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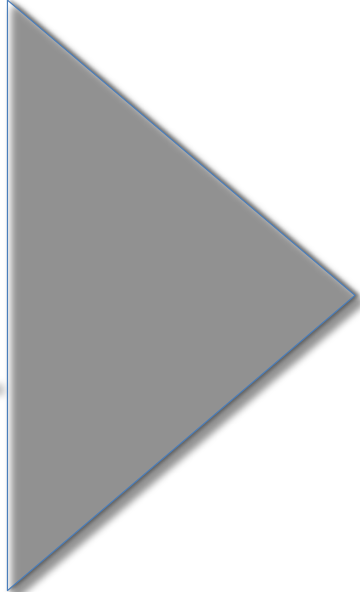
Voices in the Library

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Voice of the Customer (VOC) Emory Libraries

2006-2012

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Information Technology
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Information Technology
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- Focus Groups
- Structured Interviews
- Desktracker Data
- Listserv data
 - Ask a librarian
 - Service desk inquiries
 - Ejournals report
 - ReservesDirect
 - ILL
 - Purchase requests
- Suggestion Box
- Service Desk Comment Cards
- Personal Relationships
- Library Policy Committee
- Ad hoc Meetings on Special Topics
- Liaison Emails
- Marketing by Wandering Around
- Surveys
 - Annual Library Survey
 - Honors Survey
 - Instructional Survey

BACKGROUND

Emory University & Libraries

Students

Enrollment, Fall 2013	14,513
Undergraduate	7,836
Graduate and Professional	6,677
Degrees Awarded (2012-2013)	4,239
Undergraduate	2,186
Graduate	2,053

Libraries

Staff (2012, excluding students)	
Woodruff (including Business & MARBL)	162
Health Sciences	25
Law	19
Oxford College	10
Theology	16

Print and electronic volumes: More than 3.9 million

Serial subscriptions: Nearly 100,000, with more than 80,000 of those via electronic access

Assessment at Emory

- 2001, 2002, 2003, 2005—Conducted LibQUAL
- 2003-2004—Appointed new University President who initiated campus strategic planning efforts
- 2005—Appointed full time Assessment Librarian
- 2005-2006—Participated in ARL Making Library Assessment Work project

Assessment at Emory

- 2006—Appointed new Director from Los Alamos National Laboratory Library who had won awards there for organizational performance excellence based on the Malcolm Baldrige criteria
- 2007—Conducted first local user survey
- 2007--Developed first business plans that included customer focus elements
- 2008--Conducted focus groups with faculty, graduate students and undergraduates

Customer Focus

- Business planning process included multiple components, key among those: Customer segmentation matrix—identify and segment customers, their needs, motivations, quantity, distinguishing characteristics
- Although each library unit included customer segmentation matrix in its business plan, leadership felt there was still inadequate understanding of library customers

Services Division Customer Matrix FY10

Customer Characteristics (Needs, Attributes, Demographics)								
	Undergrad Honors	Undergrad Upper-Level (3 rd & 4 th)	Undergrad Lower-level (1 st and 2 nd)	Graduate	Faculty	Social Science	Humanities	Science
Needs & Motivations	Grades Class Assignments Simple and Timely Access Study Space Specialized Research Assistance (including data)	Grades Class Assignments Simple and Timely Access Study Space	Grades Class Assignments Simple and Timely Access Study Space	Support for Teaching Dissertation Research Support Publications Course Work Passage of Qualifying Exams Simple and Timely Access	Tenure Publications (Top Tier Journals) Teaching Support Time Attraction of Quality Graduates & Faculty Simple and Timely Access	Same for Graduate & Faculty as a Whole	Same for Graduate & Faculty as a Whole	Same for Graduate & Faculty as a Whole Grants
Attributes	More advanced research skills Short-Term Needs	Specialized Short-term needs	Not Specialized Low level of research skills Short-term needs	Specialized High Expectations Extended study (>5 years)	Highly Specialized High Expectations Pressed for time	Collaborative and Individual Qualitative and Quantitative	Individual, long-term projects Primary resources, print focus	Collaborative research Electronic-focus

Services	Undergraduate	Graduate	Faculty	Social Science	Humanities	Science
Research Assistance (Consultations)	69.09%/49.09%	65.56%/48.45%	65.19%/46.39%	83.22%/50.87%	72.86%/52.16%	56.05%/37.05%
Research Assistance (Instruction)	73.31%/46.34%	64.68%/44.02%	62.50%/40.91%	83.56%/51.22%	78.76%/46.44%	57.99%/35.19%
Study Space						
Individual	95.81%/89.96%	91.71%/76.79%	85.69%/52.92%	94.12%/80.48%	96.76%/79.28%	91.32%/73.70%
Group	97.21%/83.46%	84.21%/56.68%	69.92%/34.64%	91.72%/68.55%	87.35%/53.31%	88.69%/62.42%
Electronic Data Center	34.74%/30.02%	27.03%/23.76%	28.46%/28.85%	43.40%/37.55%	36.28%/26.95%	30.72%/24.29%
MARBL	84.77%/39.87%	73.07%/33.25%	79.27%/35.10%	87.37%/35.06%	97.63%/57.19%	71.30%/24.16%
Print Books and Journals	96.10%/76.83%	97.29%/77.75%	98.97%/81.89%	97.64%/81.15%	99.41%/94.43%	97.05%/71.17%
Electronic Collections (eJournals)	92.71%/82.62%	97.40%/95.06%	98.72%/94.95%	98.64%/95.51%	97.34%/95.24%	98.81%/90.99%
Interlibrary Loan	85.26%/58.59%	89.09%/70.44%	92.76%/78.88%	93.13%/68.16%	97.94%/84.99%	89.92%/64.11%
Reserves Direct	93.74%/87.39%	75.47%/60.02%	61.70%/50.99%	98.30%/88.19%	97.64%/89.79%	67.56%/52/71%

* % of group aware of product or service/% of group that considers product or service to be very important or essential

** %'s are taken from the 2007 Emory University Libraries Survey

2010-2011

- Newly revised Strategic Plan for the Library included a “Voice of the Customer” strategic objective to improve understanding of customer needs
- Services Division leader was the champion of the initiative and brought together a 6-person team to work on the project

Initial Project Report

- Included Baldrige profile section
- Included synthesis of previously conducted customer focus groups, survey data
- Included personas
- Included VOC process maps
- Included recommendations

Leadership Response

- While recognizing the work done, leadership did not accept the report in its first iteration
- To the group: Utilize the FOCUS methodology from *Voices into Choices: Acting on the Voice of the Customer* by Brodie and Burchill; add consultant Jude Heimel to the project team; extend the work already done using this methodology and produce a scholarly research report that incorporates improved customer data and recommendations

FOCUS METHODOLOGY

Overview of the FOCUS methodology

1. An approach to using structured interviews (and observation) to document people's statements of need relating to a product or service
2. A data analysis technique for translating need statements into priority requirements that can be used as a starting point for decisions about improving the product or service

Major steps in the process

- Frame the issue to explore and plan the project,
- Organize and balance scope, schedule, and resources
- Refine customer segments according to the issue or questions
- Review existing data sources, design and conduct interviews
- Analyze data in a way that minimizes subjectivity and abstracts customer needs, requirements, and opportunities for improvement
- Generate and select actions to address concerns or take advantage of opportunities

Benefits of the approach

- Presents techniques for clarifying goals and expectations
- Emphasizes the need to balance scope, schedule, and resources with stakeholder expectations
- Explains how to develop a useful interview guide
- Details affinity diagramming techniques for data analysis
- Presents a plan for producing actionable results focused on improving a product or service

Things the method doesn't supply

- Experienced meeting facilitator and project manager
- Experienced interviewers
- Experienced note takers

THE EMORY PROJECT

Our issue

We'd like to know more about you as an academic researcher and professor. We're particularly interested in how you work—what a typical project looks like, how you start it, how it develops, and how your work changes as it matures. Ultimately we want to adapt and improve library services so that they better support you in these activities.

Data analysis

- Identify statements of need, concerns, issues, problems, and solutions: What are our interviewees' key concerns?
- Translate strongest statements into requirements: What requirements underlie their key concerns?
- Identify themes and prioritize requirements: What are the larger themes in our requirements, and which are the highest priority for our interviewees?

Listening & Learning Posts Available for VOC Project

Focus Groups

Structured Interviews

Desktracker Data

Listserv data

Ask a librarian

Service desk inquiries

Ejournals report

ReservesDirect

ILL

Purchase requests

Suggestion Box

Service Desk Comment Cards

Personal Relationships

Library Policy Committee

Ad hoc Meetings on Special Topics

Liaison Emails

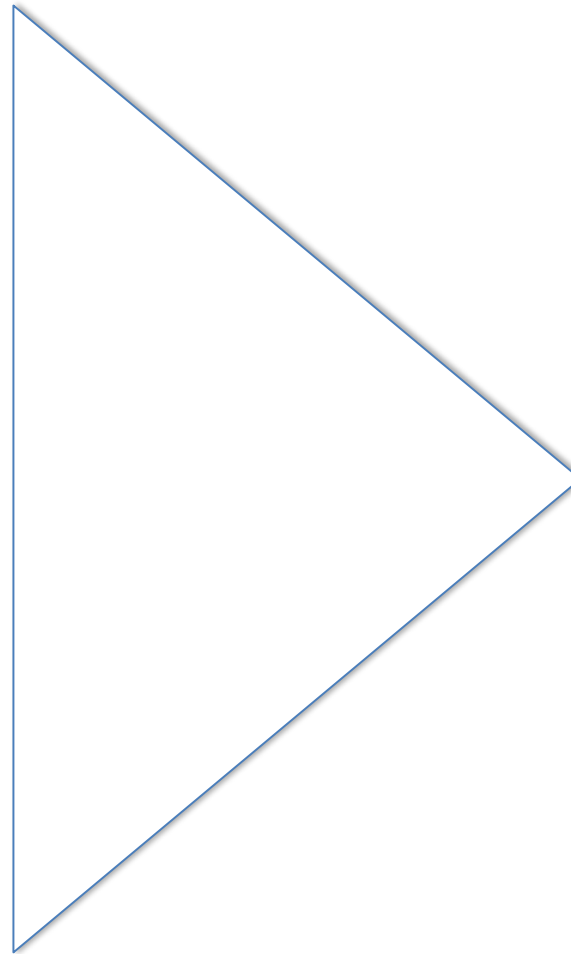
Marketing by Wandering Around

Surveys

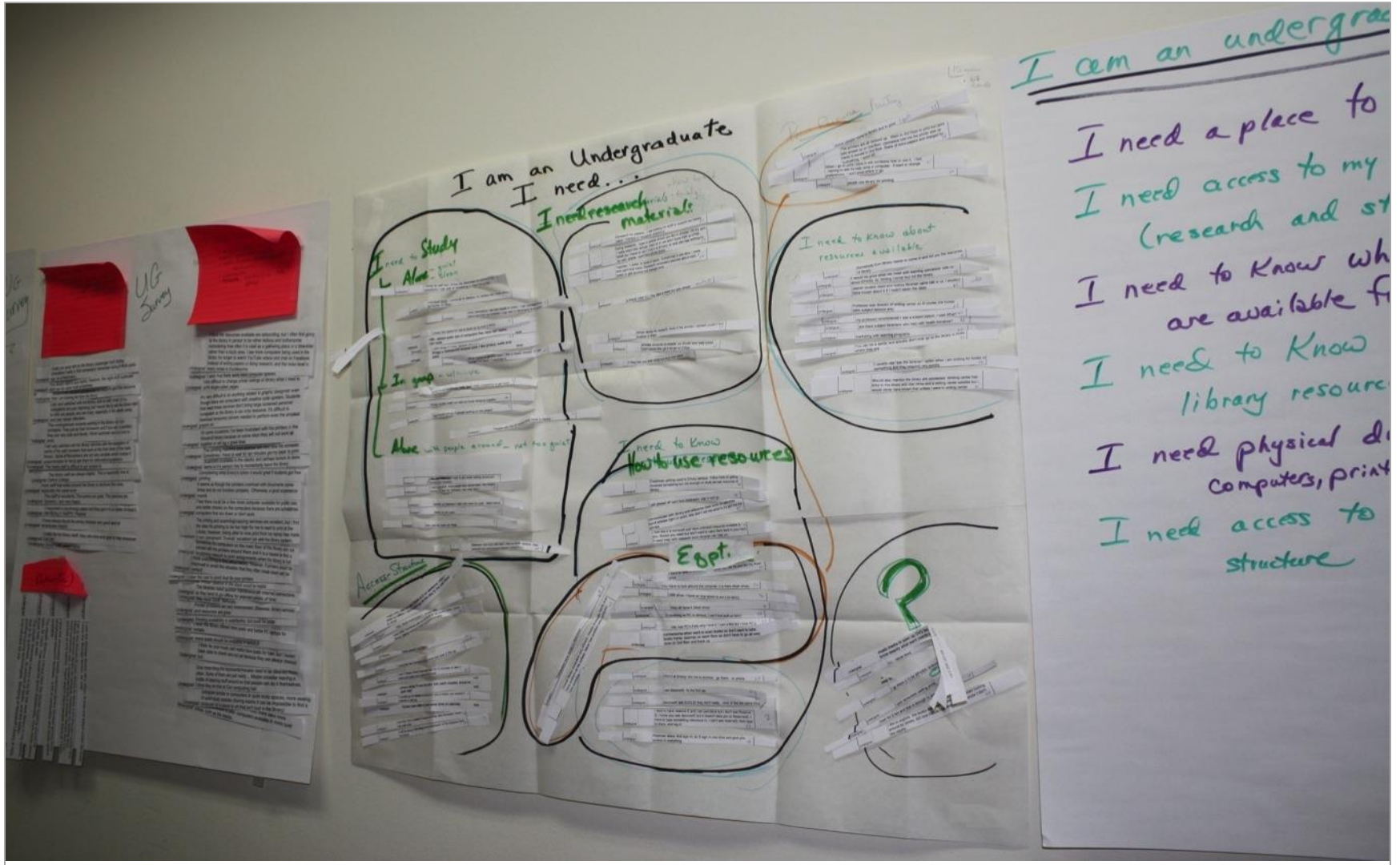
Annual Library Survey

Honors Survey

Instructional Survey



Focus Group & Survey Comments



LIBRARY SURVEY

I need research assistance for teaching:

- Data
- Collaboration
- research process/uses

I need ~~research~~ search tools: Findable

- reliable
- usable
- accurate
- comprehensive

acSci Data center is invaluable. I'd like to see more resources put into this area of the library.

Humanities Our students need much more help regarding how to do research, including understanding intellectual property. I always integrate research librarians into my classes, but I think the first-year students probably need more orientation.

Humanities I appreciate the assistance offered by the new DISC Fellows, but I have generally found that it doesn't fulfill the expectations it raises among faculty. Better communication and more practical collaboration is needed before this program can be deemed successful.

I need library space:

- usable
- updated/modern
- for research
- open/flexible
- quiet

Faculty SocSci individual studies could be updated, and better sound proofed, these provide critical quiet space for research and writing

Faculty Humanities The movable shelving is a disgrace, contrary to the life of the mind.

Faculty SocSci Sometimes the electronically mobile shelves in the stacks get stuck.

Faculty SocSci Please work on having Jazzman's cafe open during the summer, at least for 8-2 or something similar. It is very important to be able to recharge within the building.

Faculty Humanities

One consideration may be how laborious it has now become to place a book request for Reserve. It used to be very simple. Now it is such a drag (especially at the beginning of term when the system repeatedly froze or crashed) that I still don't have my books on reserve and might just throw in the towel and forget about it.

Faculty Sciences / Faculty Humanities Basic search in discoverE is great. This part is much easier than in Euclid. But once you want to drill down into a particular record, discoverE is hard to use. For example if several books are bound together into one volume (all with very different titles and authors) and put into storage, the only way to retrieve them is to guess the titles the one you desired was bound with, do some detective work to figure out which one is the one used to record the volume in the database, and then request that title from storage.

Faculty Humanities

I hate DiscoverE!!

Faculty Humanities

I dislike the new format of EUCLID

Faculty Humanities

I still have often to check other libraries (most often Harvard HOLLIS) to make sure I don't miss important editions, and other sources. Still don't like the 2-layers (discoverE and Euclid)

Faculty Humanities

PLEASE RESTORE THE OLDE VERSION OF EUCLID. THE NEW VERSION AND DISCOVERE ARE DISASTERS!

Faculty Humanities

I think I made myself clear about the new Discover-e "update." It's terrible, awful, is completely sapping productivity. Get rid of it and start anew.

Faculty Humanities

I don't understand discoverE and I am frustrated by the new EUCLID interface

Faculty Humanities

discoverE & Euclid is an awful set up that leads me to second guess every search I perform. Pick one and fix it.

Faculty Humanities

...Discover-e. Rather than ask our level of satisfaction with the presetting that you already think are important, I think you should ask regular users HOW they need to use the catalogue, what they need to know, and how they would like to see it. Then reconfigure to suit the users.

Faculty Humanities

My chief unhappiness with the library is that the search tools do not work well. This was a bad selection by someone

Faculty Humanities

It would be much better if we could put a whole long list of items on reserve through discoverE. It's possible through Euclid but seems more complicated than it needs to be. Quick and easy reserves (e.g. DVDs) would be a great thing for the library to work on.

Faculty SocSci

I continue to have problems with ILL. Most of the time my request is cancelled because the library already owns the material, but it is not listed in Euclid.

I need ^{to} recharge in
house

- longer hours
- round the clock refreshments
- more choices
- polite / efficient / professional staff

gets w/ space



I am an undergrad and I need

I need a place to study

I need access to my course materials
(research and study materials)

I need to know what resources
are available from the library

I need to know how to use
library resources

I need physical digital equipment
computers, printers, scanners

I need access to the physical library
structure

REQUIREMENTS TABLE

Exhibit 4: Humanities Faculty Requirements Table

Customer Segment & Process	Customer Product	Requirements	Attributes	Additional Attributes	How the library provides this
Humanities Faculty Process: Research	<ul style="list-style-type: none"> • Book • Coedited volume • Chapter in book • Journal article • International and national conference presentation • Grant • Tenure 	I need access to collections	<ol style="list-style-type: none"> 1. Comprehensive 2. Anywhere 3. Anytime 4. Historic and rare 5. Foreign language 6. Easy to find 7. Fast 	<ul style="list-style-type: none"> • Complete records • Physically available • Findable • Time of need • Browsable 	<ul style="list-style-type: none"> • Collections (e and print: journals, databases, books, manuscripts, rare books, archives) • Relevant collections(not comprehensive collections) • ILL
		I need a personal contact for research and teaching support	<ol style="list-style-type: none"> 1. Personal 2. Knowledgeable/expert 3. Specialized (Digitization, GIS Instructional Technology) 		<ul style="list-style-type: none"> • Subject Liaisons • Data Center • Outreach-Education activities
		I need search	<ol style="list-style-type: none"> 1. With 		<ul style="list-style-type: none"> • discoverE

		and discovery tools	<ul style="list-style-type: none"> Precision 2. Reliable 3. Easy-to-understand 4. Integrated 5. Predictable 		<ul style="list-style-type: none"> • EUCLID • Google scholar • Hathi Trust • JSTOR
		I need library space	<ul style="list-style-type: none"> 1. Usable 2. Clean 3. Updated technology 4. Open when I need it to be 5. Quiet 		<ul style="list-style-type: none"> • Variety of spaces • Security • Policies on food, noise • Stacks • MARBL
Teaching	<ul style="list-style-type: none"> • Syllabus • Course assignments • Advising graduate Students • Course reading packets • Assignments • Images for Power point • Videos/multi-media 	I need a personal contact for research and teaching support	<ul style="list-style-type: none"> 1. Personal 2. Knowledgeable/expert 3. Specialized (Digitization, GIS Instructional Technology, citation management, grant writing) 4. At time of need 		<ul style="list-style-type: none"> • Subject Liaisons • Music and Media • Data Center • Outreach and Education program and services • Research Commons/DiSC • Digitization • DPS • Reserves
		I need access to collections	<ul style="list-style-type: none"> 1. Comprehensive 2. From anywhere at anytime 4. Historic and rare 5. Foreign language 6. Easy to find 7. Fast 	<ul style="list-style-type: none"> • Complete records • Physically available • Findable • Time of need • Browsable 	<ul style="list-style-type: none"> • Collections (e and print: journals, databases, books, manuscripts, rare books, archives) • Relevant collections (not comprehensive collections) • ILL

are over there.” Another said of the change in systems, “I no longer do bibliographic work at Emory; I use the Library of Congress instead.” She went on to say, “The new interface no longer emphasizes the call number, which is what is most important to my search.” Yet another said, “And the old EUCLID was pretty reliable. There were some exceptions. Now I feel like it is always kind of like a game. Sometimes you’re lucky; sometimes you’re not.”

3. Some humanities faculty said that when print materials are in storage they are inaccessible because the indexing and cataloging lacks detail. Speaking of the German system, one faculty member said, “If it is a storage system, then they have a perfect catalog, and I can find everything in the catalog. And here [at Emory] sometimes I have the feeling that books are lost in storage because they have no access through the catalog.”
4. Humanities Faculty use technology to research and improve pedagogy. “Table of contents is a welcome enhancement,” one said. Another commented on how technology changed how his students interact with other students’ writing: “The interesting thing about wikis is that when they’re reading one another’s papers, boy does their writing improve.” Speaking of a DiSC funding grant, a third said, “Our goal is to get the digital stuff done. I’m teaching a class in the fall that involves undergraduates inputting data.”
5. Humanities faculty place high demands on and have high expectations of library facilities. For example, they would like the library’s hours to align more with their personal work schedules. One faculty member asked for library hours not to shorten during semester breaks. “That is when we have time [to do our work],” he said. Another said, “Once I found a full cup of coffee open without a lid in a bookshelf. I was shocked.” And another: “I can just see that one space after the other opens to new computers, as if the students wouldn’t have their own computers....so then it is just about getting space so they can talk and use computers.”
6. Humanities faculty browse collections; they consider browsing a critical research process. “In Rome,” a faculty member said, “I browse all of the time. I do browse a fair amount in Woodruff,” and from another professor: “Browsing is an important way to do research,” and from the teaching perspective: “...getting the students into the library and realizing an important aspect to research is actually going into the stacks. You never know what you are going to find by accident.”

Sample Observations

- The importance of the library catalog, EUCLID was a consistent theme for the Humanities faculty.
- Robust collections of data and literature are essential to the research process of social scientists.
- The scientists expressed a need for readily available books and journals for looking up facts, confirming quotes, and verifying citations.

Cross Segment Themes and Discussion

- Faculty Research:

High-level process across segments is similar

How faculty talk about their work is different:

Social Scientists and **Scientists** talk about data gathering;
Humanists talk about reading, thinking, writing, researching.

Social Scientists and **Scientists** are concerned with drawing conclusions, literature reviews, summarizing and validating results

Humanists are concerned with creativity and deep thought.

- Faculty Teaching:
 - All faculty interviewed care about their students. They want their students engaged in and to find enjoyment in their classes.
 - All faculty interviewed spend time selecting course readings.
 - All faculty interviewed advise graduate students; how they do it varies by discipline.
 - **Humanists** see advising as service to their department; it is a separate activity from their research; **Humanists** work alone to get credit for their work.
 - **Social Scientists** and **Scientists** see advising intertwined with their research. Social Scientists and Scientists collaborate; Social Scientists collaborate with peers; Scientists collaborate with peers and graduate students. **Scientists** are training graduate students how to conduct scientific research in the labs.

- All faculty interviewed rely on library collections
- Humanities talked about using JSTOR, browsing print and electronic collections and using search and discovery tools; using collections in all formats.
- Social Scientists talked mostly about e-journals and databases.
- Scientists talked about e-journals and databases.

Findings

- Research-level collections that are accessible
- Library hours that cater to student and faculty schedule
- Dissatisfaction with search and discovery tools
- Interoperability of catalog, databases and other systems
- “One” Emory Library system
- More visibility of subject liaisons
- Library Spaces for all users and all uses
- VOC findings validate findings from other sources

Recommendations

1. Maintain and expand research-level collections.
2. Address concerns about the reliability of the catalog and usability of library search, discovery, and delivery tools.
3. Coordinate policies across Emory Libraries.
4. Address frustrations with the Library's website.
5. Use customer input to develop library spaces
6. Create a programmatic assessment and voice of the customer plan for the library.

Observations from afar (time and space)

- VOC team was highly skilled in assessment and customer focused
- Results gave greater depth to what the VOC team already knew
- Power in seeing verbatims for VOC team and for others
- Deeper understanding of who the people we serve and the teaching and research processes
- Affirming to be listened to; can be used to build relationships and take down barriers

Observations...

- The FOCUS process requires a team with a variety of skills- qualitative research skills, facilitation skills, analytical skills, convergent and divergent thinking, and writing and editorial skills.
- Project scope was driven by the deadline which eliminated structured interviews of Undergraduate and Graduate Students.
- Qualitative process best for understanding obvious problems that then need to be drilled down on to understand how best to resolve.
- Report appeared at a time of a transition in leadership: departure of the Vice Provost and Director of Libraries; new library leadership bringing together Libraries and University Technology Services into a single division (LITS) under the Chief Information Officer of the University.
- Basecamp was a great project tool and has preserved institutional knowledge.

Project Complete!



Questions?

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