Call Center/Virtual Library

03.16.2017

Melody Kellogg

Kay Bauman

Karin Daugherty

Kathryn Goldbach

Tim Spindle

George Tocco

Jonathan Tolle

Overview

The Call Center/Virtual Library is envisioned as one distinct unit with a dedicated staff and a manager. The CCVL provides support services for the public but not IN the public. In other words, anything other than in person.

Responsibilities/Charge

1. Define the services, product lines, or experiences recommended to be offered by the Call Center/Virtual Library.
2. Describe how these services could help the system advance its ten initiatives in Library Unbound.
3. Assess the staff needed to support these services – FTE and specific jobs – including skills, knowledge, and abilities of successful candidates to fill these positions.
4. Review the draft organizational chart and determine how well it supports the expected needs and outcomes of the Call Center/Virtual Library.
5. Describe the expected space, equipment, and technology needs of the Call Center/Virtual Library.

Services, Product Lines, Experiences

The primary purpose of the CCVL is to provide reliably excellent customer service to library members at *their* convenience using every technological means available to Metropolitan Library System.

Member Services

In taking on the majority of interactions with remote members, CCVL staff will provide excellent customer service to members. The efforts freed by the CCVL will then be available to in person members at every physical library. We anticipate CCVL interactions will generally fall into one of three categories: Account Management, Ready Reference, and Digital Collection Support.
Goals:

- *To become the point-of-contact for all incoming communication from remote members.*
- *Answer 98% of all questions in first session. (Session being defined.)*

Examples of Calls to be "Warm Transferred" to a Library

- Shelf Checks: after considerable discussion, we decided that shelf checks should be sent to the owning or returning library so as not to hold up other callers in the queue.
- Explanation of damaged/billed items.

- Calls for event details and/or which involve in person registration. Online registration can be handled by CCVL.
- Lost and found calls ("I was just in there and I left my flash drive").

Examples of Calls to be Handled by CCVL

- In addition to account management, ready reference, and digital collection support, canceling holds that are ready for pick up. CCVL staff will email the library instead of forwarding the call.

Initiatives

All ten of the initiatives will require staff time to implement. The CCVL's main contribution to the ten initiatives is providing excellent customer service to remote members through the members' choice of communication channel. The CCVL is not an ad hoc department but is instead a unification of current reference service channels and an expansion into new channels. A byproduct of this department's success will be that frontline library staff will be able to have more in depth, face to face interactions with their members.

Staff

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

1. Account Management: We anticipate that many of the calls and emails redirected from the libraries to CCVL will 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: Still to be defined but generally 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: CCVL 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: The virtual librarian currently maintains the library's FAQ, responds to website comments and online posts (Facebook, Twitter, Instagram, Yelp, Google, etc.) and looks for opportunities to help the public via proactive environmental scanning methods like saved Twitter searches. Because of unpredictable downtime, this activity could continue to be coordinated by CCVL or at least be performed in collaboration with other departments.

5. Other Knowledge, Skills and Abilities for CCVL 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. Ability to project poise and interest (in a member's question) in an environment in which staff might work with multiple users at once

   d. Knowledge of the hardware, software, and services required to perform the job

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

   f. Systemwide programming for the month and near future

FTE and Positions

Without the ability to assess the current call volume (confirmed with IT), we were also unable to identify peak times of day, week, month, year. In 2016, the average Ask a Librarian email volume per day was 7. We cannot confirm the number of emails that members sent to branch email addresses.

- For full coverage during all hours the physical libraries are open (70 hours per week), 7-9 FTE are recommended.

Organizational Chart

Based on 7-9 FTE, the proposed organizational chart for the CCVL is as follows:

CCVL Manager
- 1 fulltime librarian
- 4 fulltime Engagement Specialists II
- 4 halftime Engagement Specialists II (2 FTE)

Recommendations

- 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.
- Start with a phased approach of forwarding published phone numbers and branch email forms from select libraries then add others as the department is built and the kinks are worked out.
- Embed a chat window on all pages throughout metrolibrary.org for chat reference.
- Initially work the same hours the physical libraries are open (70 hours/week).

Space, Equipment, Technology

A preliminary list of needs is provided below.

Space and Furnishings
- Ideally, an enclosed, non-public space.
- Desks: ideally with backboards to which important documents could be affixed and with overhead and/or side storage for files, phone books, etc. Maybe also a desk that can transition to a standing desk.
- Chairs.

Equipment

- Phones: one for each desk, ideally with the option to use wireless headsets.
- Computers: ideally with dual monitors, webcams, headsets with mics.
- UPS (backup battery) for computers. Provides uninterrupted power in case there's a power drop.
- eReading devices: iPad, Kindle Fire, Android tablet, etc. to mirror what our members are using when we assist them.
- Copier with scanning capability.

Technology Recommended for the CCVL

- **LibraryH3lp**: for FAQ maintenance and (eventually) text and chat reference. LibraryH3lp provides the ability to track stats for chat sessions, generate reports, and anonymize the chat logs just to name a few of its features.
- **Carl.X**: the rights to help the member "at that point" (like delete an account, waive fines, claims returned, etc.).
- **Website**: the rights to post a closing notification to the top of the website.
- **Social media**: the rights to *at least* reply to a follower as Metro Library.
- **Web browsers**: Internet Explorer, Edge, Chrome, Firefox, Safari as these are the browsers our members will be using.
- **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**: Google Maps is for routing while Earth provides the ability to explore an area in 3D.

Additional Technology Needs

- Automatic Call Distributor (ACD) software (and possible hardware) to manage the call queue. The Public Libraries article about libraries with call centers (bit.ly/libcallctr) mentioned Shoretel (bit.ly/libsshoretel) and the Cisco Desktop Agent (which looks to have since been upgraded to this Cisco product [bit.ly/libscisco]). IT

currently does not have this kind of software so we recommend finding something that would integrate into our existing phone system.

- If there is interest in knowing average call times, average wait time, service requests received per employee, percentage of calls forwarded to a branch, etc., we'll need the software to track and compile these stats (which ACD very well may do). Google Docs and OneDrive can be used to track questions received by channel (phone, email, social media) and categories of questions (informational/directional, reference, special collection, download/streaming, directory assistance, etc.).

Other Needs

- Ready reference collection in print, most likely mirroring what is at most reference desks in the libraries.
- Misc office supplies: pens, pencils, stapler, Post-Its, etc.

Other Questions

1. Will we take credit/debit card payments over the phone? If a customer cannot pay online, we can offer to accept their information and make payments on their behalf.

2. Where is Tailored Titles going to be?

3. If Schedule a Librarian is implemented, how will that impact CCVL?