Designing and Assessing Library Services
Library Assessment Conference 2012
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

space
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
Roving Staff
Mobile Checkout
Summoning Support
Classes
Hands-on Use
Side-by-side Support

Flickr athomeinscottsdale

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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.

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

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

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.

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

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

Name: Name & Keyword (end in “-er”)

Demographics: Describe your character - age, affiliation/status, home location,

Motivations: What drives this person? What are his/her goals?

Behaviors: How and where does he/she spend their time? With whom? Doing what?

Expectations: What does he/she expect from you in your spaces/services?

Resources: 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

“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

<table>
<thead>
<tr>
<th>Customer Journey Map</th>
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</thead>
<tbody>
<tr>
<td>Entice</td>
</tr>
<tr>
<td>--------</td>
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<td></td>
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</tbody>
</table>
journey map example

Customer Journey Map for a Workshop

ENTICE → ENTER → ENGAGE → EXIT → EXTEND

ENTICE
- Receive email announcement
- View workshop on twitter or websites
- Hear about workshop from a friend
- Browse details on course website, venue & instructor sites
- Decide to attend

ENTER
- Book class on Eventbrite
- Print ticket
- Travel to venue
- Check-in at Front Desk
- Find and travel to room
- Greeting and Handout
- Introductions

ENGAGE
- Introductory discussion on experiences...
- Visioning
- Persona creation
- Customer journey mapping
- Service Blueprinting
- Prototyping

EXIT
- Wrap-up Discussion about take-aways and tips/tricks
- Post-class survey on goals, content, & instruction

EXTEND
- Post presentation and workshop photos to web
- Send participants presentation and workshop photos
- Add to contacts and distro lists

Key Concepts
1. Touchpoints
2. Time

(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

<table>
<thead>
<tr>
<th>Service Blueprint</th>
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<tbody>
<tr>
<td></td>
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<tr>
<td>Delivery Channel 1</td>
</tr>
<tr>
<td>Physical Evidence</td>
</tr>
<tr>
<td>Customer Actions</td>
</tr>
<tr>
<td>Front-line Staff</td>
</tr>
<tr>
<td>Behind the Scenes Staff</td>
</tr>
<tr>
<td>Infrastructure and Systems</td>
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</tbody>
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Example: Blueprint from service design workshop
## Service Blueprint Example

### Service Blueprint for a Workshop

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

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

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

prototyping a new kind of library service point
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**

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

**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

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

<table>
<thead>
<tr>
<th>Ineffective assessment instruments and practices</th>
<th>Provider-centered bias for design &amp; assessment</th>
<th>Services and spaces are designed separately</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Use the same tools for design and assessment (e.g.: journey maps)</td>
<td>• Employ user-centered design tools such as shadowing, personas, and journey maps</td>
<td>• Create joint committee</td>
</tr>
<tr>
<td>• Create a culture of ongoing assessment and continuous improvement</td>
<td>• Co-create with users to get input, feedback, and buy-in</td>
<td>• Incorporate service design into design of space</td>
</tr>
<tr>
<td>• Create impact measures and evaluate whether spaces/services help or hinder desired outcomes</td>
<td>• Prototype ideas in an iterative process – fail faster and safely instead of trying to avoid it</td>
<td>• Use prototyping to bring together services and spaces, and look for ways to test ideas in current spaces before building them in new ones</td>
</tr>
<tr>
<td>• Consider three tiers of assessment, from utilization, to satisfaction, to impact</td>
<td>• Always consider front- and back-stage connected</td>
<td>• Use tools that connect the spaces and services, such as blueprints, journey maps, and service location planner</td>
</tr>
</tbody>
</table>
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
- Compendium of Tools and Resources: www.servicedesigntools.org
- Service Design Network: http://www.service-design-network.org/
thank you!

PRESENTATION LINK:
(case sensitive)

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