

# **Designing and Assessing Library Services**

## Library Assessment Conference 2012

# intro

*The purpose of this talk is to discuss the current challenges in designing and assessing library services and then describe the mindset, process, and tools to help address these challenges.*

## **Our agenda:**

- a quick poll
- service design done right
- current challenges
- amplifying trends
- mindset, process and tools
- 3 quick examples
- how to get started
- conclusions

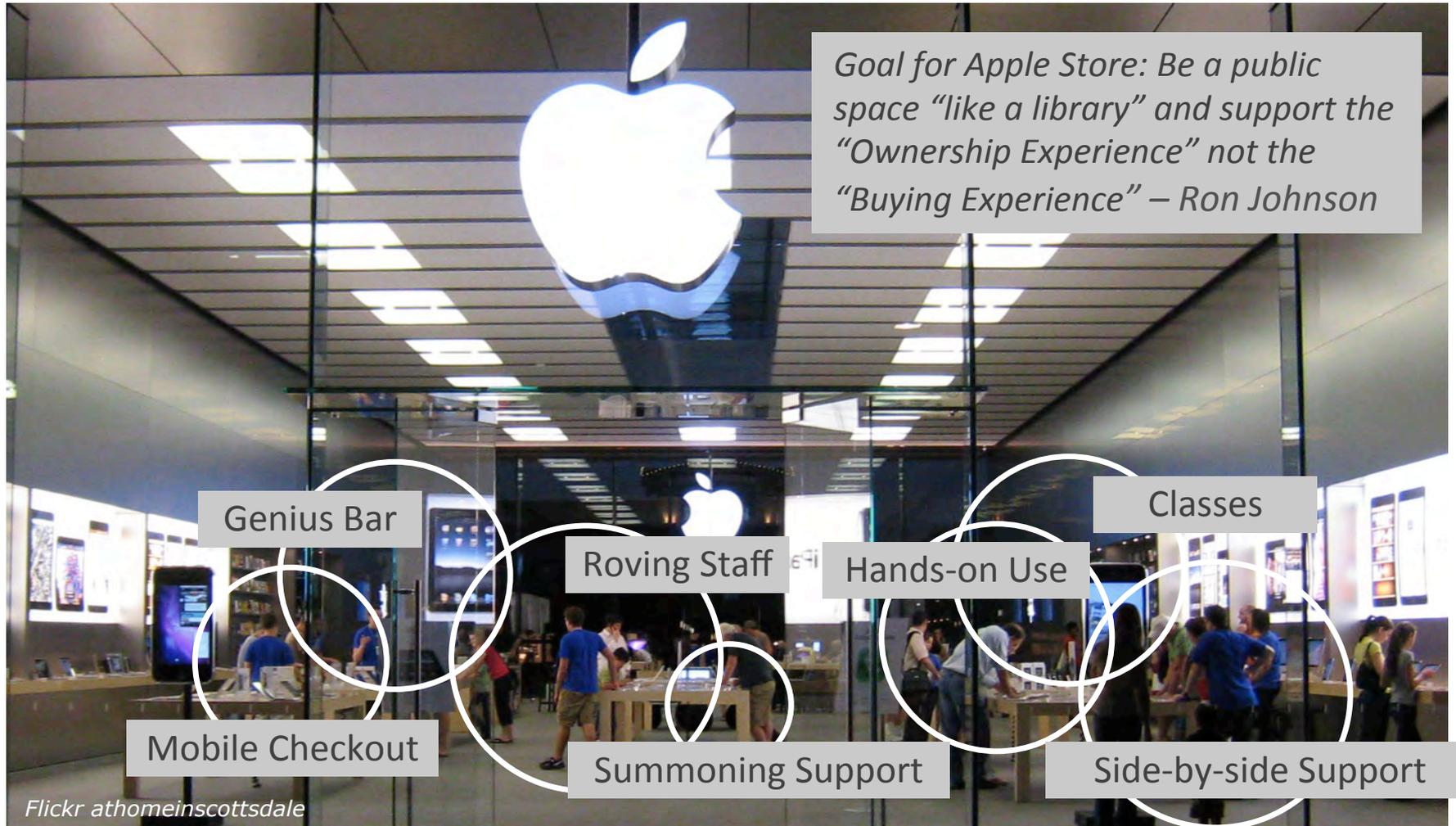
**PRESENTATION LINK:**  
[http://bit.ly/LAC12\\_services](http://bit.ly/LAC12_services)

# space



Flickr athomeinscottsdale

# space + services



*Goal for Apple Store: Be a public space “like a library” and support the “Ownership Experience” not the “Buying Experience” – Ron Johnson*

Genius Bar

Classes

Roving Staff

Hands-on Use

Mobile Checkout

Summoning Support

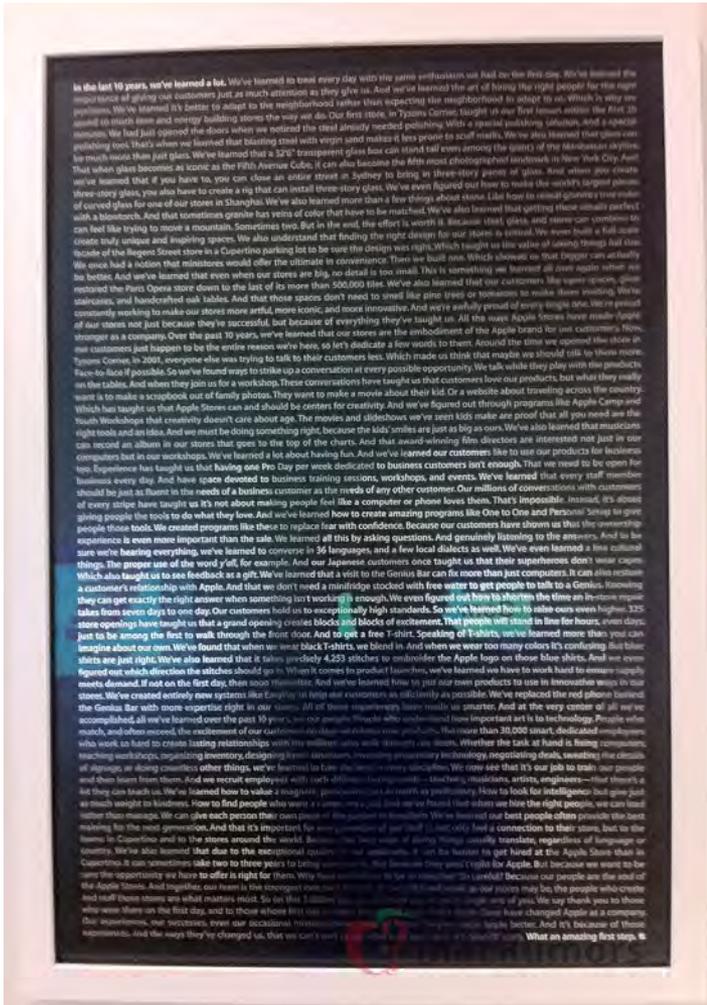
Side-by-side Support

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# space + services + assessment

## From 10 Year What We've Learned Poster:

- Everyone else was trying to talk to their customers less. Which made us think that maybe we should talk to them more.
- We need to be open for business every day. And have space devoted to business training sessions, workshops, and events.
- The Genius Bar can fix more than just computers. It can also restore a customer's relationship with Apple.
- When we wear black T-shirts, we blend in. And when we wear too many colors it's confusing. But blue shirts are just right.
- When we hire the right people, we can lead rather than manage. We can give each person their own piece of the garden to transform.



# some symptoms...

We had to **cut back on our hours** because the building is larger than we can afford to run...

Students are always going to **the “wrong place” to get help** so we have to send them to the other desks...

Our most **experienced staff are bogged down** answering routine questions like printing...

We had to put **additional staffing** here because of the way the library space was designed...

We **don't really know** how effective our services are...

# service challenges

*Service design and assessment face three big challenges: ineffective assessment instruments / processes, provider-centric bias, and separated design processes for spaces and services.*

## **Poor assessment**



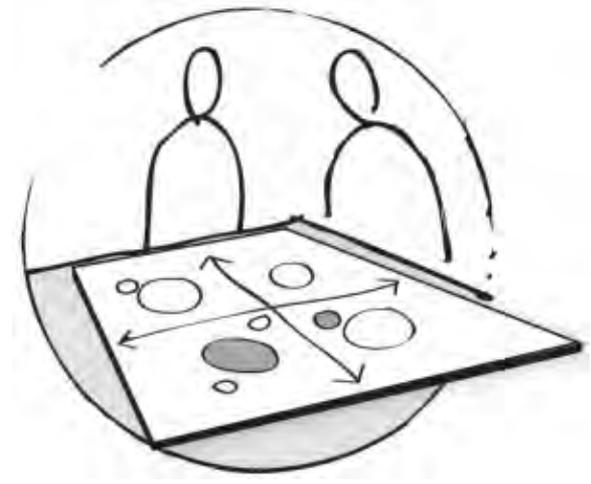
*Assessment and design not linked, lacking measures of impact, and not measuring the right things*

## **Provider-biased**



*Lacking user-centered emphasis and tools and using mostly linear process instead of an iterative one*

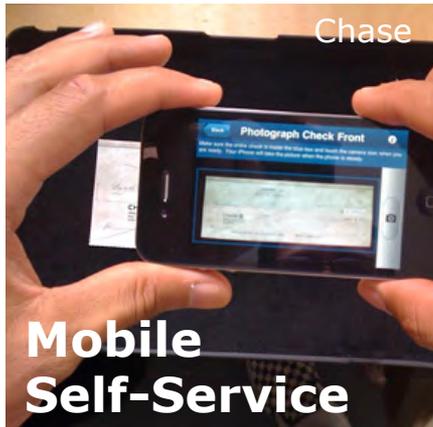
## **Process silos**



*Determined through separate processes, with different people, different budgets, at different times*

# trends impacting services

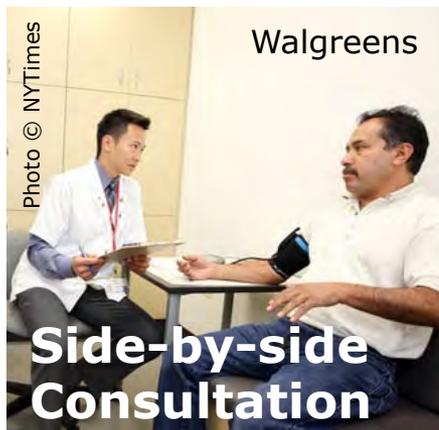
*Technology and cultural changes are reshaping services, affecting a range of industries and activities.*



*Customers expect access and the ability to make transactions wherever they are, with their devices or devices you've lent to them.*



*To build community, increase utilization, and encourage participation, events and activities need to be programmed for members and the public alike.*



*Services move from transaction to consultation as more can be done online and the need to connect with customers increases.*



*To enable convenience, usability, and efficiency, services are being co-located in integrated hubs offering "one-stop-shopping."*

# mindset, process, and tools

# a new mindset

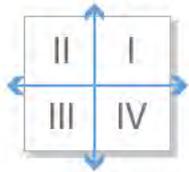
*Addressing these challenges and trends requires a new mindset for the planning, operation, and evaluation of spaces & services.*

<b>Conventional Thinking</b>	<b>Service Design Thinking</b>
Design the container and its contents	Design the activities and interactions
Design from institutional perspective	Design from user perspective
People will ask for whatever help they need	Proactive service uncovers needs
Use standards of what worked in the past	Invent new models, working with users
Focus on consistency, one-size-fits-all	Focus on personalization, responsiveness
Design and assessment are separated	Use same tools for design and assessment
Operational and Capital budgets separate	Operational and Capital budgets linked

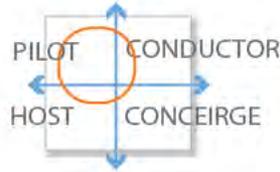
# service design process and tools

*Service design is a way of thinking and a process for designing the service interactions between people, information, technology, furniture, and spaces so that they are usable, useful, desirable, and effective.*

SCENARIO PLANNING



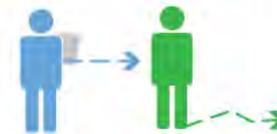
SERVICE PLOT



VISIONING



SHADOWING



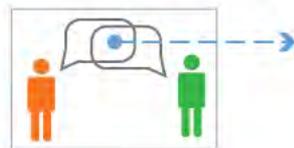
PERSONAS



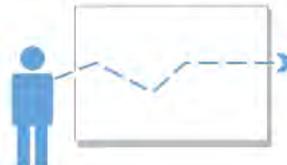
LOCATION PLAN



MYSTERY SHOPPING



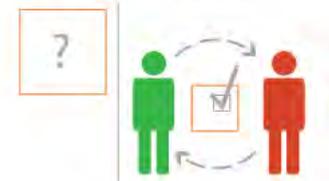
JOURNEY MAP



BLUEPRINT



PROTOTYPE



# personas

*Synthesizing what you know about your users into a set of personas that represent different prototypical users' motivations, behaviors, and expectations*

**persona: innovator / pioneer**

Name:	Leslie Chung
Demographics:	55 years old, tenured faculty, technically competent, living on campus, comp lit
Motivations:	Visualizing medieval texts, research-oriented
Behaviors:	Spends time with grad students – mentoring, oversee research projects/efforts; travelling abroad to Oxford and Italy (field research)



**persona: researcher / loner**

Name:	John Wong
Demographics:	Age 27, married, ChemE, 3 <sup>rd</sup> Year PhD, Asian American Male, Lives in EV
Motivations:	Do research, get PhD, work in industry, keep wife happy, short on time and not much sleep
Behaviors:	Time in the lab, weekend warrior, online journals, does presentations, TAs classes, driven by routines, meetings w/ undergrad students, blogs
Expectations:	Fast Service and Technical competency Help w/ multimedia and video Be left alone Space that's useful for small groups Work on blog, including uploading video
Resources:	Has: Department lab, some grant funding/ resources, including software and hardware needs: alternative spaces, digital camera
Other:	None



<b>Name:</b>	Name & Keyword (end in “-er”)
<b>Demographics:</b>	Describe your character - age, affiliation/status, home location,
<b>Motivations:</b>	What drives this person? What are his/her goals?
<b>Behaviors:</b>	How and where does he/she spend their time? With whom? Doing what?
<b>Expectations:</b>	What does he/she expect from you in your spaces/services?
<b>Resources:</b>	What are the resources that he/she relies on to get things done? Which are his/her own vs. those you provide?

# personas example



## Larry Leadwell

Professor and Associate Head,  
Mechanical and Aerospace  
Engineering

*"Wait till you see this"*

### What's your work life like:

I have been focused on aerospace engineering, doing a lot of work for the space program. Since assuming department head role 7 years ago my duties have shifted to be more administrative, including serving on a lot of committees and working with colleagues in the department. I've also got a few grad students...

### How do you use technology?

As an engineer, I'm immersed in it all the time

### How do you use the library?

I rarely use the library because I can access all the materials online. But I enjoy having someplace to walk for coffee and just meet informally with people. I also like taking visitors there to showcase everything we are doing.

### About me:

- 50 years old
- Married, empty-nester
- Hobbies include camping and fishing
- Wolfpack Club member
- NCSU Alumni Club
- PhD, Mechanical Engineering
- Tenured, w/ 26 years NCSU

### My needs:

- Attend library events
- Turnkey videoconferencing
- Place to meet informally
- Impress visitors
- Bookable event space
- Food and drink
- Space to meet people outside my department

*\*Persona developed by NCSU libraries, condensed by brightspot*

# journey map

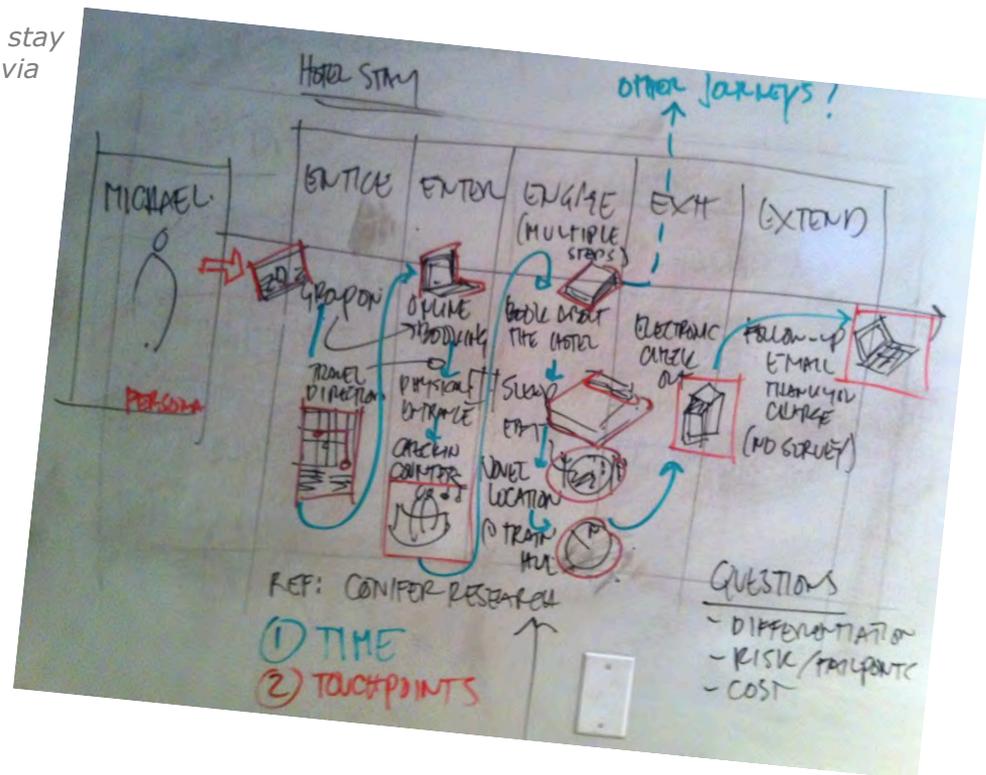
Illustrating how a persona would use / move through a space and/or service, describing the "touchpoints" where they interact and need support. Done for a variety of personas and times.

Example:  
A recent hotel stay  
which started via  
Groupon

## Key concepts:

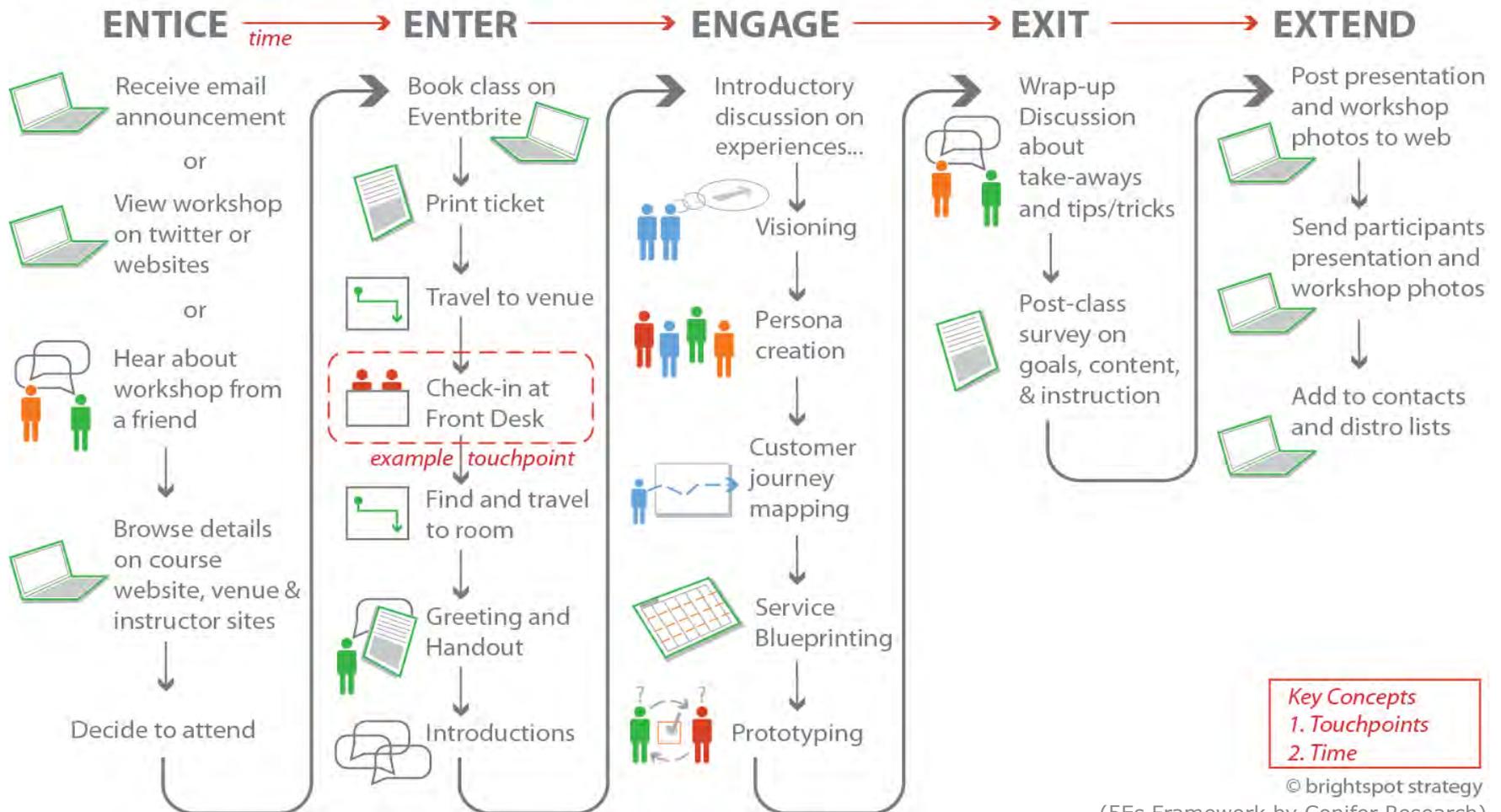
- Time: pre-service, service, post-service
- Identifying touchpoints

Customer Journey Map				
Entice	Enter	Engage	Exit	Extend



# journey map example

## Customer Journey Map for a Workshop



**Key Concepts**  
 1. Touchpoints  
 2. Time

© brightspot strategy  
 (5Es Framework by Conifer Research)

# service blueprinting

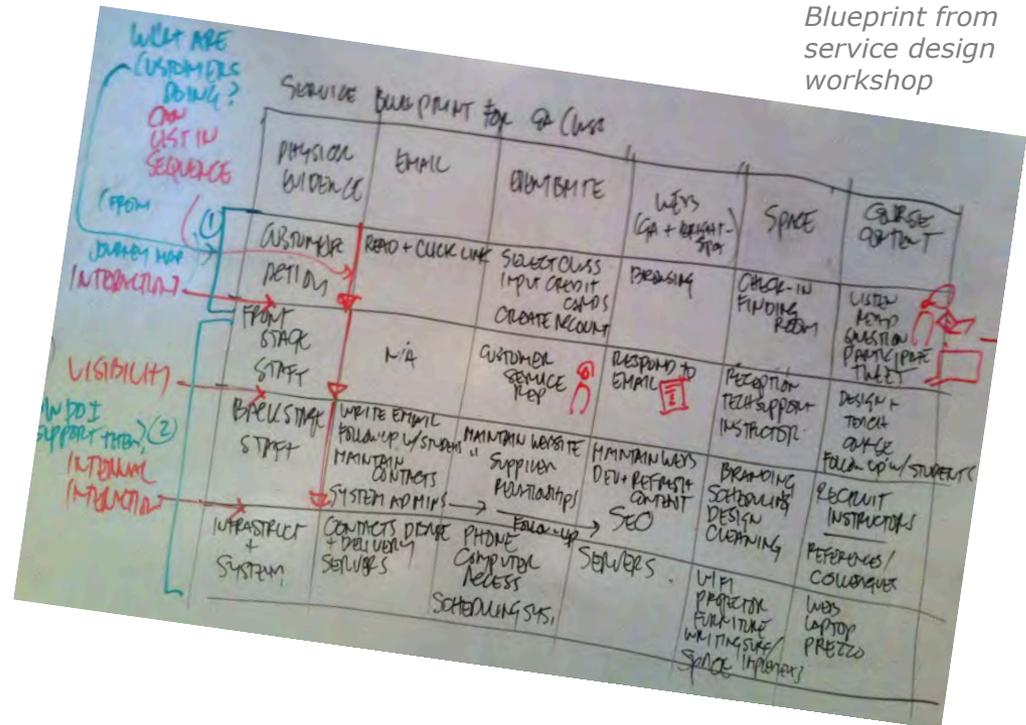
Documenting how you wish to provide a service/space, giving direction on front-line staff actions, behind-the-scenes staff, and support systems/infrastructure for each service channel

## Key concepts:

- Connecting, Front, Back, and Systems
- Understanding & coordinating delivery across channels

Service Blueprint			
	Delivery Channel 1	Delivery Channel 2	Etc...
Physical Evidence	Service delivery guidance...		
Customer Actions			
Front-line Staff			
Behind the Scenes Staff			
Infrastructure and Systems			

Example:  
Blueprint from service design workshop



# service blueprint example

## Service Blueprint for a Workshop

<i>(evidence)</i>	 <b>EMAIL SOCIAL MEDIA</b>	 <b>WEB</b>	 <b>BOOKING SITE</b>	 <b>SERVICE DESK</b>	 <b>CLASS ROOM</b>
<b>Customer Actions</b>  <i>interaction</i>	Receive / click email View posts / tweets	Browse course Browse venue Browse instructor	Select Class Create Account Input credit card Print tickets	Check-in at Desk Provide tickets Ask directions	Locate Listen and Question Participate Tweet / Post
<b>Front-stage Staff Actions</b>  <i>visibility</i>	N/A	Inquiry response (Customer Svc Rep)	Inquiry response (Customer Svc Rep)	Welcome visitors Wayfinding Orient Instructor Tech support	Design / teach course Student Follow-up
<b>Back-stage Staff Actions</b>  <i>internal interaction</i>	Write Email / Posts Student Follow-up Maintain contacts Systems Admin	Maintain site SEO Refresh Content	Maintain Website Maintain Suppliers Follow-up Systems Admin	N/A	Recruit Instructors Develop Curriculum Maintain Space Scheduling Space
<b>Infrastructure and Systems</b>	Contacts Database Servers Accounts	Phone Email system Content Mgmt	Phone Email system Scheduling system	Space scheduler Booking system Tech accessories	Wifi Projector Furniture Whiteboards

Key Concepts: 1. Connecting "Front", "Back" & "Systems" 2. Planning delivery across channels

© brightspot strategy

# prototyping

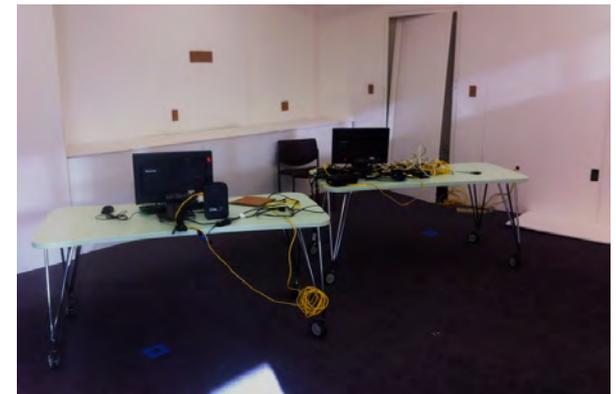
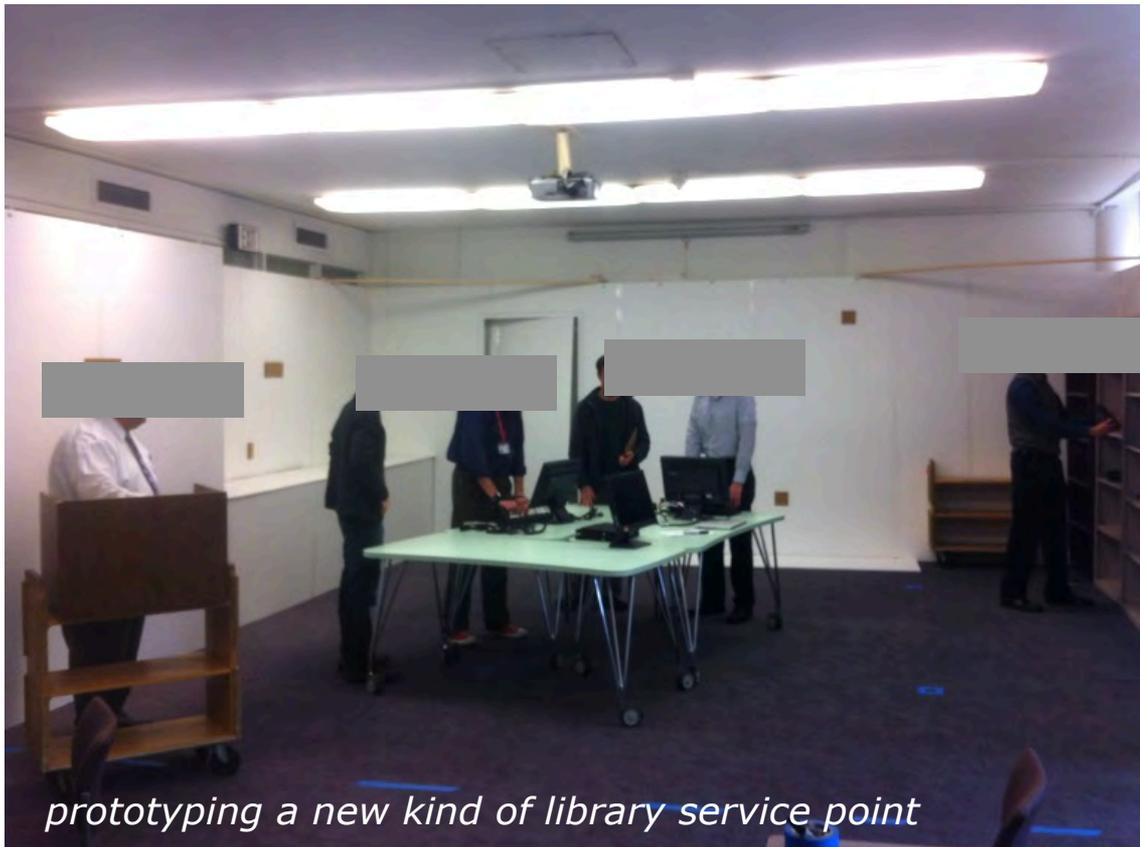
*Setting up pilots or experiments to test and refine blueprint concepts, answer questions, gather feedback, and ready your users for potential new spaces and services*



<b>Hypothesis:</b>	What question are you answering?
<b>Users:</b>	Who is it for?
<b>Location:</b>	Where it is happening?
<b>Duration:</b>	For how long?
<b>Tasks:</b>	How are you going to do it?
<b>Staffing:</b>	Who is doing it in terms of staff?
<b>Assessment</b>	How are you going to evaluate it?

# prototyping example

*Prototyping can be done through mock-ups, roleplay, and short pilot programs to inform the design of the space and staffing.*



# case study: Stanford University

*Stanford Academic Computing learned the mindset, process, and tools of service design through an all-day workshop, practicing on an upcoming project to jumpstart the process.*

## Service design training workshop



## Persona from workshop

### persona: pioneer

<b>Name:</b>	Leslie Chung
<b>Demographics:</b>	55 years old, tenured faculty, technically competent, living on campus, comp lit
<b>Movitvations:</b>	Visualizing medieval texts, research-oriented
<b>Behaviors:</b>	Spends time with grad students – mentoring; oversee research projects/efforts; traveling abroad to Oxford and Italy (field research)
<b>Expectations:</b>	Teaching in flex classroom, integrating media use, on-demand lecture capture and video-conferencing, developing OCR for primary chronicle, building spatial timeline, use/support of



©Getty Images

# case study: Liberty University

*To plan for a new 170,000gsf library, Liberty university designed an integrated service model through user research personas, journey maps, service blueprints, and a pilot service point.*

## Service design workshop



## Pilot service point



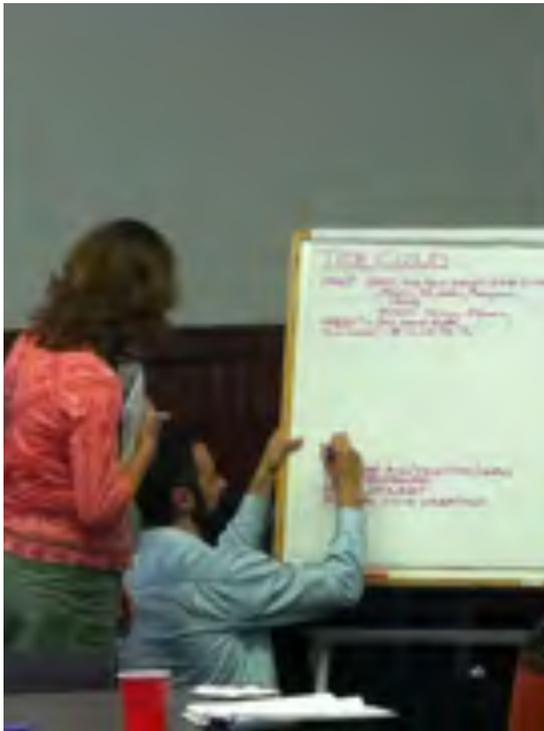
## Branded campaign



# case study: NC State University

NC State developed new service and staffing models for their new Hunt Library in a process that combined tools like personas, journey maps, and blueprints with quantitative need forecasting.

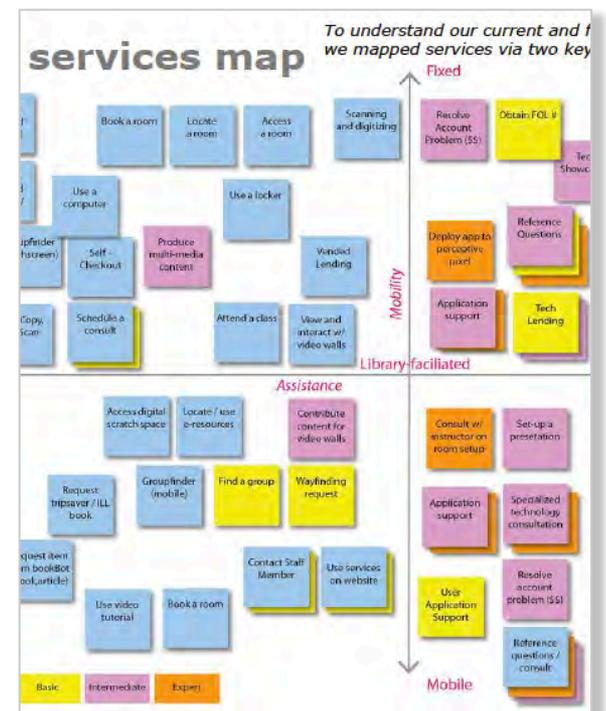
## Workshop



## Service point mock-up



## Mapping services



# how to get started

# think about tiers of assessment

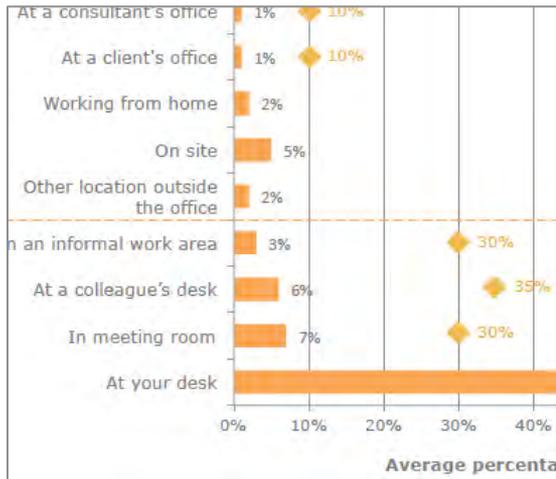
*There are tiers of assessment, with increasing value – but also the difficulty of data gathering / analysis – as you move up tiers.*



**More valuable**  
**More difficult**

## Utilization

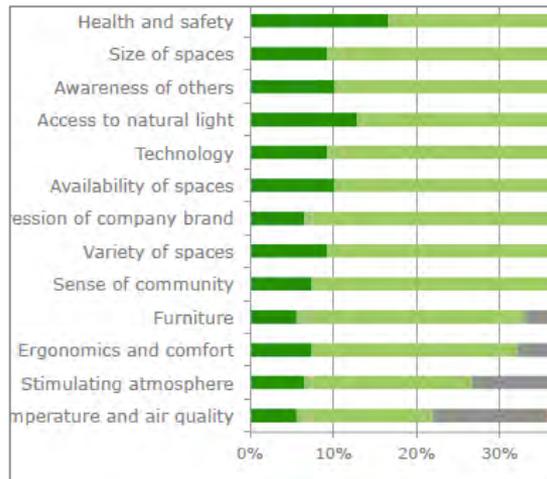
*Measuring how much a service is used, with usage as a proxy for value*



Examples: Logins, Gate counts, Item checkouts, Logging questions / tickets

## Satisfaction

*Measuring how satisfied users and staff are with a service or aspects of it*



Examples: Surveys (e.g.: LibQUAL+), interviews, observations, diaries

## Impact

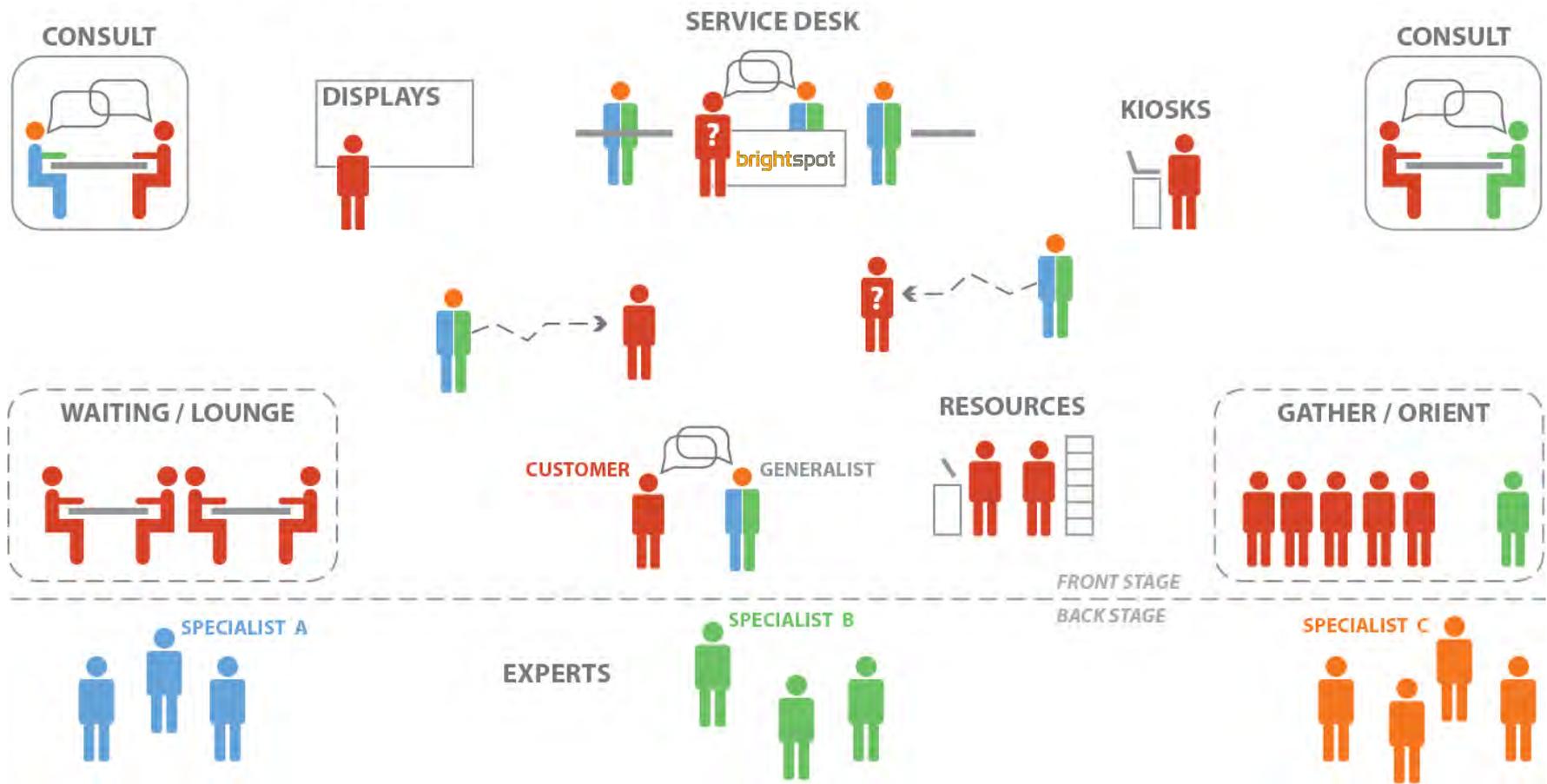
*Measuring what the service enabled users to be able to do as a result*



Examples: Value-added analysis, engagement

# map service points

*Visualize the activities and interactions at a service point then consider the information need to design and assess them.*



# use tools for design and assessment

*Institutions can use many of the same tools to evaluate current services and assess needs as well as design future services.*

## Service Blueprints

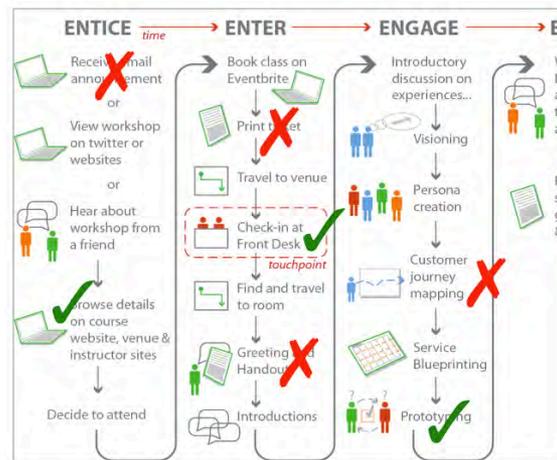
*Comparing the service delivery planned with what's actually happening*

	EMAIL SOCIAL MEDIA	WEB	BOOKING SITE	STAFF
(evidence)	Receive ✓ check email View posts / tweets	Browse course Browse venue Browse instructor	Select Class Create Account Input credit card Print tickets	Check-in Provide Ask question ✓
Customer Actions				
Front-stage Staff Actions	N/A	Inquiry response (Customer Svc Rep)	Inquiry response (Customer Svc Rep)	Welcome Wayfind Orient In Tech sup
Back-stage Staff Actions	Write Email / Posts Student Follow-up Maintain contacts Systems Admin	Maintain site SEO Refresh Content ✓	Maintain Website Maintain Suppliers Follow-up System admin ✗	N/A
Infrastructure and Systems	Contacts Database Servers Accounts	Phone Email system Content Man ✗	Phone Email system Scheduling system	Space sc Booking Tech acc

Key Concepts: 1. Connecting "Front," "Back" & "Systems" 2. Planning delivery across channels

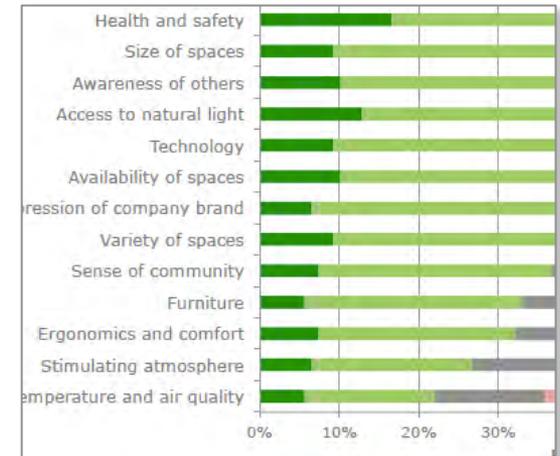
## Journey Maps

*Walking through the current journey and noting successes and failures*



## Surveys

*Comparing pre- and post-occupancy data to get a sense of the value added*



# summary

<b>Ineffective assessment instruments and practices</b>	<b>Provider-centered bias for design &amp; assessment</b>	<b>Services and spaces are designed separately</b>
<ul style="list-style-type: none"> <li>• Use the same tools for design and assessment (e.g.: journey maps)</li> <li>• Create a culture of ongoing assessment and continuous improvement</li> <li>• Create impact measures and evaluate whether spaces/services help or hinder desired outcomes</li> <li>• Consider three tiers of assessment, from utilization, to satisfaction, to impact</li> </ul>	<ul style="list-style-type: none"> <li>• Employ user-centered design tools such as shadowing, personas, and journey maps</li> <li>• Co-create with users to get input, feedback, and buy-in</li> <li>• Prototype ideas in an iterative process – fail faster and safely instead of trying to avoid it</li> <li>• Always consider front- and back-stage connected</li> </ul>	<ul style="list-style-type: none"> <li>• Create joint committee</li> <li>• Incorporate service design into design of space</li> <li>• Use prototyping to bring together services and spaces, and look for ways to test ideas in current spaces before building them in new ones</li> <li>• Use tools that connect the spaces and services, such as blueprints, journey maps, and service location planner</li> </ul>

# references

*As you move ahead, you may find the following references helpful to consult:*

- Learning Space Toolkit services section: <http://learningspacetoolkit.org/services-and-support/>
- This is Service Design Thinking (Stickdorn and Schneider) [http://issuu.com/bis\\_publishers/docs/this\\_is\\_service\\_design](http://issuu.com/bis_publishers/docs/this_is_service_design)
- Compendium of Tools and Resources: [www.servicedesigntools.org](http://www.servicedesigntools.org)
- “7 Things You Should Know About Service Design: [http://bit.ly/SD\\_7things](http://bit.ly/SD_7things)
- “Learning Space Service Design.” Elliot Felix (2011). Journal of Learning Spaces: [http://bit.ly/LearningSpace\\_SD](http://bit.ly/LearningSpace_SD)
- “Everything is a Service” post (Dave Gray): [http://bit.ly/DG\\_everythingisservice](http://bit.ly/DG_everythingisservice)
- “How to Design a Service.” Lyn Shostack (1982) European Journal of Marketing 16(1): 49–63
- Service Design Network: <http://www.service-design-network.org/>

**thank you!**

## **PRESENTATION LINK:**

**[http://bit.ly/LAC12\\_services](http://bit.ly/LAC12_services)**

(case sensitive)

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