



2021 CUSTOMER SERVICE

Empathy Research Findings

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Contents

Q1: What should outstanding customer service look like?	2
Leadership Team (15 attendees)	2
XChange (85 Attendees)	3
Common Themes	3
Q2: How can we measure if your customer service training is effective?	4
Leadership Team (15 attendees)	4
XChange (85 Attendees)	4
Common Themes	5
Matching Solutions for Both Groups (8)	5
Differences	5
Training Sustainability Survey	5
Q3: GREEN Hat Question: What tools/ideas do YOU need/have to help instill/sustain training into our culture and lead your teams?	6
Additional Ideas	6
Q4 What additional thoughts do you have on how we can create sustainable training programs (Customer Service, Leadership training, Core Value Training etc.)?	7
XChange Full Data Findings	9
Q1: What does an Outstanding Customer Service Experience Look Like?	9
Q2: How can we measure if we are providing outstanding customer service and if the training is effective?	12
Additional Considerations/Remarks from XChange:	15

Customer Service 2021 Empathy Research Overview

Empathy Research - Unlike traditional marketing research, **empathic research** is not concerned with facts about people (such as their weight or the amount of food they eat), but more about their motivations and thoughts.

This report includes:

- results from the leadership team meeting – Six Thinking Hats (March 2020)
- results from five virtual Customer Service Forums held for all XChange Members – Six Thinking Hats (February 2021)
- overview results from the Training Sustainability Survey (January 2021)

Q1: What should outstanding customer service look like?

Leadership Team (15 attendees)

Quick/fast	Accurate
Quality resources	Friendly
Greeted/acknowledged	Offered service
Show appreciation (thank you)	Knowledgeable
Be helpful/offer help	Follow up
Be engaged with the customer	Actively looking/seeking to assist
Make eye contact	Smile
Call by name if possible	Effort
Professionalism	Attentive/focused on interaction
Show them the way (no pointing)	Follow up statement (come back, see you soon)
Accessible (easy to find library staff)	Read the customer (body language, not too chatty)
Acknowledge those waiting	Be organized
Control the situation	Listen
Empathy if there is a problem (empathy statements)	Thank them for bringing the issue to your attention to fix
Orderly/neat environment/inviting	Staff roving the floor (use data for peak times)

XChange (85 Attendees)



NOTE: This data **does not** reflect the following statements by leaders:

“What everyone else said.” Or “I feel the same way as others.”

Common Themes

Although Leadership identified 30 responses, each of those can/do fall into one of the 13 themes XChange members identified.

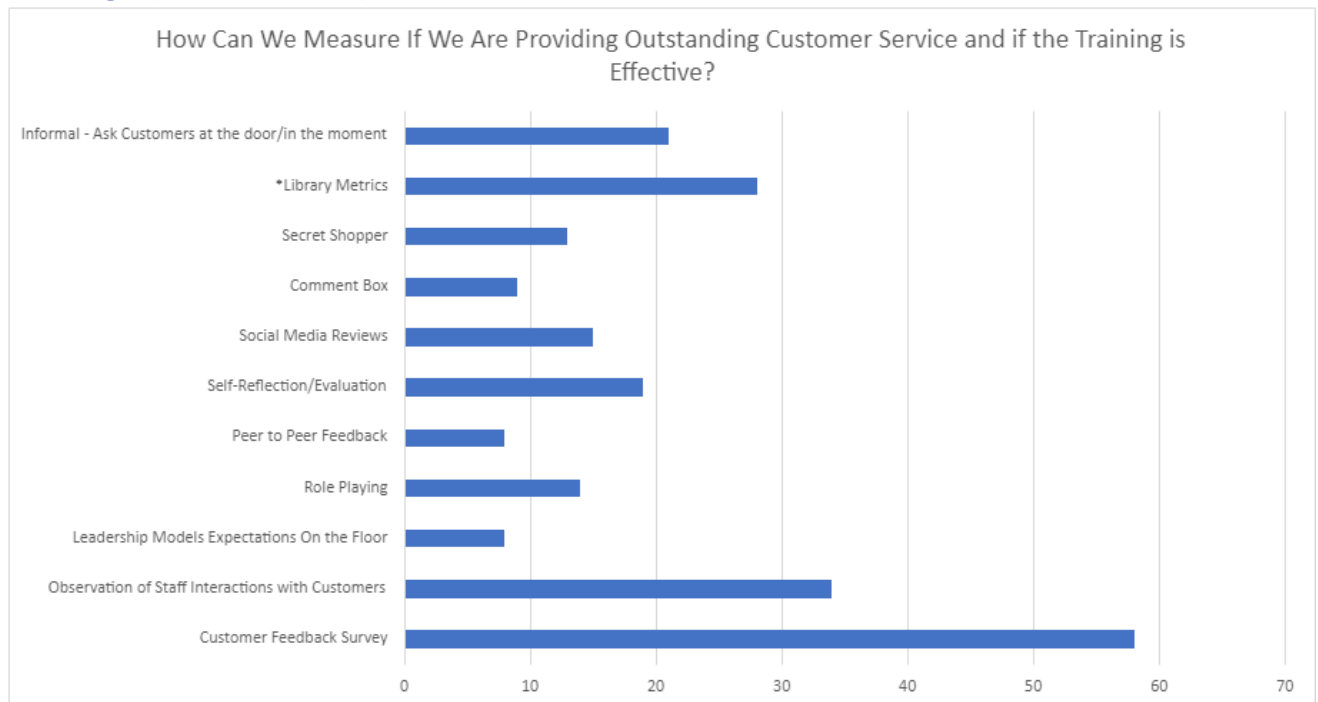
The XChange data will be expanded upon in subsequent pages of this report.

Q2: How can we measure if your customer service training is effective?

Leadership Team (15 attendees)

Secret Shopper
Internal Surveys
Refining Net Promoter
Calling customers
Follow up on specific services
Easy complaint process
Need a reward program for libraries that exceed expectations
Comment cards
Observations
Manager process (hours per month doing observations/walk abouts)
Open communication (internal comment card)
Survey on the website
Build into Performance Development Competencies

XChange (85 Attendees)



Common Themes

- Leadership Team identified 13 solutions
- XChange Identified 11 solutions

Matching Solutions for Both Groups (8)

Secret Shopper
Internal Surveys
Refining Net Promoter
Calling customers
Comment cards
Observations
Manager process (hours per month doing observations/walk abouts)
Open communication (internal comment card)
Survey on the website

Differences

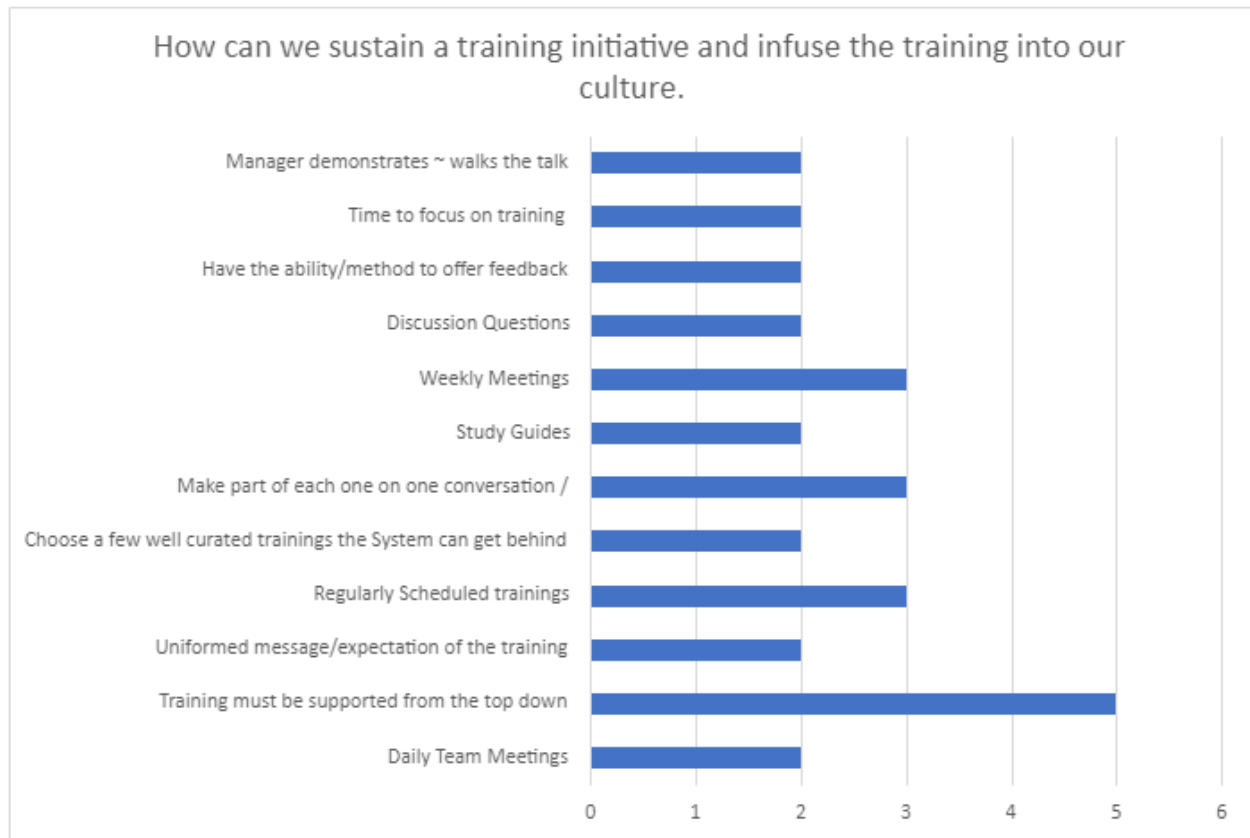
Leadership	XChange
Follow up on specific services	Self Reflection/Self Evaluation
Easy complaint process	Peer to Peer Feedback
Reward program for libraries that exceed	Role Playing
Build into Performance Development Competencies	Leadership models expectations

The XChange data will be expanded upon in subsequent pages of this report.

Training Sustainability Survey

- Distributed to 88 leaders
- 24 responses
- Four (4) of the Six Thinking Hat questions were asked. Two questions will be highlighted in this section.
 - The full survey results will be available in subsequent pages of this report.

Q3: GREEN Hat Question: What tools/ideas do YOU need/have to help instill/sustain training into our culture and lead your teams?



Additional Ideas

Departments should be included in this; not just front line

Use XChange to get frontline managers on board

Have the ability/method to ask question

Annual theme/consistent focus

Share the 'why' of the training

Celebrate success

Relevant training topics

Review, discuss and provide feedback on the training

Incentives

Q4 What additional thoughts do you have on how we can create sustainable training programs (Customer Service, Leadership training, Core Value Training etc.)?

Must be supported system wide
Must become ingrained in our culture
Trainings need to be blended learning and not solely online
Use staff to assist with training - a lot of experts in our System
Provide good metrics that our training works
Do not make it overwhelming for staff
Needs to be made sustainable
Keep it from fizzing
Training becomes a part of our culture
Training for all staff
Show good investment on time by staff
Staff need time to attend training
Some leaders so no to staff training requests

All leaders should set the example
Need to stick with one direction
Quarterly Core Value focus
Customer Service kick off at Staff Development Day
Find the balance between work and training
Make sure training is relevant
Must have follow ups after the information is presented
One on one discussions
Focus on the moment, too much change, too many directions
Training should stay the same for several years
Needs to be more than just online, needs in person to follow up

XChange Full Data Findings

Q1: What does an Outstanding Customer Service Experience Look Like?

Using a thematic analysis of five separate XChange meetings over customer service the following themes emerged within the data (shown below). All members of XChange were asked “What does an outstanding customer service experience look like to them?”. Participants were given 2 minutes to answer this open-ended question. All statements/ideas were coded into categories. Once the data was reviewed for patterns it was then categorized into thirteen themes.

Welcome/Acknowledge Customer Presence was characterized by statements such as:

- It’s not enough to get a problem solved...staff need to be happy to be there.
- Being aware when a customer enters the building.
- Make it a priority to feel welcome – eye contact, smile.
- Acknowledge everyone if you have a line of customers.

Members of XChange mentioned welcoming and acknowledging customer presence 86 times through these various statements.

Anticipate Customer Needs was characterized by statements such as:

- Pay attention to the cues they are giving us and meet those needs.
- Be situationally aware.
- Read customer to see if they want to be bothered.
- Understand how much engagement a customer wants.

Members of XChange mentioned anticipating customer needs as outstanding customer service 59 times through their discussions.

Customer-Centric or Customer-Focused approach was characterized by statements such as:

- We are too task orientated, getting books on the shelf. We have to focus on the customer.
- Don’t minimize the customers.
- Assume good intention from all customers.
- Show the customers they are important and valued.

Members of XChange mentioned having a customer-centric approach 42 times. This theme included ideas such as, “the customer should feel valued”, “assume customers have good intentions”, “have the customer’s best interests in mind.”

Use Available Knowledge/Expertise to Find a Solution was characterized by statements such as:

- Know our products and services to help customers.
- Having the knowledge (within reason) to be able to assist customers.
- Encourage staff to ask for help - if you don’t know bring another SME in, but stay to help with the customer.
- Know who the expert staff are so you can go to them when help is needed.

Members of XChange mentioned using available knowledge or expertise to find a solution 42 times. This theme centered around empowering and training staff to know what resources are available to help customers. XChange members also discussed using gentle hand off to more knowledgeable staff to avoid disruption in customer service.

Active Listening was characterized by statements such as:

- Taking time to understand questions from customers.
- Asking for clarification if we are not understanding a question.
- Be an active listener.
- Don't assume you know what the customer wants.

Members of XChange mentioned active listening as a means of outstanding customer service 37 times.

Extra Mile Service was characterized by statements such as:

- If there is a problem, go the extra mile to solve.
- Demonstrate we are going down every avenue for the customer.
- Go above and beyond to ensure they have what they need.
- Own any problems that arise.

Members of XChange mentioned going the extra mile 33 times.

Empathy for customers was characterized by statements such as:

- Being empathic to customer's wants and needs.
- Really showing you care.
- Be genuine.
- Realize customers have a need that is important to them.

Members of XChange discussed this common theme of empathy 31 times within their discussions of outstanding customer service.

Accessible Staff was characterized by statements such as:

- Someone is available when needed.
- Being present.
- Be around to answer when needed.
- Have an "I am there for you attitude".

Members of XChange mentioned staff being accessible to customers as outstanding customer service 30 times through their discussions.

Provide Alternative Resources was characterized by statements such as:

- Never leave the customer empty handed.
- Look for options if we do not have what they need.
- Given them all the resources.
- Share more resources based on what is observed from the customer.

Members of XChange mentioned providing alternative resources or solutions 28 times. The idea of not leaving customer's empty handed when they exit the library came up multiple times throughout their discussions, additionally always providing several options to customers when possible.

Timely and Efficient Service was characterized by statements such as:

- Be efficient and responsive.
- Keep responses simple – not a bunch of hoops, not a bunch of extra stuff.
- Timely, quick, responsive, no delays when possible.
- Recognize when customers want to get in and out of the library.

Members of XChange mentioned timely and efficient service as outstanding customer service 26 times through their discussions. It is notable that this theme was also discussed along the lines of using experts or SME's to ensure a customer is helped.

Customer Follow Up/Follow Through was characterized by statements such as:

- Sticking with customers until the end.
- Make sure their needs are met.
- Let customers know you are finishing up and they are next.
- Keep customers in the loop.

Members of XChange mentioned following up with customers to ensure they have what is needed 25 times. These statements were also characterized by following up with customers as they exit the building to ensure they have everything they need.

Create Personalized Experiences was characterized by statements such as:

- Learn customers' names and introduce yourself.
- Customized your approach.
- Work to establish rapport with frequent customers.
- Engage – make comments to continue to build rapport with customers.

Members of XChange mentioned creating a personalized experience as outstanding customer service 19 times through their discussions.

Approachable Atmosphere was characterized by statements such as:

- Make it "okay" to ask for help.
- No question is too small to answer.
- Customers can be intimidated, ashamed, or embarrassed – make every effort to make a customer feel comfortable.

Members of XChange mentioned creating an approachable atmosphere as a means of outstanding customer service 10 times throughout their discussions. It is important to note that many statements relating to creating an approachable atmosphere were also mentioned in tandem with welcoming customers into the library.

Q2: How can we measure if we are providing outstanding customer service and if the training is effective?

Using a thematic analysis of five separate XChange meetings over customer service the following themes emerged within the data (shown below). All members of XChange were asked “How can we measure if we are providing outstanding customer service and if the training is effective?”. Participants were given 2 minutes to answer this open-ended question. All statements/ideas were coded into categories. Once the data was reviewed for patterns it was then categorized into eleven themes. Below is a list of those eleven themes. Due to the straightforward nature of the second question, additional considerations/remarks were added below to elaborate on the numerous ways customer service could be measured and important components to keep in mind when building a customer service training.

- Customer Feedback Survey
- Observation of Staff Interactions with Customers
- Leadership Models Expectations on the floor
- Role Play
- Peer to Peer Feedback
- Self-Reflection/Evaluation
- Social Media Reviews
- Comment Box
- Secret Shopper
- *Library Metrics
 - Includes: Bonds passed, New Customers, Repeat Customers, Materials/Programs Accessed
- Informal – Ask customers at the door/in the moment

Members of XChange mentioned **Customer Feedback Surveys** 58 times through their discussions. Members of XChange made the following considerations on surveys:

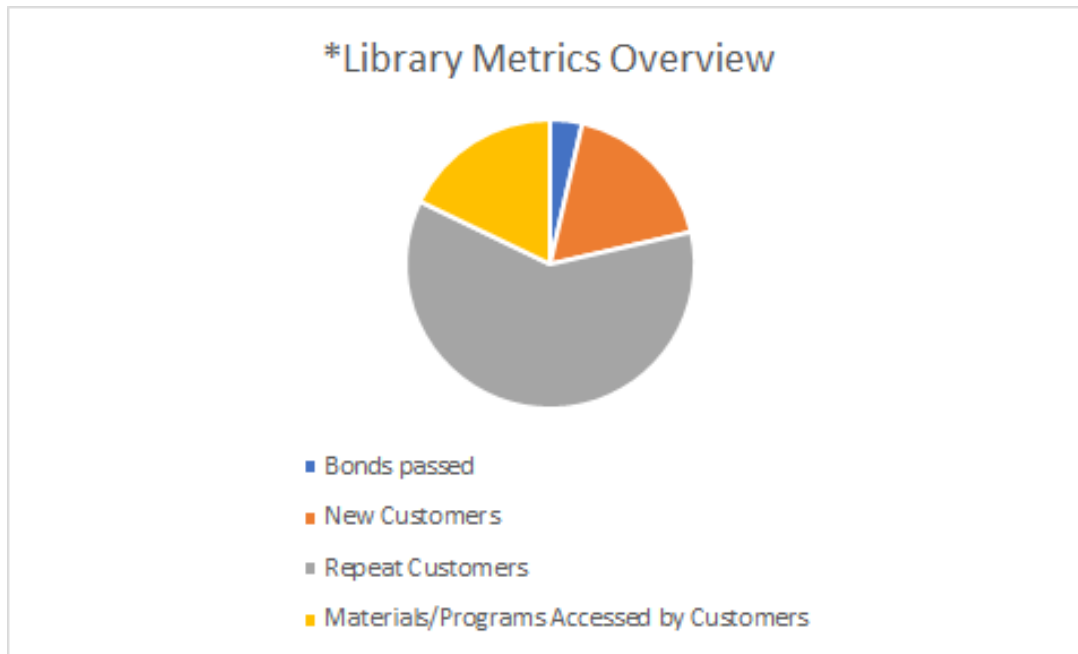
- Use links on receipts – each member of staff could have a name/number to review.
- Surveys could be sent via email.
- A standing link on the MLS website for input.
- Add a survey to the scan me app.

Members of XChange mentioned **Observation of Staff Interaction with Customers** 34 times through their discussions. Members of XChange made the following considerations on observing staff:

- Though this is a good tool, we should observe without hovering or micromanaging.
- Supervisors need time to observe staff and coach after positive and negative interactions.
- Supervisors need to be on the floor.
- Use one on one to discuss observations of staff interactions.

Members of XChange mentioned **Library Metrics** 28 times through their discussions. Library metrics included 4 categories: number of new customers - 5, number of repeat customers or customers seeking service from same location or employee - 17, materials or programs accessed by customers - 5, bonds passed - 1. Members of XChange made the following considerations on using library metrics:

- Are customers using the same library over and over.
- Metrics – amount of materials checked out and program attendance.
- Customers requesting certain staff members or visiting particular locations
- Percentage of new customers per location.



Members of XChange mentioned **Information – Ask Customer at the door/in the moment** 21 times through their discussions. Members of XChange made the following considerations on asking customers at the door/in the moment:

- Ask customer directly at the door.
- Have a manager at the exit to do a quick survey.
- Just ask the customer simple follow up statement – is there anything else that I can help you with or you did not get?
- Ask customer before they leave the building if everything went okay.

Members of XChange mentioned **Self-Reflection/Evaluation** 19 times through their discussions. Members of XChange made the following considerations on self-evaluation:

- Have staff note their customer service wins and challenge in team meetings or one on ones.
- Employee input on evaluation – reflections on good and bad from staff to work through.
- Recount customer experiences through telling stories during meetings.
- Staff rank themselves before and after customer service training.

Members of XChange mentioned **Social Media Reviews** 15 times through their discussions. Members of XChange made the following considerations on social media:

- Review social media feedback from customers.
- Ask occasionally through polling, impromptu questions on social media.
- Use social media to send out polls or surveys.
- Keep it simple - star rating or smiley face online.

Members of XChange mentioned **Role Playing** 14 times through their discussions. Members of XChange made the following considerations on role playing:

- May not be well received by staff.
- Staff could watch videotaped 'real life' scenarios.
- This will provide a safe space to practice customer service.

Members of XChange mentioned **Secret Shoppers** 13 times through their discussions. Members of XChange made the following considerations on secret shoppers at locations:

- Have secret shoppers like retail stores.
- Student employees were used in the past for secret shoppers.
- Use staff from various locations as the secret shoppers.
- Have secret shoppers rate experience.

Members of XChange mentioned **Comment Box** 9 times through their discussions. Members of XChange made the following considerations on comment boxes:

- Place comment box at all locations.
- A button to push when they left if they had good customer service.
- Comment boxes on desks.
- Comment sheets available by exit.

Members of XChange mentioned **Peer to Peer Feedback** 8 times through their discussions. Members of XChange made the following considerations on peer to peer feedback:

- Peer observations and a way to communicate that positive feedback to other staff.
- Kudos – give staff name to manager and praise staff at weekly meetings.
- Take time for peers to share feedback about each other.

Members of XChange mentioned **Leadership Models Expectations on the Floor** 8 times through their discussions. Members of XChange made the following considerations on leadership modeling expectations:

- Regional Directors could be working the desk (non COVID times).
- Supervisors should be modeling behavior and show the way by leading.
- Reinforce by modeling the behaviors they want to see.

Additional Considerations/Remarks from XChange:

- Measuring customer service should be a combination of tools, data.
- Tell staff “the why” and that it is not a means to punish.
- Must have staff buy in and include in conversations.
- Take a baseline survey before any training occurs.
- Consider customers will give negative reviews regardless.
- We need a system like PITS to store customer feedback or give staff KUDOS for a great job.
- Incentivize great customer service at locations.
- Ensure training is consistent and has longevity.