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

UKSG Conference
April 2007
Graham Stone
Bev Acreman
Survey Details

Size of Company

- 1-100 Journals: 47%
- 101-250 Journals: 8%
- 251-500 Journals: 15%
- 500+ Journals: 30%
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></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>
<td>0%</td>
<td>17%</td>
<td>30%</td>
<td>30%</td>
<td>22%</td>
<td>23</td>
</tr>
<tr>
<td>1,001-5,000</td>
<td>5%</td>
<td>28%</td>
<td>25%</td>
<td>28%</td>
<td>15%</td>
<td>40</td>
</tr>
<tr>
<td>5,001-10,000</td>
<td>6%</td>
<td>12%</td>
<td>25%</td>
<td>38%</td>
<td>19%</td>
<td>16</td>
</tr>
<tr>
<td>10,001+</td>
<td>13%</td>
<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>
</tr>
</tbody>
</table>
Criterion 1

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

<table>
<thead>
<tr>
<th>That publishers consult their customers so that they can improve their services</th>
<th>Very Important</th>
<th>Quite Important</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>
<td>0%</td>
<td>21%</td>
<td>0%</td>
<td>46%</td>
<td>33%</td>
<td>24</td>
</tr>
<tr>
<td>1,001-5,000</td>
<td>20%</td>
<td>12%</td>
<td>2%</td>
<td>30%</td>
<td>35%</td>
<td>40</td>
</tr>
<tr>
<td>5,001-10,000</td>
<td>19%</td>
<td>19%</td>
<td>0%</td>
<td>25%</td>
<td>38%</td>
<td>16</td>
</tr>
<tr>
<td>10,001+</td>
<td>9%</td>
<td>22%</td>
<td>0%</td>
<td>22%</td>
<td>48%</td>
<td>23</td>
</tr>
<tr>
<td>All Libraries</td>
<td>13%</td>
<td>17%</td>
<td>1%</td>
<td>31%</td>
<td>38%</td>
<td>103</td>
</tr>
</tbody>
</table>
Criterion 1

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

<table>
<thead>
<tr>
<th>That publishers follow up queries to ensure their customers are satisfied</th>
<th>Very Important</th>
<th>Quite Important</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>
<td>17%</td>
<td>4%</td>
<td>0%</td>
<td>21%</td>
<td>58%</td>
<td>24</td>
</tr>
<tr>
<td>1,001-5,000</td>
<td>30%</td>
<td>5%</td>
<td>2%</td>
<td>8%</td>
<td>55%</td>
<td>40</td>
</tr>
<tr>
<td>5,001-10,000</td>
<td>38%</td>
<td>0%</td>
<td>0%</td>
<td>6%</td>
<td>56%</td>
<td>16</td>
</tr>
<tr>
<td>10,001+</td>
<td>17%</td>
<td>13%</td>
<td>0%</td>
<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
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
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

Legend:
- Never
- Rarely
- Sometimes
- Often
- Very often
- 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: 20%
- Sometimes: 35%
- Rarely: 35%
- Often: 5%
- Very often: 0%
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

Percentage distribution:

- Never: 30%
- Sometimes: 30%
- Often: 10%
- Very often: 5%
- Don't know: 5%
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
<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 listservs</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>Service</td>
</tr>
<tr>
<td>------------------------------------------</td>
</tr>
<tr>
<td>Key Account Managers</td>
</tr>
<tr>
<td>Investment in better systems</td>
</tr>
<tr>
<td>Online Support Desk</td>
</tr>
<tr>
<td>24-hour turnaround on enquiries</td>
</tr>
<tr>
<td>Flexibility in approach</td>
</tr>
<tr>
<td>Direct Mail to product managers</td>
</tr>
<tr>
<td>Outsourced Distribution</td>
</tr>
<tr>
<td>Investment in staff</td>
</tr>
<tr>
<td>More outreach to customers</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>
Criterion 4

Does complaining affect policy?

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don't Know</td>
<td>20.0%</td>
</tr>
<tr>
<td>No</td>
<td>25.7%</td>
</tr>
<tr>
<td>Yes</td>
<td>54.3%</td>
</tr>
</tbody>
</table>

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)
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, serialst
- **Notices** on online site
- **Librarians** Newsletter
- **Update your website**