

CUSTOMER SERVICE TRAINING TOOLKIT

This document is intended to give an overview and suggestions for content to assist with planning and delivering customer service training in a library context.

It may be adapted for use in your own staff development or induction programme with appropriate timescales and activities. You may also wish to indicate a person in your team or organisation who is responsible for each 'activity' or area of content.

The toolkit covers:

Methods and resources to support and deliver customer service training

- Background/introduction to customer service
- Library resources/general information
- Communication – tools and techniques
- Answering enquiries
- Triage and referral
- Scenarios

Scope and coverage of customer service training in a library context

A two-fold focus:

- Policies and services (awareness and understanding of these)
- Interactions with users (how to engage with users in-person, telephone, online)

METHODS AND RESOURCES
<i>Overview of the tools and resources available to deliver customer service training</i>
Group discussions (e.g. large groups/breakout groups – to discuss scenarios)
Presentations
One-to-one meeting
Online training
VLE
Shadowing
Review real time situations

TOPIC/THEME: LIBRARY RESOURCES / GENERAL INFORMATION	
<i>OVERVIEW: Outlining the aspects of Library Service/Resources to cover in a library customer service training session</i>	
CONTENT	ADDITIONAL INFORMATION
Organisational chart – overview of library organisation and where does the library service fit into the wider departmental organisational structure	
Library policies and procedures	
Finding resources – the library catalogue/discovery tool	
Online content	
Relevant legislation – e.g. data protection, copyright, legislation	
Resources for staff answer enquiries – e.g. an online or printed manual	
Recording enquiries – how this is done; purpose of doing this	

TOPIC/THEME: CUSTOMER SERVICE – BACKGROUND / INTRODUCTION	
<i>OVERVIEW: Setting the context and imparting an understanding / awareness of why the concept of customer service is important in H.E libraries</i>	
CONTENT	ADDITIONAL INFORMATION
Conceptual overview	
Do you like the word customer – why/why not?	
What is a customer in the University/library context	
Higher education and political context – student fees and rising expectations; TEF/REF	
Knowing your customer groups/profile	
Transactional relationship – user perceptions of a library service	
Student experience	
What outcomes does the institution focus on? Retention, employability	

TOPIC/THEME: COMMUNICATION (TOOLS AND TECHNIQUES)

OVERVIEW: *Styles and forms of communication and how these impact on interactions with library users*

CONTENT	ADDITIONAL INFORMATION
How do we communicate with library users/communication styles: face to face, email, telephone, online chat, social media	
Importance of language – correct terminology, avoid slang words and jargon	
Body language and tone	
Eye contact	
Written communication- use templates for consistency	
Telephone answering – protocol and procedures (greetings/names/transfer calls)	
Emotional intelligence – adapting to situations	
Communication skills and qualities – patience, listening skills	
Visibility – how are staff identified	
Consistency – information on website/printed resources and information communicated to users	
Cultural awareness	
Dealing with difficult customers	

TOPIC/THEME: ANSWERING ENQUIRIES

OVERVIEW: *Handling enquiries effectively to ensure the student receives the information they need*

CONTENT	ADDITIONAL INFORMATION
Clarifying the question – making sure there is an understanding of what is being asked for	
Quality – even if the question has been answered 20+ times, the student in front of you is asking it for the first time	
Keeping up to date – current awareness	
Referral – procedures and knowing when to refer to a colleague	
Logging and recording enquiries	

TOPIC/THEME: TRIAGE AND REFERRAL	
<i>OVERVIEW: What are the next steps and procedures to follow if an enquiry can't be answered directly and/or needs referral to a more specialist colleague or another department</i>	
CONTENT	ADDITIONAL INFORMATION
Know the limits of your own knowledge	
Understanding the question	
Forward a phone call	
Referral through an enquiry management system	
Referral to other parts of the University/organisation	
Knowing the user "type" – to ensure the enquiry goes to the right place	

SCENARIOS AND DISCUSSION POINTS	
<i>Examples of scenarios which can be used to gain an understanding of how a service operates, what the policies and procedures are. These may be used as discussion points in a training session – to help develop staff knowledge and understanding of procedures and consider how different situations can be handled.</i>	
<i>Scenarios used should be appropriate to the rules or regulations in place and service delivery model in the particular library</i>	
Think of an example when you received excellent or poor customer service- what did you like about it; what did you not like about it	
When can we show flexibility with regard to applying rules	
A student tells you that they have left their ID card upstairs, but they just need to get a cup of coffee. What would you say to them?	
<i>Customer service training may also cover a range of topics which can be illustrated by outlining scenarios</i>	
Dealing with complaints	
Discrimination and equality	
Unconscious bias	
Invisible disabilities	

EVALUATING AND MEASURING IMPACT OF CUSTOMER SERVICE TRAINING

How can we measure the impact of customer service training – on staff and on the service

Feedback from attendees

How many staff have had training (important to record for internal/auditing)

Survey findings

Reduction in complaints

Improvement in user feedback – library user surveys, NSS scores