

Best Practices for the Customer-Focused Library



Metropolitan
Library
System



Best Practices Summary

This Customer Focused Library grant was designed to study library services and service attitudes from a retail perspective. Best practices from retail were applied to library space utilization, service philosophy, and service visibility. The consultants hired for this project evaluated the ways in which our libraries serve their customers, with the goal being the development of a customer-focused service model for member libraries.

Research Objectives

- **Explore the dynamics of visitor behavior at four Chicago area libraries**, including both public and academic libraries.
- **Measure visitor interactions** at touch points in the library.
- **Generate information on how public and academic libraries in the Chicago area can better service and educate their visitors**, thereby creating a more satisfying library visit.

Research Methodology

Four libraries in the Chicago area were studied for two days each, utilizing a combination of observation, interviews and video.

Observational

- **Tracking: Researchers used mapping programs** to track and time customers' movements and interactions within the library.
424 visitor groups were observed in four Chicago area libraries

Attitudinal

- **Questionnaires: Library patrons were intercepted after their visit to the library to inquire about their experience** in the library and the services which they regularly use. Patrons were offered a gift for completing the questionnaire.
267 patrons were interviewed after their library visit

Video

- **Small video cameras were installed in key areas of the libraries** in order to capture behavioral patterns, traffic flow, wait times and transaction times.
Over 750 hours of video footage were generated for analysis

Best Practices Findings

Visitor Profile

- **95% visited once per month**, over half visited once per week, and the majority visited alone.
- **56% spent less than 10 minutes in the library**, a surprising finding more typically associated with bookstores and grocery stores.

→ **Two-thirds did not know what they wanted before they arrived.** Since patrons may not come to the library with a specific “need,” we have an opportunity to appeal to their “wants.”

✦ Key finding:

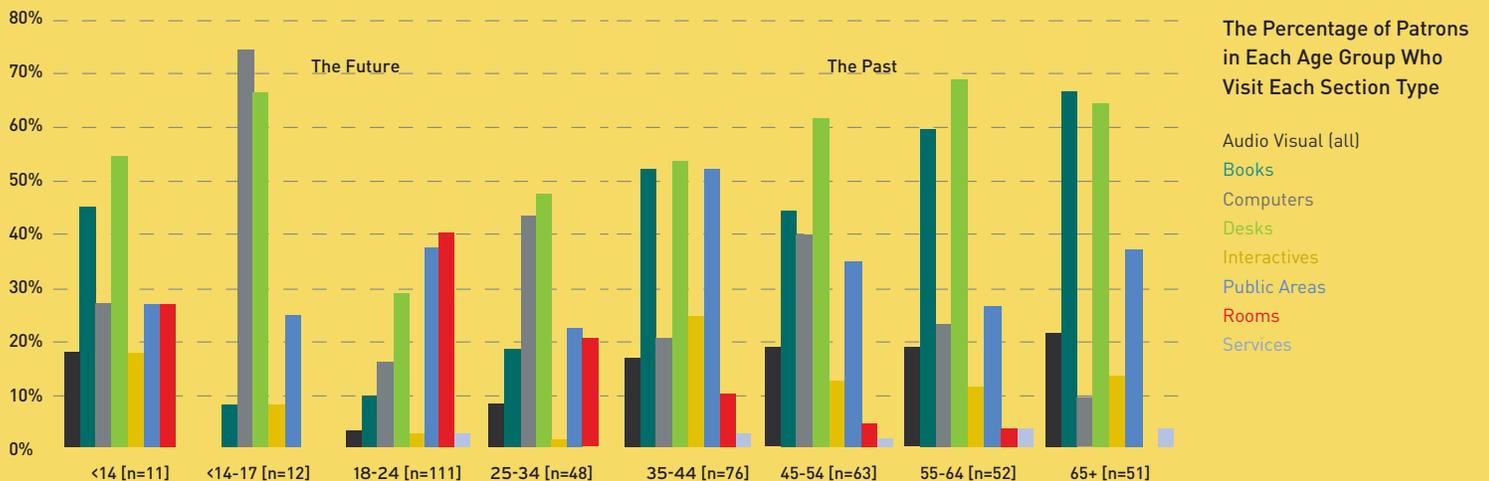
People already in the library are a primary target for items and services. The fact that a large percentage visited alone indicates an openness to ‘product’ placement and service pitches. The short length of time indicates the need for a simple, easily transmitted message.

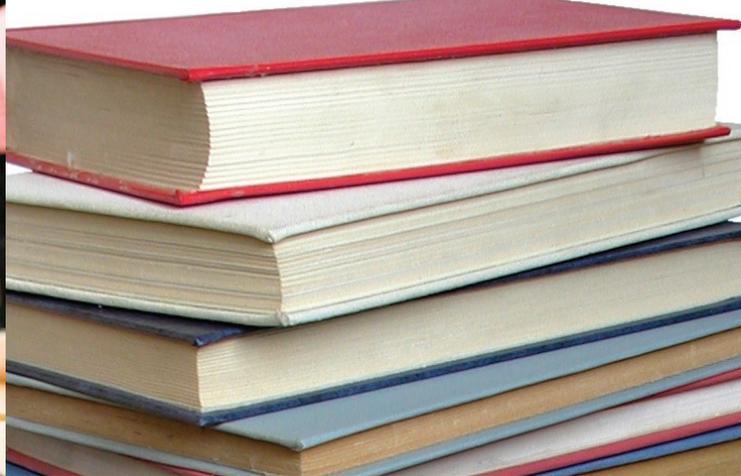
✦ Key finding:

Audiovisual materials accounted for 1/3 of circulating items. These items should be positioned in a browsable collection, particularly where patrons encounter a wait. Patrons aged 14-24 are particularly drawn to AV.

In retail, alone visitors are either mission-oriented or are more open to messages than couples. Break through the “forcefield” of personal space to deliver the message.

Fewer than one in ten patrons aged 14-24 visited the Books section





Visitor Behavior

- **One-third of patrons visited a desk** as their first destination.
- **Age impacted the sections of the library visited** by patrons. Younger patrons used the computers and seldom visited sections with circulating materials. Older patrons were less likely to use the computers and self-check.
- **Highest impact services** were circulation (60%), internet access (18%), online library catalog use (15%) and reference services (15%).
- **Two-thirds of patrons were using the library for reading or conversation**, and 15% of weekly visitors never borrow from the library.
- **Half of patrons pulled an item off the shelf** while browsing, with more items pulled in AV collections.
- **70% of patrons checked out books**, 51% checked out AV materials.

✦ Key finding:

Patrons are seeking staff interaction to serve their needs. Staff must be available and willing to help, no matter what desk patrons seek.

✦ Key finding:

Messages near, not on, desks are a good way to gain visibility. Place signs where your patrons are, not where you expect them to be.

✦ Key finding:

Selection and assortment of material was the lowest ranked category on services. This is a difficult issue that retail environments also face – you may have the item, but the patron may not be able to find it.

✦ Key finding:

Patrons are utilizing the library as meeting and study space, not just for items, computers or services. Allotting space for study and socializing needs is important when creating an overall atmosphere of service. Patrons using the building are easier to convert to users of library services than those who do not enter.

Best Practices Findings

Assistance

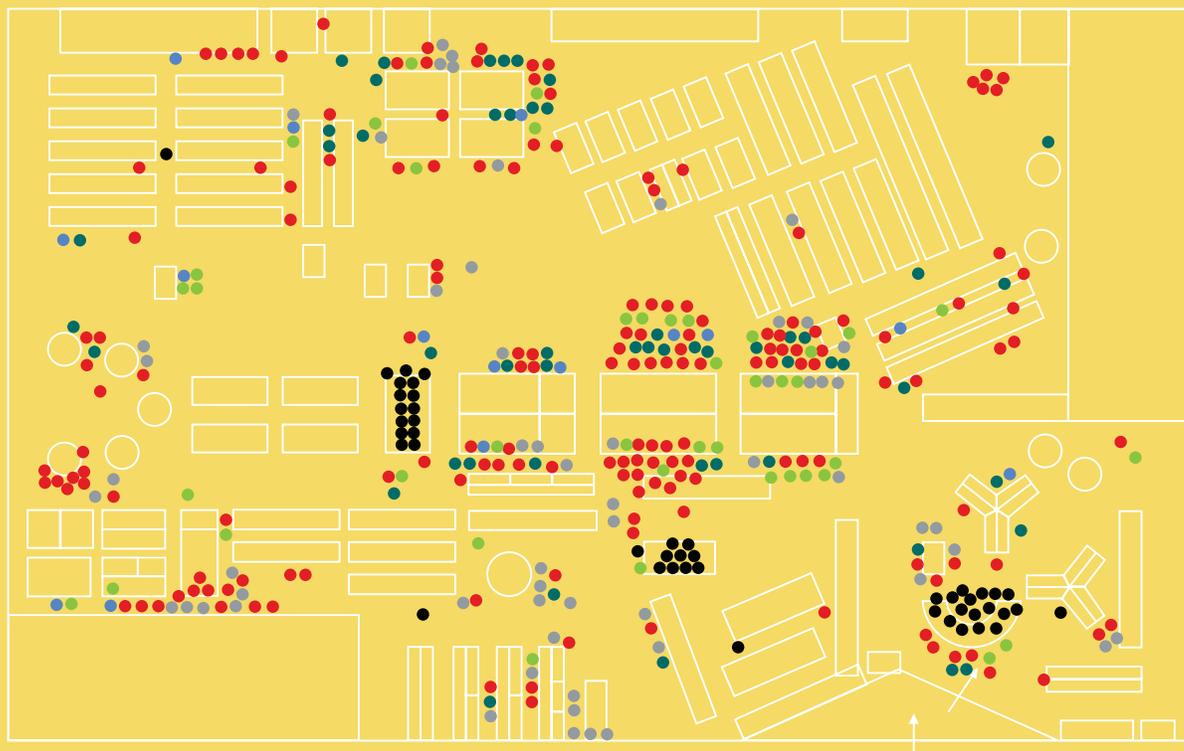
- **Over half of patrons**, excluding circulation transactions, were observed receiving assistance of some kind.
- **Finding items on the shelf caused the greatest need for assistance**, followed by finding the right section.

- Less than 15% of patrons needed help with guiding research, explaining services, and recommending items.
- **Better directional/explanatory signage** would alleviate observed need for finding sections and free staff time.

✦ Key finding:

Staff trained to offer assistance in more efficient browsing and research may be a better use of personnel than stationing at desks. A more visible staff identification would similarly help patrons find assistance when needed while away from formal desks.

Assistance rates were significantly higher (60% on average) in this study compared to previous library studies (13%) and retail environments (15%).



Frankfort Density Map
The density of patrons near the computers indicates the surrounding area will feel the effects of the noise. Clearly designate a "Quiet Area" at Frankfort to accommodate patrons who need to concentrate.

| Library Activity | |
|------------------|-----|
| Computers | 34% |
| Reading | 30% |
| Conversing | 6% |
| Playing | 2% |
| Using a Laptop | 1% |

Children
Teenagers
College-Age
Adults
Seniors
Library Staff

Signage

- **Only 12% of patrons viewed library signage.** Patrons aged 45-64 were most likely to view signs, with 34 and under least likely.
- **Stacks signage was viewed by 45% of people** who viewed signs.

Utilize unusual places to advertise the library's website and other services: screensavers, receipts, check-out lines, etc.

❖ Key finding:

Signage is the greatest tool to connect patrons with materials, either by indicating sections or introducing patrons to new authors. Easily changed, attractive signage in highly visible areas produces the most impact.

❖ Key finding:

Desk surfaces are not the best location for collateral and signs. The patron waiting can't see them, and the person who is engaging with library staff doesn't need them. Consider an attractive central collateral station instead that leaves surfaces clear.

❖ Key finding:

Sightlines and sign positioning were the most common symptoms of poor signage. Move through the library to determine patron flow and best positions for signage.



Best Practices Solutions

Market Resources Effectively

- **Provide strategic links to the online catalog**, and use catalog tools to lead users to additional items.
- **Bring images into the space** to create a more visually stimulating environment.

Consider ways to work within the Dewey Decimal System in order to free up how books are displayed. Face out more books to take advantage of cover art and increase capture power.

- **Offer more ways to pair patrons with materials.** Best Sellers, New Releases and a designated area for Staff Recommendations are a good start.

Email lists with updates on New Releases, Best Sellers and Hot Topics are a good way to reach out to patrons while they are not at the library.

- **Expand the Audio Visual section** both in terms of the amount of space allocated to the section as well as the materials carried.

Consider adding console games and other new technologies that combine learning with entertainment.

- **Group all AV materials together** (Music CDs, DVDs/Videos and Audio Books) and position the section close to Circulation to encourage impulse borrowing.

Consider placing AV materials for all ages in the same location, rather than having separate Children's and Teen's sections, thus creating a "store-within-a-store" concept.

- **Change displays frequently**, at least monthly or even weekly, to re-capture patron's attention, based on frequency of library visits.

No Budget?

- Weed collection to make room for face-out.
- Identify and market staff recommendations.
- Use screensavers and desktop wallpaper to market services.

Low Budget?

- Provide "while you wait" booklists for best sellers.
- Use shelf ends to display materials.

High Budget?

- Purchase display shelving to face out materials.

A woman with long dark hair, wearing a black cardigan over a colorful floral dress, is standing in a library aisle. She is reaching up with her right arm to touch a book on a high shelf. Her left arm is bent, holding several books. The library has white bookshelves filled with books, and the ceiling is a textured acoustic tile. The background is slightly blurred, showing more of the library's interior.

Orient Yourself to Patron Convenience

→ **Coach your responses at the first-visited desks to be service-focused.**

Often the desk closest to the door is where the most questions are asked and where a service impression is formed.

→ **Look at signage with a patron's eye** – check sightlines, proximity to wait/traffic areas, and remove jargon.

→ **Create a large site map for each library** and clearly identify sections on both the map and through signage, preferably in view from the map location.

Position the map near the online catalogue to enable patrons to look up specific items or browse by section.

→ **Face-out shelving makes retrieval slightly more difficult, but dramatically increases circulation.**

Consider sacrificing quantity for quality in face-out arrangements.

Face-out children's books at Frankfort circulated 40% more than when shelved traditionally. Space concerns are alleviated by frequency of circulation.

→ **Find ways to extend service beyond the desk**, and get to where your patrons are.

No Budget?

- Approach patrons to see if they need assistance.
- Spend time observing patrons to note confusion points and bottlenecks.
- Clean service desks and encourage staff to engage with patrons passing desk areas.

Low Budget?

- Refocus staff and services on patron convenience through updated policies, practices, and staff placement.

High Budget?

- Purchase service furniture that encourages patron engagement and minimizes barriers between staff and patrons.
- Conduct service training to focus staff on patron needs at and beyond the desk.

Best Practices Solutions

Use Space Creatively

- **Group computer workstations, lounge seating and periodicals to create a “waiting area”** for patrons who are waiting for a computer to become available.
- **Consider how your space is used.** Allow for gathering and loud spaces as well as quiet spaces. Create “buffer” zones between high-traffic and quiet study spaces.
- **Little-used collection areas can become your new power walls.** Move or remove collections to make space for new arrangements.
- **New fixtures should focus on displaying circulating materials** rather than storing the materials.

- **Investigate flexible signage and fixture packages** for future renovations or new libraries that enable easy asset reallocation as individual library needs evolve.

- **Recognize the unutilized or underutilized spaces in the library** and adjust the layout accordingly.

Sections with little or no visitation should be re-evaluated in terms of necessity, location and aisle space. When possible, condense these sections to add room in high-traffic areas.

This will facilitate cover art functioning as a sign.

No Budget?

- Move existing furniture to repurpose underutilized spaces.
- Create your own density maps to determine high traffic areas for promotion and underutilized areas to redesign.

Low Budget?

- Repaint or refurbish select areas.

High Budget?

- Purchase new furnishing and fixtures that fit space needs of patrons.

Use Signs Effectively



→ Follow a Signage Hierarchy

Level One: Section Identification

- Text signage is visible from the main path through the library.

Level Two: Theme

- Images are immediately accessible information to the viewer; use them to convey the topics and content of the section.
- Theme signage should be visible from outside the section in order to attract patrons.

Level Three: Dewey Identification

- Keep the Dewey signage on the ends of the stacks, as patrons know where to look for this information.

Level Four: Shelf Talk

- Face out titles on the shelves, and use framed easel signs to direct readers to similar titles.

→ Use Signage Strategies

- Remember that "less is more."
- Make sure the sign matters.
- Keep it concise.
- Position in-depth signage in wait areas.
- Ensure viewing signs from back to front.
- Utilize odd shapes and sizes.
- Create a sense of movement.
- The most frequently-viewed signage type should also be the most user-friendly.
- Computer-generated signage must be kept fresh, or else it loses capture power among frequent visitors.

No Budget?

- Utilize simple, colorful computer-generated signage that gets the message across.

Low Budget?

- Use office printing services to create foam-core signs designed in-house to refresh directional or face-out signage.

High Budget?

- Have flexible, customizable signage created by sign professionals.
- Purchase electronic signage (i.e. LCDs) to maximize customization.

Looking Forward

- **Don't try to change people's behavior:** identify it and design for it.
- **Think outside the box for everything.**
- **Let go of sacred cows,** including materials, furniture and beliefs.
- **Prepare staff for change.**
- **Use density maps to gather information on space use** and areas for improvement.
- **If your focus is service,** make sure staff are service focused.
- **If circulation is your primary point of human contact,** train circulation staff to be ambassadors for other services.
- **Analyze service at your first point of contact,** often the desk closest to the door.
- **Gain insight into patron wants** through multiple means.
- **Look for small wins while breaking down larger projects.** Track your success through an overall building plan.
- **Involve new eyes: people outside of the library can give you incredible insights.** Pick people carefully to not be restricted by traditional views of library services.

Change is not easy: you will face frustrations with budget and staff. It takes resources and planning, but a customer-focused library reaps dividends in satisfied patrons who return for additional services.

The most pointed lessons we learn from retail are in examining our staff behavior, updating our marketing practices, and offering patron-oriented services. With our libraries demonstrated dedication to meeting patron's wants and needs, the Customer Focused Library is achievable.



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