

Raising your game: evidence based management of your enquiry service

The old management adage goes: 'You cannot manage what you don't measure' and this is very true of your enquiry service. Despite the fact that enquiry work takes up a large part of the librarian's day, it seems to be the poor relation when it comes to software tools - often with a gate tally sufficing as measurement. At best there may be access to a module add-on to the library management system or an IT help desk system. The result is that many library directors lack proper management information and when the going gets tough library directors cannot prove their value to higher management with sufficient conviction backed up by qualitative data. Even without the threat of job cuts, library managers lack the right information to know where and how to start improving their service and cannot measure the effect of changes to their services. This article looks at how the enquiry professionals can raise their game *before it's too late* by using the right tools at three different levels: the enquiry desk staff, the enquiry team leader and the library director.

Improving the enquiry handling process

In many libraries and information units enquiries arrive in a number of ways – in person, by telephone, by email or by post. There are a number of problems with this *ad hoc* approach. Who does the enquiry come to? How does the it get recorded? How does the enquiry handler collect vital information about the user? Is this collection of user data repeated every time? How do enquiry desk staff meet deadlines especially if there is a rota for staffing the enquiry desk? How do staff check to see if something similar was done before if enquiries are stored in email inboxes? What record is there of the work done to answer the enquiry? How much time was spent? What costs were incurred answering the enquiry? Is enquiry work done outside of a system perhaps on paper and by email and then keyed-in after the event?

It needs very well-organised and conscientious enquiry desk staff to make sure they meet their deadlines in the right order, to hand over to the next person on duty and to accurately record time, costs, user details and the number of enquiries they handled. Staff may prefer this way of working and will feel like they are in control of their work. Even so they will not be working at their most efficient. The biggest problem is not having one centralised store of the enquiries and the work done to answer them. When enquiries are stored in email in-boxes they cannot be shared, re-directed, monitored, re-visited or published easily. Some organisations recognise these problems and try to solve them by developing an in-house database or imposing the use of an IT help desk system on the library. While these measures go some way to providing a single repository an in-house database will not usually integrate with the email system and an IT help desk system is not designed for this purpose.

Dedicated enquiry tracking software on the other hand can include an email messaging system to handle the correspondence - both in and out. It is important that the software helps enquiry desk staff to collect and process enquiries from start to finish so that no data has to be re-keyed into the system as this will (quite rightly) be resented as an extra task. Collecting information about the user should be as easy as picking the name from a list, and collecting the user data (email, address, department, course, office, etc) should be done only once in a purpose-built system. The recording of costs can be made more efficient by providing a menu of resources used, ranging from printed library resources to online databases, external library services, document delivery services and outsourced information workers. The cost per unit is set-up in the menu and all the enquiry desk staff

have to do is select the resource and enter the quantity. An enquiry tracking system should present a list of enquiries in deadline or priority order for each individual enquiry handler, ensuring deadlines are not missed. A timer will help with accurate recording of staff time. And a centralised system allows for handover to another member of staff. It allows for working smarter and searching to see if anyone else has done anything similar in the past and re-using research or knowledge gained from a previous enquiry.

From the enquirers' point of view they should experience an improved service. Using a web form will make it easier for enquirers to submit questions with the required information collected and added to the database at the point of collection. Nor will they have to supply their contact details every time they make an enquiry once they are registered in the system. The enquirer can follow the progress of work done on their enquiry and, on completion, receive a full print-out detailing costs and time spent. It is also important to ask enquirers to rate the service so they can give valuable feedback.

Increase team efficiency

Working to the optimum, the job of the enquiry team leader or manager is to:

- Ensure 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;
- Ensure 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;

Obviously if enquiries are sent to individuals as emails, achieving the above is pretty difficult and the following issues arise: what happens to enquiries in an email inbox if the enquiry handler is away? Does one person get more overloaded than another? Is the recipient of an email enquiry the most appropriate person to deal with it?

The team leader needs evidence to support the following decisions about the running of the service:

- Assessing the workload of the team – needs to know the number of live enquiries;
- Reviewing the workload of individual team members and re-assigning as necessary;
- Re-assigning enquiries when staff are unexpectedly absent;
- Finding out the average enquiry time across the team as a benchmark for team performance;
- Monitoring the customer satisfaction record, average completion times, and deadline compliancy record of individual team members in order to set SMART (Specific, Measurable, Achievable, Realistic, Timed) objectives in performance reviews;
- Identifying knowledge gaps of individual team members – assessed by examining the customer satisfaction by type of enquiry or by subject of enquiry;
- Obtaining statistics on the number of enquiries completed by the deadline;
- Reviewing customer satisfaction records.

- Obtaining statistics on the departments, geographical locations, types of users, courses or other sector breakdowns to understand take up of service by sector and market accordingly;
- Reporting on resources used to justify continued subscription or cancellation;
- Obtaining statistics on the performance of external services and assess how well they meet their SLA;
- Extracting aggregated data for costs and time spent in a standard format for processing into the finance system to avoid re-keying of data.

It hardly needs saying that without a dedicated enquiry tracking system the information a team leader needs to achieve their objectives is difficult and time consuming to obtain.

Open Team Enquiries		Private Enquiries		Assigned Enquiries		Submitted Enquiries	
Id	Title	Type	State	Priority	Deadline	Submitted	ResponseDue
128	account examples (36 mins)	Company filings - UK	In Progress		09/09/2009 16:46:35	09/09/2009 14:46:35	
178	filing history, latest accounts, latest annual return and any mortgages/charges for Metallic Partition Systems Limited (15)	Company filings - UK	In Progress		15/09/2009 11:58:02	11/09/2009 00:00:00	
190	all market news alerts for Goodwin PLC (5)	Press search	In Progress		14/09/2009 00:00:00	15/09/2009 12:01:06	
191	current market values of the following investments (10)	Share prices	In Progress		14/09/2009 00:00:00	14/09/2009 00:00:00	
192	Fund and share prices (12 mins)	Share prices	In Progress		15/09/2009 14:29:22	15/09/2009 12:29:22	
198	Financial info (30 mins)	Financial	In Progress		15/09/2009 18:44:23	15/09/2009 16:44:23	
216	Printed circuit board (PCB) manufacturers European targeting list (12 mins)	Targeting list	In Progress		17/09/2009 12:06:51	16/09/2009 00:00:00	
218	title deeds (25)	Property - land registry	In Progress		17/09/2009 13:40:02	16/09/2009 00:00:00	

Team leader's view of open enquiries (© from *KnowAll Enquire*)

Qualitative management information

Finally the director or overall manager of the library service needs access to meaningful qualitative data to prove the value of the enquiry service to higher management. The enquiry tracking system will help directors easily produce quick and accurate on-demand reports which provide evidence of the following:

- That whilst the number of enquiries has gone down, access to enquiries published as FAQs on the website has increased;
- The average time spent on enquiries has decreased – staff are working more efficiently;
- Customer satisfaction records have improved or remained at high levels;
- The amount of time spent on enquiries to justify a need to increase / retain staff;
- Report on how many enquiries supported business development and new business won;
- Report on the types of enquiries the service handles;
- Report on the market sectors which use the enquiry service;
- Demonstrate costs saved by using library staff compared to other (more expensive or less efficient) personnel in the organisation. (This information can

- be obtained by designing the customer rating survey to include a question on how long the enquirer thinks they would have spent if they had done the research themselves);
- Report on use of external resources/services and rate them to justify continuing or discontinuing use of those resources/services.

When running a professional enquiry service it is vital that structured data is collected as a natural part of the enquiry handling process so that it supports the enquiry staff at all levels to continuously review and improve performance, both individually and across the team. In turn the extracted statistics can be used to provide evidence to higher management of the value of the service, which should be linked to improved productivity for the organisation as a whole.

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