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Revamp Your Customer Service: Using Data to Improve Customer Service Practices

Christopher M. Jimenez
Florida International University, jimenezc@fiu.edu

Diana Reyes
Florida International University, dreyes@fiu.edu

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The slide features decorative circuit-like lines in the corners, consisting of vertical and horizontal lines with small circles at the ends, resembling a network or data flow diagram.

REVAMP YOUR CUSTOMER SERVICE

Using Data to Improve
Customer Service Practices

Diana Reyes *Serials E-Resources Librarian*

Christopher M. Jimenez *Web Services Librarian*

AGENDA

- The Problem
- The Plan
- The Partnership
- The Payoff

The image features a light gray background with a large, faint circular graphic in the center. The corners are decorated with stylized circuit board traces and nodes. The main text is centered and reads "THE PROBLEM" in a large, bold, black font.

THE PROBLEM

WHAT WAS **WRONG**?

PROBLEM:

Email Communication

- No official tracking
- No measurable turnaround
- Vague accountability

PROBLEM:

New Projects & New Issues

- Alma/PrimoVE
- OpenAthens
- Trial DB Management

PROBLEM:

Customer Satisfaction

- Get ahead of potential issues by streamlining our processes
- Identify areas in which we can apply mitigating strategies
- Respond to authentication issues

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THE PLAN

HOW DID WE **PLAN** TO SOLVE THESE
PROBLEMS?

PLAN:

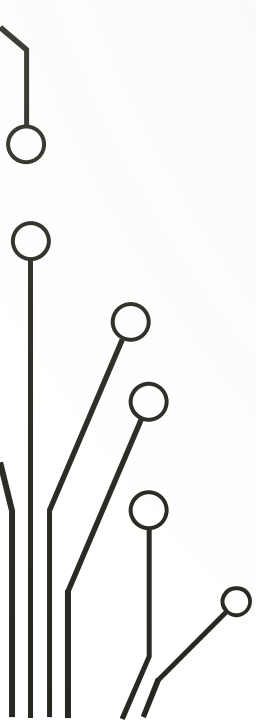
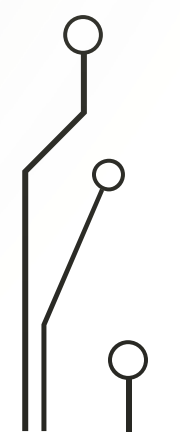
Include Collection Development & Resource Access in the LibAnswers Ticketing Queue

- Chat interactions → Ticket
- Email forwards → Ticket
- Forms submitted → Ticket



PLAN:

Training For Chat Operators

- Discuss troubleshooting protocol
 - Documentation in a troubleshooting LibGuide
 - Promote generating tickets from chat
- 
- 

PLAN:

Configure Springshare

- Establish Macros in LibAnswers
- Generate tags for tracking/analytics in LibAnswers
- PrimoVE + LibWizard – *Report A Problem With This Record*

The image features a light gray background with a large, faint circular graphic in the center. The corners are decorated with stylized circuit board traces and nodes. The main text is centered and reads:

THE PARTNERSHIP

HOW DID WE EXECUTE THE **PLAN**?

PARTNERSHIP:

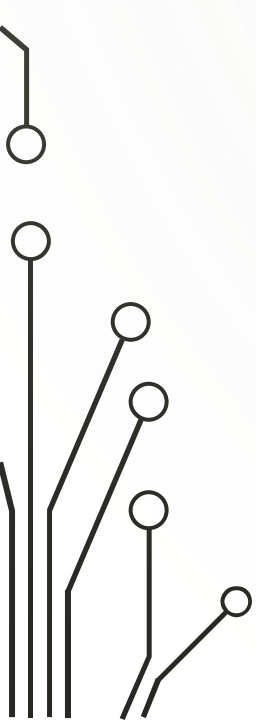
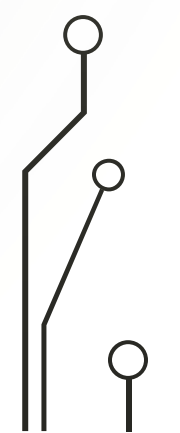
Configure Springshare

- Add colleagues to LibAnswers
- Generate tags for tracking/analytics in LibAnswers
- Configure macros for easy routing in LibAnswers



PARTNERSHIP:

Train Chat Operators

- Held a workshop on troubleshooting & routing tickets
 - Built a troubleshooting guide which featured e-resource triage
 - Add links to resources on the LibAnswers Dashboard
- 
- 

THE PARTNERSHIP

Monitor Analytics/Reports

- Identify problem areas
- Contact vendors
- Send notices to chat operators

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THE PAYOFF

WHAT DID OUR **PARTNERSHIP** PRODUCE?

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COMMUNICATION

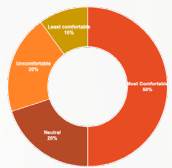
HOW **COMFORTABLE** ARE CHAT OPERATORS
WITH THE **TROUBLESHOOTING PROCEDURE**?

FAMILIARITY WITH THE PROCEDURE

100% of chat operators
are familiar with the
procedure!

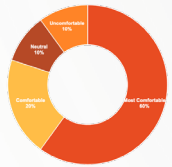


COMFORT WITH THE PROCEDURE



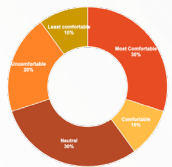
Alma/PrimoVE

50% felt Most Comfortable.



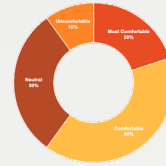
A-Z List

80% report feeling comfortable.



OpenAthens/EZ Proxy

40% report feeling comfortable.



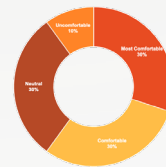
Databases

60% report feeling comfortable.



E-Books

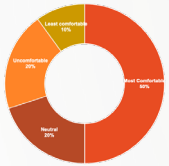
60% report feeling comfortable.



E-Journals

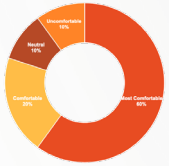
60% report feeling comfortable.

DISCOMFORT WITH THE PROCEDURE



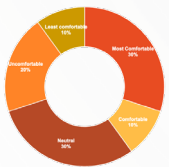
Alma/PrimoVE

Discomfort expressed along a range.



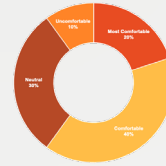
A-Z List

Nobody reported lowest comfort level.



OpenAthens/EZ Proxy

60% report feeling uncomfortable.



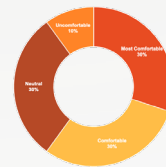
Databases

Nobody reported lowest comfort level.



E-Books

Nobody reported lowest comfort level.



E-Journals

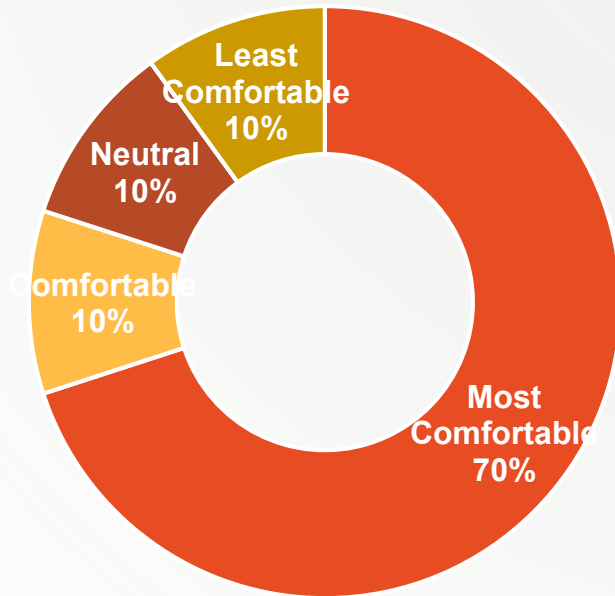
Nobody reported lowest comfort level.

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CREATING TICKETS

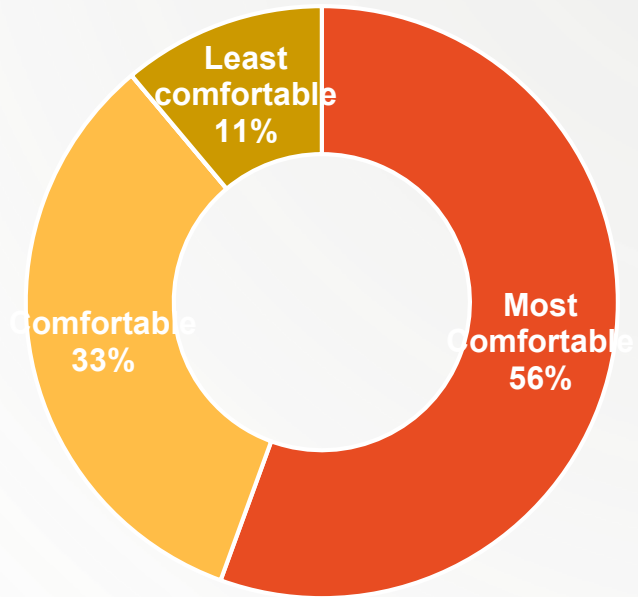
HOW **COMFORTABLE** ARE CHAT OPERATORS WITH THE METHOD OF **ENTERING TICKETS**?

TICKETS FROM CHAT



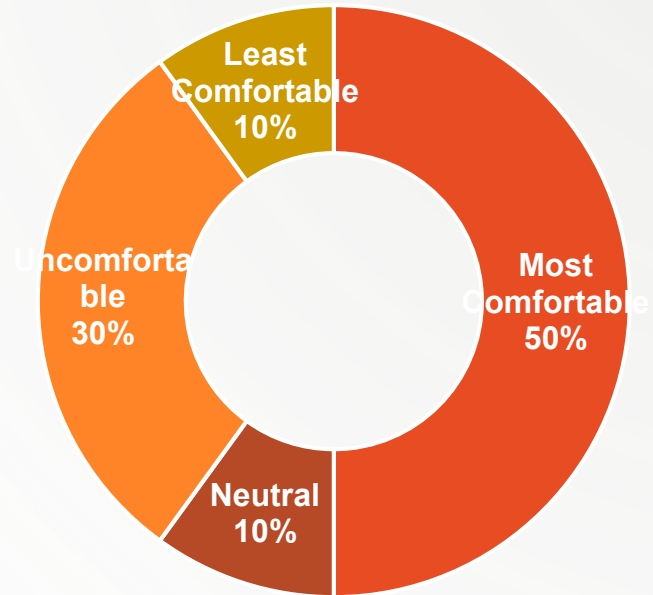
70% Most comfortable makes this the most confident method.

CREATING TICKETS FROM THE DASHBOARD



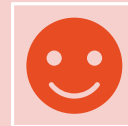
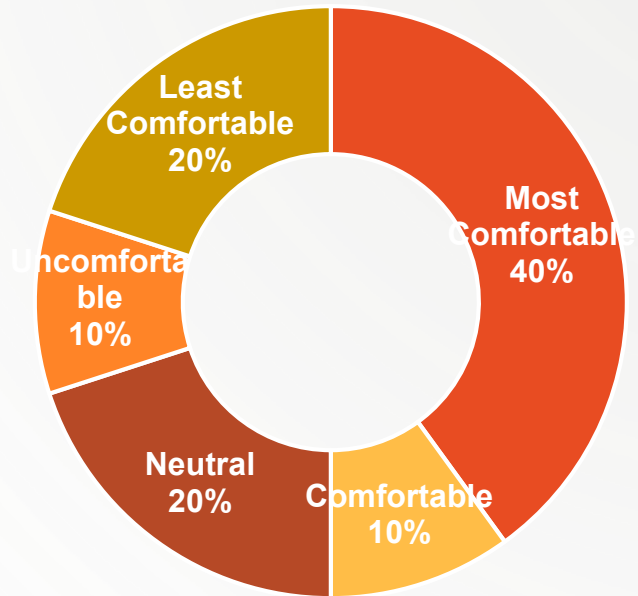
At almost **90% comfortable**, this is the highest combined comfort level for any method.

CREATING TICKETS FROM THE PRIMO/VE FORM



Arguably a **50/50 split** for this method.

CREATING TICKETS FROM EMAIL



50% feel more comfortable than not with this method.

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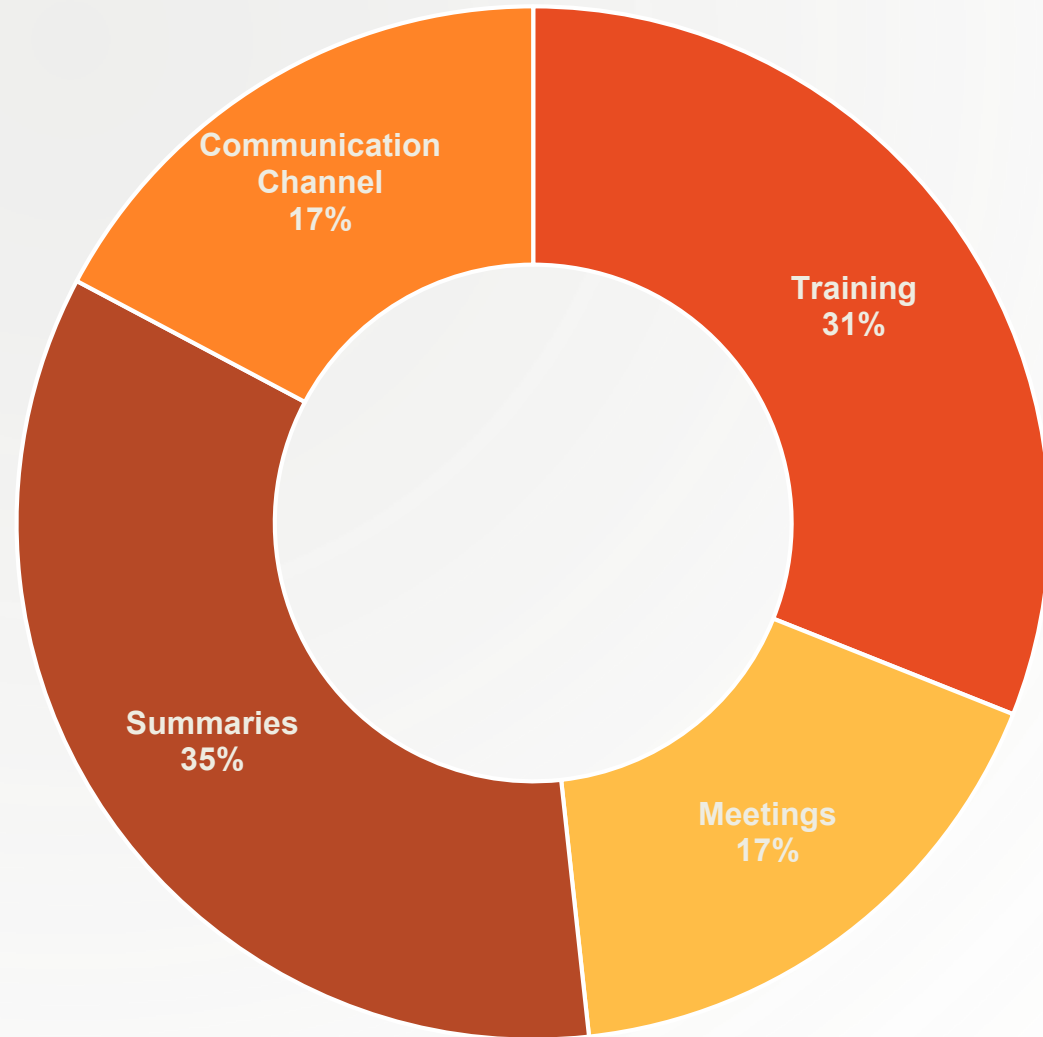
GETTING BETTER

HOW CAN WE **IMPROVE COMMUNICATION?**

HOW DO WE IMPROVE?

35% agree that regular summaries of issues and resolutions would be a helpful way to improve.

31% agree that regular trainings would also improve familiarity.

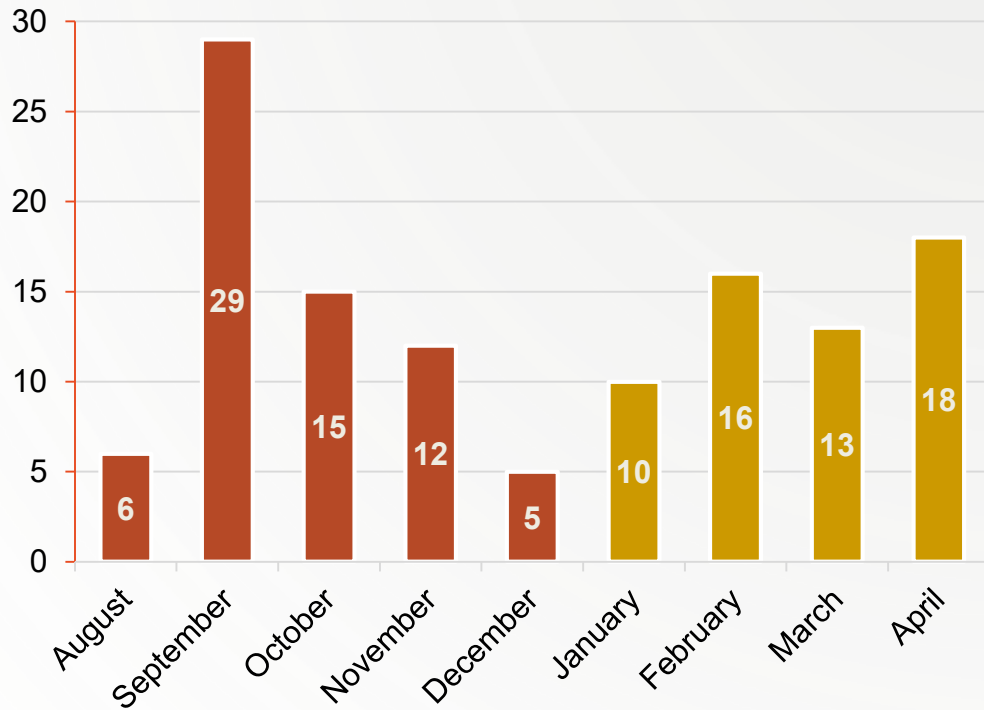


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HOW DID IT GO?

HOW WELL DID THE PLAN WORK **LAST FALL?**

TICKETS PROCESSED



67 e-resource tickets resolved in **Fall 2021**.



The busiest months were **November & October**.

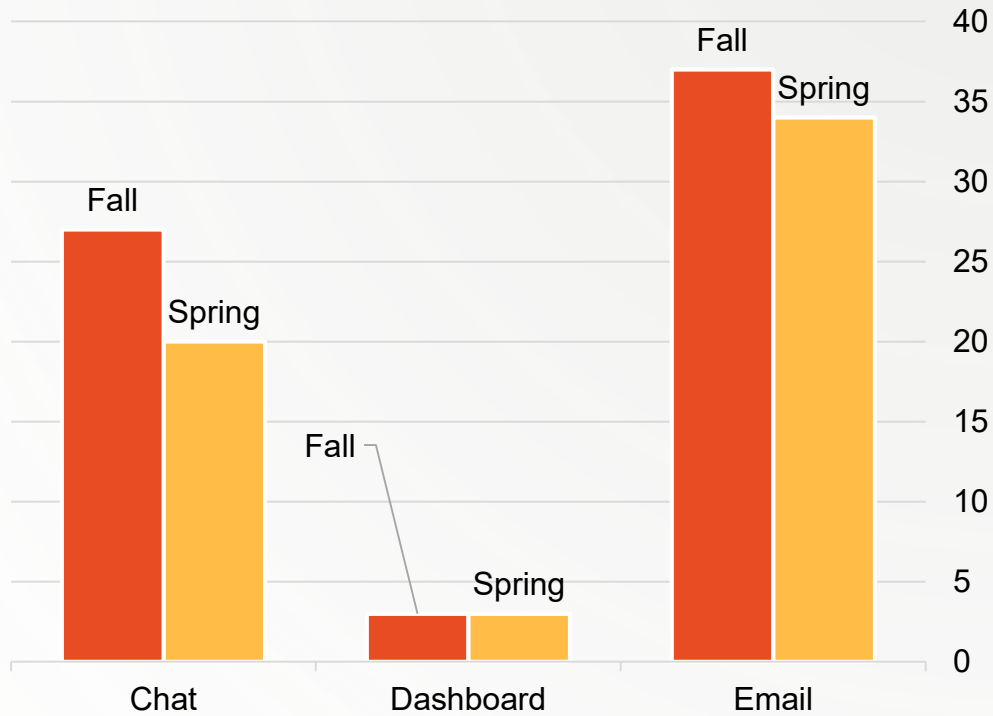


57 e-resource tickets resolved in **Spring 2022**.



The busiest month was **April**.

METHOD

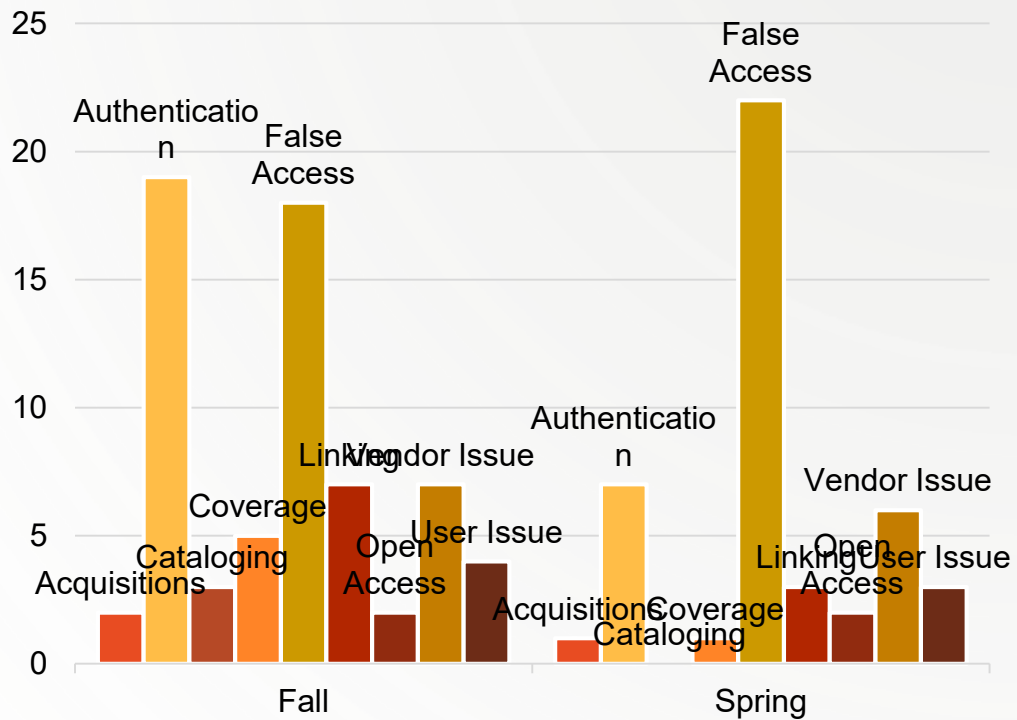


Most tickets were **Emailed** into the system.



The second most common method was via **chat**.

ISSUES

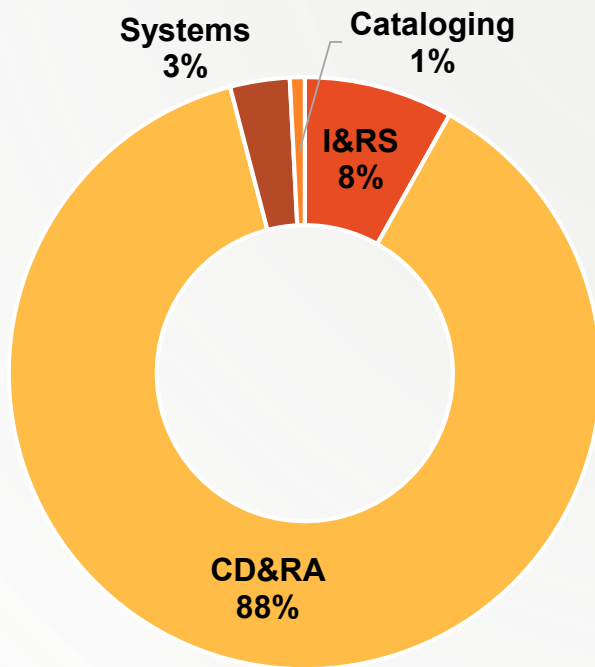


False Access is our most persistent issue.



Authentication is second.

RESPONDER

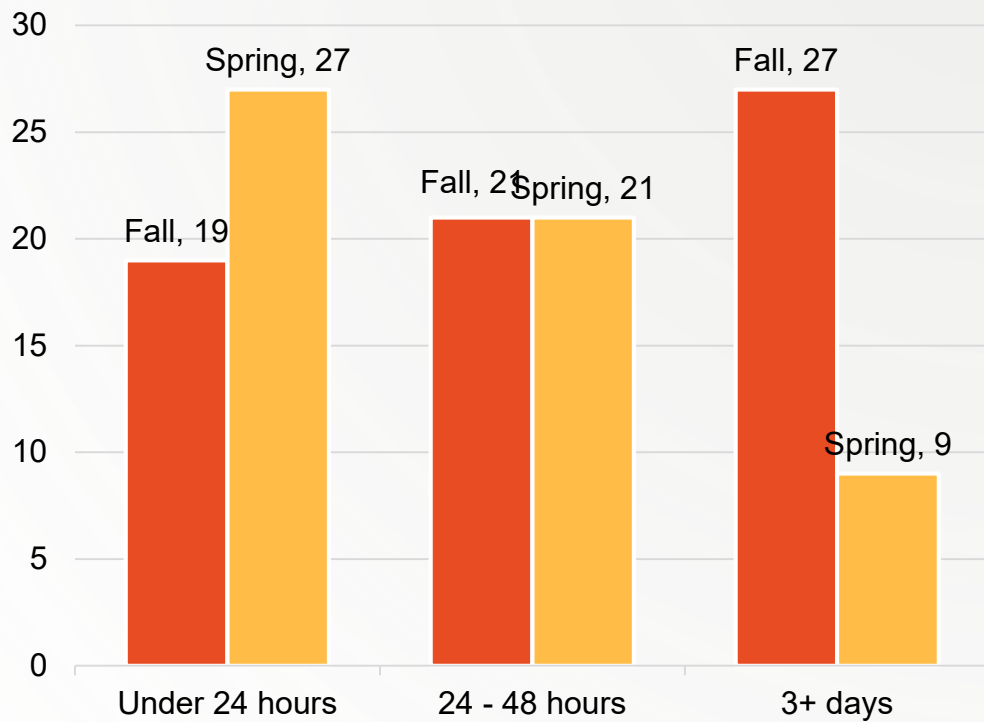


Issues were handled collaboratively by **Chat Operators, RefTech, and Collection Development & Resource Access.**



Most tickets were resolved by **CD&RA.**

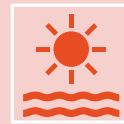
TURNAROUND



Most issues required communication with outside vendors and groups.



Under 24 Hour turnaround went up between semesters.



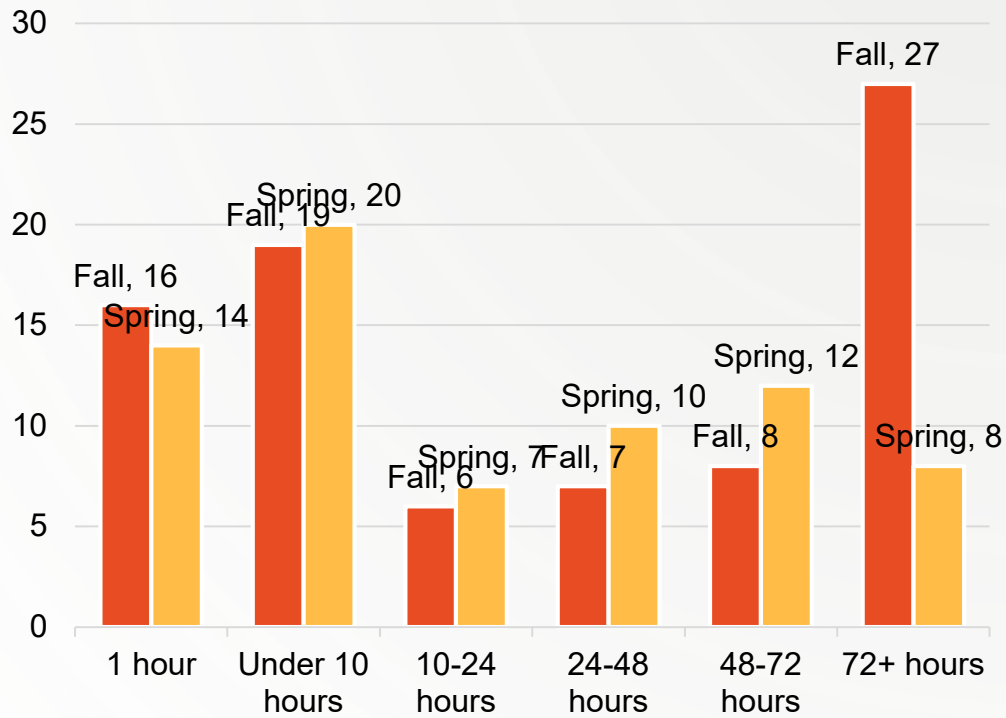
3+ Days Turnaround plummeted.

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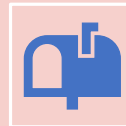
TURNAROUND

DEEPER DIVE INTO **TURNAROUND**
STATISTICS.

TIME TO FIRST REPLY

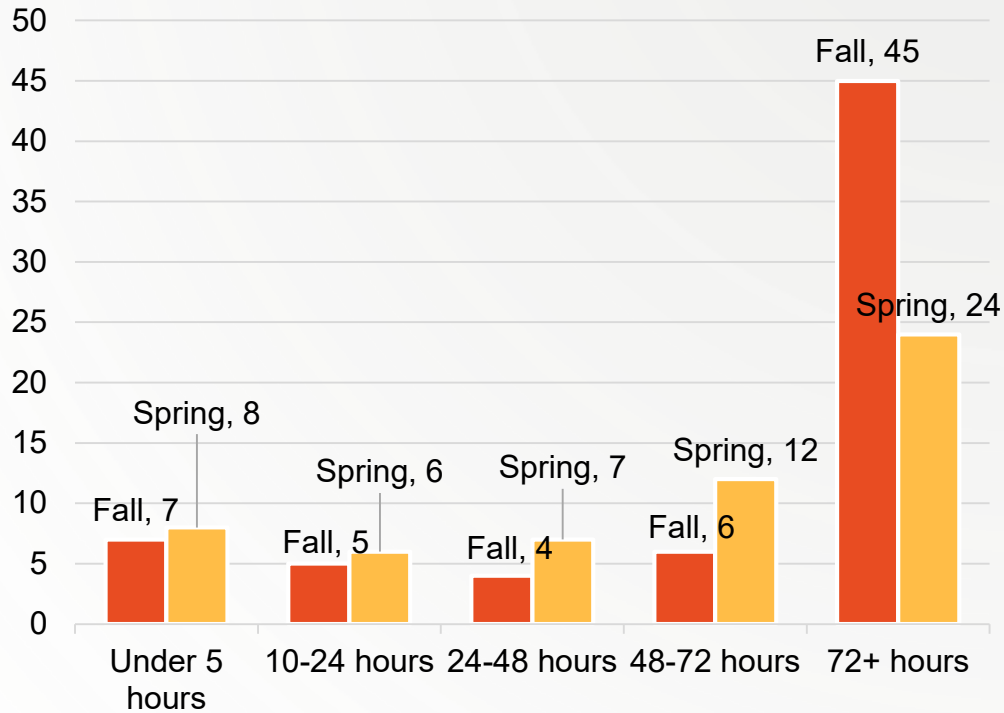


62% of tickets did not receive a first reply before 24 hours.



28% of tickets received a first reply within 10 hours.

TIME TO CLOSE



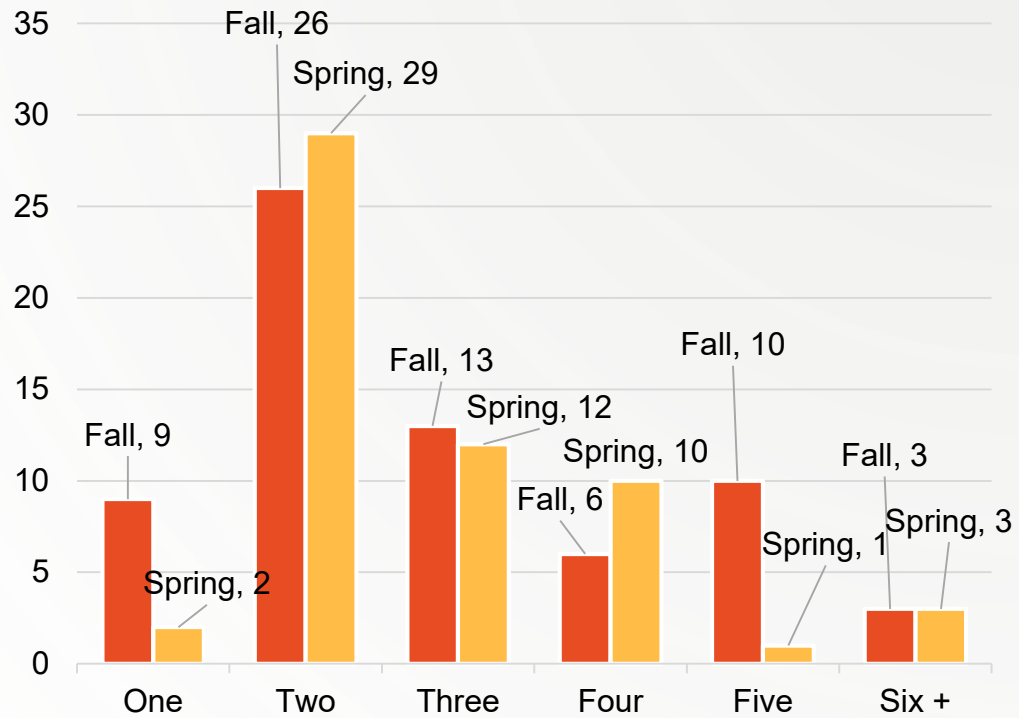
2

82% of tickets took two or more days to resolve.



18% of tickets were resolved within 24 hours.

INTERACTIONS TO CLOSE



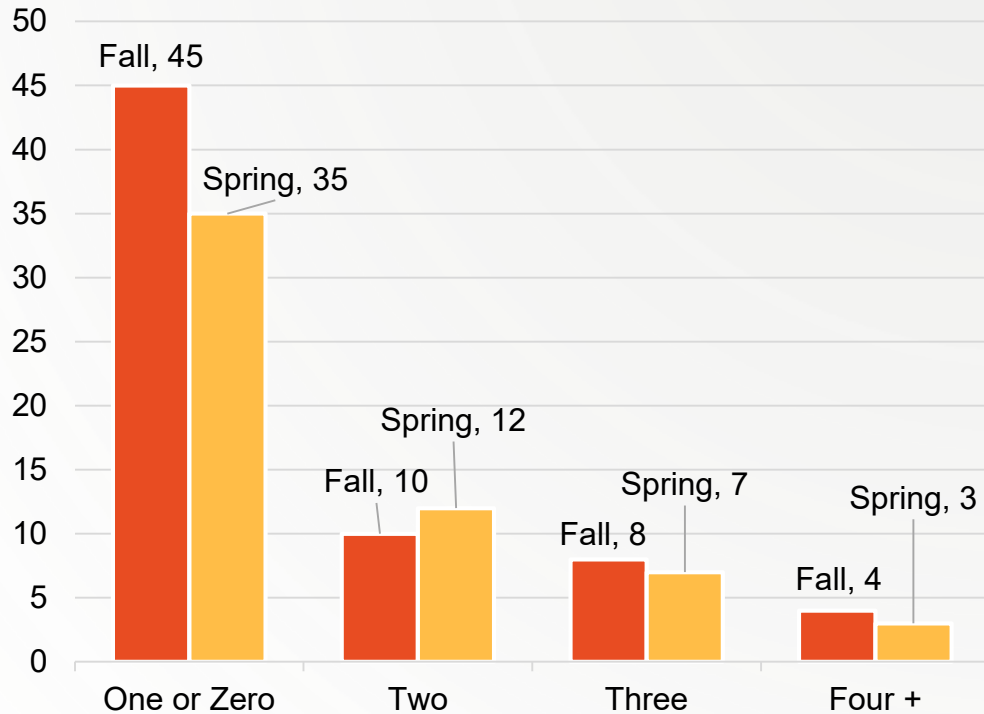
2

54% of tickets were resolved after **two interactions**.



Communication with **vendors** is not included in these interactions

REPLIES BY PATRONS



1

66% of tickets were resolved after either one or no replies by the user.

3

94% of tickets were resolved after 3 or fewer replies by the user.

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CONCLUSION

WHAT DID OUR PARTNERSHIP **PRODUCE?**

POSITIVE OUTCOMES



Chat operators are **comfortable** with the procedures.



30% 1-hour response time.



67% 1 or zero replies to tickets by patrons.



The 72+ hour time to close dropped by **46%** from Fall to Spring.

ROOM FOR GROWTH



Tickets are for higher level issues.



3+ Day Turnaround / Time to first contact

MOVING FORWARD



Planning more training meetings



Increase communication, possibly through a chat solution (Teams / Slack)

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QUESTIONS: REVAMP YOUR CUSTOMER SERVICE

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