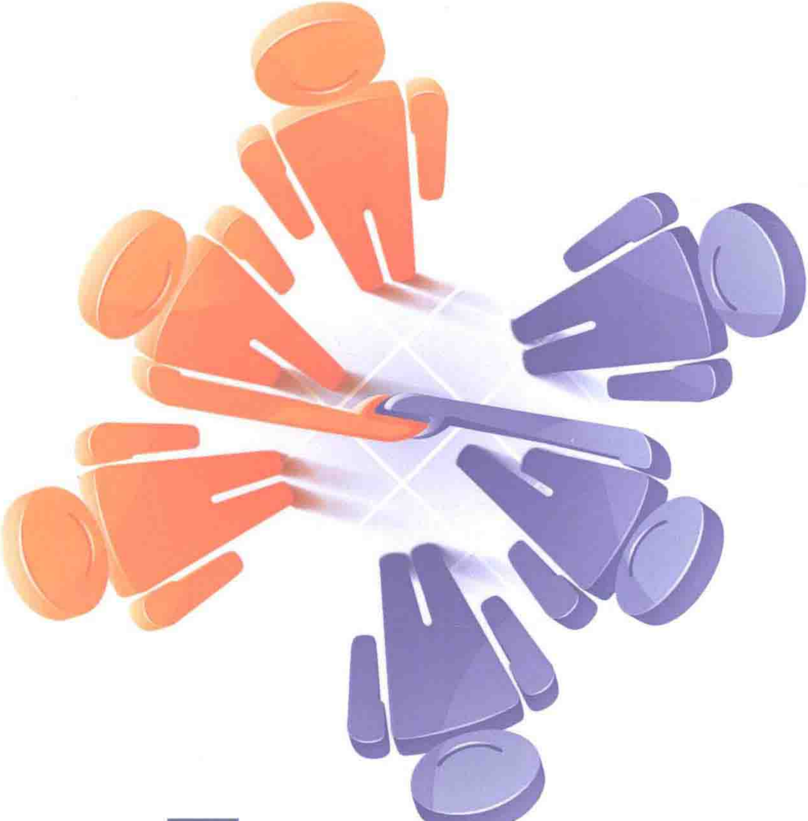
Chandos Information Professional Series

Customer Care

A training manual for library staff

Pat Gannon-Leary
and Michael D. McCarthy



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AND
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Customer Care

CHANDOS
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Pat Gannon-Leary is a consultant and joint partner of Bede Research & Consultancy with Michael D. McCarthy. Dr Gannon-Leary was previously a researcher at the universities of Northumbria and Newcastle. Her earlier career experience includes a variety of roles in academic libraries in the UK and the USA, including as a customer service manager. During that time she facilitated customer care courses for library staff. She has taught research methods and has a special interest in focus groups, which she used as an information practitioner to determine library user needs. She is co-author of *Providing Effective Library Services for Research* (London: Facet Press, 2007) and, along with one of her co-authors (Moira Bent) has recently been running workshops on supporting researchers who are writing for publication. She has been published widely and has presented at conferences in the UK and overseas.

Michael D. McCarthy served as a senior officer in the logistics branch of the RAF, including three years as a specialist instructor to officer cadets. During his RAF service he was active in mountain rescue, and for many years led expeditions to the Bavarian and Austrian Alps. On leaving the RAF, he moved into the management of customer support in major aerospace companies in the UK and Sweden. He has wide experience of customer support activity throughout the European aerospace community, covering both major contractors and suppliers. Following early retirement, he has recently spent two years working in a support role in a university library in order to obtain 'hands-on' experience of the demands of customer care in this particular environment.

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Preface

The overarching aim of this manual and the associated programme is to help people to develop both communication and quality service skills in order to deliver best practice support to their customers and to their colleagues.

By investing in this manual and in encouraging staff to develop as facilitators, your organisation is acknowledging the vital role of your staff in successfully achieving your organisational mission.

Members of your organisation form a community of diverse people working together for a common purpose. You may be an educational institution, you may be in the public sector, or you may be in the voluntary sector. Wherever you are, you will no doubt wish to give your customers the same 'best practice' quality service that commercial, non-academic businesses are expected to deliver to their clients.

In order to achieve their aims, the manual and the programme have set a number of objectives:

- to clarify what is meant by 'customer service';
- to heighten awareness of customers' needs;
- to develop staff communication skills;
- to develop skills that enable staff to meet their responsibilities with less stress, e.g. dealing with complaints, handling difficult customers;
- to help increase staff awareness of their own importance and of their performance in contributing to the delivery of the organisational mission.

The customer care course should give participants insight into methods that enable them to communicate more positively with colleagues and with customers, and thereby enjoy more positive relationships with those groups. Being engaged in more positive interaction is likely to enhance staff job satisfaction significantly and, in turn, help improve staff performance. Staff subjected to lower levels of stress will find their jobs more personally rewarding, in addition to feeling better about themselves and their role in the organisation.

We can all give examples of poor quality service. Indeed, one of the exercises in this manual involves identifying such examples. Poor quality service tends to happen when the people delivering it fail to put a high value on their work, don't experience satisfaction in a job well done, and take no pride in their work.

We can all, hopefully, give some examples of good quality service too. Again there is an exercise in the manual to identify such examples. Successful people perform their jobs to the best of their abilities, setting high standards and meeting them – or even exceeding them. When staff take pride in their achievement and have positive feelings about themselves, this can have an invaluable, beneficial knock-on effect on those around them – both colleagues and customers – and can make them feel good too.

This training manual is based on our experience as customer service and customer support managers, and our experience of staff training and development in customer service programmes. Our aim throughout has been to present information in a user-friendly fashion, so that your confidence in presenting its contents increases as you read through it and become more comfortable and familiar with it. Please take time to browse through it and get a feel for what we are aiming to do here.

We hope you find its structure logical yet flexible. It is designed to be used as both a reference book and/or as a training manual. It may be used by staff in human resources or staff development areas to organise and then facilitate their own tailored programmes. At the same time, it is designed to encourage the delivery of training by non-specialist, non-professional trainers from across the departmental spectrum.

We hope you find it straightforward and easy to use. We have not assumed that you have a de luxe training room or numerous electronic bells and whistles. We are also aware that you may not have a great deal of time to spend in preparing materials to use with the group(s). On this basis we have tried to 'keep it simple' as regards the training aids and props you will need in order to deliver the course.

Anyone wishing to run focus groups related to customer service issues will be able to 'cherry-pick' useful items or excerpts from the manual, as it has been specifically written with this in mind. For those who are new to focus groups, Chapter 10 covers these in more depth and also provides some useful further reading.

The book is suited for both one and two-day courses. There are enough exercises and options for facilitators to 'pick and mix' to fit their available timeslot, and to ensure that they choose those options with which they are personally comfortable. Course facilitators will need sufficient time to read through the content of this manual and decide which activities they wish to include. They will also require some lead time to convert relevant resources from the manual into forms better suited for the participants.

The following timetable demonstrates how the chapter sessions could be fitted into a two-day course:

- Day 1:
  - Chapter 2 – Introduction (45 minutes)
  - Coffee (chance to get to know each other better, talk over feelings about doing the course etc.)
  - Chapter 3 – What is customer service? (30 minutes)
  - Chapter 4 – Who are our customers? (50 minutes)
  - Lunch (chance to talk about course so far, your customers and their needs)
  - Chapter 5 – Communication (50 minutes)
  - Chapter 6 – Questioning and active listening (45 minutes)
  - Tea (chance to talk over progress of course, listening exercises)
  - Chapter 7 – Handling complaints (70 minutes)
  - End of Day 1

- Day 2:
  - Chapter 8 – Dealing with challenging situations (60 minutes)
  - Coffee (chance to talk over yesterday)
  - Chapter 9 – OK Corral and life positions (70 minutes)
  - Lunch (chance to talk about customer service situations, influencing styles)
  - Chapter 10 – Suggestions for improvement (70 minutes)
  - Chapter 11 – Teambuilding (40+ minutes)
  - Tea (useful recap of course before final session and before feedback forms)
  - Chapter 12 – What are we good at? (70 minutes)
  - Chapter 13 – Wrapping it up (20 minutes)

You will note that the sum total for each day's activities is approximately five hours per day, excluding, say, a further 90 minutes for lunch and coffee breaks. We have planned this slight shortfall in the normal working day in order to cater for the tendency of inexperienced or unfamiliar facilitators to run slightly over time in their initial efforts to present a course such as this. At this early stage, we cannot overemphasise the central importance of time management in the successful delivery of training. If you allow the timetable to 'get away from you' in the early stages, you will then be constantly struggling to get back on track, so it's best not to go there in the first place.

For preference, courses should be limited to 8–12 participants, although limited resources may demand larger groups. A maximum of 25–30 would be advisable. These staff should ideally come from a variety of levels and locations, but the groups should have sufficient in common for facilitators to pitch the presentation at an appropriate level and create a more productive synergy. Where possible, it may be helpful to mix staff that have not previously worked together. For such circumstances, this manual includes suggested 'icebreakers' as a means of improving both communication and interaction.

The manual follows the order in which sessions are run. For each session there are details of the aims and a tabular session plan giving an outline of the activities, materials and time needed to complete the session. Times are approximate because, in many cases, facilitators have a choice of activities within each session. They can use those they feel most comfortable with and that they feel are most appropriate for their particular group of participants. In addition, many chapters have exemplars of best practice and case studies which can be used to supplement activities or as discussion points.

Content marked 'background' is descriptive in nature, outlining the nature of the issue being discussed. Facilitators may want to make a few notes from this area to use during the course, or to serve as an aide memoire. The text in this section will form the basis of the brief introductory talk for each session given by facilitators, marked as 'T' on the session plans (Table 0.1 presents a blank session plan template – feel free to adapt this to use in your preparation). In addition to activities ('A' on the session plan), there are accompanying handouts. You may wish to copy or scan these but, in some cases, it is probably easier to write up flipcharts.

Good luck in running the course(s) and in developing your own facilitation skills and confidence via our structured, low-risk training and learning process.

Please let us know how you got on. We value your feedback and we too are seeking to continuously improve.

Pat Gannon-Leary and Michael D. McCarthy

Table 0.1 **Session plan template**

Session title	Aims	Content	Methods*	Aids*	Time (mins)
Approx. total time (mins)					

*A, activity (participants); F/C, flipchart; H/O, handout; P/I, Post-it notes; T, talk (facilitator)

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