

## On the Front Lines: Welcoming the Next Patron

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Welcome to this first article of a new recurring column in *North Carolina Libraries* where we on the front lines of librarianship can share our experiences, tips, and recommendations.

Perhaps no word better summarizes what librarianship is than **service**. All who work in libraries provide service to others, whether frontline customer service to patrons asking for circulation or reference assistance or to internal customers asking for acquisitions, cataloging, IT, or administrative support. Since most of my experience over nearly 25 years of working in academic libraries has been public facing in access service, this issue's column will share some musings from that perspective.

So many books and trainings exist on customer service and yet it is so difficult to teach, learn, and faithfully practice in every encounter with library patrons and others. How many times have we all been on the receiving end of unwelcoming, uninterested, unhelpful, and unavailable service at a store, restaurant, or other businesses? We certainly do not want our libraries to be among those mental lists of our patrons. Many of us no doubt have turned toward retail-focused books to learn how major brands provide a good “customer experience” (CX): Disney's *Be Our Guest*, and *The Nordstrom Way* come to mind. We've perhaps received training on the golden rule, the platinum rule, and more recently even the rhodium rule as applied to customer service. Perhaps we've tried to enact the concierge services model from hoteliers, as Cyril Oberlander encouraged interlibrary loan conference attendees in the 2000s. Or maybe we're not even wanting to use the term “customer service” because it has become too loaded, as James Waters, Eleanor Cleveland, and Jeff Hipsher have suggested in recent years.

Whatever model or terminology we use to describe helping library patrons (or users, customers,

borrowers, or readers), there are many **best practices** we can strive to implement. We can be approachable even when working on other tasks at the desk. We can smile, welcome patrons, offer assistance and referrals, and chat if patrons seem to want to and there isn't a line of other patrons. We can strive to be person-centered, employ active listening, have open body language, use people-first and inclusive language, and attempt to avoid possible microaggressions and stereotypes. We can promptly reply to voicemails and emails from patrons and coworkers asking for our replies. We can certainly ensure privacy by not speaking loudly when repeating titles or talking about patrons by name at the desk with coworkers.

When assisting patrons who speak another primary language than English, or who might be from another country or culture than your own, we can be thoughtful when making gestures or using idioms that could be culturally offensive or confusing, and we can be understanding if their reactions are not what we might expect (e. g. not making eye contact or speaking with a louder or softer voice). If assisting patrons with an interpreter or sign language interpreter, we can speak looking at the patron rather than the interpreter.

Even for patrons who speak English as their primary language, libraries often use terms many patrons have not encountered elsewhere previously, and even the concept of a library is confusing to some patrons. For instance, many undergraduate students come to my library's service desk asking to rent a laptop and how much it costs, and so many struggle with the idea of why there are due dates when they have not finished with an item yet. We need to be mindful of library jargon and explain what we do and mean and why these perhaps seemingly arbitrary policies exist. We should validate

patron confusion, apologize for our part in that, and then perhaps work with colleagues to review our policies and how we explain them, revising as needed.

Even though being asked for the millionth time where the restroom is located can be boring, or potentially insulting to some (I went to graduate school for this?), we on service desks must remember that this patron may be asking the question for the first time. We should respect them and answer readily without launching into a lecture on how to read signs or into a spiel about everything else the library can provide them.

It is also all too easy for some of us at service desks to slip into autopilot and not listen well or respond appropriately – and our patrons do it, too. I have asked patrons as they approach the desk “how may I help you” to have them respond “fine and you” as if I had asked how they were. A coworker of mine who was also a student at the time once had a patron who knew her ask her how her finals were going as she handed him a stack of checked out books and she said “thank you” and looked back at what she had been doing only to realize a moment later what he had said. I’m afraid sometimes we, too, forget to smile, greet, and thank our patrons because they walked up while were in the midst of doing something else, or there is a line of patrons, or we’re having a bad day ourselves.

We can certainly attempt to **train employees** thoroughly in advance on all needed information, but realistically not all will be remembered since there is so very much frontline employees must be trained to know. To help in these lapses, we should have current policy, procedure, and instruction documents readily available for quick reference when questions arise during a patron interaction, especially if working a service desk alone, so a patron does not have to wait long, and employees do not get flustered while frantically looking for how to help. We can also provide a reassuring work environment to our employees, encouraging them to make their best judgment decision in the moment to address an immediate issue, especially if an instruction or supervisor is not available, without the fear that there will be repercussions for an error. Rarely is any of these decisions irreversible in libraries.

As much as we strive to meet or exceed patron expectations, **there are limits**; indeed, the customer is not always right. We must have organizational restrictions for compliance and liability and must have personal boundaries for employee safety and wellness. We can practice the art of saying no, use various de-escalation techniques, and use some assertiveness training. More simply, we can sometimes prevent or reduce a potential conflict with some planning. On one early morning at my university library, a patron became agitated and repeatedly banged his umbrella on our service desk because our employee had stepped away for a moment to ask a colleague a question and he was having to wait for assistance. In this case, and in others, scheduling a desk with more than one person whenever possible is incredibly helpful to waiting patrons; having preprinted “back in five minutes” signs or having a bell with a “ring for service” sign can also be helpful.

Other times, though, there are patrons who are having a bad day and take it out on you no matter what you have or have not done. Unfortunately, having to assist through some of this and then take a step away from a desk to decompress from such an encounter is common in any customer service environment. Then there are some patrons who are prone to question every policy, every overdue item, every equipment late fine, every hold or interlibrary loan item that has taken far too long in their mind to arrive. In such cases, my colleagues and I have found these patrons have responded best when the same employee has helped them because we learn the patron and they learn us. Sometimes patrons have made this request, and sometimes we have chosen this method so a patron is not attempting to play every employee against the other. Making notes of conversations in your circulation system, or email, or a notebook, can be helpful to ensure consistent decisions with high-need patrons, too. At the least, we all need to know when to refer to a supervisor or transfer/end an abusive phone call or one that is spiraling and when to call library security or police if an incident is that severe. For many practical tips on security, [The Blackbelt Librarian](#) by Warren Graham, a former long-time security guard from the Charlotte Mecklenburg Library in North Carolina, is a quick and useful read.

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Much more goes into having good - or bad - customer service encounters than what happens with a patron at the library service desk to find a title, get directions, checkout an item, or discuss a fine or damaged/lost item, though. Employees need customer service training in advance and need training on their duties, systems, the library's policies, collections, and services. The department's documentation must be current and readily available. The library's policies, signage, email templates, workflows, forms, and outreach materials all must be set, reviewed, and updated as needs and patron expectations change. All these **behind-the-scenes tasks** make every encounter at a service desk, over the phone, or replying to an email a possibly good, or bad, experience, too, and must receive attention as well as frontline customer service training.

As so many libraries are facing book challenges and program challenges, we need to remember to be

representative of all patrons and be a safe, welcoming space for all. It is an awfully hard tightrope to walk on sometimes, though, to please groups diametrically opposed to materials or programs that represent other parts of our communities. However, we must remember that our libraries are community funded and for the benefit of our community members; rarely are our libraries the only option (at least for some of our patrons) for research or leisure materials, study or gathering space, or any of the other services that we strive to provide so well. We need to be the choice our patrons think about, want to come to repeatedly, and importantly refer their friends to use. Our customer service makes the difference in our patrons' experiences, and we hope their lives, and in our own, too. So let's welcome the next patron.

## Submission Requirements for North Carolina Libraries

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- » To submit you must login; if needed you can register using the link in the header.
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- » We have a rolling deadline; articles are juried when received.
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