Library On [the] Line

INTRODUCTION

A workgroup was developed in March 2017 to assess and make recommendations for the establishment of a call center/virtual library to include services to be provided and the need for specific staff, space, equipment, and technology. The members of the workgroup were: Kay Bauman (Member Services), Karin Daugherty (CAT), Kathryn Goldbach (DN), Melody Kellogg (Lead, District 1), Tim Spindle (DL), George Tocco (MC), and Jonathan Tolle (CH). This plan is based on the proposal as well as feedback received when the proposal was posted on the intranet for all staff to review.

OVERVIEW

The Call Center/Virtual Library Workgroup proposed a new name that is simpler and all encompassing: Library On the Line (LOtL or LOL). The primary purpose of LOL is to provide reliably excellent customer service to library members at *their* convenience using every technological means available to Metropolitan Library System. LOL is not an ad hoc department but one distinct unit with a dedicated staff and manager that serves to unify current reference service channels and expand into new channels. LOL will provide support services for the public but not *in* the public. In other words, anything other than in person.

Member Engagement

Metro's ten initiatives will require significant staff time to implement. Library On the Line's success will support frontline library staff having more time for in-depth, face-to-face interactions with their members in addition to working on these initiatives.

LOL interactions are expected to correspond to one of three categories: Account Management, Ready Reference, and Digital Collection Support. Definite processes are still to be developed. Account Management includes many things, including waiving or accepting payment for fines, renewing materials, placing items on hold, updating member information, etc. One example of account management is canceling hold(s) for members. LOL staff will cancel the hold, and if the item(s) are ready for pick up, notify library staff by email to pull the items.

Some members' needs will be better served by staff in a physical library. Following are some examples of calls to be "warm transferred" to a library:

- A warm handoff will occur when a member needs a **Shelf Check** so any other callers in the queue can be assisted more quickly.
- Explanations of **Damaged** materials for which a member has received a letter or invoice will be handed off to the library where the item is being held.

- Calls for **event details** and/or which involve in person registration will be connected to local library staff. Online registration will be handled by LOL.
- **Lost and found** calls ("I was just in there and I left my flash drive") will go to local staff.

Launching Library On [the] Line

The first steps to launch LOL are to hire a manager and staff.

Staffing

Without the ability to assess the current call volume or confirm the number of emails that members sent to branch email addresses, there is no means to identify peak times of day, week, month, year. For full coverage during all hours the physical libraries are open (70 hours per week), LOL will be launched with 4-5 staff, at least two of which will hold an MLIS. The department will be expanded as needed to fully meet the demands of the operation.

To ensure a successful experience for members, every LOL staff member will be expected to be fully qualified to assist members in at least the following categories:

1. Account Management: Many of the calls and emails to be redirected from the libraries to LOL will likely be requests to remedy account issues like a soft block on a member's account, requests for account information, renewing items, placing holds, etc. Thorough knowledge of Carl.X and LS2PAC will be required.
2. Ready Reference: This is still to be defined but generally includes access-related inquiries like *What is the Oklahoma State Flower? How do I search for DVDs? What were last night's Powerball numbers? I need the phone number for News9.*
3. Digital Collection Support: LOL staff will have thorough knowledge of the digital collection. They will be able to assist members in using our digital collection on their device(s) by way of walking members through the steps to download and/or stream content, including the installation and configuration of software, and troubleshooting. For these tasks, staff must be familiar with our current digital collection, our databases and services, and the variety of devices (e.g. ereaders, phones, tablets, etc.) members will use to access our digital collection. Moderate technology teaching and coaching skills, such as clearing a browser's cache or reinstalling an app, will be necessary.
4. Content Creation: Current tasks – creating FAQs, responding to website comments and online posts (Facebook, Twitter, Instagram, Yelp, Google, etc.) and looking for opportunities to help the public via proactive environmental scanning methods like saved Twitter searches – will be continued and/or performed in collaboration with other departments.
5. Other Knowledge, Skills and Abilities for LOL staff:
   a. Conduct an effective reference interview in a virtual environment
   b. Communicate at a professional level (with an understanding to engage the member on a personal level) with remote members
   c. Project poise and interest (in a member's question) in an environment in which staff might work with multiple users at once
   d. Possess knowledge of the hardware, software, and services required to perform the job

e. Possess general knowledge of policies and procedures, e.g. library card issuance, checkout and renewal limits, hold procedures, lost and damaged procedures, etc.

f. Be familiar with systemwide programming for the month and near future

Training will be provided prior to any staff engaging with members.

Space Needs
While the hiring process is occurring, space will be identified to house LOL. The desired space and furnishings are as follows:
- An enclosed (for sound), non-public space to house 5 employees
- Sit/stand desks with some storage
- Chairs
- Shelves to keep ready reference easily accessible
- Bulletin board or white/glass board for important documents or messages

Equipment
As soon as the space is available to establish LOL, equipment will be secured and installed.
- Phones: one for each desk with the option to use wireless headsets with mics
- Computers, dual monitors, webcams
- UPS (backup battery) for computers
- eReading devices: iPad, Kindle Fire, Android tablet, etc. to mirror what our members are using when we assist them
- Copier with scanning capability

Technology and Permissions
The LOL manager will work with IT to determine the best way to accommodate the permissions needed by LOL staff:
- **Carl.X**: full permissions
- **LibraryH3lp**: FAQ maintenance and text/chat reference.
- **Website**: permissions to post a closing notification to the top of the website
- **Social media**: permissions to reply to a follower as Metro Library
- **Web browsers**: Internet Explorer, Edge, Chrome, Firefox, Safari
- **Adobe Digital Editions** and both versions (bit.ly/mlsodapps) of the **OverDrive** app for eBook/audiobook help.
- **Microsoft Outlook Client**: i.e. not using mail.metrolibrary.org for email support.
- **Google Earth**

Other Needs
- Ready reference collection in print
- Misc office supplies: pens, pencils, stapler, Post-Its, etc.

Begin Partnership with Physical Libraries

LOL will start by forwarding the published phone numbers and email forms from DN and BI. As soon as staff have established processes that work and capacity exists, other libraries will be added.

FOR FUTURE DEVELOPMENT

- LOL staff will establish standards for excellent customer service. Examples: no member whose call has been answered should wait on hold longer than 60 seconds without being checked in on. All remote members will be greeted in a friendly, personal manner and asked how they can be helped.
- A chat window will be embedded on all pages throughout metrolibrary.org for chat reference.
- Hours beyond those the physical libraries are open will be considered after partnerships have been established with all of the physical libraries.
- A workgroup will be established to assess and recommend Automatic Call Distributor (ACD) software and possibly hardware to manage the call queue.
- Software to track and compile average call times, average wait time, service requests received per employee, percentage of calls forwarded to a branch, etc. may be considered.