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

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REVAMP YOUR CUSTOMER SERVICE

Using Data to Improve

Customer Service Practices

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AGENDA

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

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

THE PLAN

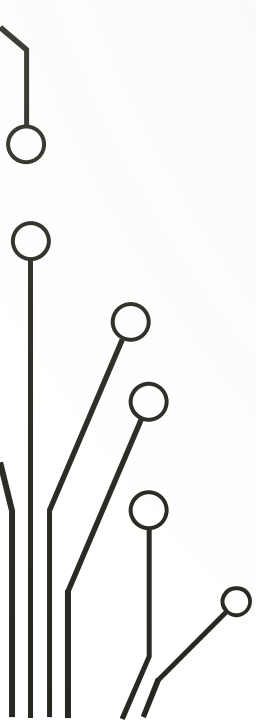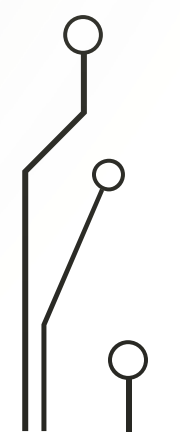HOW DID WE PLAN TO SOLVE THESE PROBLEMS?

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 PARTNERSHIP

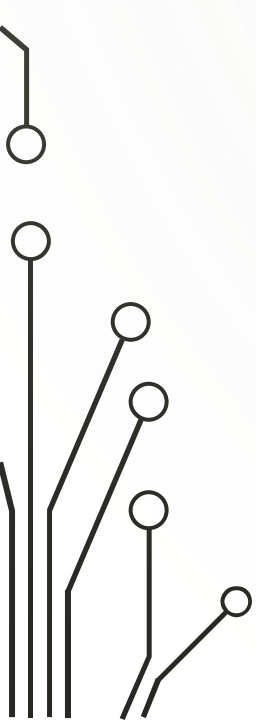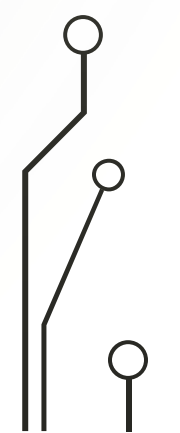HOW DID WE EXECUTE THE PLAN?

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

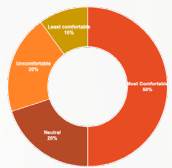# THE PAYOFF

WHAT DID OUR PARTNERSHIP PRODUCE?

COMMUNICATION

HOW COMFORTABLE ARE CHAT OPERATORS WITH THE TROUBLESHOOTING PROCEDURE?

FAMILIARITY WITH THE PROCEDURE
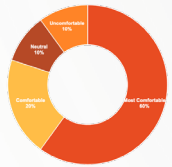
100% of chat operators are familiar with the procedure!
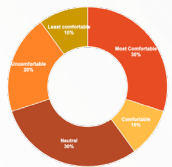
COMFORT WITH THE PROCEDURE
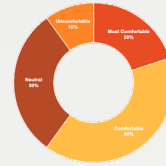
Alma/PrimoVE

50% felt Most Comfortable.

A-Z List

80% report feeling comfortable.

OpenAthens/EZ Proxy
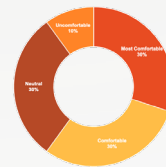
40% report feeling comfortable.

Databases
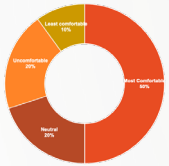
60% report feeling comfortable.

E-Books

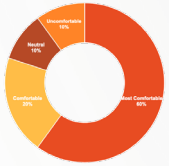60% report feeling comfortable.

E-Journals

60% report feeling comfortable.
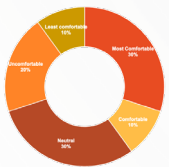
DISCOMFORT WITH THE PROCEDURE

Alma/PrimoVE

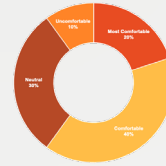Discomfort expressed along a range.

A-Z List

Nobody reported lowest comfort level.

OpenAthens/EZ Proxy

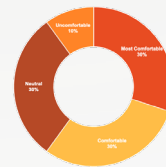60% report feeling uncomfortable.

Databases

Nobody reported lowest comfort level.

E-Books

Nobody reported lowest comfort level.

E-Journals

Nobody reported lowest comfort level.

CREATING TICKETS

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

TICKETS FROM CHAT

Least Comfortable 10%

Neutral 10%

Comfortable 10%

Most Comfortable 70%
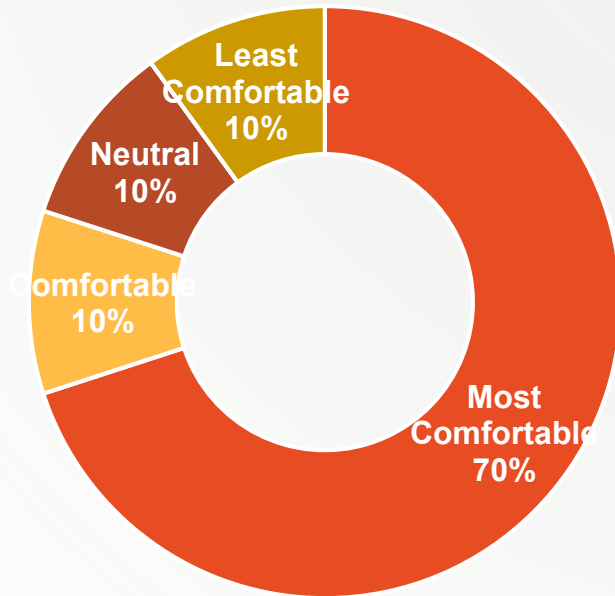
70% Most comfortable makes this the most confident method.

CREATING TICKETS FROM THE DASHBOARD

Least comfortable 11%

Comfortable 33%

Most Comfortable 56%
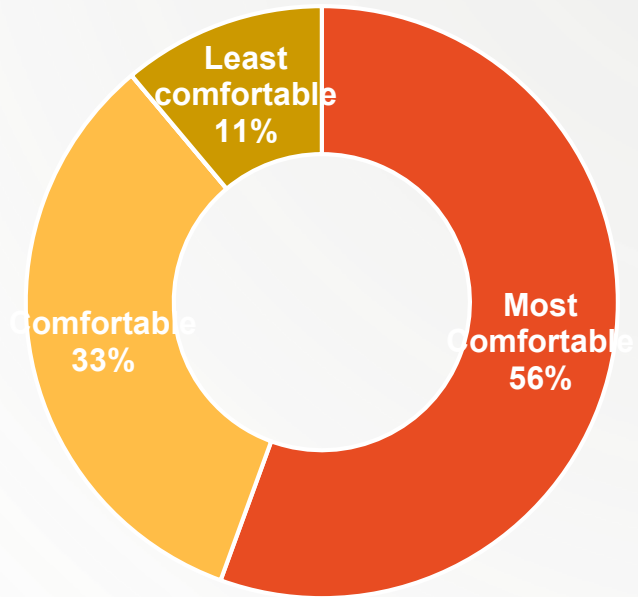
At almost **90% comfortable**, this is the highest combined comfort level for any method.

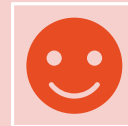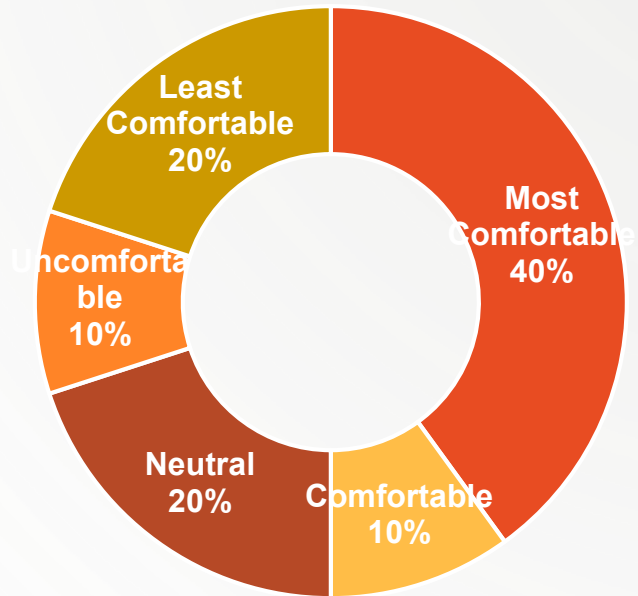# CREATING TICKETS FROM THE PRIMO/VE FORM

Least Comfortable 10%

Uncomfortable 30%

Most Comfortable 50%

Neutral 10%
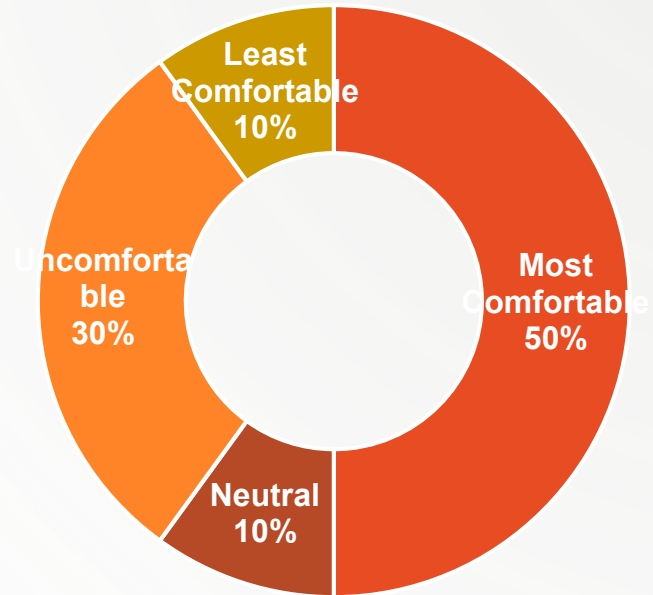
Arguably a **50/50 split** for this method.

CREATING TICKETS FROM EMAIL

Most Comfortable 40%

Least Comfortable 20%

Uncomfortable 10%

Neutral 20%

Comfortable 10%

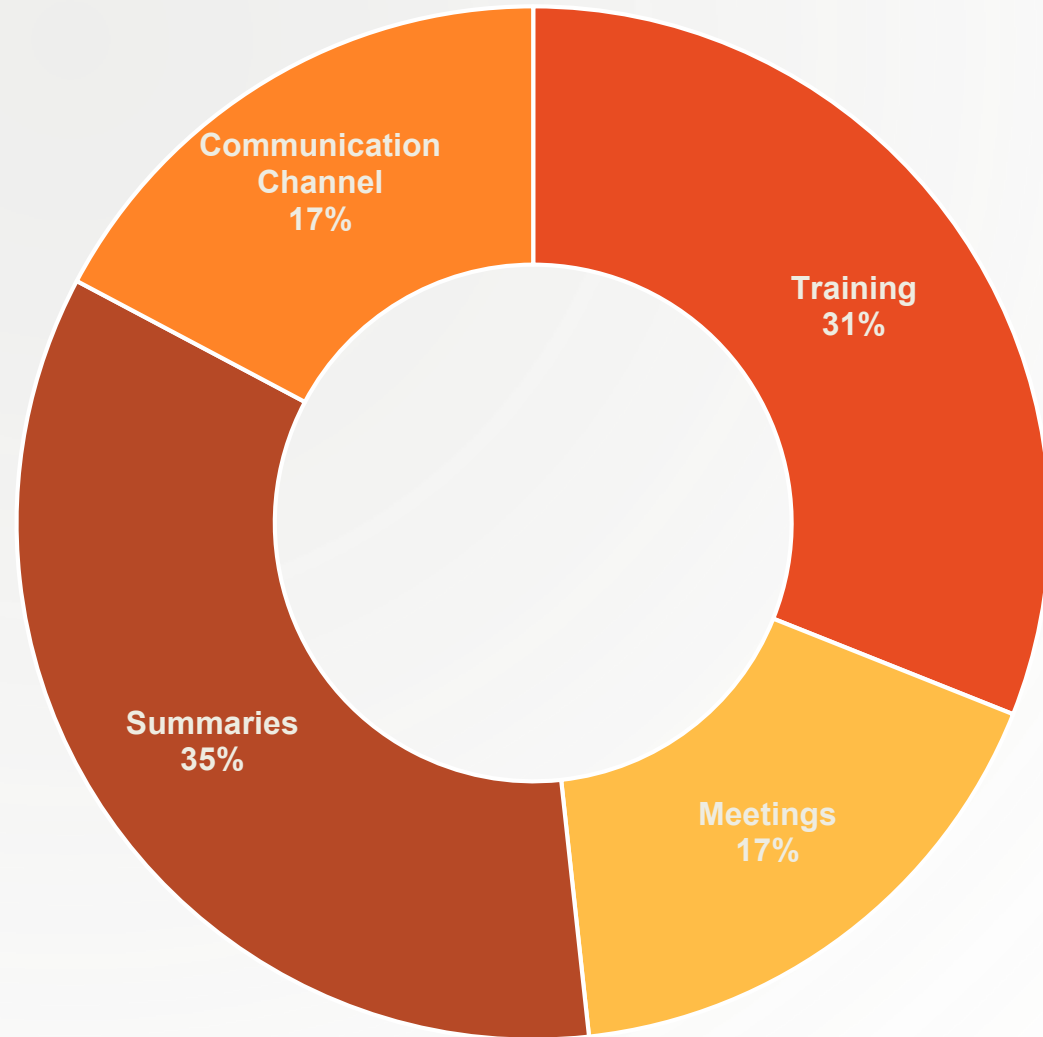**50%** feel more comfortable than not with this method.

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.

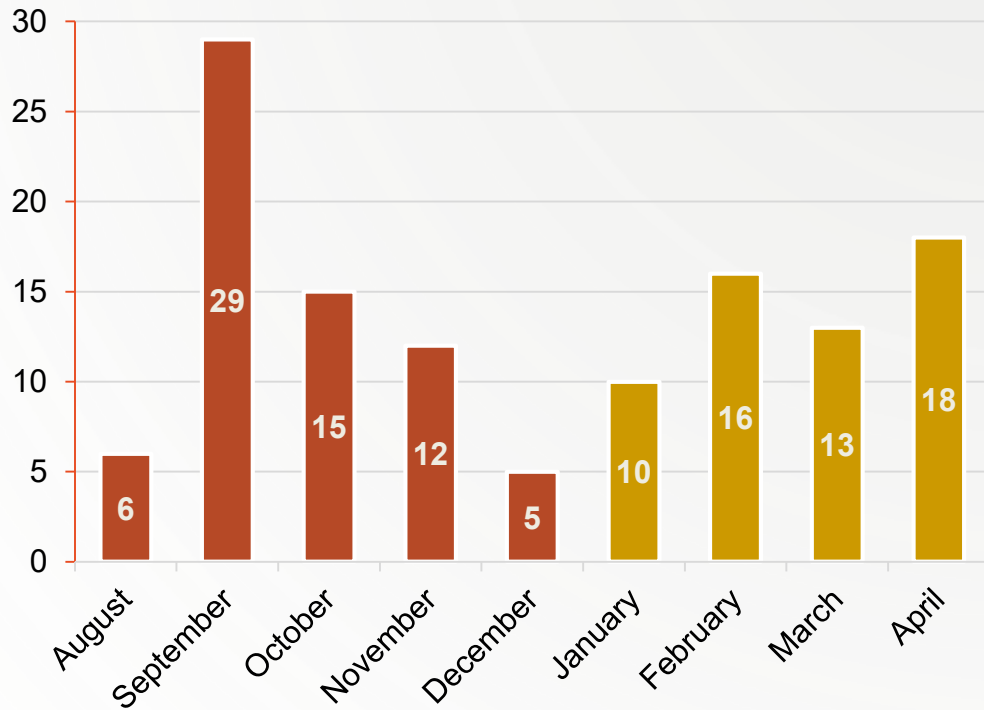**31%** agree that regular trainings would also improve familiarity.

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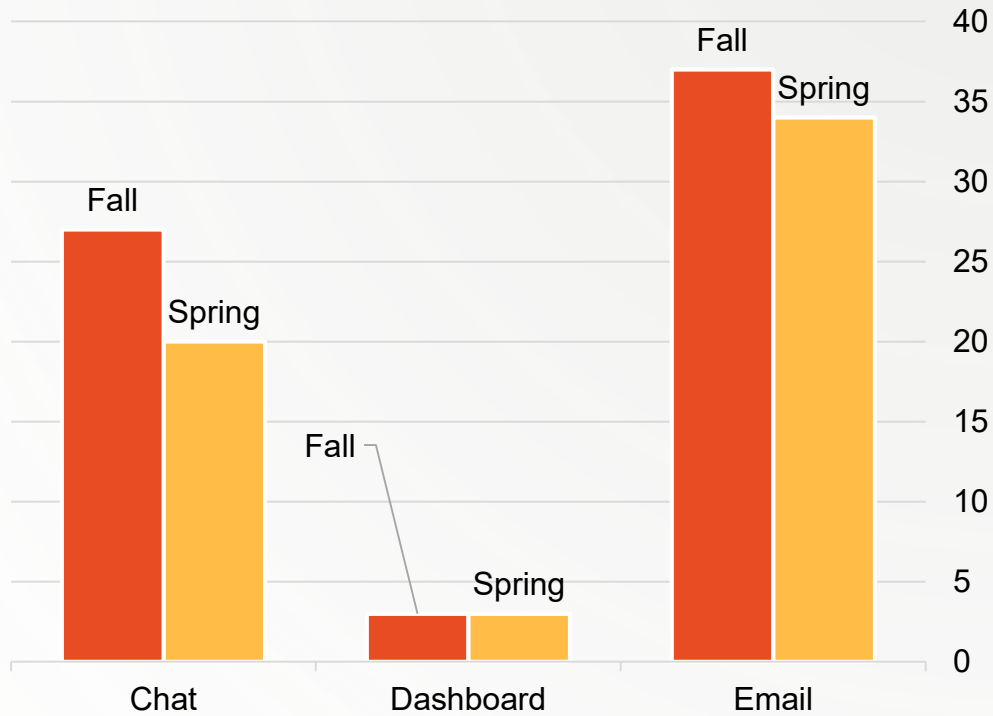
57 e-resource tickets resolved in **Spring 2022**.

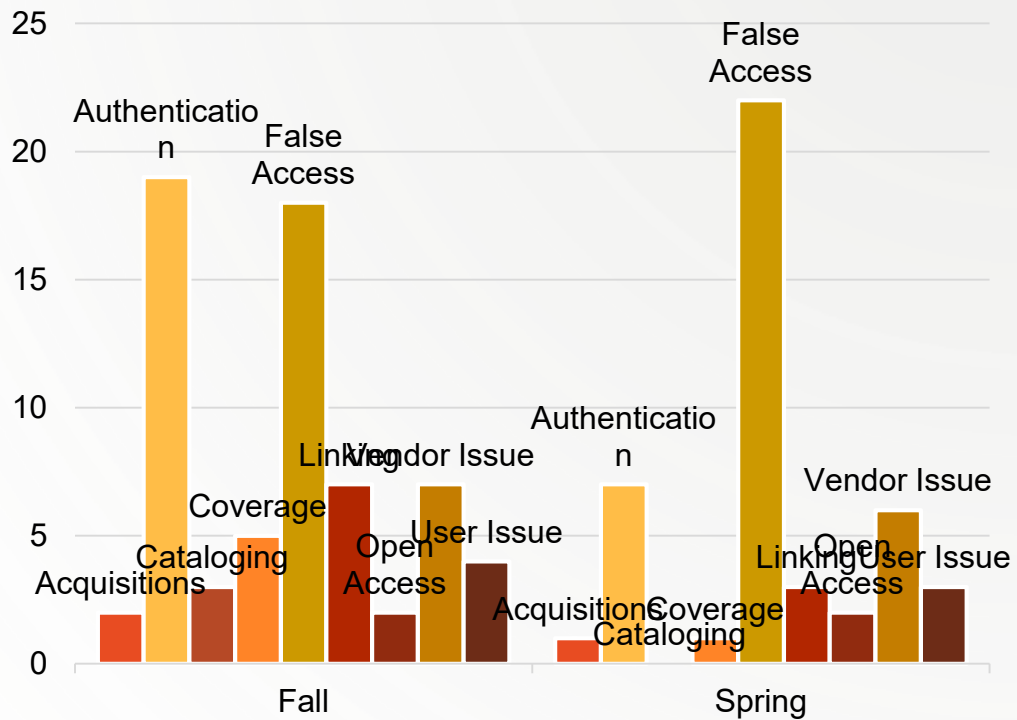The busiest month was **April**.

METHOD

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

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

ISSUES

False Access is our most persistent issue.

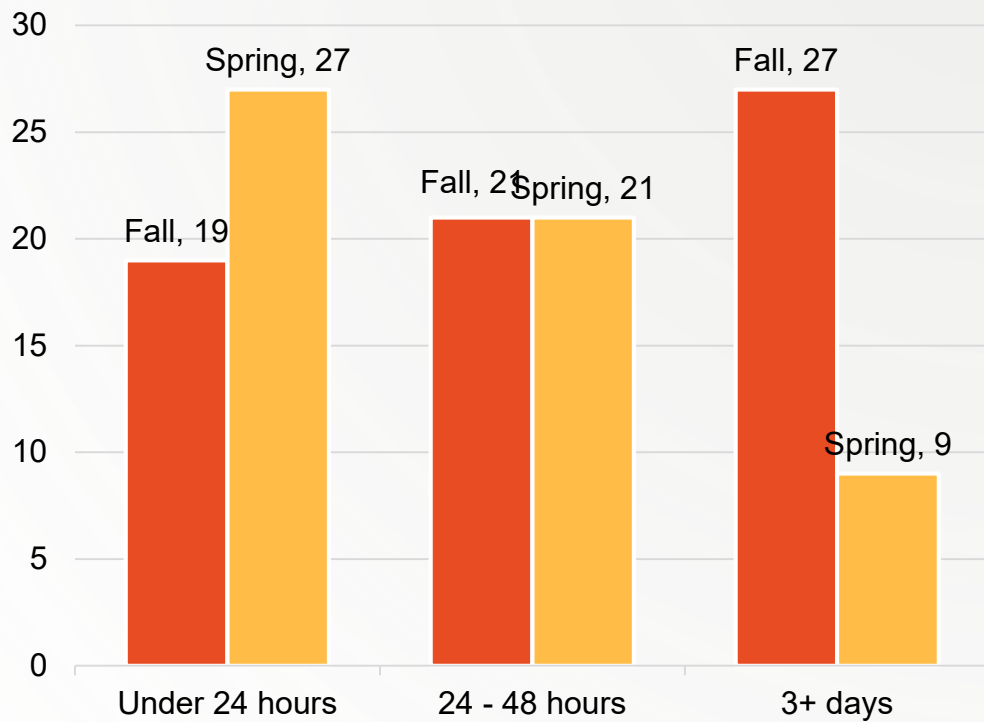Authentication is second.

RESPONDER

Systems 3%

Cataloging 1%

I&RS 8%

CD&RA 88%
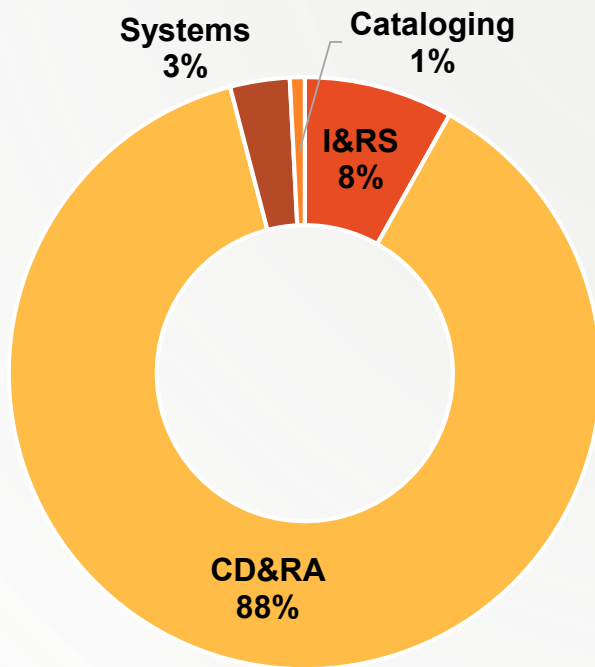
Issues were handled collaboratively by **Chat Operators**, **RefTech**, and **Collection Development & Resource Access**.

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

TURNAROUND

Chart: Turnaround times comparing Fall and Spring semesters
- Under 24 hours: Fall, 19; Spring, 27
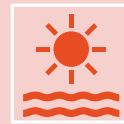- 24 - 48 hours: Fall, 21; Spring, 21
- 3+ days: Fall, 27; Spring, 9

Most issues required communication with outside vendors and groups.

Under 24 Hour turnaround went up between semesters.

3+ Days Turnaround plummeted.
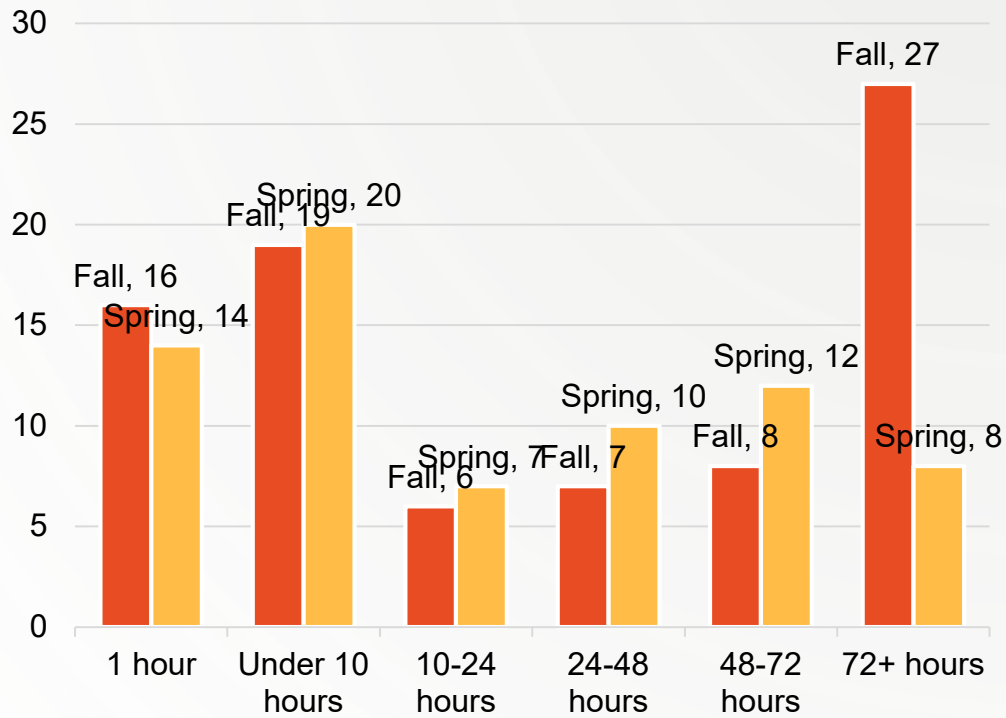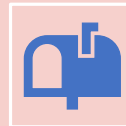
TURNAROUND

DEEPER DIVE INTO **TURNAROUND STATISTICS**.
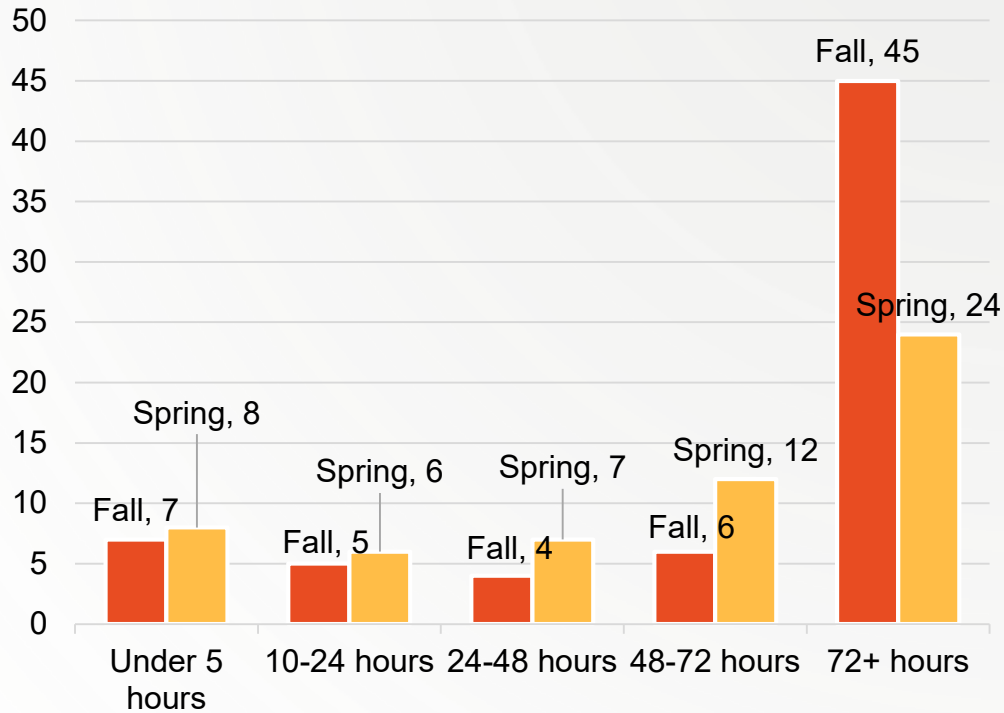
TIME TO FIRST REPLY

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

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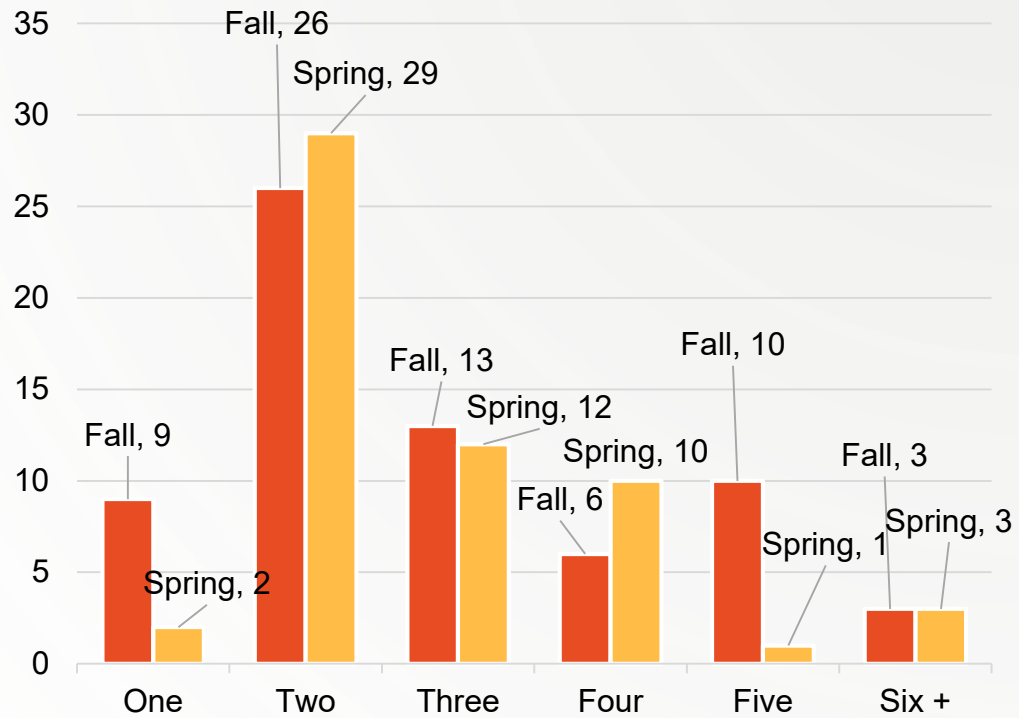
TIME TO CLOSE

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

18% of tickets were resolved within 24 hours.

INTERACTIONS TO CLOSE

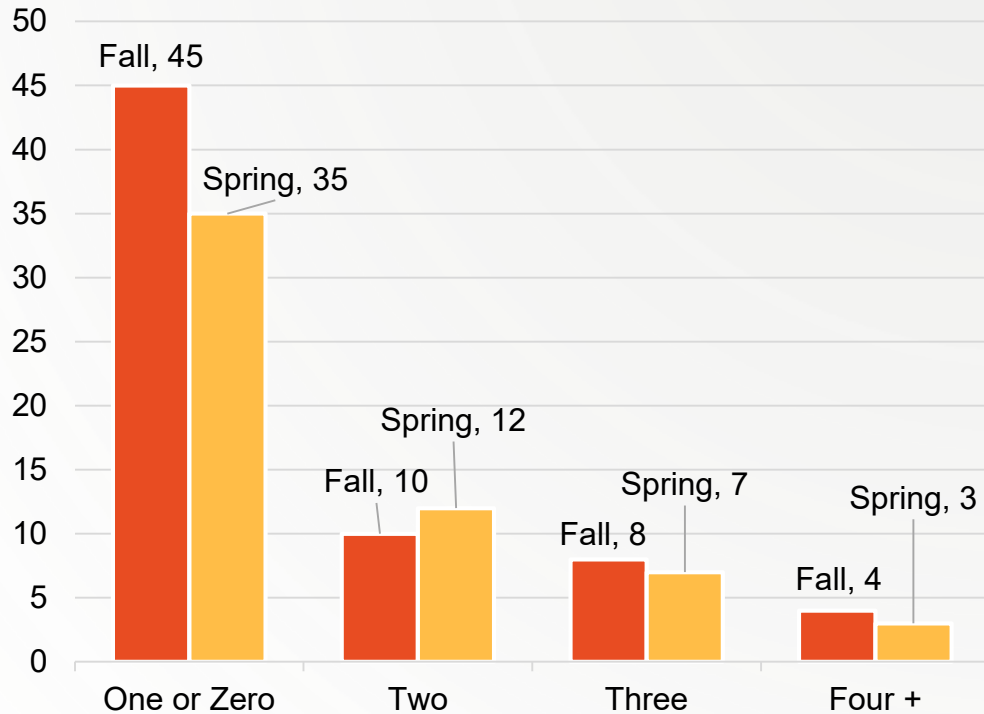**2** **54%** of tickets were resolved after **two interactions**.

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.

Chart data:
- One or Zero: Fall, 45; Spring, 35
- Two: Fall, 10; Spring, 12
- Three: Fall, 8; Spring, 7
- Four +: Fall, 4; Spring, 3

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)

QUESTIONS: REVAMP YOUR CUSTOMER SERVICE

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