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## Customer Service Training in an Academic Technical Library

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## **Customer Service Training in an Academic Technical Library**

Anne Marie Casey and Kathleen Citro

### **INTRODUCTION**

A student walks up to the library's research desk and asks, "Can you help me find information on personality profiles of male and female pilots? Helpful to this will be any data that relates to aircraft accidents with gender makeup of the crews." Another student, taking courses at an air force base outside London, emails the research service with, "I am looking for data on load factor, CASM, RASM, aircraft utilization, on-time performance, and airfare pricing for Norwegian Air International." Many reference librarians, even the most veteran, might have difficulty knowing where to begin to help these students. Yet, these are real reference requests and typical questions for the ten full-time and three adjunct research librarians at Embry-Riddle Aeronautical University's (ERAU) Hunt Library, where providing excellent customer service is a top priority.

The concept of reference or research assistance as a customer service point in an academic library may not be first one that comes to mind to describe the work. Reference librarians engage in instruction during the interview process; this differs somewhat from the common conception of library customer service, which may be characterized by such activities as checking out books, putting paper in a printer, or pointing the way to the rest room. However, in the reference interaction, librarians engage in interpersonal communication with the user and provide a service that includes providing information or instructing them in effective information-seeking activities. In order to ensure effective customer service, reference librarians need not only an understanding of the positive interpersonal communication skills, which are common to all good customer service; they also need an in-depth knowledge of the information resources that support the curriculum and research at their institutions. Effective training is necessary for them to attain these skills and nowhere more so than at an academic library that supports a unique technical curriculum. This chapter will focus on the formal and informal peer training that ERAU librarians receive that prepares them to provide good customer service.

### **BACKGROUND**

ERAU is the world's oldest and largest university specializing in aviation and aerospace and is the only fully accredited aviation-oriented university. With two residential campuses, in Daytona Beach, Florida, and Prescott, Arizona, over 150 distance-learning centers and online programs, ERAU educates 30,000 students annually. Degrees range from an associate's in air maintenance science to PhD programs in aerospace engineering, aviation, engineering physics, human factors, and mechanical engineering (Embry-Riddle Aeronautical University 2015).

Library services at ERAU are offered from two locations. The Hazy Library, on the Prescott campus, serves the needs of the residential community in Arizona. The Hunt Library, on the Daytona Beach Campus, supports the university administration, the Florida campus, and the students taking courses online or through the distance learning centers of the Worldwide Campus. Because the information resources in the fields of aerospace are often difficult to negotiate, a thorough understanding of them as well as strong customer service skills are necessary to assist students and faculty to find the correct information and to encourage them to return whenever they need help.

The Hunt Library collections consist of many books, periodicals, and databases not commonly found in academic libraries. In order to work effectively with students and faculty, library staff need some familiarity with the subjects taught and the library resources. However, no one on the staff needs as a thorough a grasp of the language and literature of aviation and aerospace as do the research librarians. Comprised of ten full-time librarians, two technicians and the associate director, Research and Worldwide Library Services is the largest department in the Hunt Library. Research librarians work four- or five-hour shifts on the physical research desk in the library or on the virtual research desk where they field questions via email, chat, and the occasional telephone call. In addition, the research librarians provide library instruction classes, develop virtual instruction tools, participate in collection development, and support faculty contributions to the institutional repository.

Other library departments are Access Services, consisting of Circulation, Inter-library Loan, and Media Services, Technical and Electronic Library Services, and Administration. Adjunct research librarians come from one of the other library departments and tend to have responsibilities that lend themselves to research assistance, such as inter-library loan and cataloguing.

All of the Hunt Library staff need some basic understanding of the aviation and aerospace areas in order to perform effectively but the research librarians require an in-depth knowledge of the field and the resources that they did not receive in any earlier education or experience. The training they undergo to come up to speed in these resources takes between four and six months and is provided by all of the full-time research librarians.

## **LITERATURE REVIEW**

The Reference and User Services Association (RUSA) of the American Library Association (ALA) defines reference transactions as “information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs” (Reference and User Services Association 2008, 1). In addition, RUSA developed a set of Guidelines, the intent of which is to “identify and recommend observable behavioral attributes that

could be correlated with positive patron perceptions of reference librarian performance” (Reference and User Services Association 2013, 1). Thus while RUSA defines a reference transaction in terms of an exchange of information, it also recognizes that the behavior of the librarian is important to the perception of the person seeking the information. The categories the Guidelines discuss are visibility and approachability, interest, listening and inquiring, searching, and follow-up (Reference and User Services Association 2013), all of which could be considered attributes of good customer service in most environments.

In her exploration of the use of Total Quality Management in reference services, Witlatch writes that, “Behaviors related to courtesy and the constellation of behaviors which recognize the customer’s individual query are associated with successful reference service” (Witlatch 1995, 20). In fact in an unobtrusive observational study of reference transactions conducted over several years, the Willingness to Return Study, findings revealed that qualities such as approachability, open questions in the interview, listening skills, and interest have a powerful effect on a customer’s willingness to return to the same librarian for future requests (Durrance 1995).

Saunders (2013) reports that in a survey she and a colleague conducted among 900 reference librarians, 94.1 per cent of academic reference librarians indicated that customer service skills are important and 63 percent agreed that customer service skills are among the three most important for reference librarians. The author discusses positive and difficult reference interactions encountered by graduate library students and emphasizes that at a time when patrons have many options for discovering information, good customer service is more important than ever to attract them back. She goes on to say, “In order to accomplish a culture of customer service, library directors must establish clear policies and expectations, train employees, and model behavior” (Saunders 2013, 149).

Training for a new reference librarian can take a variety of formats and often may include some form of peer mentoring. In peer-training situations, newer librarians may be paired with veterans on a service point to observe and ask for help as they learn the unique aspects of the library. Some libraries establish a more formal approach such as the peer-coaching program the Temple University Library initiated in the 1990s. Mentees in the program reported that they felt more comfortable learning from a peer than a supervisor, who would be evaluating them, and supervisors observed that the new librarians developed a greater understanding of the resources as well as communication and interpersonal skills necessary for good customer service in the transaction (Arthur 1990).

The University of Arizona Library developed an extensive training program in the early 2000s to support the transition to a Learning Commons approach to library service. Initially conceived as a

program that would be designed and offered by a designated training team, the program evolved into one where previously trained librarians were assigned ownership of specific training modules. Thus, more experienced librarians were responsible for training newer colleagues in a particular aspect of their work, which has proven to be an effective model (Sult and Evangeliste 2009).

The literature of Library and Information Science (LIS) related to reference training in an academic library, which supports a heavy science or technology curriculum, is limited. One of the few articles on this subject describes a program at Wayne State University Libraries in the 1990s in which reference librarians in each of the discipline-specific area of the libraries developed training sessions that included discussion and description of specialized programs. Although not limited to science and technology, the sessions included these areas and participants agreed that they were able to provide a higher level of assistance based on a better understanding of subjects and resources they had not had a familiarity with previously (Spang 1996).

Another program that provides background information for reference librarians is Bootstrap Training, developed at San Jose State University Library in the late 1990s. It included a mini-seminar for adjunct librarians on the background of the science questions they were encountering on the reference desk. Feedback from the trainees was very positive and expressed the opinion that understanding the sciences better helped them to decipher student questions and to consult the correct resources to assist them (Peterson and Kajiwara 1999).

Peer training appears to be valuable in helping public services librarians acquire knowledge in areas in which they have little background, whether these are in the sciences or other subject areas. In the early 2000s, the DePaul University Libraries established a training program that encouraged campus librarians, proficient in the subject areas taught at their campuses, to educate their colleagues. The primary goal was to provide a staff development venue where librarians could increase their sense of security when answering questions on unfamiliar topics (Dankert and Dempsey 2002).

Another form of peer training in the sciences occurs through the observation of questions and answers in a shared email account by all of the public services librarians at the New York University Ehrman Medical Library. Each of the librarians who contribute to the shared email account was responsible for reviewing the questions and answers on a regular basis. "As new librarians and veteran reference librarians struggle to keep abreast of the growing numbers of health sciences databases while maintaining high-quality search techniques, the power of observation through email serves to facilitate training among all mediated searchers" (Viera and Dunn 2005, 70). Not only does this program

contribute to training but has also helped with quality control. Colleagues are able to evaluate previous answers and provide feedback for improvement.

## **RESEARCH LIBRARIAN TRAINING AT THE ERAU HUNT LIBRARY**

### **Full-Time Research Librarians**

The current training program for public services librarians at the Hunt Library has evolved over time into a strong formal series of peer instruction. The origins of the program date back to the 1970s as the staff in the original learning resource center grew and as more faculty and students were recruited to the university. The current director, who shaped the training program, was originally hired to provide reference assistance with little training and knowledge of aviation. She consulted with faculty, took classes, and read the literature of the field to teach herself enough about the technical subjects and resources to answer reference questions. As the reference department grew, new librarians began adopting particular areas to learn in-depth, such as air maintenance or safety. This practice evolved as the department expanded and ERAU offered a larger variety of programs. By 2015, the training program has become an important resource for new and veteran librarians, whose titles were changed from reference librarian to research librarian in 2012, to identify the library's strong supportive role in the university's five-year plan to increase undergraduate research.

Training for a new research librarian at the Hunt Library is put into motion as soon as a librarian accepts the position. They are registered to audit the aviation science course for non-pilots. In this class, they learn the basics of the physics of flight, meteorology as it relates to flight, and common terms and practices pertaining to airplanes, helicopters, and airports. (This course is also recommended for new librarians in other departments, such as cataloging, to help them understand the terminology of the predominant courses of study at ERAU.)

At the same time that the trainee research librarian is auditing the basic course, they are also encouraged to read books and articles that will supplement the knowledge gained in class. The largest part of the training, however, is a formal program of instruction taught by each of the full-time research librarians, who have assumed responsibility for keeping up on trends and issues in particular aspects of the ERAU curriculum. The training is laid out in a manual that includes information on common sources, homework assignments, and quizzes designed to help the trainee learn each area as thoroughly as possible. (See Appendix 1 for a Table of Contents to the training manual.) Once the trainee has successfully completed an area of the manual, both the trainer and trainee submit an evaluation of each other to the associate director. This helps to maintain quality training and continuous updating of the training manual.

The process of instilling customer service values also starts immediately. Much emphasis is given to the high expectations that the Hunt Library leadership places on customer service. The orientation and training process includes mentoring from each librarian charged with modeling good customer service skills. Although alluded to in the formal policy and procedures manual, the strongest and most effective approach is observation of colleagues who place customer service at the forefront of each interaction regardless of format — chat, face-to-face, email, and telephone.

Trainees shadow the veteran research librarians on both the physical and the virtual research desks. The shadowing includes working every shift during their training period<sup>1</sup> so that they can observe the different approaches the veteran librarians take to requests. During this period, the trainees are able to learn in-depth about the resources in the collection that are unusual and to pick up the terminology of the field as it relates to research assistance.

The newest Hunt Library research librarian, who has nearly completed her training, expressed how important the extensive technical training has been for her. This is her third position as a librarian in a reference setting, but the first with training of this magnitude. She believes that it has been a great experience because the resources are so different from anything she experienced in her Master's program or on previous jobs. The level of training ensures that she learns about the unique resources as well as the styles of her colleagues and the ways in which they interact with students and with each other.

Once a new librarian has completed the training, they begin working on the physical research desk alone and on the virtual research desk, which is always staffed with two or three librarians, depending on the volume of requests. Training continues at this point for all librarians in two primary ways. The first is weekly discussions at the research department meetings, where librarians share information on course assignments and new resources and agree on new policies and procedures. This information is then added to the research notebook that resides at each of the desks, for easy referral.

The other form of ongoing training is the shared research email account. The responses to all virtual requests, which are the majority from both residential and distance students, are sent through the shared account. Librarians are able to read the sent messages and continue to learn by exploring the resources and approaches their colleagues have taken to a particular question. This method has helped the librarians to continue learning about new resources and to provide some quality control on the responses to requests.

## **Adjunct Training**

The training of adjunct research librarians is similar to that of the full-time librarians. They all audit the basic aviation science class and take part in the semester-long training and the shadowing. However, the adjuncts do not participate in the weekly discussions or the virtual research desk. They provide assistance on the physical research desk on certain weekdays to allow the full-time librarians time for meetings and other duties. Some of the questions they receive are routine in nature and easy for them to handle. However, when they do encounter more difficult questions, they generally request assistance from one of the full-time librarians, who will conduct some training on the resources that relate to the immediate question, helping both the student and the adjunct.

## **CONCLUSION**

Reference librarians often come to a new position with some knowledge, gained in their Master's Degree programs, internships, and prior work experience. Once a librarian has mastered the art of the reference interview and developed their abilities to search for information quickly and effectively, they generally absorb the particular needs of the new academic library without too much trouble. Most of the librarians who worked in reference positions before coming to the Hunt Library admit that they had little to no formal training on earlier jobs and figured out what they needed to know by shadowing colleagues and asking questions of the veterans in their department.

At a science or technical library, this general approach to on-the-job training often is not practical. The average reference librarian probably does not have the background in science, engineering, or technical education required to understand the terminology, questions, and resources in these fields. As other libraries such as San Jose State University and Wayne State University have discovered over time, the Hunt Library has long recognized the importance of teaching a new librarian about aviation and its literature before they ask that person to work with the students and faculty on the research desks. The formal training at Hunt Library is vital to the quality of customer service at a university with unique programs and resources.

The Hunt Library model may be easily adaptable to other specialized academic or special libraries. By offering a formal set of modules designed to educate the new librarian on the most common information resources and questions coupled with formal and informal peer mentoring at different reference service points, the new librarian learns quickly and effectively while the veteran continues to sharpen skills.

## **NOTES**

1. The research desks at the Hunt Library operate seven days a week, including five evenings.



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## APPENDIX 1

# HUNT LIBRARY RESEARCH TRAINING MANUAL

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