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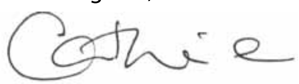
welcome

This issue is our first online-only issue and we'd welcome your comments and suggestions. Also we look forward to your article ideas, case studies and suggestions for book or product review. Videos, podcasts, Prezis and other online media also welcomed!

Warm regards,



Catherine Dhanjal, Managing Editor

Don't forget to sign up for the MMIT 2012 National Conference: support the Group and journal, network with interesting peers across the industry, participate in workshop sessions and hear plenary speakers Marshall Breeding of librarytechnology.org and Ross Mahon, Google Apps Edu Evangelist at Google.
See more on page 3 or visit http://tinyurl.com/5taclmc

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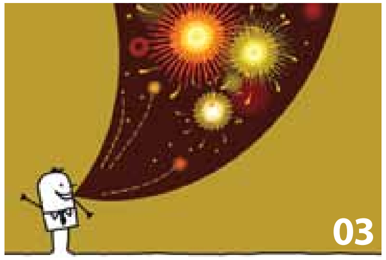

contents

Beyond Outlook: the concept of enquiry tracking software

Enquiry tracking software can help make enquiry handling, tracking and management much more efficient, and provide statistics which can allow library managers to illustrate the value of the service and to identify where the enquiry service can be improved, explains Penny Bailey

I come across many information centres using Outlook or other email applications to 'manage' their enquiries. The enquiry staff are very diligent in making it work. For example, there may be a centralised inbox to which enquirers are encouraged to send their requests. Enquiry staff have a process for dealing with those enquiries perhaps in date order and handing over unfinished enquiries to the next person on duty. This article shows the problems with this approach and how enquiry tracking software can help you to improve your service in many ways.

enquiry handlers can spend two or three days a month just entering data

Firstly, email is not the only method that enquirers use to ask questions. Enquiries could happen as walk ups, 'phone calls, via a web form, through a chat room or by SMS. How are these enquiries being managed? Email is ideal for communicating with enquiry service users but it is just one communication medium. How does the team leader coordinate a consistent approach across these different mediums and perhaps multiple inboxes? How are deadlines managed and service level agreements monitored if there is no view of all the enquiries in the pipeline? Are all the enquiries from all sources recorded? How do enquiry staff find similar work that has been done in the last few months? An inbox is difficult to search even if you are highly organised and if there is no single repository then you cannot search across all enquiries. Moreover you cannot offer a searchable knowledge base to your users.

Perhaps the biggest drawback of managing enquiries through Outlook is that emails are not data. For this reason Outlook is often combined with an in-house database or spreadsheet to record some key facts about enquiries. Enquiry handlers often find they don't have time to fill this in as they are focused on fulfilling requests or it is done after the enquiry and may not be accurate. Enquiry handlers can spend two or three days per month entering data. Depending on how developed the application is, enquiry staff may have to repeat such details as name, department, cost codes, etc., when they enter data, which is a waste of time.

make it easy for people to submit questions

But why does this all matter? Well the key reason is statistics. Library managers need statistics to know how and where the enquiry service needs improving and to prove their value to the wider organisation especially during a recession. In recognition of these problems, some organisations will try to solve them by developing an in-house database or imposing the use of an IT help desk system on the enquiry service. While these measures go some way to providing a single repository, an in-house database will not usually integrate with the email system and IT help desk systems are often described as inflexible, overly complicated and not fit for the enquiry desk process. Integration with all possible means of submitting enquiries is essential to achieve a single repository for all enquiries. By using the dedicated enquiry tracking software at three different levels: the enquiry desk staff, the enquiry team leader and the director, the statistical information should be produced efficiently as part of the enquiry work process, starting with the point of collection.

Image: © Mario Lopes | Dreamstime.com

The enquirer

Let's start with the enquirer: they want to be able to submit enquiries by their preferred method, at the moment the question pops into their head, and from wherever they happen to be. They don't want to have to login to an application to submit their enquiry. One enquiry service suffered a 50 percent decrease in enquiries when they introduced enquiry software that required users to login and fill in a web form — this was the only way to submit an enquiry. So the lesson is: make it easy for people to submit questions. Users may also wish to follow the progress on enquiries or re-read the answer to a question they have submitted in the past. It may also be useful if users could search a knowledge base of answers to questions from other users that are not private. Enquiry software can provide this end user functionality that would be impossible to provide using Outlook + database.

Enquiry handlers are quite rightly focused on answering/processing enquiries and meeting deadlines and are often very conscientious in this respect. How does enquiry software help them? If managers are going to wean enquiry handlers off Outlook then they need to offer a comparable tool for communicating as efficiently as possible with their users. This is why integration with email and text messaging (SMS) is vital. The enquiry system needs to be set up to capture emails, SMS and web form submissions. The enquiry software also needs to provide a messaging service so that enquiry

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handlers can respond to the enquirer by email or SMS to acknowledge receipt, ask for more information and send answers. The messages can then be associated with the rest of the enquiry data and be visible to anyone looking back at the enquiry or in a handover situation. If the messaging service is part of handling of an enquiry and not a separate process, then there is more likelihood of enquiry handlers entering complete and accurate statistics as they go.

That leaves 'phone calls and walk-ups to be entered by the enquiry handler. Some walk-ups and 'phone calls are very quick taking one or two minutes to complete. These need a quick counter to capture a few details, perhaps not even bothering with a user identity and choosing an enquiry type from a menu and a default time in one minute time slots. This ensures that these quick enquiries are recorded and some statistical information is generated from them. This leaves the enquiry desk staff to concentrate on the more in-depth enquiries, for which enquiry staff can complete a full enquiry form to collect all the required details.

tools such a timer allow staff to easily and accurately record time taken to deal with enquiries

Enquiries arriving by electronic means can automatically be associated with a person using just one unique identifier which could be a mobile number, an email address or a login name. The system needs to be able to associate more than one such identifier with a user record, as enquirers could use a home email rather than a campus or work email address. The demographics about the enquirer are entered and stored once in a central user database so that the contact details and any preferences do not need to be collected for every enquiry submitted. Ever had the annoyance of having to fill in a form with all your details again when you know you have supplied the same information to the organisation previously? The central user database can be updated from a central user registry like Windows Active Directory Service (ADS), an HR database, student registry etc. Public enquirers will be required to register on first contact.

Enquiry tracking software should have tools like a timer to accurately record time instead of having to guess time taken, or it could allow staff to choose from a menu of such arbitrary time bands as two minutes, five minutes, 10 minutes etc. Enquiry handlers need to be able to start and pause the timer, as they may be in and out of different enquiries according to what needs to be done. Assigning it should be easy — through a click of a button — or enquiry handlers are likely to boycott the tool. Timers ensure accuracy of time recording and may prevent a time entry which reflects what the enquiry handler feels the enquiry is worth. Accuracy of time recording is important so that managers can make an informed assessment of staffing requirements for the enquiry service.

The other thing an enquiry hander needs is to be able to search back over previous enquiries either because they know they have done something similar in the past or because they might be able to learn from their colleague's past endeavours. So search tools are essential, as are efficient ways of grouping and sorting views of enquiries. Recording the search strategy in a narrative text box or as an attached document is highly valuable added knowledge.

A further obligation incumbent upon enquiry handlers is to record the resources that they used to answer enquiries, especially where these are subscription-based resources. Again this needs to be quick and easy to record. Enquiry handlers need a drop down menu listing the resources and associated charges, such as Companies House reports at £20 each, photocopying at 10p per copy, online search at 50p per minute or £2.00 per search, or things like document delivery at £3.50 per item. The idea is these are selected from a menu for the active enquiry, saving time compared to entering the enquiry details and the costs in a spreadsheet.

In an Outlook inbox it is easy to sort incoming emails by date received and by enquirer but the enquiries will have different deadlines — and this information is normally embedded in the body of the email on which you cannot sort. Enquiry software provides a dedicated deadline field on which you can sort to ensure that enquiries are dealt with in the correct order.

Figure 1: Team leaders view of the workload, partial screenshot from KnowAll Enquire.net ©

The enquiry team leader

Next, let's turn our attention to the enquiry team leader. The job of the enquiry team leader or manager is to:

- Ensure that there is an evenly distributed workload within the team;
- Manage the staff rota;
- Assign enquiries appropriately according to subject knowledge and abilities of the individual;
- Monitor the performance and efficiency of individual team members and identify training needs;
- Ensure service level agreements are met with particular regard to deadlines
- Monitor the quality of the service;

Monthly Usage Report - 01 Jan 2010 to 01 Feb 2010

Office	Enq's	Enq' Worklogs	Total Time (hrs)
Central Brighton	287	543	551
Department			
Accounts and finance	129	245	178
Request Type			
Company Financials	22	42	24
Company General	32	45	25
Complaint	2	3	33
Case Law Other	12	25	23
Case Law UK	52	106	45
Freedom of Information	5	16	12
Media Line	4	8	16
Administration	10	26	72
Distribution	13	23	29
General	25	42	31
IT	[illegible]	[illegible]	144
[illegible]	[illegible]	[illegible]	[illegible]

Figure 2: Monthly usage report from KnowAll Enquire.net enquiry tracking software ©

- Ensure that appropriate resources are sourced to undertake enquiry work;
- Monitor outsourced information workers and other external services;
- Market the service to all potential sectors;
- Transfer data about costs to the central finance system.

Let's face it these tasks are pretty difficult to achieve in Outlook and the team leader is often most aware of the shortcomings of managing an enquiry service without dedicated enquiry tracking software. At a glance the team leader needs to monitor the activity of the enquiry service. A dashboard (see previous page) should give all the information required:

To be able to carry out the tasks listed above, team leaders need a combination of tools such as views to monitor work in progress and reports showing how the service has been used within any timeframe. This is where enquiry software comes into its own. Outlook allows sorting and filing of emails but does not provide customised and filtered views of enquiries. Nor does Outlook provide reports because, as stated above, it does not contain data.

Here are some examples of reports and how they can help enquiry team leaders to manage their service better:

- Reports on who's using your service, and who's not, by department or office to inform your marketing strategy (see left)
- Reports on when users submit enquiries — to inform opening hours and staff resources
- Reports on how enquiries are submitted to understand more about how to advertise contact methods, etc.
- Reports on customer satisfaction feedback to publicise this back to users, to inform higher management and above all to make sure that you are satisfying your users
- Reports on meeting deadlines to inform whether you are achieving SLA agreements or simply meeting deadlines
- Reports on how users rate resources in terms of how useful they are in answering their question
- Reports on resource usage to inform decisions about renewals and cancellations
- Reports on use of the knowledge base to inform the success of the service
- Reports on the time spent by enquiry staff to inform staff requirements
- Reports on average time spent by each member of staff or customer satisfaction record of each member of staff to inform performance appraisals of staff
- Reports or exports of data about chargeable costs so this data can be processed by finance, saving rekeying of data
- Reports on the type of enquiries to identify gaps, i.e. what subject specialists are required and which resources are needed
- Reports on the amount of time spent on enquiries to justify the need to retain or recruit staff

Image: © Milan Jurkovic | Dreamstime.com

Perhaps the most important outcome is that you will gain statistical information with which you can undertake impact analysis by correlating use of the enquiry service with achievements. This will differ by sectors but an example of this is: research in academic libraries has shown a correlation between usage of the library with higher academic achievement of students[1]. I leave it to you to extrapolate your own impact analysis and prove your worth to your organisation[2]. ■

Penny Bailey is managing director of Bailey Solutions Ltd. She can be contacted on: penny@baileysolutions.co.uk www.baileysolutions.co.uk

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1. **CIBER.** 2011. *Student satisfaction and library provision. An analysis of National Student Survey and Times Higher Education Student Experience Survey data.* A CIBER working paper for Research Libraries UK. [Online]. www.rluk.ac.uk/files/RLUK-student-satisfactionFR.pdf
2. **RIN/RLUK.** 2011. *The value of libraries for research and researchers.* A RIN and RLUK report. [Online]. www.rluk.ac.uk/files/Value%20of%20Libraries%20TG_0.pdf

coming soon...

May: focus on blended and elearning

August: focus on Web 2.0 & 3.0

November: focus on mobile technology

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17th April 2012, University of Sheffield, UK

Online booking form: http://tinyurl.com/d6qteh7

See more on the conference on page 3

Your articles, photographs, reviews, thoughts and suggestions for the journal are always welcome, just contact Catherine Dhanjal on catherine.dhanjal@theansweruk.com or call +44 (0)800 998 7990.

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