Public libraries today are gingerly stepping into the emerging philosophy among successful businesses around the world: customer experience. Libraries are hiring staff with “customer experience” in their title, others are curious and want to learn more. Most of the resources currently available to libraries hoping to get started take a corporate approach particularly as it impacts financial success. The bottom line is that all of us are in the customer experience business, whether we know it or not. It goes to the heart of everything we do – how staff interact with the public and each other, the value libraries provide to a community, even the cleanliness of the restrooms. Additionally many of those companies that library users experience in their daily lives – health care, insurance, retail – have already jumped on the customer experience bandwagon, overall raising the public’s expectation of what they should experience in libraries. How and where to start? How does a library build a road map to develop a customer experience philosophy and culture, which staff will embrace and support? When building a new library how do you design that building using a customer experience lens? Columbus Metropolitan Library has spent the last five years mapping out a customer experience practice, which includes staff training, journey mapping, customer insights, customer engagement training and library design.

“You can design and create and build the most wonderful place on earth. But it takes people to make the dream a reality.”

- Walt Disney

WE ARE A LIBRARY IN THE CUSTOMER BUSINESS

Columbus Metropolitan Library (CML) has an accomplished record of ahead-of-the-curve-thinking, including a significant change in 1989: rather than referring to the public as “patrons” CML put a stake in the ground and called our users “customers.” That terminology remains controversial even today among some public libraries, and CML continues among the few to adopt it. For a further discussion of the terms “customer, user, patron, member,” and so forth see Auld (2004), Bell (2012), Molaro (2012) and Pundsack (2015).

Throughout the ensuing years CML built a service delivery model based on this idea of “customer.” For me, personally, that culminated in 2012 when CML evolved the Deputy Director role to Chief Customer Experience Officer, the one I hold today. As such I lead a multi-pronged customer experience effort that ranges from architecture to ease-of-use touchpoints to service delivery.
WHAT AND WHY CUSTOMER EXPERIENCE

Customer Experience (CX) as an industry began seven years ago when a group of professionals saw a gap in the market. Responding to pronounced changes in customer behavior they saw CX as a means to drive customer loyalty. With so many options available to the public, why do consumers choose one option over another? This is no less relevant to public libraries. With the ubiquity of the web – even among at-risk/low-income communities – what is our value add?

To demonstrate this change in customer expectations, take a look at a survey we conducted around 2012. We asked our public to:

1. Use one word to describe the library of your youth. Clearly “books” predominated as seen in this word cloud of responses in Figure 1.

2. Describe the library of the future. The change is notable – “books” is not easily found in Figure 2.

With customers expecting a different library, we challenged ourselves to meet that expectation.

BUILDING A CUSTOMER EXPERIENCE PRACTICE

With a newly cast customer experience focus, we began with a reinvigoration of our customer service philosophy. CML has always defined its customer service approach in order to have consistent, measurable expectations for staff. That philosophy hadn’t been refreshed in several years, and staff were eager for guidance and leadership in this area.

CUSTOMER FIRST
BUILDING ON OUR HISTORY

We have long believed in the value of excellent customer service. Our Customer First philosophy builds on a lengthy history of doing right for the public.

Figure 3. Customer First - Building on Our History
There is no doubt that people own what they create, so our approach to building a new philosophy was collaborative. Because I passionately believe words matter, we also hired a Creative Director to guide us in a productive, clear, concise direction.

Through a number of facilitated sessions comprised of different levels of staff, we built a new philosophy we call Customer First. Here’s our opening salvo:

*At the library, our customers come to us to find, explore, discover, solve and do. We’re available, engaged and responsive. We listen to them. And we help them. We put the customer first. Our to-do list comes second to the customers’ to-do lists. Our positive attitude, meaningful interactions and productive transactions make each and every customer feel like they’re the most important customer ever.*

The implications of this philosophy span everything from name tags to scheduling. For example: previously, public-facing name tags were associated with an individual’s security badge and hung low on a lanyard to make it easy for staff to swipe their security badges. But the public couldn’t read the tags: they hung too low and frequently flipped over obscuring names. Who does that benefit? Not to mention that right-handed people place their name tag on the left chest because that is easier to manage. However, it’s proven that, in shaking (right) hands, people follow the right arm up to the right chest where a name tag should be. Guess which side our staff now consistently wear their name tags?

Scheduling can be challenging. It’s not unreasonable for staff to want to work a 9-5 schedule to accommodate family and personal needs. However, our busy hours don’t coordinate with such a schedule. Thus we are exploring how to staff for peak hours while remaining mindful of work-life balance.

**Customer First stands atop three pillars:**

- **I’m Here for You:** Be empowered, be more than your title, be passionate
- **I See and Hear You:** Be accessible, be engaged
- **I’ll Help You:** Be a problem-solver, be a conduit

Each of these pillars has additional detail found in a training manual.

As we developed this with staff, one manager contacted me and observed that the pillars align perfectly with CML’s stated organizational values: Respect, Integrity and Inspiration. Beautiful how things work out.
Keeping it real, we surveyed our customers and asked them to choose one word from a pre-selected list of attributes to describe what they expect from staff. These top attributes were then linked to Customer First, helping us to meet customer expectations. For example, *Welcoming* links to “I’m here for you; *Approachable* to “I see and hear you”; *Knowledgeable* to “I’ll help you.”

We throw a lot at our staff, and it can be challenging to fit all of the messages together. We created this graphic, based on our organizational chart, to help simplify it all. Just like our organizational chart, the customer is at the center: represented here by Customer First. Around that we nestle our strategies because they drive our service. The next ring includes policies, procedures, service expectations – more on that in a moment. Finally, values form the outer ring because that is how we deliver Customer First.

**Customer expectations.** The 14 words in this wordcloud represent the personality attributes that our customers expect of the CML staff. The scale of the words represent the importance placed on each word. Aligning our attitude and personality with the expectations of our customers is just another way we put them first.

**Figure 5.** Customer Expectations of CML Staff

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**Figure 6.** How It All Comes Together

**Figure 7.** CML Organizational Chart
A word on policies and procedures. There is a fine line between delivering on Customer First and stepping beyond the bounds of policies. For example, CML policy prohibits staff from transporting customers in their personal vehicles. It’s closing time and a 10-year-old lives nearby with no way home. What trumps here: Customer First – put customer needs first? Or policy? 110% policy. The nuance can be hard to navigate and it is something our training spends considerable time addressing.

Here’s an example I cite when I introduce the training: it is state law that you can’t smoke in a restaurant. Yet a local restaurant says “the answer is always yes.” When a customer wants to smoke, they are not told “no, you can’t smoke.” They are told “yes, you can smoke out here in our smoking area.” Granted that is nuanced, but the customer experience is different depending on the yes or no answer and how it is delivered.

**ROLLING OUT CUSTOMER FIRST**

Customer First requires thinking and deep understanding: it isn’t black or white; it isn’t like technical training. Staff require time and space to understand the “why” and grasp at a fundamental “how” to use judgement in order to deliver on Customer First. With that in mind, we developed a new kind of training – something experiential and hands-on.

In partnership with our Learning and Development team, a group of managers from a training task force mapped out the Customer First training based on real-life scenarios. Using complex situations, this team sorted through challenging scenarios to diagram how Customer First guides us to resolutions that deliver on our promise. That sounds easy. It wasn’t. In particular, the team struggled through the gray area between Customer First and policy. At one point our Learning and Development manager approached me asking for guidance through the often passionate discussions.

At a previous employer of mine we called this “creative abrasion.” It’s the tough wrestling through of ideas that burnish them to success. It’s okay to disagree, even heatedly, if it helps us achieve our best work.

Once the training was created by this team, we conducted nearly 50 sessions with all public facing staff, including security officers. As chief officer for customer experience I opened each session with the “why.” Staff trainers led sessions based on the scenarios developed by our training task force.

As part of my presentation we created a powerful video (see link under resource on columbuslibrary.org/cx-libraries) to make the emotional case for Customer First. The video demonstrates that each person entering the library carries their own story. Tapping into that story makes a personal connection that drives that customer’s experience.
WHAT FOLLOWS CUSTOMER FIRST: ARCHITECTURE

Guiding our staff to deliver a consistent approach to customer experience was step one. Obviously we want our people to understand what is expected of them so that they can deliver the customer experience our customers expect. There is more, however, to delivering customer experience. Every customer touchpoint, including connections in physical spaces and digital platforms, is a customer experience.

CML has completed nine projects in its ambitious ten-project building program. This has coincided with our work on Customer First, giving us a unique opportunity to align our customer experience approach in building design with what we are asking of our staff. Throughout the design process we have taken broad steps to deliver an intuitive customer experience, challenging ourselves to think about the library from the user’s point of view instead of from long-held, legacy presumptions.

Glass: Say you are a person who has never been in a library. Walking into a strange building for the first time is intimidating. What goes on there, who can help, who else is in there, what are they doing? Glass allows the activity of the library to be visible from the street and, when lit up at night, it becomes a beacon for a community. With our transformation to glass we are seeing new customers whose curiosity – and bravery – are inspired by what they see on the street.

Public-Facing Desks: CML has long been on a path to remove the large desks that have been standard library fare. Now our circulation and information desks are kiosks. Staff stand in front of the kiosk proactively welcoming the public – I See You. As a customer this removes the confusion of “Should I bother that person behind the desk?” “Are they too busy?” and fosters a more welcoming experience.
The Collection: We talk about libraries moving from collections to connections, and our public’s response to “describe the library of the future” word cloud shows that our customers believe that too. At the same time we agree that the collection remains as important as ever – we are still a library, after all. How to deliver on both concepts? We thought deeply about ways to showcase our collection while not overwhelming the space with shelves. Lower height shelves allow clearer sight lines, better opportunities for display, more breathing space around shelves, focused lighting to add drama: these deliberate gestures support the customer experience. Additionally we created Visual Merchandizing Guidelines and held workshops for staff to deliver maximum impact.

Signs and Clutter: Libraries fill space with signs and clutter. From a customer experience perspective it is befuddling. Customers don’t know which signs take priority, they stumble on rules that don’t make sense, and most signs aren’t developed with the customer in mind. At one point I checked out our own library and counted seven different styles of signs in one small area. Our approach now is to trust our staff to talk to people, not tape multiple signs to the walls or hand out fliers. And as anyone who knows me will tell you, I’m a nutcase for things hung crookedly. When something is crooked it shows that we aren’t paying attention and we don’t care enough about you, the customer, to keep our house in order.

And clutter. What message does clutter deliver to our public? That we don’t care? That anything goes? That there aren’t any priorities? In The Effortless Experience, author Matt Dixon describes “the paradox of choice”: too many options paralyzes customers. “As more and more choices are added to any decision, it actually hampers our ability to make a good decision. The lesson is clear: More choices create a higher-effort decision, a bad outcome both for the customer and the company.”

Consistency: Customers like consistency. They like predictable experiences that are easy to navigate. Retailers, restaurants and hotels understand this concept, and some are exceptional at delivering on it. Customers want to have confidence that they can be the captain of their experiences with you. Earlier building philosophies at CML stressed unique buildings with their own furniture, layout and palette. Today, knowing that our customers travel from branch to branch, we want to minimize the reorientation when they use different branches. As one customer said to a branch manager, “Where do you keep your new books?” That’s always stayed with me. Today we are much tighter on consistency across buildings with zoning of spaces, palette, shelving and furniture. Our buildings all have unique architectural features, but we’ve captured a strong CML identity. Customers are now saying, “I know a CML building.”
BUILDING A CUSTOMER EXPERIENCE CULTURE

Staff are trained; new buildings are open or underway. Now we turn our focus to building a CX culture. Here’s some of what we are doing to entrench that culture.

Guided Reading: We’re a library right? So all managers have read two titles:

1. **Outside In: The Power of Putting Your Customers at the Center of Your Business**, Harley Manning and Kerry Bodine (2012). This title launched the CX industry and is a must-read. You’ll start noticing the ways in which – inevitably – we see our customers from the inside out: we see our work through our own lens, not theirs. “Customer experience is how your customers perceive their interactions with your company. Once you understand that, you can manage your business from the outside in, bringing the perspective of your customers to every decision you make.”

2. **The Effortless Experience**, Matt Dixon (2013). This turns customer service on its head. Over the years we’ve all bought into the idea of the “wow” experience. Guess what? Customers don’t really care about that. They just want it to be easy to do business with you. Again, eye-opening to consider all the ways we don’t do that. “Companies tend to grossly underestimate the benefit of simply meeting customer expectations. In a world in which customer expectations are significantly inflated and seemingly on the rise all the time, what we find is that customers are in fact quite happy to simply get what was promised them. If there happens to be a problem, just resolve it quickly and easily. No more, no less.”

Customer Journey Mapping: A key tool of the CX trade is customer journey mapping. This exercise maps out each step of a customer’s interaction with you and helps you identify opportunities to improve. We have conducted mapping exercises with children coming to the library for homework help as well immigrants walking into the library for the first time. And remember, their journey starts before they get to the front door. They carry with them stories written by their life experiences as seen in the Customer First video we created.

Customer Effort Studies and Pilots: Like all organizations, we have rules that can be hard for customers. We build services that may require customers to jump through hoops to access. In today’s fast-paced, everything-at-your-fingertips world, ease-of-use trumps most everything. Back to the idea that customers prefer “easy” to “wow.” I love this simple hierarchy as defined in *Outside In*.

![Figure 13. Journey Mapping](image)

![Figure 14. Outside In Hierarchy](image)
We now conduct ease-of-use studies to observe how customers struggle with services (we did one on faxing) and launched pilots to uncover new opportunities (we have one underway for reserves by mail).

**Customer Insights Practice:** I bet you struggle with this too: how to capture actionable data of customer behavior to guide business decisions. Like you, we have data; we struggle with knitting it all together. We made this a top priority and have hired a Director of Data Analytics and Insights to develop a data culture. Because to quote Jack Welch: if you don’t measure it, it’s just a hobby.

**Customer Understanding:** Every employee at a library touches the customer directly or indirectly. Yet the accounts payable staffer in Finance can feel far away from that front-line experience. CX maturity happens when the entire organization focuses on the customer. To help accomplish this we’re introducing “customer-in-a-box” – not to be taken literally. Staff package stories about customers – narratives, photos, even messages from customers – to our back-of-house administrative teams for use at departmental staff meetings. Importantly these can’t just be feel good stories. It’s best if they also address challenges, disappointments and other real issues. Our ultimate goal is for all employees to connect to the customer.

**Global CX Day:** Each year a date in October is Global CX Day as established by the Customer Experience Professional Association. CML celebrated this day by capturing a photographic record of a day in the life of a library. Staff took photos of customers and how they use our libraries over the course of this single day. Customers voted on the best photo through social media; we hosted top vote-getters in a gallery show; best photos will be included in a video for our annual fundraiser event. (No worries: we’re getting permissions.)

**Customer Engagement Training:** It can be a challenge for staff to proactively engage with customers. For some it doesn’t come easily. Telling them to do it doesn’t work; providing them with tools and training can. It can be especially hard for staff to approach families and talk with them about their child’s kindergarten readiness, one of our top strategies. Thus we have developed Family Engagement training to support staff in this work so they can provide the most impactful customer experience.

**In-the-Field Exercise:** We read the books, had the training, but it all became real with an in-the-field exercise where eight groups of four visited different retail businesses (two per group) and enacted two different scenarios (a customer buying children’s gluten-free vitamins, for example). They ranked their experience against several criteria to evaluate the overall experience. Each manager then translated that experience to their own customers. The exercise helped make all the previous training come to life.

**Customer First Champions:** We launched an annual recognition program to celebrate the staff who best exemplify the attributes of our Customer First philosophy. Each team selected a champion who was recognized through a gallery show and a luncheon, where each champion received a certificate and a Customer First Champion pin.

**CX Advisory Board:** Our customers experience many brands in their day-to-day life. Everything from retail and concert venues to the Department of Motor Vehicles. Each of those influence how they perceive and assess experiences with us. To keep us aware of trends and their impact, we launched a CX Advisory Board comprised of local experts. Central Ohio is home to powerful retail brands as well as globally dominant design firms. Inviting representatives to share their knowledge and observations is an easy ask, one that these professionals are eager to provide.
LESSONS LEARNED

Go Slow to Go Far
Prior to my tenure at CML I developed programs akin to Customer First for leading companies. But if I had whipped up something over a weekend, what credibility would it have? People own what they create, especially something as interpersonal as this customer-facing work. Giving staff the opportunity to craft this philosophy – which they do every day – can only work if staff devote thoughtful time to its creation.

Grow Your Discipline to See Outside In
You’ll be surprised at what you don’t see. We’ve made customers adapt to our view of things rather than see it through their eyes. Even with the best intentions, this happens. Develop a rigor to see outside in to avoid this pitfall. In particular, scrutinize your language for two things: library jargon, Juve Fiction for one and positive language: “the library closes at 9 p.m.” …. to “the library is open until 9 p.m.” So much more welcoming.

Make It a Culture
This is not a check-the-box effort. It is an enterprise mindset no matter your job title or responsibility. Keep it fresh, focused and evolving. Pay attention to it daily. Create meaningful ways to tell customer stories throughout the organization – and not only the feel-good ones. Sometimes the difficult ones help us to be better.

Challenges
Two large challenges remain:

1. Metrics. Libraries typically lack funding to support robust performance dashboards and the staff to make the connections between metrics and customer experience.

2. Vendors. Some of our most significant ease-of-use challenges center around third-party products over which we have little to no control. Until those vendors care more about the experience, or the industry sees greater competition, this will hold us back from real excellence.

CONCLUSION
Bruce Temkin, a co-founder of the Customer Experience Professionals Association, is my go-to thought leader for customer experience. He wrote recently:

“I hate to break this news to you, but your customers most often interact with your organization because they have to, not because they want to. And when they do connect with you, it’s part of a larger journey that they’re on to achieve something more important than the interaction with you.

That’s why it’s critical for organizations to understand and to design experiences for their customers’ journeys.”
This reality is no less true for legacy institutions like libraries. The good news is we have something unique to offer with great people who are passionate about helping the public. That’s a critical first step. With honest and thoughtful consideration of how we deliver our experiences, we can continue to meet customer expectations and secure our future.
RESOURCES

• Customer Experience Professionals Association (CXPA): a global association with many local chapters throughout the U.S. I lead the local chapter in Columbus.

• Temkin Group: Bruce Temkin's website, temkingroup.com, offers many white papers on CX, and his team provides considerable training in person and online. I've attended their workshop, Driving Customer Experience Transformation. They provide full scholarships to nonprofits.

• Outside in: The Power of Putting Your Customers at the Center of Your Business, Harley Manning and Kerry Bodine

• The Effortless Experience, Matt Dixon. He also has a good overview on YouTube.

• Jeanne Bliss books and blogs. With Bruce Temkin, Jeanne Bliss founded CXPA. She has a CX blog called Customer Bliss. She has written three books (CML is mentioned in both!): I Love You More Than My Dog; Chief Customer Officer and Chief Customer Officer 2.0.

• Customer First video: https://www.youtube.com/watch?v=cG4WEKmBRMU

Bruce Temkin citation: https://experiencematters.blog/2017/08/09/the-power-of-customer-journey-thinking-infographic/

Notes on contributor
Alison Circle is the Chief Customer Experience Officer for Columbus Metropolitan Library (CML), and has more than 25 years marketing and branding experience. In 2004 she joined CML as Director of Marketing and Strategic Planning, winning over 20 national and international awards for her work. For three years she was a Library Journal blogger, and, in 2012, was selected a Library Journal “Mover and Shaker.” In 2012 she was promoted to Chief Customer Experience Officer where she serves on the Executive Leadership Team and oversees 23 library locations, marketing, volunteers and all programs and products. She leads programming, experience and design for the library’s building program for 10 buildings, including the Main Library. She has earned a CCXP (Certified Customer Experience Professional) certification. She has MA in English from the University of Wisconsin.