No More “Magic Aprons”: Longitudinal Assessment and Continuous Improvement of Customer Service at the University of North Dakota Libraries

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No More “Magic Aprons”: Longitudinal Assessment and Continuous Improvement of Customer Service at the University of North Dakota Libraries

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Abstract: The University of North Dakota (UND) Libraries have developed a multi-award winning Customer Service Program (CSP) involving longitudinal assessment and continuous improvement. The CSP consists of iterative training modules; constant reinforcement of Customer Service Principles with multiple communication strategies and tools, and incentives that boost morale and foster not only compliance, but initiative-taking and innovation. The CSP became a widely adopted part of campus-wide assessment, beyond the libraries. Subsequent presentations at conferences led to multiple requests and implementation at other libraries.

Keywords: Access Services, Circulation, Customer Service, Assessment, Learning Outcomes, Leadership, Student Employment
Section 1: Context

Emphasis on higher education assessment has increased recently, including at the University of North Dakota (UND). In 2001, Karlene Clark began working at UND’s largest library, Chester Fritz Library (CFL), as a Circulation & Reserves Specialist in Access Services, supervising 8-10 students. No organized method of training students existed; the Procedures Manual (c1998) was useless. We operated on a “Magic Apron Theory” - hire someone as a cook, give him an apron, and he’ll magically know how to cook. The library’s version was “Hire a student, put her behind a library desk, and she’ll magically understand library tasks.” Training was minimal. In libraries, as in most work environments, there is a culture that must be learned to be an effective member. However, this is rarely formalized, articulated, or recorded, and leads to a form of tribal knowledge difficult for new employees (Evans 2013). Worse, for most students, this was not only their first library job but their first paid job; customer service principles were a mystery.

Clark had spent thirteen years in retail, and realized the importance of superb customer service. She suggested CFL needed better customer service training. Initially, colleagues, supervisors, and library administrators resisted. They were unwilling to consider library users “customers” – just as there has been resistance to words like “marketing” and other business lingo. Over time, as antipathy to such terminology abated, resistance to adapting Customer Service Principles to fit CFL declined. Students also have begun to see themselves as customers. The Higher Education Funding Council for England Strategic Plan 2003–2008 included the statement that “students increasingly see themselves as consumers, entitled to agreed standards of provision and to full
information about the quality of what is provided” (Lomas 2007). When CFL supervisors tell newly hired students to consider fellow students (and others) as customers, they receive less pushback than in the past. While it may be unpopular to consider higher education a “business,” there are valid parallels and principles. Universities market themselves to compete in the worldwide higher education market (Lomas 2007) and research shows that customers’ behavioral intentions, including loyalty, are consequences of service quality and customer satisfaction (Kirin 2011). Libraries aren’t exactly businesses, but it was worth asking whether poorly treated patrons were likely to return, and if they did, whether they might avoid staff and be less cognizant of available services. Kirin and Diljit note that the “satisfaction, value, and quality” of an interaction involves “an emotional reaction from the customer or student employee that determines if they come back” (Kirin 2011). CFL had received several complaints. Inadequately trained staff were providing sub-optimal service; such interactions might prevent users from deriving maximum benefits.

Over time, Clark has had increased responsibilities and title changes. She is now Coordinator of Circulation Services & Student Employees, and supervises 30+ students. In 2014, the manual for new Access Services students was updated, and a new manual completed for Senior Students, who are responsible for complex tasks and evening/weekend supervision. She also enrolled in San Jose State University’s online Master of Library & Information Science program, focused on Leadership & Management, becoming eager to use what was learned to enhance services in a real library. Simultaneously, changes were brewing at UND and CFL. A new Provost - a strong library supporter - arrived. Several senior CFL positions, including that of Library Director, became vacant; the latter was redesigned as “Dean of Libraries & Information Resources” and a
Clark gained a new supervisor when the Head of Reference & Research was promoted to Assistant CFL Director & Head of Public Services; the new Assistant Director supported increased training and a focus on customer service. The push for assessment was another factor: there was a need to evaluate services and prove the library’s value. In January 2015, with support from CFL and the campus, Clark joined a new group formed by UND Student Affairs, entitled the Student Employment Working Group (SEWG). She attended workshops on communication, service expectations, and customer service, and began designing training modules. In September 2015, Stephanie Walker was hired as the new Dean of Libraries & Information Resources, and she began redesigning CFL’s administrative structure, with an interest in improving communication and collaboration.

Unfortunately, by December 2015, falling oil prices devastated the state economy; higher education budgets were cut by 20%. Pressure to demonstrate value intensified. The library had evaluated instruction, but little else. Yet the Circulation/Access Services Desk was often the first place patrons went. Circulation staff – often students – were thus the first encounter patrons had with CFL. It was critical that they demonstrate superb service. UND was also asked to demonstrate value beyond classrooms, and CFL was tasked with demonstrating student “learning outcomes” (LOs) from employment. This sharpened the library’s interest in training and assessment. Across CFL, “customer service” was no longer “too corporate.” Managers achieved unanimous agreement on the importance of exceptional service and cross-training, so that if a student is ill, a student from another unit can replace her while meeting identical service standards.
Section 2: Program Development & Implementation

Clark and Walker agreed that Customer Service Principles (CSPs) would benefit CFL. Users would have improved experiences and be motivated to return; student staff would learn valuable employment skills. Working with the SEWG and HR, CSPs were mapped to Learning Outcomes (LOs), and linked to the National Association of Colleges and Employers “Attributes Employers Want to See on New College Graduates Resumes” (NACE 2015) and UND’s Mission and Goals (UND 2017). At CFL, Clark convened a group of interested staff from across units. First looking at CFL’s Mission and Goals (CFL 2016), they identified who the library’s customers were, and what they wanted/expected. Customers included faculty, staff (staff are customers to each other!), students, and community members. The group decided that supervisors demonstrate customer service by trusting and valuing staff, and praising them for good performance. “An effective staff is trusted and valued by management. Without this trust, the staff will not truly believe in their work, and this disbelief and lack of faith will manifest outward in poor customer service skills” (Hasty 2004). Managing by stress – providing inadequate training, having unrealistic expectations, not communicating expectations, pressuring employees, denigrating them for errors, etc. - leads to adverse employee performance, which translates into poor customer service (Hasty 2004). Clark decided to focus on “building students up” – praising good performance, offering rewards, demonstrating trust. The hope was to improve point-of-service interactions and foster students’ sense that they were valuable team members.

Next, the group identified core competencies. In April 2015, CFL student supervisors brainstormed, writing ideas for core competencies on a whiteboard, then compiling thoughts into six core LOs: Accountability, Approachability, Efficiency, Knowledgeability, Respectfulness,
and Teamwork. The SEWG added one more: Communication. The SEWG and HR advised the library to pick one or two competencies to start; if students were taught everything at once, and tried to tie LOs to all library policies and procedures, CFL risked information overload, and it would be impossible to achieve clarity or consistency.

The group selected Accountability, asking, “What does Accountability look like at CFL?” Evans and Alire provided clarification, saying “Although some people use the terms ‘accountability’ and ‘responsibility’ interchangeably, there is a significant difference between them. Responsibility is what you ought to do, whereas accountability is being answerable for an action. Thus, accountability is important in the process of enforcing responsibility” (Evans 2013). The questions were “How do we model accountability?” and “How do we instill it in student employees?” Accountability, it was decided, included arriving on time, calling in advance about problems with shift coverage, completing error-free timesheets, advising supervisors of issues during shifts, etc. It included being accountable to supervisors, but also fellow students, staff, and customers. Clark instilled that modeling this, and repeatedly communicating Accountability’s importance to students via multiple tools and strategies, was vital.

The core competencies that became the seven LOs also needed evaluative tools, to ensure criteria were met. The only tool Clark had was an ancient generic personnel evaluation form; no one in the SEWG had anything better! This would not do. Under Clark’s guidance, CFL led a UND-wide initiative to create a full rubric specifically for student employee evaluation. The first rubric item was Communication. The rubric gave clear guidelines for evaluation at four competency levels: Novice, Developing/Acceptable, Accomplished/Above Average, and
Advanced/Outstanding. The term Novice was selected to encourage students, as opposed to fails or does not meet standards. Novice means they are often new or still learning expectations for the LO. Outstanding includes characteristics like “encourages others”, “inspires others”, “proactively invites” and “demonstrates ability to guide and direct.” Clark informs students that Outstanding is a difficult pinnacle, but by the end of four years, she believes they will reach it. She is rarely disappointed. They rise to the challenge.

Clark also began addressing revisions to the Policy Manual. She consulted with other units to standardize it across CFL. However, CFL also learned that simply handing students a print manual did not work. Students did not retain everything: it was overwhelming. Saying, “It’s in the Procedure Manual” when telling a student they had erred resulted in blank looks, and set students up for failure in Knowledgeability. Clark created alternatives. She noticed that the library’s largely “Millennial” students were more interested in, and able to retain, information digested online. She described this as “click – and stick.” Visual prompts in online guides were also important – the more visuals included, the better they seemed to retain information. (The authors make no comment on general effectiveness of online vs. print guides; this is just a description of their experience.) She also oversaw creation of posters including pop culture images. Each core competency received its own poster, e.g. Approachability has penguins from the movie Madagascar. Clark implemented these changes - and the program started working! Students began retaining information. Clark also oversaw creation and implementation of training modules consisting of online tutorials, online quizzes, and paper quizzes. Clark learned to code using Scratch, and created training games. Using multiple forms of instruction reinforced learning. We also made explicit ties between each core competency and the Mission
and Vision of CFL, so students could understand the context for rules and for their positions.

Excited by this success, we expanded the program, creating tutorials for more topics, e.g. understanding differences between Circulation and Reference questions.

Clark began spending extensive time on orientation, including mandatory training (before classes begin) that gives students basic information on policies, expectations, customer service standards, timesheets, what an academic library is, and how to do basic online searches. Students review a Research Guide (CFL 2017) during their first week; it includes games, videos on basic LC and Dewey classification, the Policy Manual, and a required FERPA test on privacy.

To further reinforce learning, Clark implemented an apprenticeship model. New students are paired with experienced students to learn tasks that build in complexity as they learn, preventing information overload. For example, when a student passes a shelving tutorial, he is permitted to interfile materials on a cart at the desk, double-checked by his “buddy.” If he succeeds, he progresses to shelving in the stacks; his buddy double-checks. With each success, he checks another item off a training checklist (kept at Clark’s desk), and his buddy signs off. After completing each task correctly five times, he advances to tasks at the next level. Once the checklist is completed (usually near the end of their first work semester), they complete a quiz. They can use manuals, training guides, and computers, but may not ask their buddy questions. Anything they don’t know, Clark reviews with them. This shows Clark not only what they know and don’t know, but where the buddy needs help. Buddies are human – they sometimes forget!

This training style frees the supervisor’s time and encourages experienced students to assume leadership roles. Many students use this experience on their resumes, to demonstrate leadership capabilities and teamwork.
Buddies are usually students in training to become Senior Students. Senior Students earn more, and work nights/weekends without full-time staff in the building. They must master another checklist, including fire safety/extinguisher training with Campus Safety, handling emergencies, responsibility for cash registers, and opening/closing the building. After training, they take another quiz. Clark also presents them with scenarios that they must explain how they would handle. One scenario might be the customer service/respect aspect of giving change: Clark asks them to consider how many times they have been at a drive-thru window and received coins on top of bills – only to have the coins fall to the ground outside the car. Light invariably dawns: students never again forget to place coins in a customer’s hand before bills.

Regular incentives and reinforcements are provided to ensure students follow procedures and model appropriate behaviors. This begins with praise, preferably publicly. For example, it is emphasized that “Everyone is your customer.” To reinforce this, Clark regularly praises them (in front of others) for smiling and saying “Hi” upon arrival, or for smiling and greeting patrons even before they reach the desk. She encourages them to treat everyone, in front of and behind the desk, with the respect they would show someone they admire. Students who excel at this are lauded and “buddied” with others to model the behavior.

When corrections are needed, these are generally done privately; only rarely, under specific circumstances, is correction done publicly. One example of the latter is the situation where a student may use quiet time to sit at the Circulation Desk engrossed in her own work, with a laptop or a pile of paper. Clark takes the student to the front and places herself behind the Desk,
sitting as they did. She asks them to walk into the Library as though they were seeking assistance. This never fails – they say “Oh. I get it.” By necessity, this is public. There is also gentle training/correction in monthly student staff meetings that Clark chairs. Clark designed library adaptations of popular games – Catch Phrase, Jeopardy – and gives situational examples of things that are important to remember, or that staff could be doing better. Students compete to get correct answers. Examples used in games are always something done by multiple people, so no individual is shamed. Students get very competitive, battling to see which team can do the best job of addressing a situation. Knowledge gathered in such games is generally retained. Largely, however, correction is done privately. Clark also tries to get students to see for themselves what they did incorrectly, rather than telling them. Asking “What could you have done better?” fosters reflection and retention.

Clark also regularly reiterates that students have power and can lead, and provides opportunities to do so. Supervisors encourage students to suggest and implement changes to training, e.g. by creating new games, posters, etc. They enjoy this, and CFL receives many effective materials. For example, Clark taught a Scratch coding class to various staff and students; two students are now creating new training games. Another result was the creation of an “Awards Wall” for the student employees that includes a “Student of the Month” (chosen by other patrons, staff, or the students themselves) and excellence in LibStats – previously, keeping proper statistics had been near impossible. Students didn’t understand what constituted an appropriate interaction for a specific statistic, and didn’t see the importance of accurate statistics. After training on how statistics are utilized, and after seeing people get awards for keeping flawless statistics, they understood their importance. Two additional awards are offered in recognition of anything done
especially well that month, such as a terrific customer interaction, a great response to a difficult situation, etc. Rewards are small, but prized. We experimented with many options. Stickers are popular. Students work hard to collect specific stickers or a complete set, and display them proudly on their employee badges. The top two students each month get a small treat – candy, coupons for discounts at local merchants, fancier stickers. There are also Student Appreciation Days, for which the Library provides snacks, and End of Term Potlucks.

Students are also empowered to discuss problems. Clark implemented a monthly meeting where students discuss concerns, schedules, problems, policies, etc. Policy changes may be made based on these discussions. For example, there were requests to keep CFL open 24/7 around exams. That was impossible, but the hours were extended until 2 a.m. Students working these hours counted fewer than a dozen patrons between 12-2 a.m. They objected to working late when usage was poor. CFL returned to closing at midnight. While the social risk of discussing a problem in front of colleagues and supervisors is high in some workplaces, the Access Services students are unfazed, because of trust in each other and Clark.

Using other students as buddies, along with having Clark spend extensive time on training and orientation and later on reinforcement and gentle correction, has increased student confidence. Even when a small fire broke out in CFL on a Sunday (an EXIT sign burst into flames due to a wiring failure), the Senior Students remained calm, calling the Fire Department and Campus Police, implementing evacuation procedures, and contacting Clark at home to let her know everything was under control. Reluctant to dump problems on the next shift, they stayed 1.5 hours past their shift-end. The Fire Department and Campus Police were amazed; the next day,
they told Clark they were impressed with the students’ poise and professionalism, and thought they were permanent staff. The authors consider this stellar accountability. It is well established that “employees under the supervision of a trusted superior tend to have higher levels of confidence to carry out their jobs” and this “reduces concerns for social uncertainty and interpersonal risk” (Li 2012). The Access Services students demonstrate trust and confidence, and CFL trusts and values them.

Section 3: Communicating Results and Impact

What have the authors’ results been? Frankly, the impact on CFL has been tremendous. Customer service has improved. There are fewer complaints about poor service, rudeness, or mistakes. Effective hiring and training has resulted in higher retention of student employees; given the effort expended on good training, this is a high priority. Interestingly, the SEWG noticed that even when training was poor, CFL had low turnover compared to many campus units. The authors cannot pinpoint the cause, though perhaps the fact that they always tried to create a decent atmosphere helped. The people were disorganized - not nasty. Students have told Clark that they now feel they are on solid ground regarding training and expectations. Generally, staff feel that when there are “clear expectations, there is a better work environment and a trust in their supervisors” (Borin 2001). The authors believe that clarity of expectations has improved significantly. They also retain even more students; the majority remain until they graduate. Clark regularly asks students why they chose to stay at CFL; answers cluster around issues such as learning valuable skills, having something solid to put on resumes, pleasant working atmosphere, and feeling valued as part of the organization. It is not the pay: CFL’s
budget does not support high salaries for students, and pay rates are on the low end for UND. Still, they stay.

There is also a change among regular staff. Even those who resisted the “corporate” idea of customer service are believers. This happened in three ways. Sometimes, skeptical staff had wonderful interactions with trained students. In other cases, staff hired students trained by Clark, and were impressed. Finally, staff saw that CFL began receiving frequent praise from patrons. A startling example happened recently: the library received a sizable donation from a community member, whose accompanying note stated that it was in gratitude for two students who went “above and beyond” to assist him. This “straw” broke the back of resistance. More cross-training has been added, which Walker supported and funded; supervisors eagerly send students to participate.

Cross-training also helped the library deal with financial constraints. The Periodicals Manager retired. Duties were reallocated duties and some tasks ceased. Students assumed more responsibilities, not necessarily for functions formerly done by full-time staff, but for things once considered beyond their scope. With new knowledge of better ways to conduct training, and better-trained students, CFL absorbed the staff loss without serious damage to services. Clark also involves students in new projects that give them something concrete for their resumes, such as digitization, creating marketing materials, etc. They gain not only leadership and teamwork experience, but demonstrable projects. This is a direct result of training; supervisors have more confidence in students’ skills and reliability.
Clark’s training program was widely adopted. She shared training materials and rubrics with the SEWG and HR; both were impressed, and these were adapted for units across UND. In April 2016, Clark was honored by Student Career Services with UND’s inaugural Student Supervisor of the Year Award and the North Dakota Student Supervisor of the Year Award, from the Midwest Association of Student Employment Administrators. Repeated campus-wide presentations have been given on the program, and the author has assisted other units with re-evaluating and streamlining processes. Clark has also shared her work beyond UND. In September 2016, and again October 2017, she gave presentations on Customer Service Standards at the North Dakota Library Association conference. While attending another conference, her input at an open session resulted in a librarian from another library requesting her material for implementation on their own campus. They have since exchanged ideas and learned from each other’s methods. Staff from non-UND libraries have visited CFL and shadowed Clark, to learn her techniques. Walker and Clark also publicized the program on social media and listservs, which resulted in multiple requests for information.

Another result is that our students truly learn – and know they have learned – useful skills for future employment. Many graduates return to tell Clark how their experience helped. After one year of this process, in spring 2016, a graduating student interviewed for a hotel management position. The employer called Clark, saying “She nailed everything! She volunteered information about accountability, teamwork, communication, and demonstrating good customer service perfectly. I don’t have any questions left to ask her - or you. Could you just confirm she is as terrific as she seems?”
Another result has been ongoing program revisions. As people make suggestions, and the library assesses the successes and failures, the program continues to expand and adapt. As noted, the library is adding Scratch games and expanding guides for new areas, e.g. SUDOC training. Clark holds orientations for other CFL supervisors. Supervisors are walked through the program and rubrics, and provided training and feedback. It has turned into a new training program for supervisors. For example, the Dean approved the hiring of a student to work under the new Digital Initiatives Librarian on a grant-funded project. Clark trained the librarian; both found the experience useful. Several staff – new to supervision or long-time supervisors – have taken advantage of the program. Walker believes strongly in training and professional development for prospective managers. She has noticed that recruitment for entry-level librarians often yields 100 applicants, while recruitment for managers may yield just a dozen qualified applicants. She once asked many talented librarians why they never applied to managerial positions, and while some were uninterested, many said they felt they lacked managerial training and experience. Any programs that identify and train talented staff for managerial roles are helpful. “Leaders almost always have had opportunities during their twenties and thirties to actually try to lead, to take a risk, and to learn from both triumphs and failures” (Kotter 2001). The authors wish to provide these opportunities.

There have also been palpable changes in CFL’s atmosphere. Student staff feel better trained, more confident in their roles, more valued, and more like part of an important team. Other staff feel they can rely on and trust trained students. Especially in difficult financial times, anything that improves morale is good.
Finally, as noted, like many institutions, UND is focusing on assessment and on demonstrating value. This program is a major component of the library’s assessment initiatives, used to determine how well CFL serves customers. It is also used to assess the impact on and value to student staff. CFL is a major student employer. Part of the value of university experience is what students learn outside classrooms; that includes on-campus employment. From evaluations, it is abundantly clear: students who work at CFL benefit from the experience.

**Section 4: Leveraging the Findings**

CFL is practicing what they preach, involving students and colleagues in “next steps.” Clark has worked with Senior Students and supervisors to create an exit interview for student employees, newly implemented in Access Services. This will tell us how the supervisors and the library are doing, and how well the training program has worked. It will also tell more about what students feel they received by working here, and what they will take with them to future jobs. Clark and a team of Senior Students are also developing a Supervisor Evaluation Form. In a dramatic departure from past practice, Senior Students are now included in student hiring. One student participates in each interview, giving them a chance to see how it works from the other side, and to practice future leadership skills.

As well, Walker is using the results obtained, and the publicity generated by widespread adoption of the program and Clark’s awards, to hold the Library up as a model for customer service assessment at UND. There have had many queries from other units asking for assistance or asking about her processes and results.
Section 5: Reflection

The most rewarding part of this has been seeing students use what they learned and apply the methodologies and training. The most difficult part was getting staff buy-in to standardize the process throughout CFL. As staff saw benefits, one department at a time, it was rewarding to see the program adopted, and to watch changes develop in staff and students.

For anyone wanting to start a customer service assessment program, the authors have a few recommendations and some things to say about lessons learned and what they believe are best practices. These include:

1) Begin by gathering current policies and procedures, and examining them closely. Get material from across the Library – silos must die! The culture of “tribal knowledge” – where information, policies, and procedures are known but not written anywhere, or one area knows something but others have never heard about it – must be eliminated. Knowledge needs to be shared broadly for cross-training to succeed.

2) Align your unit’s values and learning outcomes with the mission, vision, and values of your library and institution. Context is critical.

3) Be prepared for resistance: this may seem clichéd, but change is hard. Learning to present “baby steps” was instrumental to success.

4) Identify specific steps to take to assess LOs. At CFL, student supervisors revised job descriptions to include an expected LO for each type of task. An orientation is also held before fall semester starts. After that, there are monthly meetings with students, and daily/weekly “check-ins.”
5) Acknowledge students. Frequently. Watch for little things. While all supervisors expect their student employees to do the job, they excel when caught doing it right. Saying things like “Great communication! I love the way you handled that situation” or “I appreciate that you always do your timesheet correctly – great accountability!” works.

6) Collaboration and getting support are key to program success. At CFL, having support from the Dean, Student Affairs, and other campus departments made the process move more smoothly. Once support was obvious within and beyond the Library, resistance evaporated.

7) Aligning other student supervisors to the process is important: other supervisors must become involved and feel they have a stake in the outcomes, language used, values espoused, and goals set.

8) Make sure that everyone understands that customer service is not limited to one department. All interactions are a point of service.

9) Nothing is set in stone. Revisit the program often. Make changes. Encourage students to make changes – and listen to their suggestions.

10) In planning your assessment, find opportunities to attend workshops on customer service in your community. With that knowledge, you can start looking at the image you wish to portray, what you want students to get from working for you, and what employers expect from graduates. Start with one department and a small group of students.

Finally, the authors would like to mention two things. First, this program is adaptable to institutions of different purposes and sizes. Even if you have no student employees, this can apply to staff in any environment. This program creates a “team” environment and culture,
develops trust, and fosters everyone’s alignment with joint expectations and goals. Secondly, it is also important that managers take responsibility and prove themselves willing to adapt. “As a manager, you are always accountable for your actions as well as the actions of those you supervise… You must take responsibility for your supervisee’s failures; your job is to monitor and assist in supporting the person’s performance” (Evans 2013). In this program, all supervisors – buddies, Senior Students, full-time staff, library administrators – are models for the success of every employee, and are accountable to each other.
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