Am I Obsolete? How Customer Service Principles Ensure the Library's Relevance

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By Mark P. Bernstein
Let me take you back in time (so to speak) to a 1961 episode of “The Twilight Zone.” In this episode, Burgess Merideth plays a man who, when called before the tribunal of a totalitarian state, is told he is to be exterminated. Why? Because he is obsolete. Why is he obsolete? Because he is a librarian!

The show does not go on to explain the specifics of why the librarian is obsolete. But don’t worry—in typical ironic “Twilight Zone” fashion, the librarian is ultimately spared as the dictator is instead deemed outmoded.

Newspaper readership is declining, and online shopping is increasing. One of the great names of libraries, Andrew Carnegie, has seen most of the steel mills that helped build his empire go the way of the dinosaur. As our use of technology expands and increases, more than ever people question whether libraries will be necessary in the future. How do we as librarians ensure that we and our libraries do not become obsolete?

I believe the question can be answered in three words: customer service. Without the service mission and the people who provide that service, the library is nothing more than a warehouse. As service offerings, libraries must adapt, evolve, and change as users continue to learn to use new tools and ways to communicate and receive information. Service is what will allow libraries to not only survive, but thrive.

Exemplary Customer Service

What are the keys to providing good customer service? Many of them are discussed in Robert Spector and Patrick McCarthy’s The Nordstrom Way (Wiley, 1999). As it traces the history and mission of retailer Nordstrom, this book discusses service principles applicable to any organization whose primary role is customer service, including the library.

While some may question comparing a library to a department store, and some may shudder at using the word customer instead of patron, keep in mind that our users are our customers. Whether they are taxpayers members of the public, attorneys in a firm, or faculty and students of an academic library, they are still our customers. Here are some of the Nordstrom principles that library staffs can apply to enable their libraries to meet challenges and seize opportunities in coming years.

1. Product Knowledge. Research librarians, technologists, catalogers, clerks: Know your stuff! Know the current—and anticipate the future—needs of your customers. As more databases and digital products develop, we need to know which of these will bring the most value to our users. We do this by attending conferences, keeping abreast of literature, and, most importantly, talking with our users.

2. Take advantage of trial offers for databases, and test them with your primary users. Even if your budget may not cover the databases at the moment, appropriate administrators will often find the necessary funds if important customers deem them useful. We must anticipate the future, for changes will continue at a pace we can only imagine.

3. Courtesy. Quite simply, think how you react as a customer at a store, your physician’s office, a restaurant, or a theater. Treat other customers how you would like to be treated. It may be a cliché, but by doing so, you will bring customers back to your library—and that is the primary goal of any service organization.

Recently, a graduate student in the career services office that he could not have gotten through law school without the library staff. If and when he ever had money (after paying off his debts) to give to the law school, he said that he would designate it for the law library.

4. Solution Oriented. Know and recognize a problem or question and focus on its solution. Don’t think “could have” or “should have.” Don’t just try to meet users’ needs—exceed their expectations. Use your network of contacts to obtain a title on interlibrary loan, or expedite an article from a non-legal database through document delivery.

5. Follow Through. Communicate! This is probably one of the most widely heard concerns in libraries. Make sure your customer’s requests are being addressed. Provide the maximum information by going the extra mile.

6. Coordination. This is the meaning of follow through. It requires working with colleagues who are perhaps more proficient in an area than you might be. There is no harm in saying, “I don’t know, but let’s check with someone else.”

Ideally, customer service should be seamless and efficient, giving the user maximum satisfaction with minimal anxiety or stress. If one of your research librarians is a specialist in foreign law or tax law, refer your customer to that person. Directing the customer to the right specialist should be no different than your internist referring you to a specialist or your attorney referring you to another attorney who has the particular area of expertise you require.

7. Professionalism. Be confident and take pride in what you do; each job is essential to the entire enterprise.

Managing Customer Service

The service principles that Nordstrom espouses must be combined with related management principles that increase the quality of customer service. Allow people to make decisions when possible, and back those decisions. This will motivate your staff and allow for more open communication, perspective, and viewpoints. In turn, your library staff will work more collaboratively and cooperatively in fulfilling its mission.

Set goals through strategic planning or a similar staff development program. Planning allows an organization to adapt, evolve, and successfully take on new challenges, thus preventing stagnation and apathy. Change is constant; continuing to do something simply because you have always done it that way can often lead your customers to turn elsewhere for information.

Consider using a library e-newsletter, blog, or intranet as a current awareness tool to keep clientele abreast and reflect a proactive stance.

Another key component in the service equation is the environment, or, more simply put, the library as a place. Create a setting with an attractive and inviting layout, amenities, collection, and resources. Ensure convenience for your customers; suggestions for this include an integrated catalog, research guides, and a comprehensive Web site. Whatever setting you choose, try to ensure one-stop shopping in your library. In each personal transaction, get your customer to the person or resources most pertinent to his or her questions.

As a manager, keep a great staff. One of Nordstrom’s principles is that you can teach some skills, but you can’t train or teach attitude. Too often I have seen members of search committees look only at experience; be sure to get to know the potential employee’s attitude. A positive attitude will ensure that the employee completes projects, that the customer will return, and that an ongoing relationship between librarian and customer will be created.

Expectations at the Ritz

In the May 9-15, 2008, St. Louis Business Journal, Hal Becker wrote a column that discussed customer service using the Ritz Carlton hotel chain as an example. The Ritz focuses on 20 basics in its customer service formula. While many would appropriately deem the Ritz and Nordstrom upscale, these concepts will work for any type of service organization, including the library, because these principles focus on people rather than things. A summary of the principles every Ritz employee is expected to know and adhere to are as follows:

1. Know, Own, and Energize the Credo. The Ritz’s highest priority is...
personalized customer satisfaction. Like libraries, it wants to anticipate and meet customers’ needs. The focus here is on being proactive, not reactive.

2. “We are Ladies and Gentlemen Servicing Ladies and Gentlemen”—Practice Teamwork and “Lateral Service” (to Internal Customers or Other Employees). As I stated earlier, we are all customers to each other. Not only does this attitude lead to more positive working relationships, but it also creates the overall impression for external customers that an organization is efficient and service minded.

3. Know the Likes and Dislikes of Repeat Customers. How often in our libraries do we have the same faculty, attorneys, students, or public use our collections and ask us questions? Knowing customers’ personalities, expectations, and temperaments can help us better serve their needs.

4. Complete Training Certification to Ensure Hired Staff Members Understand the Job. While many libraries have orientation programs for new staff, it is equally important to ensure staff members have opportunities to attend professional development meetings and training sessions so that they may continue to be ahead of the curve. If you acquire a new database, take advantage of the vendor’s offer to train staff or provide a demonstration. Hopefully, any questions that arise may have already been answered by the trainer.

5. Understand Work Area Goals and the Strategic Plan. As I mentioned above, planning is key. All new employees should know what is expected of them upon hire so that no unfair surprise comes when it is time for evaluation. This will also alleviate any anxiety in new employees. They will know what is expected of them; if they have questions, they will feel comfortable approaching their supervisors to learn about anything not covered in the training or plan.

6. Know the Needs of Customers so that Services can be Delivered as Expected.

7. Continuously Identify Defects in the Organization. Basically, this is the concept of continuous improvement. If a process is in place and isn’t working to achieve the maximum result, then brainstorm new ways to fix the defect or problem. This may require a change in workflow or responsibilities or potentially a discussion with the person providing the service. Identify the problem, and find its solution.

8. Own a Customer’s Complaint. If you receive a complaint, follow the proper protocol to fix the complaint and solve the problem. This may require adhering to a strict policy or adapting a policy on a case-by-case basis. The key here is to weigh the cost and benefit of remedying the situation with a “tailored to the customer” approach as opposed to “the rules are the rules.” Flexibility is a key factor in providing excellent customer services.

9. Pacify the Customer Instantly. While this may not always be possible, be sure to communicate and follow up to verify that a problem has been solved. The worst thing is not to get back to someone with a response, even if it means saying, “I may not have an answer for you for a day or until I speak to someone else with decision-making authority.”

10. Record Every Incident of Customer Dissatisfaction. While this may seem a bit overwhelming in concept, the hope is that if a pattern appears, the supervisor and employee can work together or with the customer to see if there are common threads or patterns.

11. Be Responsible for Uncompromising Levels of Cleanliness. While libraries may be less formal than the Ritz hotels, there is still no reason not to look presentable and have your workplace organized. While some people feel comfortable in a cluttered office, the impression this provides the customer can be one of disorganization, potentially leading an initial customer to seek assistance elsewhere.

12. Smile, Be on Stage, and Maintain Eye Contact. Use phrases like “good morning” and “my pleasure.” How often have you, as a customer, experienced a service employee simply waiting for you to say something? Initiate the transaction so the customer knows you are there to help and that you are not bothered by his or her question or visit.

13. Always Refer Positively to Your Organization. This may be difficult at times, but while there will always be those who will complain about, these complaints can be kept in-house—don’t air your dirty laundry in public!

14. Escort Guests Rather than Point out Directions. Obviously, this is often difficult, especially in a large library in which one is the only reference librarian or a small library in which one is the only staff member available. In either case, you can provide maps or guides to direct customers more specifically. Consider providing virtual tours on your Web site.

15. Know General Information and be able to Answer Inquiries Directly. Again, try to create one-stop shopping. If expertise is required, ensure that signs direct the person to the right party. For example, if someone has a question regarding her laptop, make sure she is directed to the technology staff.

16. Answer the Phone whenever Possible. Ask permission to put your caller on hold and try to answer the question without transferring, if possible. As we all know, receiving automated messages and being told to hit buttons becomes frustrating. Ensure that your main service phones are answered a great majority of the time.

17. Have Immaculate Grooming and Uniforms (this repeats an earlier principle; perhaps the Ritz wanted to make it an even 20!).

18. Know Your Role in Emergency Situations. This point is becoming more critical in this day and age. Each staff member should know his or her organization’s emergency and/or disaster plan; if you don’t have one, assemble a task force to create one. There are many models available for reference—one does not have to reinvent the wheel. If chaos does erupt and customers observe panic, they will panic. While all scenarios cannot be prevented, planning can move the situation from chaos to calm.

19. Notify the Supervisor of any Hazards, Injuries, or Need to Change Equipment. If you do not have the tools of the trade to do your job, not only will you become frustrated, but so will the customer.

20. Protect the Organization’s Assets. Ritz points out that 96 percent of its employees identified “excellence in guest services” as a top priority. In a sense, this gets back to a mission statement; ensure that your library staff knows what the common goals of your library are and how to meet them.

These customer service principles apply to all users, including faculty, students, alumni, the public, attorneys, and others; they also apply to your library staff. We too are dependent upon each other through our collaborative projects, turning to our colleagues with expertise, and having an open and trusting avenue of communication.

While Nordstrom and the Ritz-Carlton are clearly “upscale” establishments, their basic customer service principles are easily adaptable to any library. There is much overlap in the principles they use, mainly because they are largely common sense. Still, in the busy days of work and personal lives, common sense can slip through the cracks.

Because these organizations hold these principles so high, they maintain their high standing in their industries. A library of any type or size can follow many of these principles, and by doing so will increase its visibility and appreciation, an appreciation that can often translate into economic benefits through gifts and donations.

By using customer service principles like those I’ve mentioned, one can ensure the library remains relevant regardless of changes in technology, budget, hard times, good times, changing times, or any other variable you can think of. Then, unlike Burgess Merideth in the “Twilight Zone,” no one could ever deem any of us obsolete.

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