Customer Service Excellence Workshop

Graham Stone, The University of Bolton
Bev Acreman, Taylor & Francis
Customer Service Excellence Workshop

- Aim of workshop
- Survey details
- Charter Mark
- Feedback
- Discussion
Aim of today’s Workshop

• To discuss the problems in the communication chain between publishers and libraries and what we should do to eliminate them
  – Results of two anonymous surveys for librarians and publishers
• Introduce the idea of Charter Mark as a way to improve quality
• To report back from this workshop in a future issue of *Serials*
Survey Details

Survey mailed March 2007 to various listservs

Total Respondents – 218

69% Librarians

31% Publishers

Who were they?

Librarians – Good spread of library sizes

Publishers – mostly those with less than 100 journals (a key problem area in our workshop last year); 30% with 500+ journals
Survey Details

Size of Library

- 1-1000: 24%
- 1001-5000: 38%
- 5001-10000: 15%
- 10001+: 23%

UKSG Conference
April 2007
Graham Stone
Bev Acreman
Survey Details

Size of Company

- 1-100 Journals: 47%
- 101-250 Journals: 30%
- 251-500 Journals: 15%
- 500+ Journals: 8%
About the Survey

- Last year we asked about specific problem areas
- This year was more a general request for feedback using ideas the Charter Mark
- Similar issues were raised in responses
Charter Mark
Charter Mark

• Criterion 1 – Set standards and perform well

• Criterion 2 – Actively engage with your customers, partners and staff

• Criterion 3 – Be fair and accessible to everyone and promote choice

• Criterion 4 – Continuously develop and improve

• Criterion 5 – Use your resources effectively and imaginatively

• Criterion 6 – Contribute to improving opportunities and quality of life in the communities you serve
Charter Mark

- Criterion 1 – Set standards and perform well
- Criterion 2 – Actively engage with your customers, partners and staff
- Criterion 3 – Be fair and accessible to everyone and promote choice
- Criterion 4 – Continuously develop and improve
Criterion 1  Set standards and perform well

- You need to show that your organisation:
  - sets clear service and performance standards by consulting customers
  - meets those standards
  - monitors and reviews performance against standards and publishes the results
  - designs, puts into practice and monitors standards with as little unnecessary paperwork and administration as possible
Criterion 1

- How important are the following to you (split by library size)

<table>
<thead>
<tr>
<th>Category</th>
<th>Very Unimportant</th>
<th>Quite Unimportant</th>
<th>Neither Important nor Unimportant</th>
<th>Quite Important</th>
<th>Very Important</th>
<th>Response Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-1,000</td>
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<td>17%</td>
<td>30%</td>
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<td>1,001-5,000</td>
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<td>10,001+</td>
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<td>22%</td>
<td>13%</td>
<td>22%</td>
<td>30%</td>
<td>23</td>
</tr>
<tr>
<td>All Libraries</td>
<td>6%</td>
<td>22%</td>
<td>24%</td>
<td>28%</td>
<td>21%</td>
<td>102</td>
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Criterion 1

- How important are the following to you (split by library size)

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<th>Quite Important</th>
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<th>Quite Unimportant</th>
<th>Very Unimportant</th>
<th>Response Total</th>
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<tbody>
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<td>19%</td>
<td>2%</td>
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<td>38%</td>
<td>16</td>
</tr>
<tr>
<td>10,001+</td>
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<td>22%</td>
<td>0%</td>
<td>22%</td>
<td>48%</td>
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<td>1%</td>
<td>31%</td>
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Criterion 1

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<th>Library Size</th>
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<th>Quite Important</th>
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<th>Response Total</th>
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<td>0%</td>
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<td>58%</td>
<td>24</td>
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<tr>
<td>1,001-5,000</td>
<td>30%</td>
<td>5%</td>
<td>2%</td>
<td>8%</td>
<td>55%</td>
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<td>9%</td>
<td>61%</td>
<td>23</td>
</tr>
<tr>
<td>All Libraries</td>
<td>25%</td>
<td>6%</td>
<td>1%</td>
<td>11%</td>
<td>57%</td>
<td>103</td>
</tr>
</tbody>
</table>
Criterion 1

Does your company have standards to measure customer service performance?

- Yes: 47%
- No: 38%
- Don't Know: 15%
Criterion 1

Does your company make these standards available to your customers?

- N/A
- Don't Know
- No
- Yes

0% 10% 20% 30% 40% 50% 60%
Criterion 1

Does your company provide your customers with details about its performance against these standards?

- N/A
- Don't Know
- No
- Yes

0% 10% 20% 30% 40% 50% 60%
Criterion 1

If your company does not have standards to measure customer service does it have plans to develop these standards in the future?

- N/A
- Don't Know
- No
- Yes

0% 5% 10% 15% 20% 25% 30% 35% 40% 45%
Criterion 2 Actively engage with your customers, partners and staff

• You need to show that your organisation:
  – actively works with (engages with) customers, partners and staff to make sure it delivers high-quality services
  – consults and involves present and potential customers of public services, partners and staff
  – is open, and communicates clearly and effectively in plain language and in a number of different ways
  – provides full information about services, their cost and how well they perform
Criterion 2

How do you feel about the following methods that publishers might use to consult their customers when they seek to improve their services?

- Beta tests
- Roadshows
- Library advisory/user groups
- Online Surveys
- Focus groups

Dislike very much
Dislike
Neither like nor dislike
Like
Like very much
Criterion 2

How often does your company use the following methods to consult its customers in order to improve its services?

- Beta tests
- Roadshows
- Library advisory/user groups
- Online Surveys
- Focus groups

Don't Know
Criterion 3  Be fair and accessible to everyone and promote choice

- You need to show that your organisation:
  - makes services easily available to everyone who needs them, offering choice wherever you can
  - treats everybody fairly in access to services and service delivery, and pays particular attention to people with special needs
Criterion 3

After publishers have dealt with your queries how often do they follow this up by asking whether you are satisfied with their answer?

- Never
- Rarely
- Sometimes
- Often
- Very often
Criterion 3

After having replied to a customer's query how often does your company follow this up by asking whether they are satisfied with the answer?

- Don't know
- Very often
- Often
- Sometimes
- Rarely
- Never

0% 5% 10% 15% 20% 25% 30% 35%
Criterion 4  Continuously develop and improve

- You need to show that your organisation:
  - always looks for ways to improve services and facilities, particularly when using technology
  - puts things right quickly and effectively
  - learns from, and improves as a result of, complaints, compliments and suggestions
  - has a clear, well-publicised and easy-to-use complaints procedure, with the opportunity for independent review wherever possible
Criterion 4

In general how good do you feel that publishers are at keeping you informed about any planned upgrades or downtimes for their platforms?

- Very good
- Good
- Average
- Bad
- Very bad

0% 10% 20% 30% 40% 50% 60% 70%
Criterion 4

In general how good do you feel that your company is at keeping your customers informed about any planned upgrades or downtimes for your platform?

- Don't Know
- Very good
- Good
- Average
- Bad
- Very bad

0% 5% 10% 15% 20% 25% 30% 35% 40% 45%
Criterion 4

<table>
<thead>
<tr>
<th>Librarians: Most valuable aspect of Customer Service that Publishers have introduced in the last five years</th>
</tr>
</thead>
<tbody>
<tr>
<td>(all responses with more than one respondent)</td>
</tr>
<tr>
<td>Active participation in blogs and listserves</td>
</tr>
<tr>
<td>Admin Sites on ejournals platforms</td>
</tr>
<tr>
<td>Dedicated Online Support departments</td>
</tr>
<tr>
<td><strong>Email notifications of changes</strong></td>
</tr>
<tr>
<td>More outreach to customers</td>
</tr>
<tr>
<td>Named Contacts</td>
</tr>
<tr>
<td>Regular Newsletters</td>
</tr>
<tr>
<td>Reliability of Platforms/Better notice of downtime</td>
</tr>
<tr>
<td>Up to date &amp; Useful Websites</td>
</tr>
<tr>
<td>Usage Stats</td>
</tr>
<tr>
<td>Nothing at all/ha ha ha/Don't know</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
<tr>
<td>3 6%</td>
</tr>
<tr>
<td>6 11%</td>
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<tr>
<td>3 6%</td>
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<td>11 21%</td>
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<td>2 4%</td>
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<td>7 13%</td>
</tr>
<tr>
<td>53 100%</td>
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</tbody>
</table>
Publisher's: Most valuable aspect of Customer Service that you have introduced in the last five years

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Account Managers</td>
<td>1</td>
<td>7%</td>
</tr>
<tr>
<td>Investment in better systems</td>
<td>1</td>
<td>7%</td>
</tr>
<tr>
<td>Online Support Desk</td>
<td>2</td>
<td>14%</td>
</tr>
<tr>
<td>24-hour turnaround on enquiries</td>
<td>3</td>
<td>21%</td>
</tr>
<tr>
<td>Flexibility in approach</td>
<td>1</td>
<td>7%</td>
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<tr>
<td>Direct Mail to product managers</td>
<td>1</td>
<td>7%</td>
</tr>
<tr>
<td>Outsourced Distribution</td>
<td>1</td>
<td>7%</td>
</tr>
<tr>
<td>Investment in staff</td>
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<td>21%</td>
</tr>
<tr>
<td>More outreach to customers</td>
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<td>7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>14</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
Criterion 4

Does complaining affect policy?

- Don't Know: 20.0%
- No: 25.7%
- Yes: 54.3%

Does your company routinely incorporate customer complaints into its annual planning?
What to do..

- Ensure your website is completely up to date – including plenty of Help and FAQ links – this is where librarians will go first.
- Produce Library Newsletters if you don’t already.
- Engage with the discussion lists.
- No anonymous customer service responses – named contacts are key.
- (8 respondents couldn’t think of a thing we had improved – including “ha ha ha” as a response.)
Library Sites/Newsletters

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Critical Communication Plan

Not needed for *all* announcements, but for Critical Communications use the following mix:

- **Agents** – for including in their newsletters (not completely reliable according to respondents last year)
- **Email Lists** of your own customers (build a list if you don’t already have one)
- **Listservs** – lis-e-journals, liblicense, serialist
- **Notices** on online site
- **Librarians Newsletter**
- **Update your website**