutacrl/directoryofleadership/sections/is/iswebsite/projpubs/bestpractices-exemplary). *zz*

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("Be Here," continues from page 340)

The goal was to truly create something that is useful for all library employees, and it impacts each team differently. Foundationally UVU library believes that every employee always represents the library, whether they regularly see patrons or not. That is why this process included many stakeholders in order to create something useful for all.

For example, the technical services librarian suggested the principle "Remember the Goal"—something his team was already using. For a group like Technical Services, which is often separated from the public, "Remember the Goal" reminds them that work, seen and unseen, impacts the experiences and opportunities of faculty and students. Each of the principles is adaptable and can be used differently, depending on the needs of a particular department or team.

## Conclusion

"Be Here" is UVU library's principle-based customer service solution that asks employees to be present, flexible, and innovative. It is UVU library's best attempt to put patrons first by focusing on what the library can do, rather than what it cannot.

## Notes

1. Ronald Block and Julie P. McNeil, "Get to yes: Branding public library customer service," *Public Libraries Online: A Publication of the Public Library Association*, retrieved from <http://publiclibrariesonline.org/2015/02/get-to-yes-branding-public-library-customer-service/>.

2. To see the training videos please visit <https://sites.google.com/site/behereuvulibrary/home>. *zz*