Looking at CX from the Inside-Out

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Executive Summary

The report *Looking at the CX from the Inside-Out* details the second half of the Customer Experience (CX) Intern Librarians' project which began in May 2017. This report examines painful touchpoints identified from the first report *Looking at the CX from the Outside- In* through the creation of Service Blueprints (SBs) and potential recommendations for improvement. The CX interns determined that Service Blueprinting was the most effective tool to unpack the touchpoints, engage EPL Staff and facilitate potential recommendations. From December 2017 to January 2018 five interactive focus groups were conducted with 43 EPL staff members. During these sessions participants analyzed select Customer Journey Maps (CJMs) in small groups, completed design activities to brainstorm potential solutions and shared their ideas with other participants for further discussion. In addition 17 meetings were conducted with EPL Managers, Team Leads and Content Experts from December 2017 to February 2018. These were done to gain a better understanding of relevant projects currently being undertaken within the organization, recommendations for painful touchpoints and potential limitations.

With the data from the focus groups and internal meetings eight concept based SBs were created illustrating the internal and external practices as well as staff impacting painful touchpoints. The Blueprints included in the report are: Memberships, Holds, Borrowing a Physical Item, Digital Item Acquisition, Early Literacy Program, Family Visit, Website, and Library Chat. The findings from the Blueprints are broken down into five overarching concepts based on how they create a painful touchpoint and why it is occurring at EPL: A) lack of personalization, B) limited use of technology for accessibility and wayfinding, C) customer's dependence on staff for digital literacy, D) staff's perceptions of workload, E) and the skills and engagement of staff.

An analysis of blueprint content was conducted with a focus on recommendations. Eighteen potential recommendations were identified. The recommendations have been organized around the Edmonton Public Library 2017-2018 Business Plan Strategic Goals. Through discussions with the CX Team the intern librarians suggest that the SBs be used in conjunction with the CJMs from the previous report for future EPL employee orientation and training, debriefs between Managers and Front-Line Staff, and future service evaluations.

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Introduction

In May 2017 EPL hired two intern librarians to complete a comprehensive Customer Experience (CX) evaluation. The main goals of the yearlong project were:

- To establish the current state of CX at EPL
- Identify what is working well and where improvements can be made
- Engage with customers and staff directly for data collection
- Identify potential recommendations for the identified painful touchpoints

The focus of this report is the process of Service Blueprinting and recommendations. The interns conducted focus groups and interviews with EPL staff to unpack the painful touchpoints identified during the first stage of the project and develop potential recommendations to improve the customer experience. The report contains a comprehensive breakdown and subsequent discussion of the findings obtained from the SBs, identification of project limitations and a comprehensive list of recommendations. Applying CX research involves finding a balance between the organization's goals and opinions and those of customers (Datig, 2015). The benefit of CX research is that decisions can be made based on data from customers rather than anecdotal evidence (Datig, 2015). With the current Business Plan concluding EPL's five year Strategic Plan, this report provides valuable information for strategic planning and future initiatives.

Definitions

Customer Journey Map

Customer journey mapping is a tool that helps organizations understand the digital and physical steps required to perform a given activity. A customer journey map is a visual representation of what customers are thinking, feeling and doing at every step. The mapping process can provide valuable insight into what it is like to walk in the customer's footsteps (Marquez, Downey & Clement, 2015).

Service Blueprint

A Service Blueprint is a visual representation of everything that impacts a particular touchpoint. The Blueprint serves as a detailed image of each touchpoint, internal and external influences. It demonstrates the backstage and behind the scenes of how EPL supports the customer experience. It allows for in-depth analysis of the customer experience during each stage of service delivery (Baranova, Morrison, & Mutton, 2011).

Touchpoint

The word touchpoint became commonly used in the early 2000s to represent all of the points at which a customer interacts with an organization product to complete a goal or activity. A touchpoint can range from a tweet on Twitter to using the library catalog to locate a physical book. (Datig, 2015) Research can focus on digital or physical touchpoints or a combination of the two.

Unstructured Interview
Unstructured interviewing employs an open-ended, flexible approach to questioning participants that allows interaction. There is no specific set of questions although certain topics may be focused on. While the resulting conversation can be lengthy and not always directly relevant to the topic, the strength of unstructured interviews is the sheer level of detail they can provide (Wilson, 2015, p. 196).

Literature Review

The literature review focused on the development of SBs, focus groups, interviews and their application within a library environment.

A. Service Blueprints

Service Blueprinting is a customer-centered process used for analyzing and improving service that originated in 1984 from the business sector (Pretlow & Sobel, 2015). Since then it has continued to evolve as an approach for addressing challenges in service design particularly customer experience design (Bitner, Ostrom, & Morgan, 2008). The process is popular in other industries with numerous articles coming out of the business and nonprofit sectors (Pretlow & Sobel, 2015). A SB is a detailed map of internal service processes which allows for an analysis of the customer experience and staff influence at each stage of service delivery (Baranova, Morrison, & Mutton, 2011). The Blueprints do not serve simply as a graphical representation of a service rather their main purpose is to create a solid foundation for improvement efforts whatever their form might be: evaluation, enhancement, redesign or creation (Baranova, Morrison, & Mutton, 2011).

Blueprinting is frequently presented as a component of larger customer service improvement strategies (Pretlow & Sobel, 2015). In contrast to other process oriented design techniques SBs are customer focused allowing the visualization of the service process, points of customer contact and the physical evidence associated with services from the customer’s perspective (Bitner, Ostrom & Morgan, 2008). Few studies focus directly on library environments but they demonstrate how Blueprinting can be applied within different contexts (Phillips, 2001; Maharana and Panda, 2001; and Radnor, Osbor, Kinder & Mutton, 2014). Pretlow and Sobel provide the most comprehensive analysis of Service Blueprinting within an academic library environment. While their study focuses on academic organizations, it demonstrates the flexibility of this method, its ability to facilitate discussion about painful touchpoints and effectiveness in meeting the needs of different organizations.

A SB provides employees with an overview of the entire service process so that they can see how their role fits into the integrated whole. Blueprinting establishes a common point of discussion for new service development or improvement (Bitner, Ostrom & Morgan, 2008). The process of blueprinting and the visual document generate insights into various roles, practices and interdependencies throughout the whole organization.

B. Unstructured Interviews

Numerous insights can be gained by effectively engaging staff as they represent a wealth of firsthand knowledge and experience. Interviews are among the most popular qualitative methods used in library and information studies research (Connaway & Radford, 2016). Interviews are effective when there is a need to gather perceptions, opinions and accounts of experience from a designated participant group (Connaway & Radford, 2016).

Examples from scholarly studies demonstrate two important features of this technique: they can be used for a variety of research problems and they allow the researcher to carefully select participants that have particular knowledge or experience of interest (Connaway & Radford, 2016). Three types of interviews are commonly used: unstructured, where the participant is in control of the process and the researcher's role is to clarify; semi-structured, where control is shared and questions are open-ended, and structured, which is highly controlled with questions predetermined (Connaway & Radford, 2016). For the purposes of this research, unstructured interviews were conducted.

C. Focus Groups

Focus group methods have been used in diverse library settings including public, academic, corporate libraries (Connaway & Radford, 2016). The information acquired through focus groups is often used to assist researchers in understanding perceptions and attitudes of the target population. They have the potential to elicit strong and shared opinions. In this case the target population was EPL staff who directly work and engage with customers and branch Managers.

The main advantage of focus groups is the opportunity to observe multiple discussions on a topic in a limited time period (Connaway & Radford, 2016). Unlike other methods focus groups benefit from interactions between participants which produce rich data that provides a detailed understanding of the participants' experiences (Connaway & Radford, 2016). The energy of a focus group discussion has the potential to stimulate unexpected insights and produce robust data.

Methods

A. Method selection

Service Blueprints (SBs) were chosen as the method for examining the pain points from an EPL staff perspective. Through the literature review and industry scan, SBs were selected to compliment the Customer Journey Maps (CJMs) created in the first half of the project, adding depth and an internal perspective to specific painful touchpoints. The interns then focused on identifying techniques for data collection to create the SBs. It was decided to collect data through interactive staff focus groups, unstructured interviews with internal stakeholders, and by referring to internal documents, reports, and practices. Consideration was given to the most effective ways of engaging staff. These approaches were selected based on the scope of the overall project, limited availability of staff and time constraints of the 12-month intern position.

B. Data Collection

Focus Groups

Using the CJMs as a guide for the organization of the focus groups, five staff focus groups were conducted between December 2017 and January 2018. This structure was designed with the goal of attracting a variety of staff throughout the entire system:

- December 5th 2017: Focus group for Front-Line Staff
    - The Front-Line Staff sessions largely involved Library Assistants with select Community Librarian, Director, Library Service Coordinator and Interlibrary Loan Assistant participants.
- December 7th 2017: Focus group for those involved in Youth Services
- December 13th 2017: Focus group for Front-Line Staff
- January 18th 2018: Focus group for Front-Line Staff
- January 25th 2018: Focus group for Managers and Associate Mangers

To recruit participants for the Front-Line Staff focus groups, a course was created within the EPL Learning Management System (LMS) and featured on Staffweb and in the staff newsletter at the end of October. To limit the scope of focus groups, recruitment was directed at branch level staff. During their November Up-to-Speed presentation, the interns also encouraged staff to sign up. To recruit the Youth Services focus group participants, an Outlook invite was sent to all members of the School-Aged Services (SAS) and Early Literacy and Family Services (ELF) teams, to the Youth Services Librarians, and the Youth Services Manager. A similar tactic was taken to recruit for the Managers and Associate Managers Focus Group, where an Outlook calendar invite was sent to all branch Managers and Associate Managers. In addition, meetings were held with key staff members, departments, and teams to gather data from shared services.

There were 43 participants:

Role	Number of participants
Library Assistants	14
Community Librarians	3
Youth Services Librarians	5
Managers	14
Directors	1
Collections Librarians	1
Library Service Coordinators	2
Interlibrary Loan Assistant	1
Associate Manager	1
TOTAL PARTICIPANTS	**43**

Figure 1. Focus Group Participants

One week before each focus group the participants were sent an introductory email with meeting materials. The email communicated the goal that these sessions be solution focused with an aim to brainstorm solutions to pain points identified in the CJMs. The materials included the following (Appendix A):

- An agenda
- A brief description on how to read the CJMs
- The select CJMs that would be addressed

Each focus group was an hour and a half and took place at the Idylwylde and Strathcona branches. These were chosen for their central locations and relatively large program rooms. Every focus group was organized in the following way:

1) 30 minutes – Introduction
    a. Participants were provided with background information about the project and how the CJMs were created.
    b. The intern librarians briefly explained how to read the CJMs.
    c. The intern librarians provided a brief overview of the CJMs identified for the particular focus group, allowing time for questions and comments from the participants. The number of CJMs addressed in each focus group was limited by and based on the amount of participants.

2) 30 minutes – Design Sprint
    a. The intern librarians divided the participants into groups of 2-4 and each group was assigned a different CJM.
    b. The groups were challenged to come up with the fewest solutions to address the most pain points identified in the CJM. This structure was chosen so that participants would come up with the most versatile and broadly applicable solutions.
    c. The following three questions were provided along with a sheet of brainstorming techniques (Appendix B) that could be used if the participants felt stuck.
        i. What would this experience look like if every touchpoint was delightful?
        ii. What needs to change for this to happen?
        iii. What supports would you need as staff for this to happen?
    d. The intern librarians circulated to make sure groups were engaged but they needed little motivation.

3) 30 minutes – Sharing Session
    a. Each group presented their solutions quickly and concisely.
    b. The intern librarians would encourage and facilitate thoughts, questions, and feedback from other participants around the solutions presented.

c. Depending on the number of groups, each had 5 to 15 minutes to present their solutions and discuss with the rest of the participants.
d. The participants were thanked and encouraged to contact the intern librarians with any more questions or ideas.

During the focus groups the intern librarians took notes and audio recorded the sharing sessions. For the Youth Services and Manager focus groups, a Planning, Assessment and Research (PAR) analyst also joined the intern librarians in taking notes due to the larger number of participants. The audio recordings were subsequently transcribed and the notes consolidated.

To capture ideas that may not have been fully developed in the brainstorming and sharing sessions, an anonymous survey was sent to participants the day after their focus group session via QuestionPro. The survey included the following questions:

1) What was the most important pain point to fix and why?
2) After the focus groups, what new ideas did you have in terms of addressing pain points?
3) Do you have any additional ideas or suggestions to share?

There were 26 responses to the survey. These were consolidated into an excel document and coded thematically for review.

Unstructured interviews with internal stakeholders

Data was also collected for the SBs through unstructured interviews with internal stakeholders. In total, the intern librarians held 17 unstructured interviews with 27 EPL staff. The need for these interviews was determined by the content of the CJMs and the identified painful touchpoints. The intern librarians met with staff representatives from departments and teams, as well as staff leading certain projects. Staff from the following departments were interviewed: Learning and Development, IT, Web Services, Fund Development, Marketing and Communication, Collection Management and Access (CMA), Digital Literacy Initiatives (DLI), and the Makerspace. The intern librarians also spoke to staff on the Service Point Workflows and the Customer Experience teams, those working on the Services to Newcomers and Great Spaces projects and consulted with the Youth Services Manager and Volunteer Coordinator.

Before these unstructured interviews, the intern librarians created and sent out meeting materials which contained an agenda, how to read CJMs, relevant CJMs, and a breakdown of the pain points (Appendix C). During these unstructured interviews, the intern librarians used the CJMs as a way to initiate a conversation with the staff as to the pain points pertaining to their area of expertise, their current knowledge of what was being addressed, as well as any further ideas they had to improve these touchpoints. To record the data from these unstructured interviews, both of the intern librarian took notes, which were subsequently consolidated and referred to while creating the SBs.

Review of internal supporting documents and research

To ensure that a holistic view of the customer experience was captured in the SBs the intern librarians also reviewed and made note of other EPL internal supporting documents and previous EPL research. These documents included library practices, procedures, and reports relevant to specific pain points. In terms of research, previous intern reports were reviewed as well as the most recent Customer Satisfaction Survey (CSS).

C. Creation of Service Blueprints

The first step in creating the SBs was developing a format that would clearly illustrate the deconstruction of each pain point. A typical concept SB depicts only the basic steps of the entire process or activity (Bitner, Ostrom, & Morgan, 2008). The intern librarians decided to modify the structure of SBs to focus only on painful touchpoints and ignore the positive aspects of the journey. As a result the steps were revised for the Service Blueprint template (Appendix D) to only include those that undermined the customer experience. The SB template includes five components: customer pain points, EPL employee actions; internal support and influences, external influences, and ideas and questions to explore further. For a detailed component breakdown please see Appendix D1.

To create specific SBs the intern librarians revised and incorporated the notes from the focus groups and the unstructured interviews and reviewed and consolidated information from internal EPL documents. Together the intern librarians went through and consolidated their findings into the SBs. Staff members from CMA, DLI and Youth Services were also contacted via email for a final round of feedback to ensure that the information in the SBs was presented accurately. These departments were contacted based on their area of expertise. An SB was created for eight of the ten CJMs. The Printing and App CJM were not included due to ongoing evaluations that will significantly change the process of both experiences. More information related to the scope of the SBs and recommendations can be found in the discussion section.

Limitations

While Service Blueprinting can be a silo-breaking tool, allowing for staff to gain a better understanding of the entire process impacting an activity or touchpoint the method has a number of limitations. A SB attempts to capture a dynamic process in the service delivery in its static form (Baranova, Morrison, & Mutton, 2011). There is always a danger of not representing subtleties, outliers and changing customer expectations and preferences (Baranova, Morrison, & Mutton, 2011). By conducting unstructured interviews with staff the emphasis was placed on qualitative information rather than the number of participants.

Focus groups have a number of limitations common with qualitative methods. Focus group data is based on perceptions and opinions rather than facts and as a result is subjective (Connaway & Radford, 2016). Selecting a broad enough participant base for focus groups can be an issue especially when it involves recruiting front line staff away from their assigned responsibilities. This type of method relies on small numbers of participants in order to be successful but it may result in skewed results depending on the composition of the group (Ippoliti, Nykolaiszyn, & German, 2017).

A mixed methods approach utilizing interactive focus groups and unstructured interviews was chosen as a less formal, organic process that would allow a tactical opportunity for collecting information rapidly, analyzing the data and identifying both immediate and long-term recommendations that could be acted upon. The data collection period was kept relatively short in order to gather as much information as possible while ensuring that project deadlines were maintained. While rich data was collected, the participant group was too limited in size to provide generalizable results reflecting the broader EPL community. Characteristics and perceptions of staff participants may not reflect all staff. Despite this, the techniques were effective in unpacking painful touchpoints that occur at EPL and identifying potential solutions which could be explored further.

Findings

The findings presented were identified and developed as a result of the creation and analysis of the eight SBs (Appendix D). Figure 2 below shows the number of painful, satisfying and delightful touchpoints established during the first stage of the project. The painful touchpoints of each map were aggregated and informed the creation of the SBs. For more details please see Report #1 *Looking at CX from the Outside-In*.

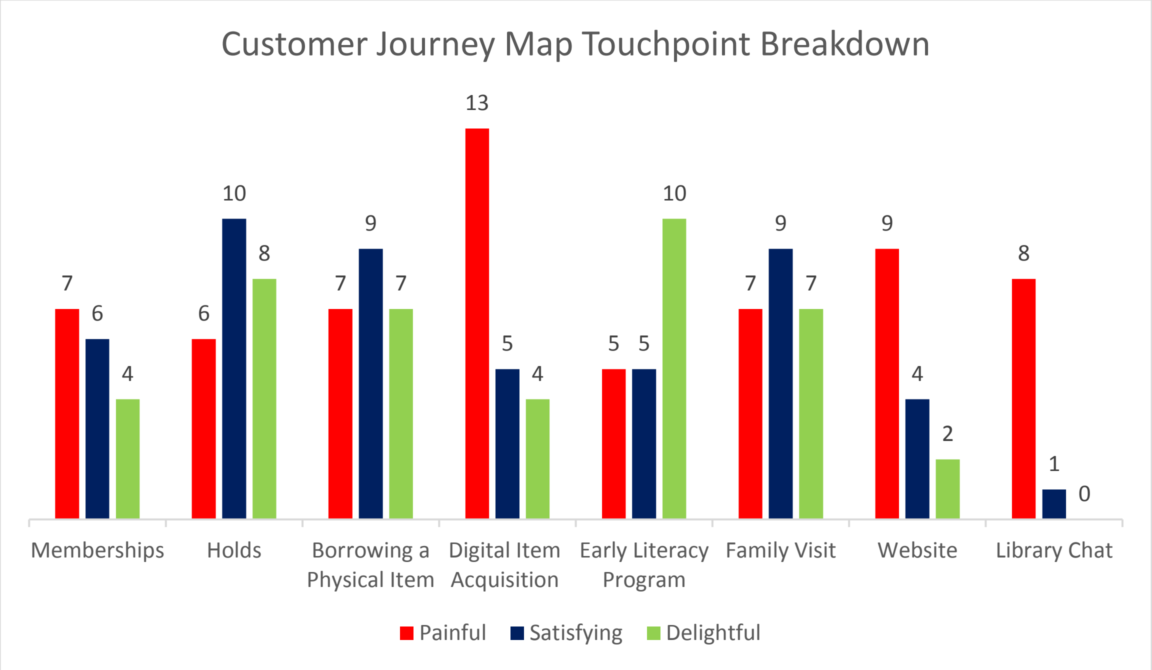

Figure 2. Customer Journey Map Touchpoint Breakdown

Through an analysis of the eight SBs, five overarching concepts have been identified that negatively impact the customer experience at EPL:

A. lack of personalization,
B. lack of use of technology for accessibility and wayfinding,
C. customer's dependence on staff for digital literacy,
D. staff's perceptions of workload, and
E. the skills and engagement of staff.

This section breaks down each concept by identifying how it creates a painful touchpoint for customers and why it is occurring at EPL.

A. Lack of personalization

Personalization can be defined as the way in which information, resources and services are tailored to match the unique needs of a specific customer or community (Frias-Martinez, Chen, & Liu, 2006). Effective personalization can create more tailored, customer oriented interactions that help and enhance the process of accessing EPL programs, collections and services.

How does this create the painful touchpoint for customers?

1) Customers used to higher standard based on experiences with other industries, especially retail
    - Retail examples include: targeted digital and physical content; account customization such as being able to restrict what is promoted and emphasis on particular services, programs and collections based on the actions of the customer
2) Makes physical and digital spaces less welcoming and tougher to use
3) Creates lack of self-sufficiency for the customer
4) Digital and physical information overload
    - Examples: The presentation of digital content such as Audiobooks and ebooks; EPL information during the membership process

Why is this a problem?

1) Lack of technology use in personalization
    - Examples include: limited catalogue search functionality; narrow customization of EPL app
    - Desire for targeted recommendations for customers
2) Lack of personalization from staff
    - Due to perceived time crunch
3) Vendor and technology limitations
    - Restrict the flexibility of related software and content

B. Limited use of technology for accessibility and wayfinding

Ensuring effective accessibility of content and wayfinding of digital and physical space is important for any public library. Simplified directional signage and easily identifiable catalogue stations for example can support intuitive and independent use as well as ease customer frustration (Warren & Epp, 2016). Technological opportunities exist through the use of Bluetooth wireless capabilities; interactive sign displays and integrated physical connectivity with the EPL App.

How does this create the painful touchpoint for customers?

1) Customers used to higher standard based on experiences with other industries especially retail
    - Examples include: electronic ticketing, digital maps, integrated app and website
2) Makes physical and digital spaces that are less welcoming and tougher to use
3) Creates lack of self-sufficiency for customer

Why is this a problem?

1) Lack of technology use in wayfinding
    - Physical wayfinding
        - Difficult to locate specific items in the stacks
        - No specific signage for lineups or memberships
    - Collection organization
        - Difficult for adults to browse for their own interests due to the separate locations of children and adult content
2) Lack of identifiable catalogue stations
    - Catalogue stations physically resemble workstations
    - Overall login and interface is similar to public workstations
3) Vendor and technology limitations
    - Restricts software interoperability across devices and platforms
    - Requires the creation of separate accounts for each vendor

C. Customer's dependence on staff for digital literacy

EPL customers have a broad range of digital literacy skills, and those with lower proficiency depend on staff to assist them with accessing and becoming familiar with digital resources. As a result this can limit the attention paid to other customers. Opportunities exist to provide instruction through other methods to allow selfdirected learning and exploration such as online tutorials, interactive FAQs and a proactive library chat.

How does this create the painful touchpoint for customers?

1) Customers used to higher standard of digital services
2) Creates lack of self-sufficiency for customer

Why is this a problem?

1) Vendor websites with varying functionality make it difficult for customers to navigate due to different logins, interfaces and search functions
    - e.g. hoopla vs Overdrive vs Recorded Books, etc.
2) Customer information overload
    - Organizational practices and vendor constraints related to how digital content is displayed
3) Lack of communication around technology and children
    - What is appropriate screen time?
    - What is the value of technology for children?
4) Difficulties in accessing online help
    - Not enough FAQs
        - e.g. app use; placing a hold and then number of clicks to do so; accessing vendor controlled content
    - Library chat is inconsistent and does not always provide direct information for customers
    - Technological limitations related to the customer’s personal electronic device
        - e.g. outdated software or hardware from older tablets, cellphones and ebook readers
5) Vendor and technology limitations
    - Restrict the flexibility of related software and content

D. Staff’s perceptions of workload

Front-Line Staff can become overwhelmed when large ques of customers develop or when an interaction demands dedicated attention over a period of time. While this perception does not always reflect the reality, it does undermine service quality and lead to more rushed customer interactions that may lack context. Staffing and Front-Line practices should allow for different levels of customer engagement to ensure that each individual receives appropriate service regardless of the number of customers.

How does this create the painful touchpoint for customers?

1) Front-Line staff are not consistently accessible when customers need them

- Front-line Staff do not always actively rove or greet consistently
    - Examples include:
        - Not always being available to help parents before programs in the children's section
        - Not always available to help parents in the children's section
        - Lack of roving and anticipating customer needs in the stacks

2) Staff emphasize speed of service rather than quality; this leads to:
    - Using ILL as a replacement for effective reader's advisory and conducting a reference interview
    - More transactional, less rewarding work for staff influences Front-Line burnout and less engagement with customers
3) Lack of communication from Front-Line Staff to customers
    - Examples include:
        - Little communication in terms of digital literacy as contrasted to general literacy

Why is this a problem?

1) Staff feeling overwhelmed by their perception of the number of customers
    - Line-ups stress staff which impacts effective service delivery (inconsistent understanding that lines are acceptable)
    - Library chat context:
        - Only one staff is scheduled for chat at one time
        - Service Workflows processes impacting branch staffing of chat
2) Staff feeling overwhelmed by their perception of the volume of work
    - Examples include initiatives such as selling bus passes
    - Lack of off-desk time
        - Due to high workload some branches' staff use their hour on library chat more like task time
        - Organizational practices impacting branch staffing
3) Pressure from Customer Service Assessment Initiatives
    - Stress from secret shoppers feedback to do everything correctly
    - Pressure to be an expert on everything

        - Organizational practices related to onboarding and staff training

4) Staffing constraints
    - Front-Line Staff are not always available to assist parents before programs in the children's section
        - Organizational practices concerning program staffing

E. Staff's skills and engagement

Ideally all staff would have up-to-date knowledge of the latest collection, service, technology, and program information at EPL in order to engage and provide the highest quality customer experience. The best form of customer engagement feels authentic for each individual while bot being in a one size fits all format (Cook, 2015). EPL staff have existing skills and interests that could be integrated and used within the organization to educate other staff. CX Expectations can be reinforced through monthly departmental and staff meetings to ensure that all Front-Line staff understand their responsibilities and are effectively engaging customers.

How does this create the painful touchpoint for customers?

1) Lack of front-line staff being available when customers need them
    - Lack of greeting and anticipating customer needs
    - Lack of roving to engage customers at point of need
    - Organizational practices related to staffing
2) Insecurity of customers around digital literacy
    - Limited communication of digital literacy by Front-Line Staff (digital literacy is not integrated)

Why is this a problem?

1) Lack of utilizing staff to full potential:
    - Example: not using other language and cultural skills of staff
    - Example: not using other staff expertise from education, other jobs or hobbies
2) Still lacking knowledge around digital literacy
    - Front –Line Staff: Limited communication or engagement of digital literacy (i.e. little digital literacy content in programs vs other literacy skills)
    - Organizational practices related to staff training
3) Lack of people skills (soft skills)
    - Process around hiring and probationary period
    - Need for people who are skilled at CS

    - Staff's level of comfort approaching and engaging customers
4) Perception of work being more transactional and less dynamic
    - Based on a desire to avoid lines and keep the customers flowing through
    - Need to reinforce expectations and ensure consistency

Discussion

A detailed analysis of the eight SBs provided opportunities to examine those services, practices and procedures both in-person and digitally that were causing frustration for customers, and where recommendations could be made. The Service Blueprinting presented in Appendix D demonstrate how each painful touchpoint is influenced by internal and external factors. Recommendations range from quick fixes that can be achieved at a relatively low organizational cost to those that will potentially require more substantial resources and have a more disruptive impact. The recommendations address changes especially in relation to staff training, education of children and technology, and integrating technology to improve accessibility and personalization. With the new five year strategic plan currently in development there are opportunities to actively engage with the proposed recommendations and integrate them into the plan.

Scope

It is important to note that a portion of data collected during the CJM stage of the project while valuable has not been integrated into the process of Service Blueprinting and subsequent recommendations. For more detail on the CJM process please see Report #1. The following topics have been excluded based on information gained from the unstructured staff interviews and conversations with the intern supervisor that established that printing, App and branch Wi-Fi projects are currently being undertaken by different EPL teams. Changes related to the need for appropriate ID for a membership; the physical accessibility of branch space; and the hold process are not logistically feasible at this point in time.

While the creation of the printing CJM was an informative process, in November 2017 EPL launched a new public computing session management and printing solution that significantly changed the printing customer journey. With this software being rolled out, IT is conducting its own evaluation. Incorporating different language content was identified as a responsibility of CMA. A number of options concerning current policies around acquiring a library membership were explored but it became clear that appropriate ID is non-negotiable. The EPL app has been identified as a service for further evaluation by DLI and Web Services. As a result of this information and vendor specific constraints of the app it was not explored further in this study.

Branch Wi-Fi strength varies by location and is impacted by the physical construction of the building. Craig Siemens and members of the IT team are engaged in an evaluation of the Wi-Fi infrastructure and as a result it was deemed the interns would have little additional information to contribute.

The holds process can be confusing for customers especially when they receive a pick up notification without the item actually being available. Despite this, it was understood that premature emails are a constraint of the ILS system. Emails are triggered after a certain amount of time after being routed in through the system, but in some cases have not manually ended up on the shelf yet.

The job of CX research is never complete and there are always improvements to be made in some aspect of the experience. Customer behaviors and expectations will continue to change as new tools and technologies are developed by libraries and related organizations. Effective communication with different levels of library staff was considered to be an important component of this stage of the project. Staff content experts and team leads were consulted to ensure that the information presented in the SBs was accurate and reflect the reality of EPL. Some of the suggestions from the focus groups and interviews while exciting, were too far out of scope and fell beyond the limits of what is realistic for the organization including the creation of a book storage building; centralization of library chat; and virtual reality goggles for collection browsing. Effectively applying CX research involves finding a balance between the library’s goals and the opinions of its staff and customers.

Recommendations

Recommendations were drawn from the focus group sessions, interviews and a review of scholarly and professional literature. Different literature reviews were conducted to locate new, different and experimental library programs, initiatives and services. The reviews focused on library association journals, public library news magazines and library science academic journals. Results were limited between 2014 and 2018 to ensure that content was recent. In order to provide a variety of recommendations, additional organizational research was done to understand limitations and what the scale of potential recommendations could be. While secondary research informed the recommendations, feedback from staff proved to be the most valuable in generating potential recommendations.

The recommendations are structured around applicability to the proposed 5 Year Strategic Plan and are listed in order of priority. A list of eighteen practical and achievable recommendations have been developed to assist in improving touchpoints and the overall customer experience at EPL. For each recommendation the concepts causing pain points that it would address are identified. These recommendations represent a foundation to base the improvement of library collections, programs and services. They can be used as inspiration for other more significant changes, incorporating branch considerations and broader community needs. While no recommendation stands out in terms of dramatic impact, this speaks to the high quality of customer experience currently offered at EPL. Small steps, improved practices and ongoing evaluation will be required to get the customer experience to the next level.

A. Best Place to Learn

1. **Improve family access to EPL resources through a streamlined membership that allows for multiple members to share a 'card'**
   Review the possibility of linked family cards, or the option of having only one card for an entire family. This could also be linked to the recommendation for the app to keep track of more than one card at once. Note: Organizational work has been done on this project previously demonstrating that new membership options are constrained by a lack of BiblioCommons interest and support.

2. **Ensure website content is accessible for customers regardless of digital literacy skills**
   Adjust the amount of content currently displayed through the EPL website so that clutter is limited and valuable content is emphasized. This may involve changing some of the terminology, integrating FAQs and help features, or design a more dynamic website that promotes content based on the actions of the customer. The removal of 'content lists' into a more authoritative format with associated technology devices has the potential to strengthen customer interactions with specific vendor content such as Hoopla. In order to understand how the website is used more comprehensively a usability study should be conducted in order to explore issues related to finding and accessing specific EPL resources and services.

3. **Integrate parenting content in displays and shelves adjacent to children's section to improve parent access**
   Create displays strategically located in and near the children's section that has content specifically geared towards parents, with the goal of establishing EPL's broad value beyond services and resources for their children. These displays should include a targeted selection of books, CDs, DVDs, and audiobooks selected by parent staff members. Content should include digital literacy and parenting.

4. **Proactively engage with parents and caregivers to educate them about child use of computers and technology though events, programs and services**
   Improved engagement in this area may involve family based programs where parents and children can learn about the use of computers and technology together.

5. **Explore ways of working with customers to demonstrate the value of technology**
   Develop initiatives that resembles Early Literary but orientated towards Digital Literacy for customers to address concerns with screen time and some information on how to incorporate digital technology in a valuable way. The development of the initiatives should involve different EPL staff in collaboration with marketing to ensure the information is presented effectively. The ELF team is currently working on a project that will promote child and technology interactions which could be incorporated into a broader initiative.

B. Best Place to Be

Implement personalized customer experiences based on results of customer experience research

1. **Explore options for improved recommendations for customers (could involve a vendor) by Front-Line Staff to evaluate and utilize existing areas of expertise**
   Consider an opt-in service for customers to choose to participate in active staff recommendations or algorithm based item recommendations (e.g. Amazon). For staff this may involve additional training in order to demonstrate how to effectively engage a customer to evaluate what other items they might be interested in.

2. **Explore electronic ticketing for improved line management and program access**
   This would consist of an electronic ticketing system that customers could use instead of standing in line for help. Customers could potentially check-in using an app and staff could meet them at a chosen spot in the library. This ticketing system could allow for a screening process where the customer could select the type of question they have, so staff have an idea of what type of assistance they need. This could be connected to the concept of the electronic concierge. An alternative could be created for those with limited digital literacy skills that would allow for staff assisted check-in or a simplistic ticket with images/colors to identify information.

Investigate and implement technological solutions to strategically locate services

1. **Integrate digital wayfinding in branches**
   Explore the possibility of implementing the following:
   - A digital interactive map of the library resembling those found in malls or the lobby of MNP Tower. Ideally the map could be integrated into the catalogue and app. (i.e. when you look up an item in the catalogue

and it is at you branch, it would show you on a map where exactly to find the item according to call number).

- Use of geo-location technology to find physical items within a library branch. As with a digital interactive map this could be ideally integrated into the catalogue and app. This point could also include push notifications if you have an item on hold and it is on a nearby shelf.

2. **Improve Catalogue stations by:**
   Reorienting the physical computer and computer screen of the catalogue stations to make them more identifiable and interactive (similar to Chapters).
   - Examine how to streamline the catalogue stations so that they specifically direct customers to the catalogue for searching. This could involve restricting the usability of the catalog station for only catalog searching (i.e. Chapters) or streamlining the login process to improve one and done access. Additional content related to effective searching or recommendations could be tied to this and the configuration of the catalogue station.

3. **Evaluate branch Wi-Fi signal strength**
   Conduct a signal strength evaluation of the Wi-Fi in each branch to ensure a consistently strong connection. Unique structural issues should be taken into account. Strategically placed signal boosters may improve signal strength.

4. **Add branch name to Google EPL locations in addition to EPL**
   This is low-hanging fruit that could help customers locate a specific EPL branch online. Adding a branch name would reflect the current practice of other public institutions such as City of Edmonton Recreation Centers. COMPLETE.

Incorporate the following to ensure our virtual spaces are more flexible and responsive to customer needs

1. **Library Chat**
   The Service Point Workflows team is completing an evaluation of Chat. Recommendations based on feedback include: Consider having a pop-up chat screen appearing on the website; clearly displaying library chat on the homepage; changing current vocabulary to make the library chat service more evident to customers - ‘Chat with an Information Ninja’ is not clear for customers; adoption of chat bots to filter and structure chat; and the creation of consistent canned responses for staff to use across the EPL system. How staff are trained for conducting Library Chat and staffing

practices can also be evaluated to provide a more consistent level of service.

2. **Review and revise FAQs on Website**
   Evaluate existing FAQs to improve readability, content and accessibility. Utilize other customer centric data, including the CSS to design robust FAQs that address common customer questions. Examples include placing a hold, accessing vendor controlled content or searching for an item through the catalogue. The creation of FAQs should include different teams in order to foster collaboration and ensure the content is accessible for customers.

Identify priorities to ensure our physical spaces are more flexible and responsive to customer needs

1. **Physical signage in-branch**
   - This could include signage to clarify the following:
     i. Where to stand in line for customer service
     ii. Stroller parking
     iii. More evident hours of operation

C. Best Place to Work

1. **Review job descriptions and hiring practices to include further emphasis on customer experience**
   Evaluate existing job postings and evaluate current hiring practices and reconfiguring them to focus on the concept of customer experience and its strategic place within EPL.

2. **Review hiring/onboarding and probation process**
   Review hiring and onboarding processes to explore possibility of more training before staff start working at a branch (i.e. EPL bootcamp). Review tools for Managers to use for diligent review of staff during probation period and enforcement of EPL employee expectations.

3. **Establish consist engagement with customers based on their goals and needs**
   Ensure that Front-Line staff are able to effectively engage each customer. The level of engagement depends on the customer and staff should be educated in how to evaluate, anticipate and target their information delivery accordingly. The CX team has created and updated resources related to CX expectations and staff onboarding. These documents could place additional emphasis on Front-Line employee engagement and anticipating customer needs. Emphasize co-learning in walking customers through a process so that they gain a basic level of understanding.

4. **Review CX Team's current terms of reference and mandate to include more shared services perspectives**
   Reevaluate the configuration of the CX team to ensure that perspectives from other staff departments are included. The broader the team the more perspectives can be included and considered when it relates to CX at EPL. The CX Team's current mandate could be reconfigured to include a larger focus on CX within the organization in addition to the current focus on staff-training. This may involve creating two teams out of the current CX team; one dedicated to CX and one dedicated to staff training or have some team members attend meetings semi-regularly. The CX team is currently reviewing their mandate but emphasis could be placed on integrating shared services into the team to ensure their perspective is represented.

Future Research

This study suggests many opportunities for future research and the application of CJM and SB methods. Additional research could be done of specific EPL customer demographics to better understand the experience of different groups such as Indigenous customers, those experiencing homelessness, newcomers, families or young adults. Specific demographic studies would allow EPL to better understand specific customer groups and their needs. Targeted recruitment would be necessary to develop a strong participant group of the desired demographic. The focus could also be placed on specific activities, services, and programs including the EPL website, app, chat or select branches. Internal customer experience research could be conducted to map the experience of shared services and how effective EPL is meeting the customer needs of staff.

The methods used in this study could be applied at the branch level to understand how customers are using EPL services, programs and collections within a location. It can also be used by shared services in order to analyze internal customer needs or to focus on a specific customer demographic, such as socially vulnerable populations.

Conclusion

This project underscored the value of Customer Journey Mapping and Service Blueprinting as methods to evaluate, analyze and improve library service. The combination of both of these methods allowed the incorporation of customer and staff perspectives in order to identify problematic touchpoints and areas for potential improvement. While the findings are derived from two months of data collection with a small sample size and are not generalizable, both minor and more involved changes have been suggested to improve the overall customer experience across different touchpoints. For other more complicated pain points or those with significant logistical constraints the data collected provides a foundation for moving forward for future evaluation or discussion. EPL must continue to maintain a strong customer service ethic which places the customer experience as a core value and strategic priority in all settings.

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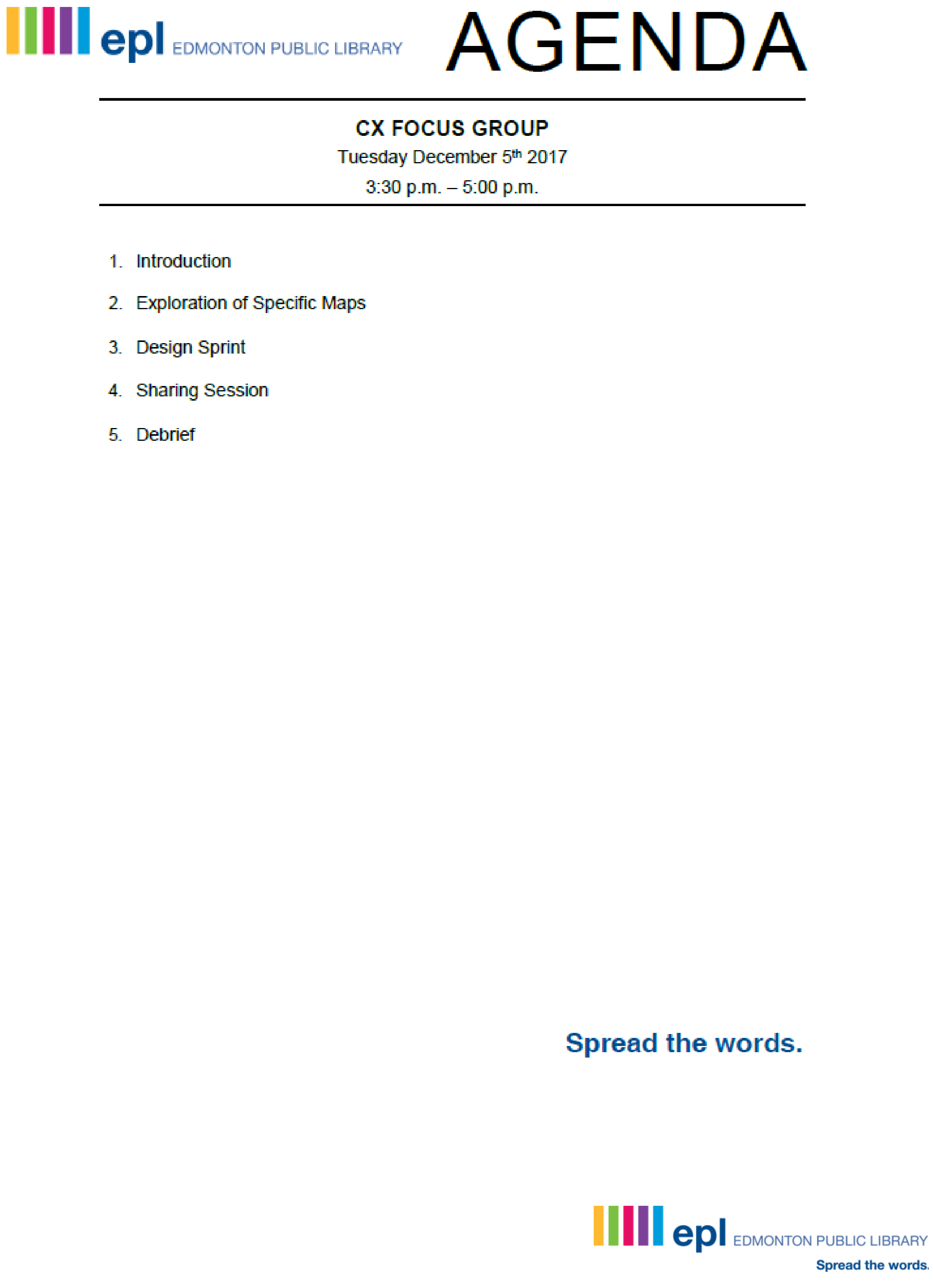
Appendix A1 – Agenda Sent to Focus Group Participant



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AGENDA

CX FOCUS GROUP
Tuesday December 5th 2017
3:30 p.m. – 5:00 p.m.

1. Introduction
2. Exploration of Specific Maps
3. Design Sprint
4. Sharing Session
5. Debrief

Spread the words.

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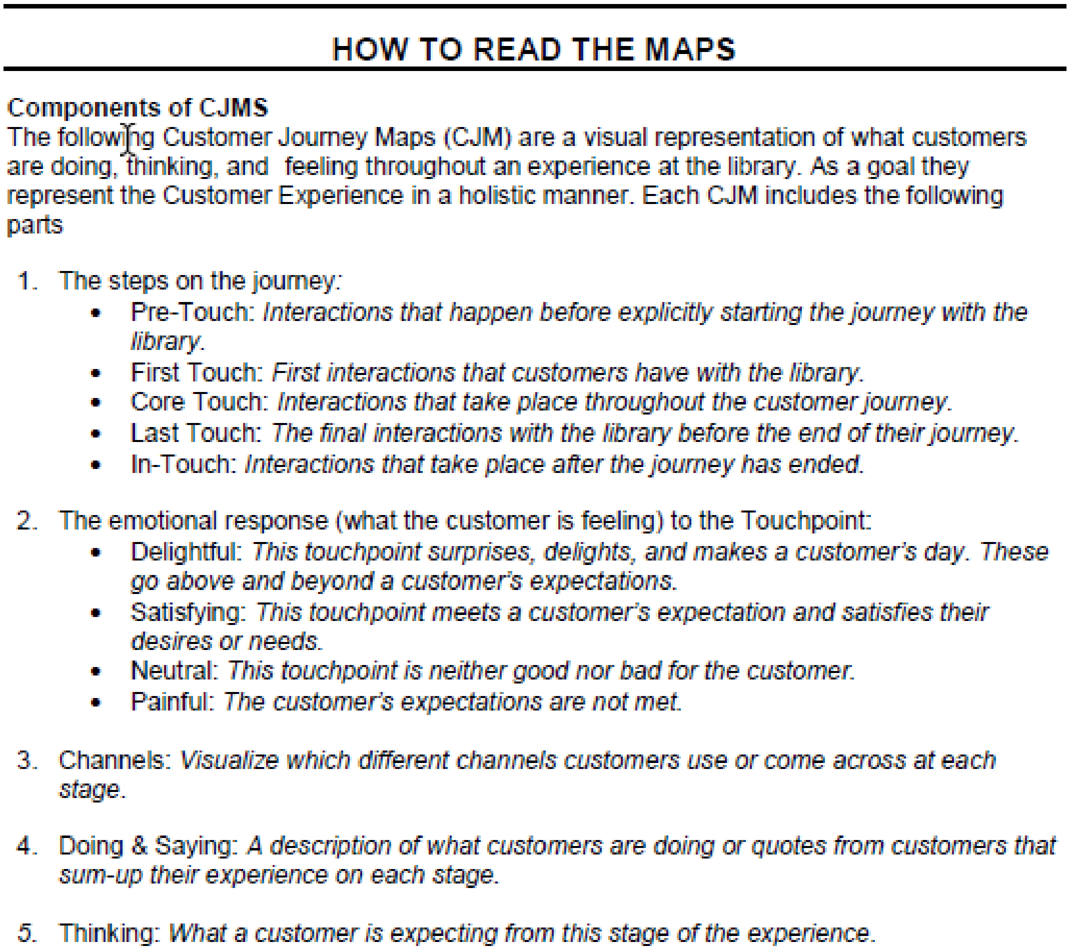
Spread the words.

Appendix A2 – Instructions on Reading CJMS sent to Focus Group Participant



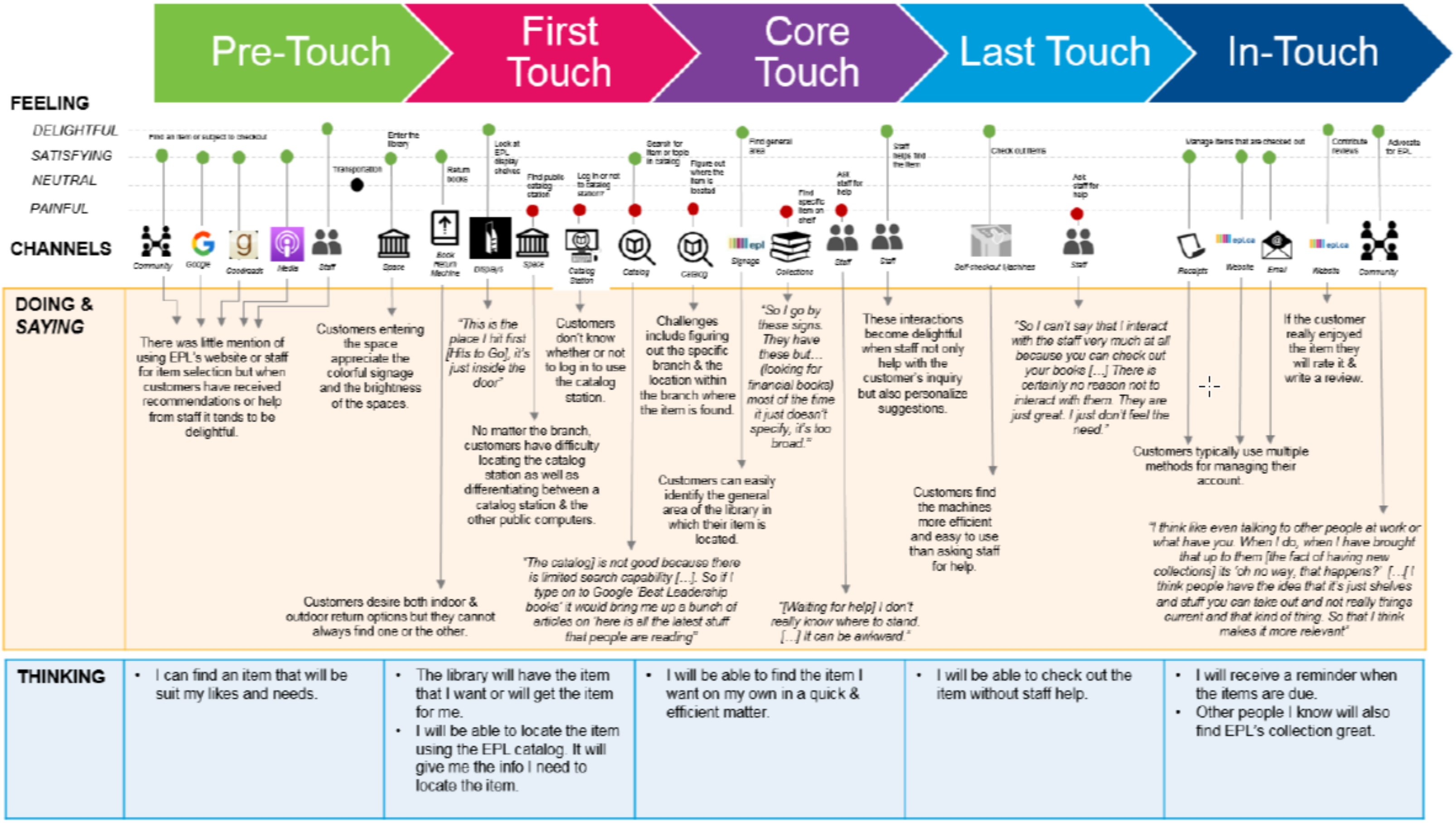
HOW TO READ THE MAPS

Components of CJMS
The following Customer Journey Maps (CJM) are a visual representation of what customers are doing, thinking, and feeling throughout an experience at the library. As a goal they represent the Customer Experience in a holistic manner. Each CJM includes the following parts

1. The steps on the journey:
    - Pre-Touch: *Interactions that happen before explicitly starting the journey with the library.*
    - First Touch: *First interactions that customers have with the library.*
    - Core Touch: *Interactions that take place throughout the customer journey.*
    - Last Touch: *The final interactions with the library before the end of their journey.*
    - In-Touch: *Interactions that take place after the journey has ended.*
2. The emotional response (what the customer is feeling) to the Touchpoint:
    - Delightful: *This touchpoint surprises, delights, and makes a customer's day. These go above and beyond a customer's expectations.*
    - Satisfying: *This touchpoint meets a customer's expectation and satisfies their desires or needs.*
    - Neutral: *This touchpoint is neither good nor bad for the customer.*
    - Painful: *The customer's expectations are not met.*
3. Channels: *Visualize which different channels customers use or come across at each stage.*
4. Doing & Saying: *A description of what customers are doing or quotes from customers that sum-up their experience on each stage.*
5. Thinking: *What a customer is expecting from this stage of the experience.*

Appendix A3 – Example of CJMS sent to Focus Group Participant

Physical Item Acquisition


Pre-Touch
First Touch
Core Touch
Last Touch
In-Touch
FEELING
DELIGHTFUL
SATISFYING
NEUTRAL
PAINFUL
CHANNELS
Find an item or subject to checkout
Transportation
Enter the library
Return books
Look at EPL display shelves
Find public catalog station
Log in or not to catalog station?
Search for item or topic in catalog
Figure out where the item is located
Find general area
Find specific item on shelf
Ask staff for help
Staff helps find the item
Check out items
Ask staff for help
Manage items that are checked out
Contribute reviews
Advocate for EPL
Community
Google
Goodreads
Media
Staff
Space
Book Return Machine
Displays
Space
Catalog Station
Catalog
Catalog
Signage
Collections
Staff
Staff
Self-checkout Machines
Staff
Receipts
Website
Email
Website
Community
DOING & SAYING
THINKING

There was little mention of using EPL's website or staff for item selection but when customers have received recommendations or help from staff it tends to be delightful.

Customers entering the space appreciate the colorful signage and the brightness of the spaces.

"This is the place I hit first [Hits to Go], it's just inside the door"

Customers don't know whether or not to log in to use the catalog station.

No matter the branch, customers have difficulty locating the catalog station as well as differentiating between a catalog station & the other public computers.

Customers desire both indoor & outdoor return options but they cannot always find one or the other.

Challenges include figuring out the specific branch & the location within the branch where the item is found.

"The catalog] is not good because there is limited search capability […]. So if I type on to Google 'Beat Leadership books' it would bring me up a bunch of articles on 'here is all the latest stuff that people are reading"

Customers can easily identify the general area of the library in which their item is located.

"So I go by these signs. They have these but… (looking for financial books) most of the time it just doesn't specify, it's too broad."

"[Waiting for help] I don't really know where to stand. […] it can be awkward."

These interactions become delightful when staff not only help with the customer's inquiry but also personalize suggestions.

Customers find the machines more efficient and easy to use than asking staff for help.

"So I can't say that I interact with the staff very much at all because you can check out your books […] There is certainly no reason not to interact with them. They are just great. I just don't feel the need."

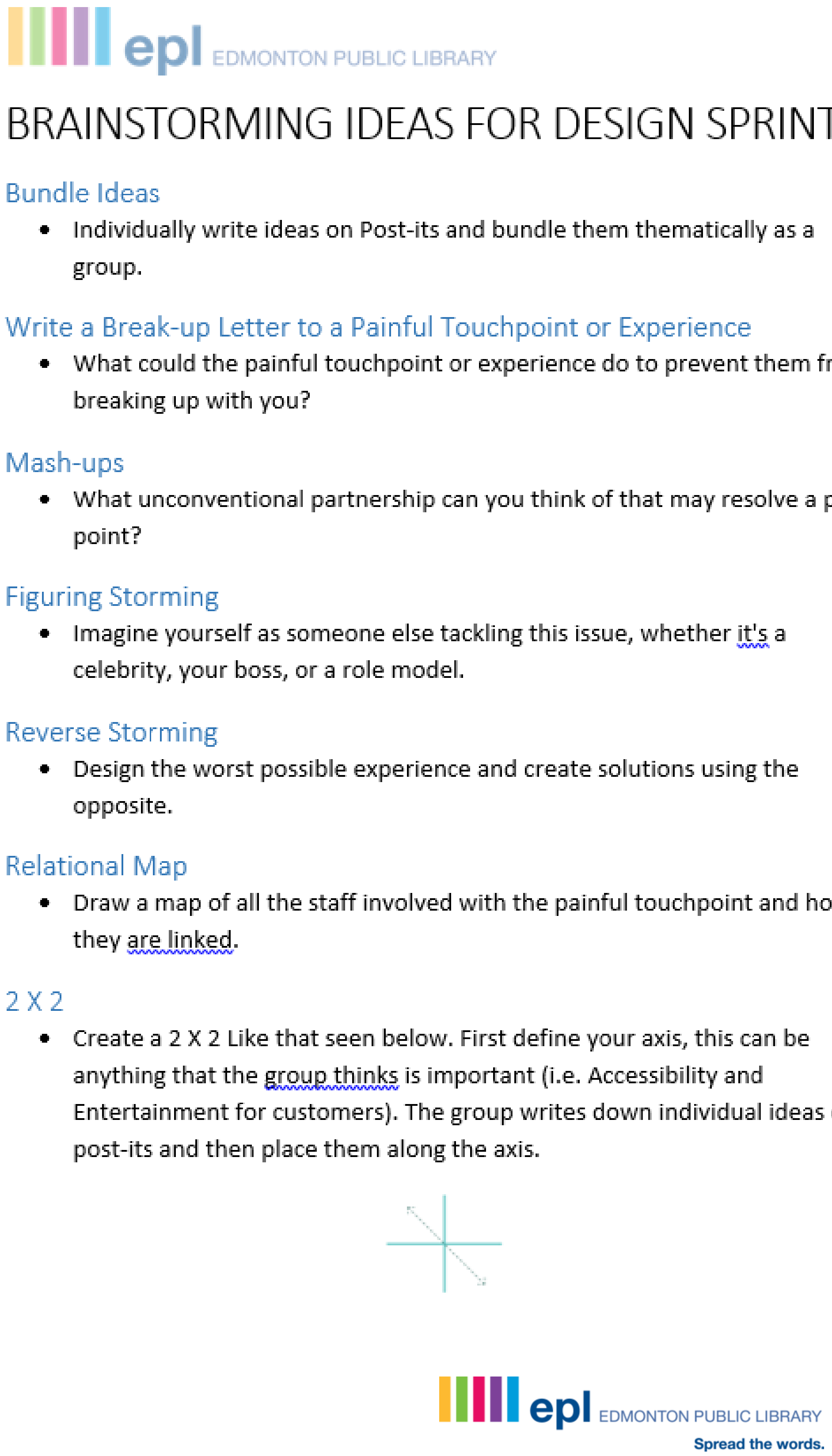
Customers typically use multiple methods for managing their account.

If the customer really enjoyed the item they will rate it & write a review.

"I think like even talking to other people at work or what have you. When I do, when I have brought that up to them [the fact of having new collections] its 'oh no way, that happens?' […] I think people have the idea that it's just shelves and stuff you can take out and not really things current and that kind of thing. So that I think makes it more relevant"

THINKING	- I can find an item that will be suit my likes and needs.	- The library will have the item that I want or will get the item for me. - I will be able to locate the item using the EPL catalog. It will give me the info I need to locate the item.	- I will be able to find the item I want on my own in a quick & efficient matter.	- I will be able to check out the item without staff help.	- I will receive a reminder when the items are due. - Other people I know will also find EPL's collection great.

Appendix B – Brainstorming techniques provided to focus group participants



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BRAINSTORMING IDEAS FOR DESIGN SPRINT

Bundle Ideas

- Individually write ideas on Post-its and bundle them thematically as a group.

Write a Break-up Letter to a Painful Touchpoint or Experience

- What could the painful touchpoint or experience do to prevent them from breaking up with you?

Mash-ups

- What unconventional partnership can you think of that may resolve a pain point?

Figuring Storming

- Imagine yourself as someone else tackling this issue, whether it's a celebrity, your boss, or a role model.

Reverse Storming

- Design the worst possible experience and create solutions using the opposite.

Relational Map

- Draw a map of all the staff involved with the painful touchpoint and how they are linked.

2 X 2

- Create a 2 X 2 Like that seen below. First define your axis, this can be anything that the group thinks is important (i.e. Accessibility and Entertainment for customers). The group writes down individual ideas on post-its and then place them along the axis.

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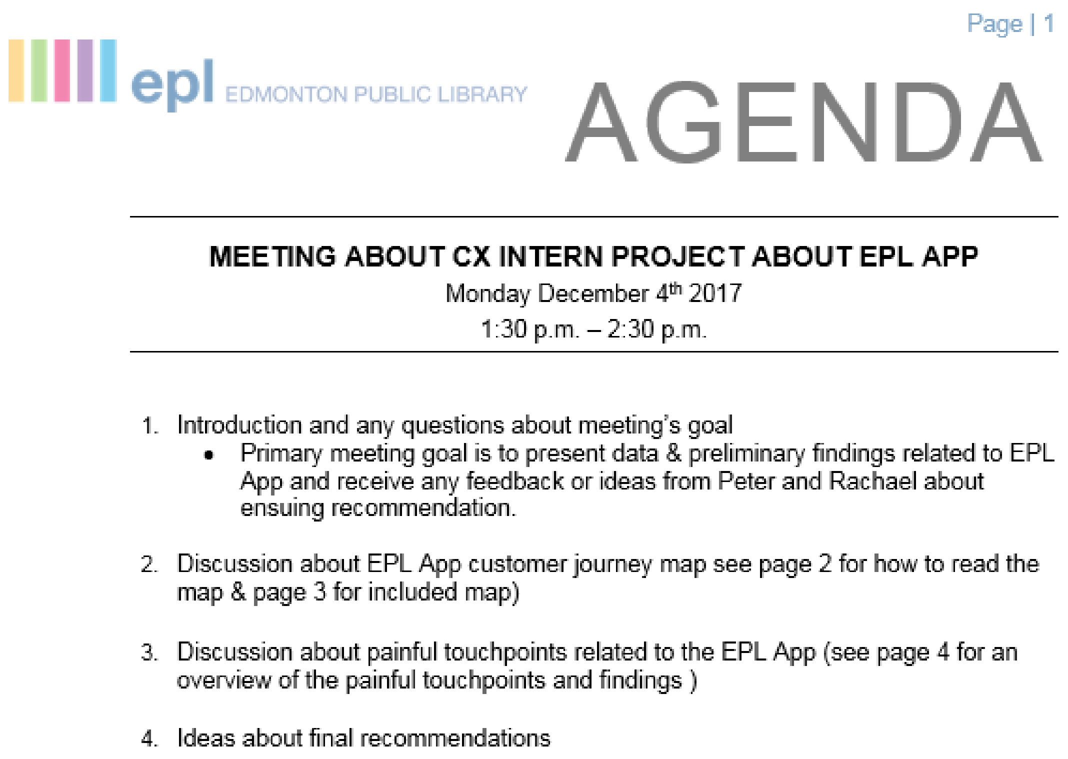
Spread the words.

Appendix C1 – Example of agenda sent to internal stakeholder



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AGENDA

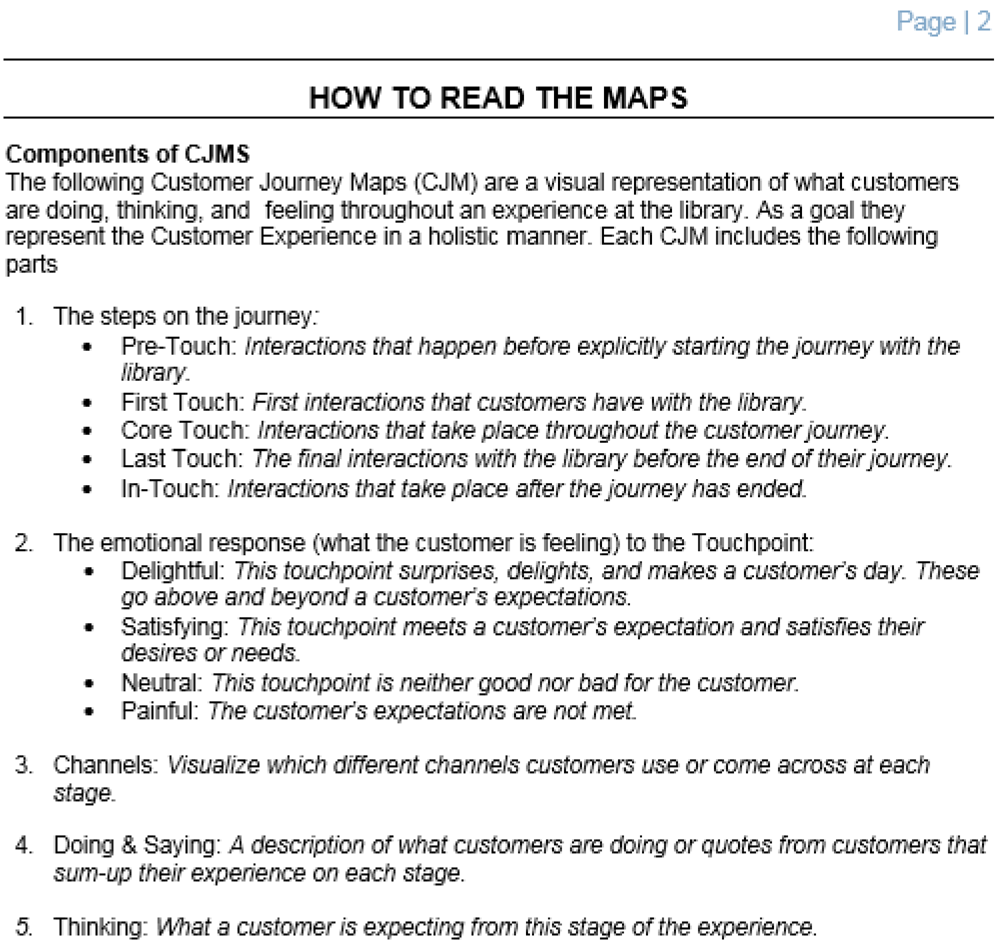
MEETING ABOUT CX INTERN PROJECT ABOUT EPL APP

Monday December 4th 2017

1:30 p.m. – 2:30 p.m.

1. Introduction and any questions about meeting's goal
    - Primary meeting goal is to present data & preliminary findings related to EPL App and receive any feedback or ideas from Peter and Rachael about ensuing recommendation.
2. Discussion about EPL App customer journey map see page 2 for how to read the map & page 3 for included map)
3. Discussion about painful touchpoints related to the EPL App (see page 4 for an overview of the painful touchpoints and findings)
4. Ideas about final recommendations

Appendix C2 – Example of how to read CJMs sent to internal stakeholders



HOW TO READ THE MAPS

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    - Neutral: *This touchpoint is neither good nor bad for the customer.*
    - Painful: *The customer's expectations are not met.*
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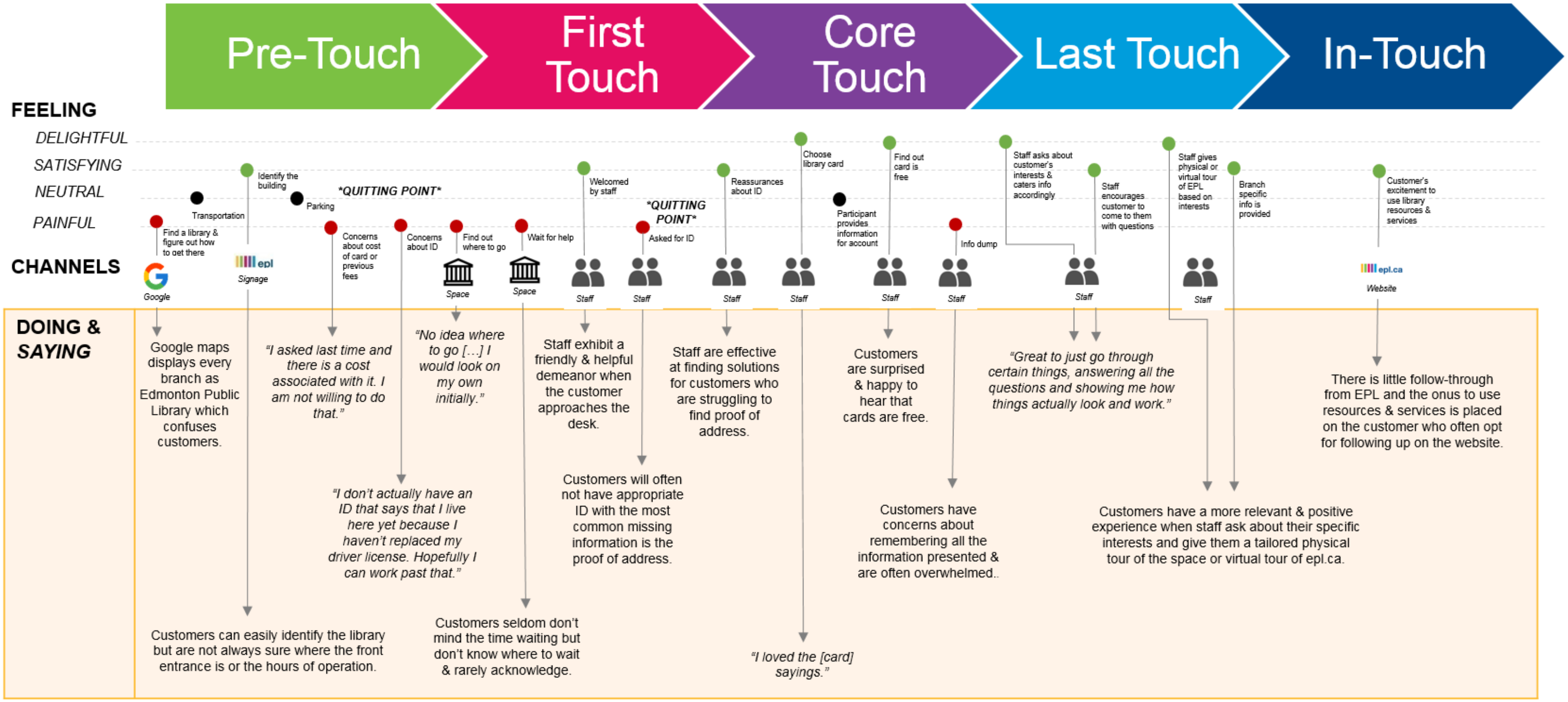
4. Doing & Saying: *A description of what customers are doing or quotes from customers that sum-up their experience on each stage.*
5. Thinking: *What a customer is expecting from this stage of the experience.*

Appendix C3 – Example of relevant CJM sent to internal stakeholders


Pre-Touch
First Touch
Core Touch
Last Touch
In-Touch
FEELING
DELIGHTFUL
SATISFYING
NEUTRAL
PAINFUL
CHANNELS
Find a library & figure out how to get there
Transportation
Identify the building
Parking
QUITTING POINT
Concerns about cost of card or previous fees
Concerns about ID
Find out where to go
Wait for help
Welcomed by staff
QUITTING POINT
Asked for ID
Reassurances about ID
Choose library card
Participant provides information for account
Find out card is free
Info dump
Staff asks about customer's interests & caters info accordingly
Staff encourages customer to come to them with questions
Staff gives physical or virtual tour of EPL based on interests
Branch specific info is provided
Customer's excitement to use library resources & services
Google
epl
Signage
Space
Space
Staff
Staff
Staff
Staff
Staff
Staff
Staff
Staff
epl.ca
Website
DOING & SAYING

Google maps displays every branch as Edmonton Public Library which confuses customers.

"I asked last time and there is a cost associated with it. I am not willing to do that."

"No idea where to go […] I would look on my own initially."

Staff exhibit a friendly & helpful demeanor when the customer approaches the desk.

Staff are effective at finding solutions for customers who are struggling to find proof of address.

Customers are surprised & happy to hear that cards are free.

"Great to just go through certain things, answering all the questions and showing me how things actually look and work."

There is little follow-through from EPL and the onus to use resources & services is placed on the customer who often opt for following up on the website.

"I don't actually have an ID that says that I live here yet because I haven't replaced my driver license. Hopefully I can work past that."

Customers will often not have appropriate ID with the most common missing information is the proof of address.

Customers have concerns about remembering all the information presented & are often overwhelmed.

Customers have a more relevant & positive experience when staff ask about their specific interests and give them a tailored physical tour of the space or virtual tour of epl.ca.

Customers can easily identify the library but are not always sure where the front entrance is or the hours of operation.

Customers seldom don't mind the time waiting but don't know where to wait & rarely acknowledge.

"I loved the [card] sayings."

THINKING	• I will be able to get to the library & identify the library upon arrival. • It will be challenging for me to have proper ID to get a library card. • It will cost me something to get a library card.	• I will have to wait to get a library card. • Getting a library card will take me a lot of time. • I might not get a library card due to lack of ID.	• All the important card information will be presented to the me when signing up.	• The information I received will be relevant to my personal interests. • After receiving this information I will be able to competently use the library.	• It will be easy to find the rest of the information I need about EPL resources & services. • I will keep using my library card.

EPL Membership Customer Journey Map

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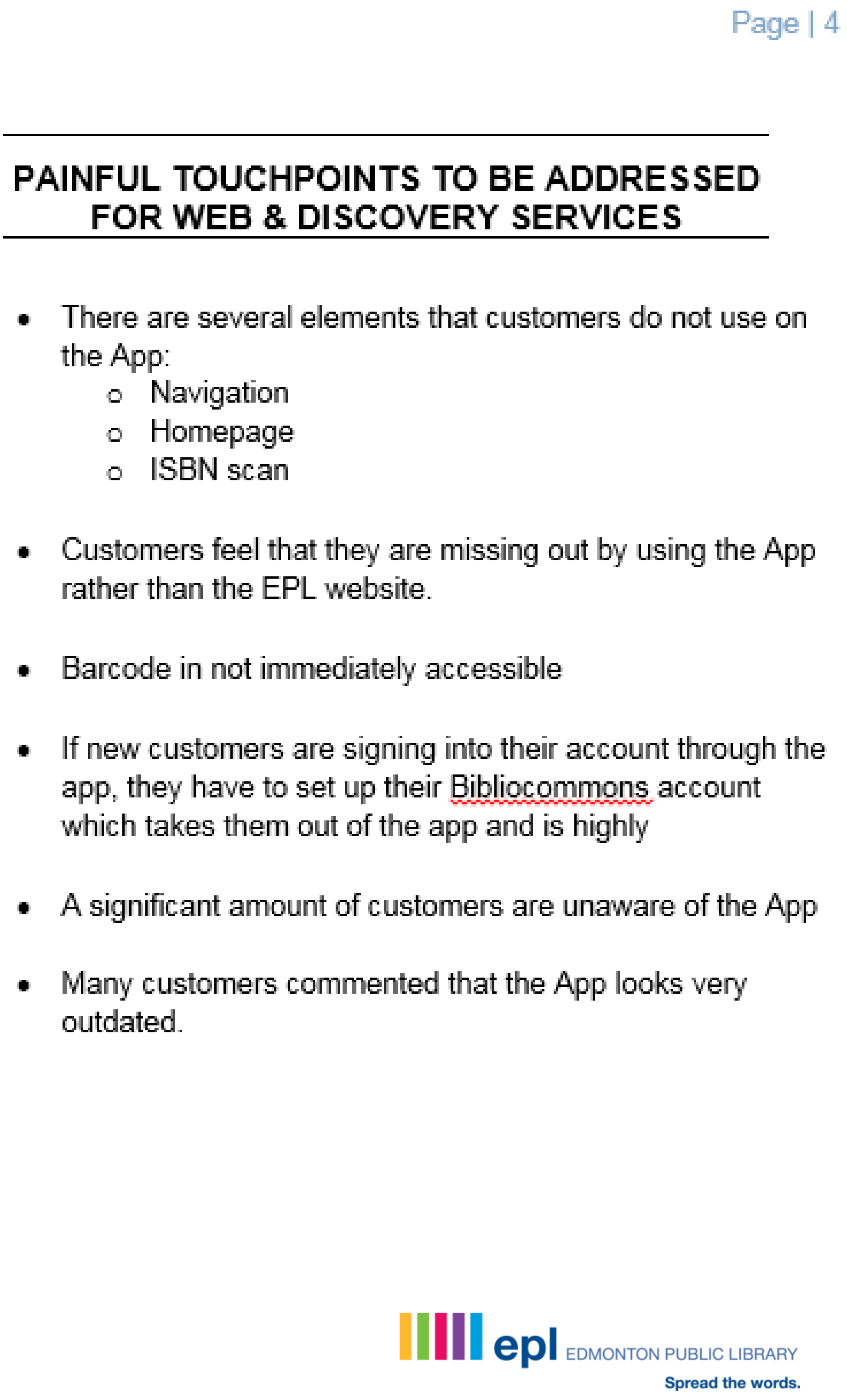
Appendix C4 – Example of pain point breakdown sent to internal stakeholders



PAINFUL TOUCHPOINTS TO BE ADDRESSED FOR WEB & DISCOVERY SERVICES

- There are several elements that customers do not use on the App:
    - Navigation
    - Homepage
    - ISBN scan

- Customers feel that they are missing out by using the App rather than the EPL website.

- Barcode in not immediately accessible

- If new customers are signing into their account through the app, they have to set up their Bibliocommons account which takes them out of the app and is highly

- A significant amount of customers are unaware of the App

- Many customers commented that the App looks very outdated.

Appendix D1 – Service Blueprint Components

1. **Customer Pain Points**

   The pain points from a specific CJM were consolidated into a manageable number of pain points per SB based on their content.

2. **EPL Employee Actions (Front Stage):**

   This section consists of the employee actions that the customers can observe directly and that contribute to the pain point.

3. **Internal Support and Influences (Back Stage):**

   This section consists of the EPL specific practices, procedures, projects, and workflows that influence the employee actions and contribute to the pain point.

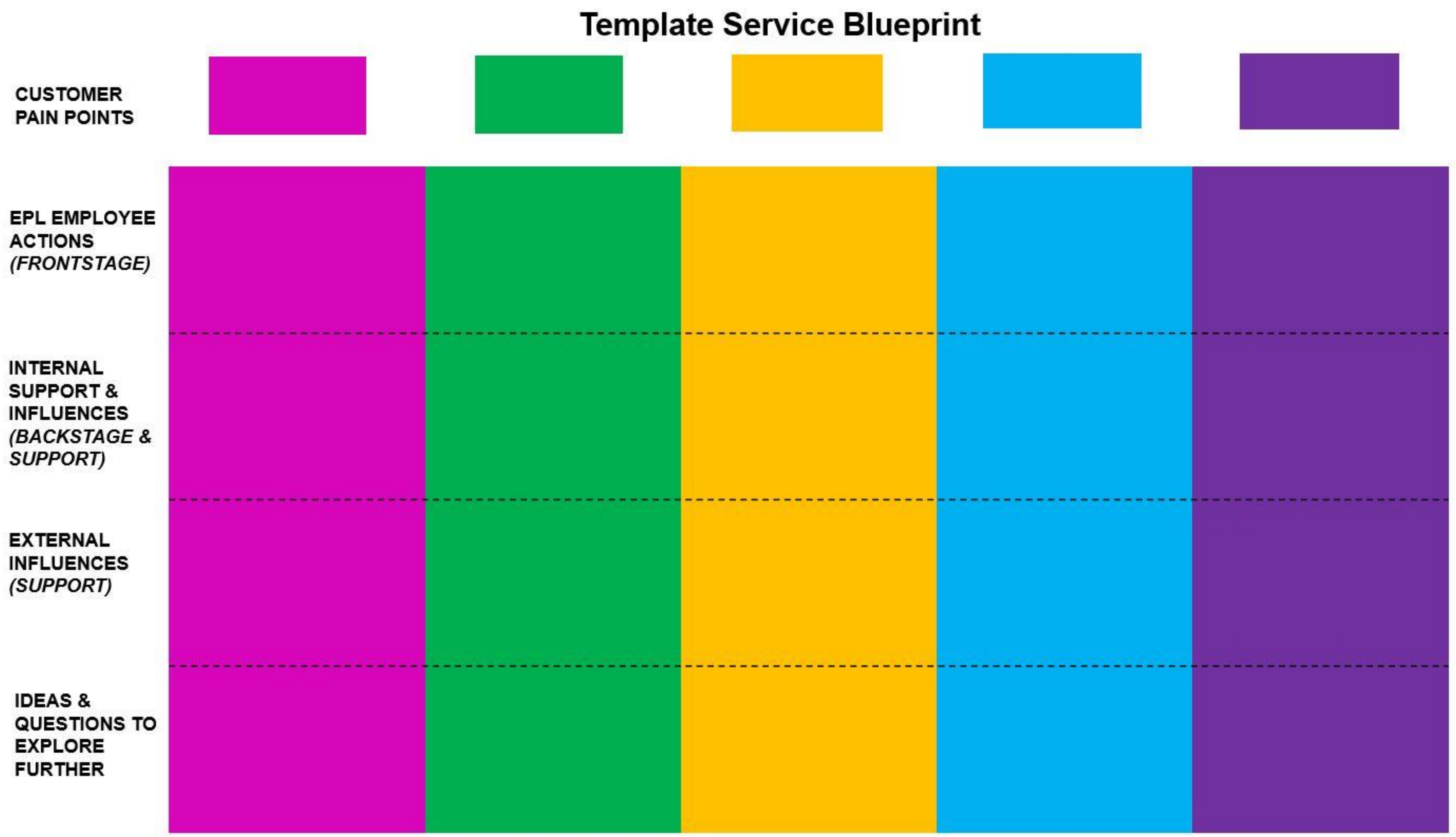
4. **External Influences (Outside the Organization):**

   This section consists of external influences on EPL or/and their customers that contribute to the pain point. Many of the external influences are not conditions that EPL has control over such as BiblioCommons control of the catalog interface and customer expectations related website content and search functionality.

5. **Ideas and Questions to Explore Further:**

   This section consolidates ideas and questions presented in the focus groups and meetings related to addressing painful touchpoints. These comments were used as a starting point to explore potential recommendations.

Appendix D2 – Service Blueprint Template



Template Service Blueprint

CUSTOMER PAIN POINTS

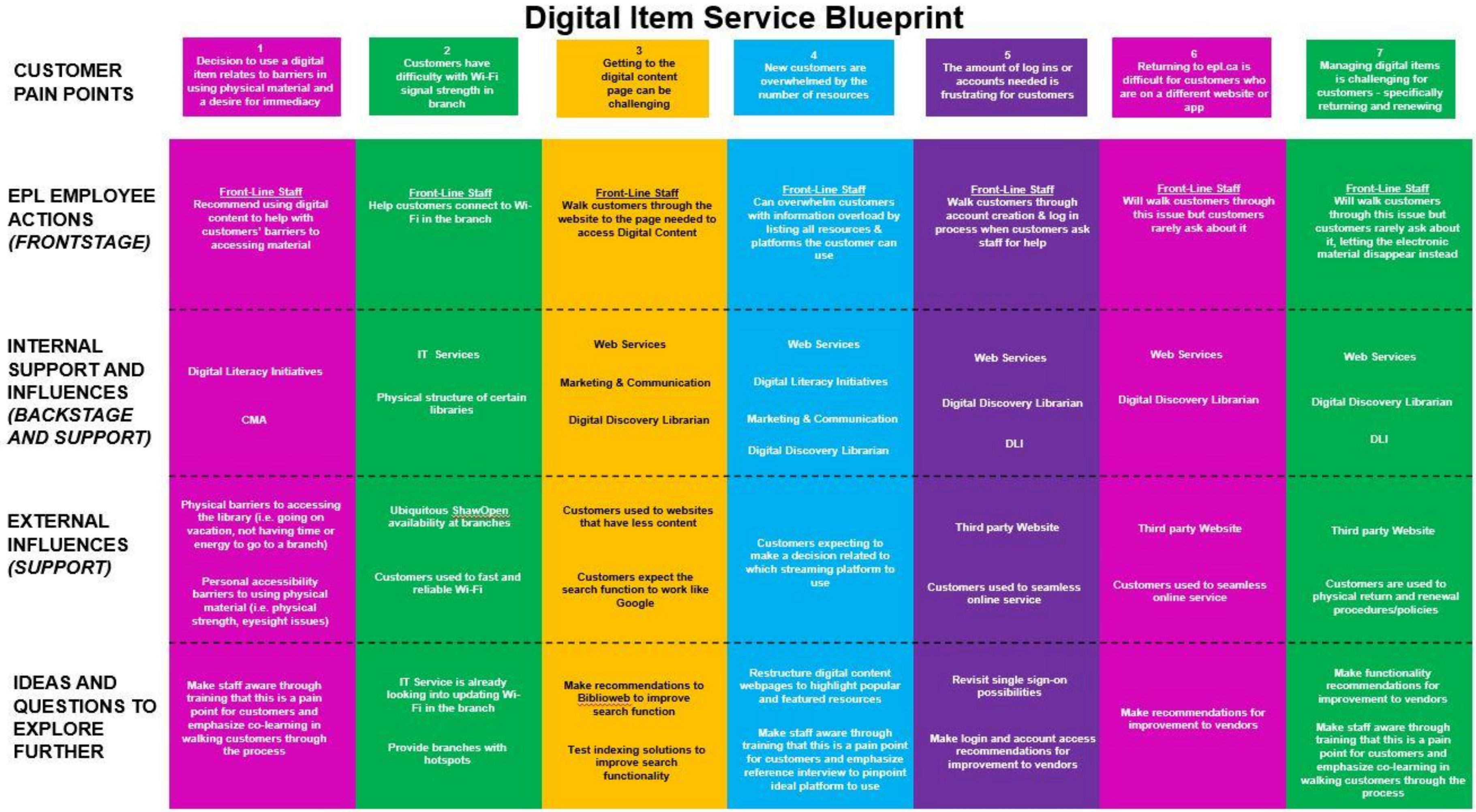
EPL EMPLOYEE ACTIONS *(FRONTSTAGE)*

INTERNAL SUPPORT & INFLUENCES *(BACKSTAGE & SUPPORT)*

EXTERNAL INFLUENCES *(SUPPORT)*

IDEAS & QUESTIONS TO EXPLORE FURTHER

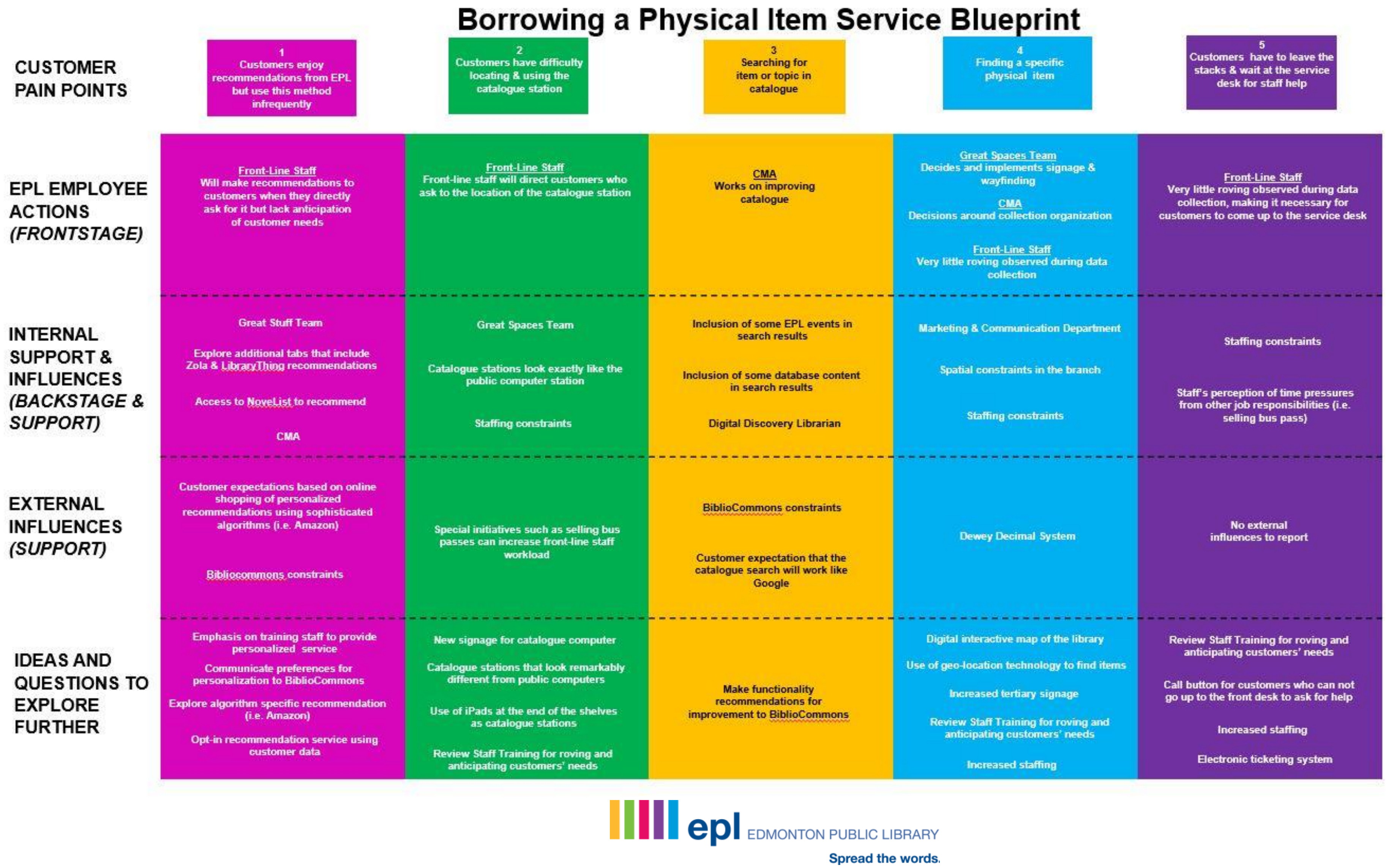
Appendix D3 – Digital Item Service Blueprint



Digital Item Service Blueprint

CUSTOMER PAIN POINTS	1 Decision to use a digital item relates to barriers in using physical material and a desire for immediacy	2 Customers have difficulty with Wi-Fi signal strength in branch	3 Getting to the digital content page can be challenging	4 New customers are overwhelmed by the number of resources	5 The amount of log ins or accounts needed is frustrating for customers	6 Returning to epl.ca is difficult for customers who are on a different website or app	7 Managing digital items is challenging for customers - specifically returning and renewing
EPL EMPLOYEE ACTIONS *(FRONTSTAGE)*	Front-Line Staff Recommend using digital content to help with customers' barriers to accessing material	Front-Line Staff Help customers connect to Wi-Fi in the branch	Front-Line Staff Walk customers through the website to the page needed to access Digital Content	Front-Line Staff Can overwhelm customers with information overload by listing all resources & platforms the customer can use	Front-Line Staff Walk customers through account creation & log in process when customers ask staff for help	Front-Line Staff Will walk customers through this issue but customers rarely ask about it	Front-Line Staff Will walk customers through this issue but customers rarely ask about it, letting the electronic material disappear instead
INTERNAL SUPPORT AND INFLUENCES *(BACKSTAGE AND SUPPORT)*	Digital Literacy Initiatives CMA	IT Services Physical structure of certain libraries	Web Services Marketing & Communication Digital Discovery Librarian	Web Services Digital Literacy Initiatives Marketing & Communication Digital Discovery Librarian	Web Services Digital Discovery Librarian DLI	Web Services Digital Discovery Librarian	Web Services Digital Discovery Librarian DLI
EXTERNAL INFLUENCES *(SUPPORT)*	Physical barriers to accessing the library (i.e. going on vacation, not having time or energy to go to a branch) Personal accessibility barriers to using physical material (i.e. physical strength, eyesight issues)	Ubiquitous ShawOpen availability at branches Customers used to fast and reliable Wi-Fi	Customers used to websites that have less content Customers expect the search function to work like Google	Customers expecting to make a decision related to which streaming platform to use	Third party Website Customers used to seamless online service	Third party Website Customers used to seamless online service	Third party Website Customers are used to physical return and renewal procedures/policies
IDEAS AND QUESTIONS TO EXPLORE FURTHER	Make staff aware through training that this is a pain point for customers and emphasize co-learning in walking customers through the process	IT Service is already looking into updating Wi-Fi in the branch Provide branches with hotspots	Make recommendations to Biblioweb to improve search function Test indexing solutions to improve search functionality	Restructure digital content webpages to highlight popular and featured resources Make staff aware through training that this is a pain point for customers and emphasize reference interview to pinpoint ideal platform to use	Revisit single sign-on possibilities Make login and account access recommendations for improvement to vendors	Make recommendations for improvement to vendors	Make functionality recommendations for improvement to vendors Make staff aware through training that this is a pain point for customers and emphasize co-learning in walking customers through the process

Appendix D4 – Borrowing a Physical Item Service Blueprint

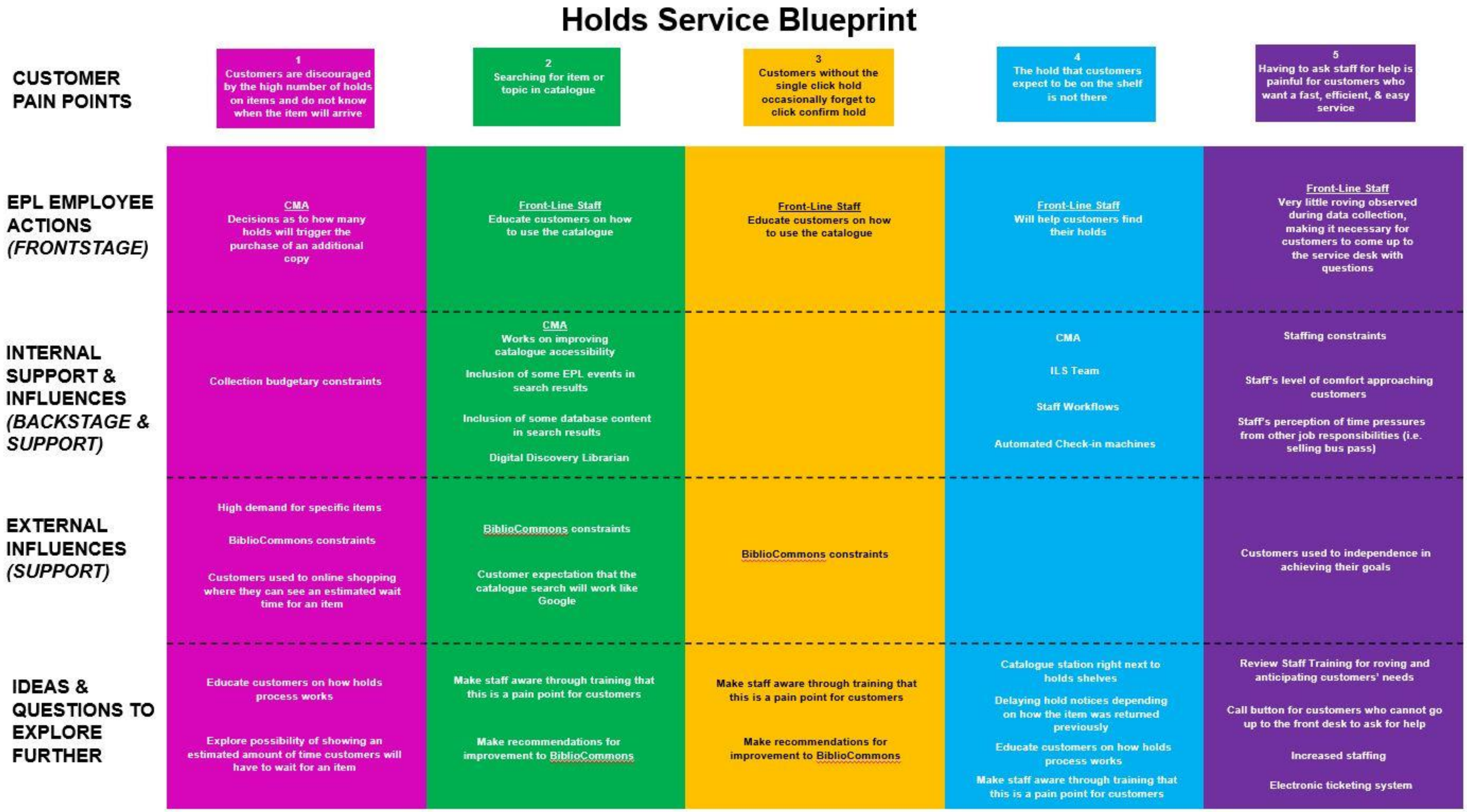


Borrowing a Physical Item Service Blueprint

CUSTOMER PAIN POINTS	1 Customers enjoy recommendations from EPL but use this method infrequently	2 Customers have difficulty locating & using the catalogue station	3 Searching for item or topic in catalogue	4 Finding a specific physical item	5 Customers have to leave the stacks & wait at the service desk for staff help
EPL EMPLOYEE ACTIONS *(FRONTSTAGE)*	Front-Line Staff Will make recommendations to customers when they directly ask for it but lack anticipation of customer needs	Front-Line Staff Front-line staff will direct customers who ask to the location of the catalogue station	CMA Works on improving catalogue	Great Spaces Team Decides and implements signage & wayfinding CMA Decisions around collection organization Front-Line Staff Very little roving observed during data collection	Front-Line Staff Very little roving observed during data collection, making it necessary for customers to come up to the service desk
INTERNAL SUPPORT & INFLUENCES *(BACKSTAGE & SUPPORT)*	Great Stuff Team Explore additional tabs that include Zola & LibraryThing recommendations Access to NoveList to recommend CMA	Great Spaces Team Catalogue stations look exactly like the public computer station Staffing constraints	Inclusion of some EPL events in search results Inclusion of some database content in search results Digital Discovery Librarian	Marketing & Communication Department Spatial constraints in the branch Staffing constraints	Staffing constraints Staff's perception of time pressures from other job responsibilities (i.e. selling bus pass)
EXTERNAL INFLUENCES *(SUPPORT)*	Customer expectations based on online shopping of personalized recommendations using sophisticated algorithms (i.e. Amazon) Bibliocommons constraints	Special initiatives such as selling bus passes can increase front-line staff workload	BiblioCommons constraints Customer expectation that the catalogue search will work like Google	Dewey Decimal System	No external influences to report
IDEAS AND QUESTIONS TO EXPLORE FURTHER	Emphasis on training staff to provide personalized service Communicate preferences for personalization to BiblioCommons Explore algorithm specific recommendation (i.e. Amazon) Opt-in recommendation service using customer data	New signage for catalogue computer Catalogue stations that look remarkably different from public computers Use of iPads at the end of the shelves as catalogue stations Review Staff Training for roving and anticipating customers' needs	Make functionality recommendations for improvement to BiblioCommons	Digital interactive map of the library Use of geo-location technology to find items Increased tertiary signage Review Staff Training for roving and anticipating customers' needs Increased staffing	Review Staff Training for roving and anticipating customers' needs Call button for customers who can not go up to the front desk to ask for help Increased staffing Electronic ticketing system

epl EDMONTON PUBLIC LIBRARY
Spread the words.

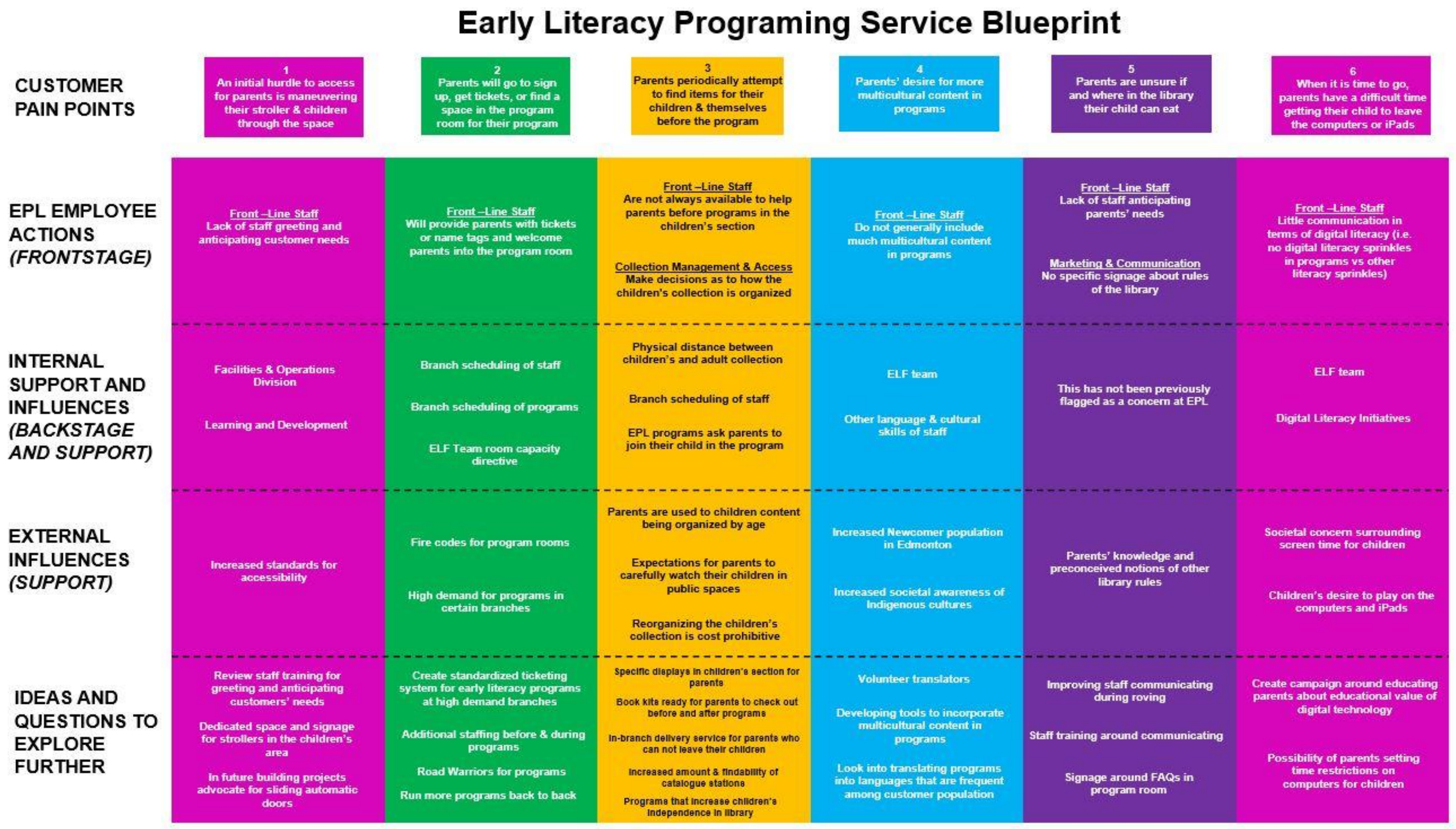
Appendix D5 – Holds Service Blueprint



Holds Service Blueprint

CUSTOMER PAIN POINTS	1 Customers are discouraged by the high number of holds on items and do not know when the item will arrive	2 Searching for item or topic in catalogue	3 Customers without the single click hold occasionally forget to click confirm hold	4 The hold that customers expect to be on the shelf is not there	5 Having to ask staff for help is painful for customers who want a fast, efficient, & easy service
EPL EMPLOYEE ACTIONS *(FRONTSTAGE)*	CMA Decisions as to how many holds will trigger the purchase of an additional copy	Front-Line Staff Educate customers on how to use the catalogue	Front-Line Staff Educate customers on how to use the catalogue	Front-Line Staff Will help customers find their holds	Front-Line Staff Very little roving observed during data collection, making it necessary for customers to come up to the service desk with questions
INTERNAL SUPPORT & INFLUENCES *(BACKSTAGE & SUPPORT)*	Collection budgetary constraints	CMA Works on improving catalogue accessibility Inclusion of some EPL events in search results Inclusion of some database content in search results Digital Discovery Librarian		CMA ILS Team Staff Workflows Automated Check-in machines	Staffing constraints Staff's level of comfort approaching customers Staff's perception of time pressures from other job responsibilities (i.e. selling bus pass)
EXTERNAL INFLUENCES *(SUPPORT)*	High demand for specific items BiblioCommons constraints Customers used to online shopping where they can see an estimated wait time for an item	BiblioCommons constraints Customer expectation that the catalogue search will work like Google	BiblioCommons constraints		Customers used to independence in achieving their goals
IDEAS & QUESTIONS TO EXPLORE FURTHER	Educate customers on how holds process works Explore possibility of showing an estimated amount of time customers will have to wait for an item	Make staff aware through training that this is a pain point for customers Make recommendations for improvement to BiblioCommons	Make staff aware through training that this is a pain point for customers Make recommendations for improvement to BiblioCommons	Catalogue station right next to holds shelves Delaying hold notices depending on how the item was returned previously Educate customers on how holds process works Make staff aware through training that this is a pain point for customers	Review Staff Training for roving and anticipating customers' needs Call button for customers who cannot go up to the front desk to ask for help Increased staffing Electronic ticketing system

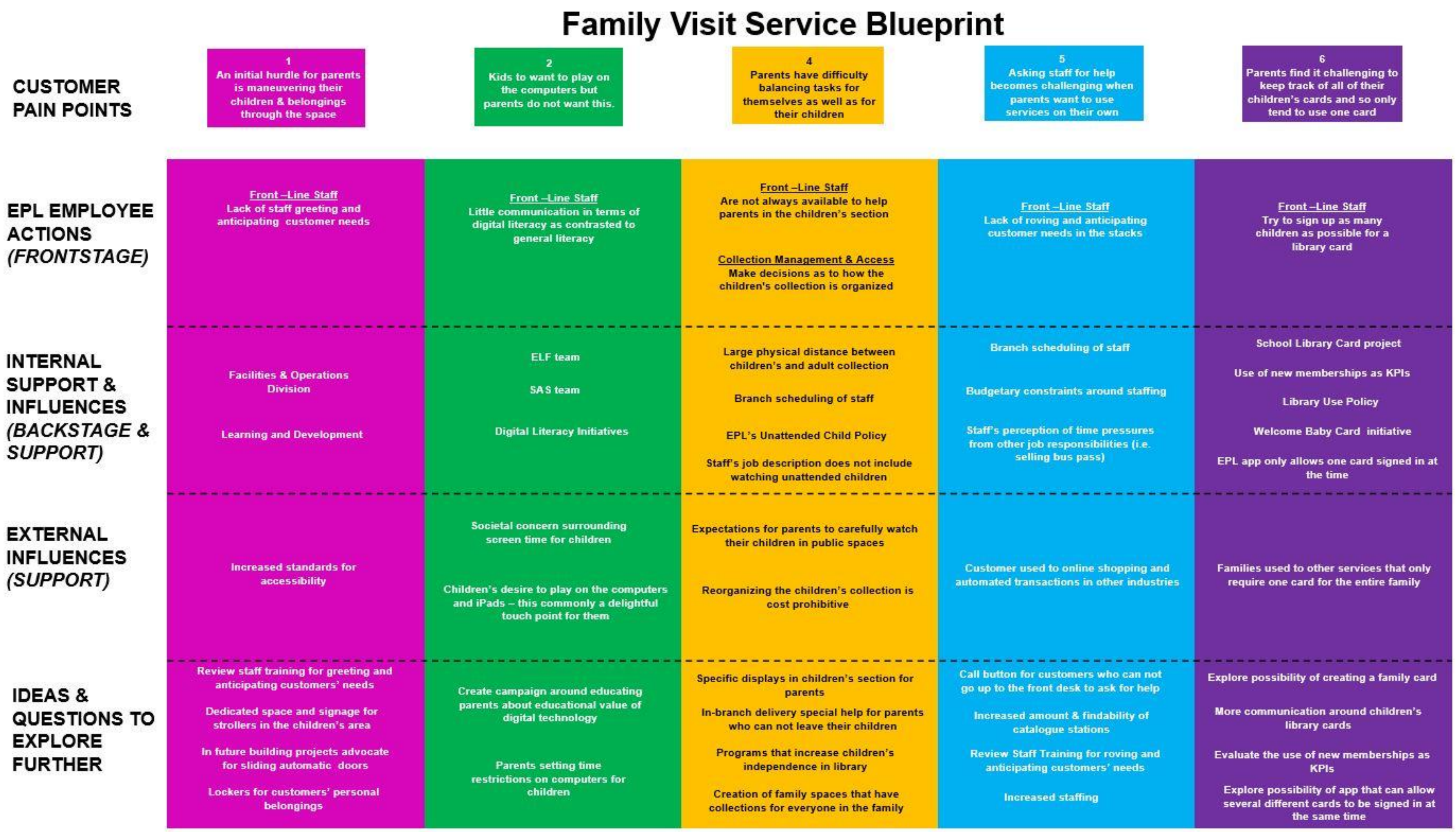
Appendix D6 – Early Literacy Program Service Blueprint



Early Literacy Programing Service Blueprint

CUSTOMER PAIN POINTS	1 An initial hurdle to access for parents is maneuvering their stroller & children through the space	2 Parents will go to sign up, get tickets, or find a space in the program room for their program	3 Parents periodically attempt to find items for their children & themselves before the program	4 Parents' desire for more multicultural content in programs	5 Parents are unsure if and where in the library their child can eat	6 When it is time to go, parents have a difficult time getting their child to leave the computers or iPads
EPL EMPLOYEE ACTIONS *(FRONTSTAGE)*	Front –Line Staff Lack of staff greeting and anticipating customer needs	Front –Line Staff Will provide parents with tickets or name tags and welcome parents into the program room	Front –Line Staff Are not always available to help parents before programs in the children's section Collection Management & Access Make decisions as to how the children's collection is organized	Front –Line Staff Do not generally include much multicultural content in programs	Front –Line Staff Lack of staff anticipating parents' needs Marketing & Communication No specific signage about rules of the library	Front –Line Staff Little communication in terms of digital literacy (i.e. no digital literacy sprinkles in programs vs other literacy sprinkles)
INTERNAL SUPPORT AND INFLUENCES *(BACKSTAGE AND SUPPORT)*	Facilities & Operations Division Learning and Development	Branch scheduling of staff Branch scheduling of programs ELF Team room capacity directive	Physical distance between children's and adult collection Branch scheduling of staff EPL programs ask parents to join their child in the program	ELF team Other language & cultural skills of staff	This has not been previously flagged as a concern at EPL	ELF team Digital Literacy Initiatives
EXTERNAL INFLUENCES *(SUPPORT)*	Increased standards for accessibility	Fire codes for program rooms High demand for programs in certain branches	Parents are used to children content being organized by age Expectations for parents to carefully watch their children in public spaces Reorganizing the children's collection is cost prohibitive	Increased Newcomer population in Edmonton Increased societal awareness of Indigenous cultures	Parents' knowledge and preconceived notions of other library rules	Societal concern surrounding screen time for children Children's desire to play on the computers and iPads
IDEAS AND QUESTIONS TO EXPLORE FURTHER	Review staff training for greeting and anticipating customers' needs Dedicated space and signage for strollers in the children's area In future building projects advocate for sliding automatic doors	Create standardized ticketing system for early literacy programs at high demand branches Additional staffing before & during programs Road Warriors for programs Run more programs back to back	Specific displays in children's section for parents Book kits ready for parents to check out before and after programs In-branch delivery service for parents who can not leave their children Increased amount & findability of catalogue stations Programs that increase children's independence in library	Volunteer translators Developing tools to incorporate multicultural content in programs Look into translating programs into languages that are frequent among customer population	Improving staff communicating during roving Staff training around communicating Signage around FAQs in program room	Create campaign around educating parents about educational value of digital technology Possibility of parents setting time restrictions on computers for children

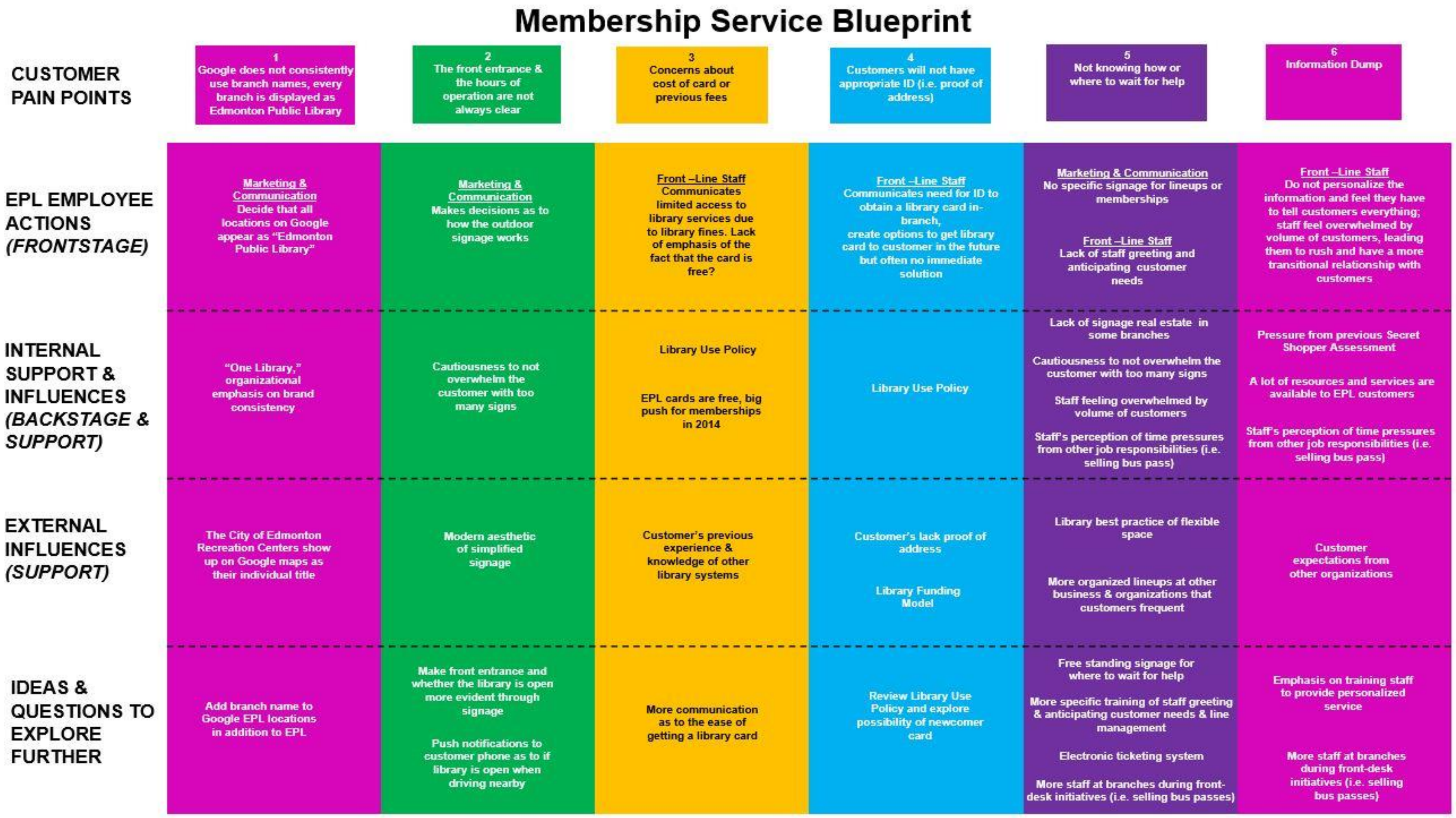
Appendix D7 – Family Visit Service Blueprint



Family Visit Service Blueprint

CUSTOMER PAIN POINTS	1 An initial hurdle for parents is maneuvering their children & belongings through the space	2 Kids to want to play on the computers but parents do not want this.	4 Parents have difficulty balancing tasks for themselves as well as for their children	5 Asking staff for help becomes challenging when parents want to use services on their own	6 Parents find it challenging to keep track of all of their children's cards and so only tend to use one card
EPL EMPLOYEE ACTIONS *(FRONTSTAGE)*	Front –Line Staff Lack of staff greeting and anticipating customer needs	Front –Line Staff Little communication in terms of digital literacy as contrasted to general literacy	Front –Line Staff Are not always available to help parents in the children's section Collection Management & Access Make decisions as to how the children's collection is organized	Front –Line Staff Lack of roving and anticipating customer needs in the stacks	Front –Line Staff Try to sign up as many children as possible for a library card
INTERNAL SUPPORT & INFLUENCES *(BACKSTAGE & SUPPORT)*	Facilities & Operations Division Learning and Development	ELF team SAS team Digital Literacy Initiatives	Large physical distance between children's and adult collection Branch scheduling of staff EPL's Unattended Child Policy Staff's job description does not include watching unattended children	Branch scheduling of staff Budgetary constraints around staffing Staff's perception of time pressures from other job responsibilities (i.e. selling bus pass)	School Library Card project Use of new memberships as KPIs Library Use Policy Welcome Baby Card initiative EPL app only allows one card signed in at the time
EXTERNAL INFLUENCES *(SUPPORT)*	Increased standards for accessibility	Societal concern surrounding screen time for children Children's desire to play on the computers and iPads – this commonly a delightful touch point for them	Expectations for parents to carefully watch their children in public spaces Reorganizing the children's collection is cost prohibitive	Customer used to online shopping and automated transactions in other industries	Families used to other services that only require one card for the entire family
IDEAS & QUESTIONS TO EXPLORE FURTHER	Review staff training for greeting and anticipating customers' needs Dedicated space and signage for strollers in the children's area In future building projects advocate for sliding automatic doors Lockers for customers' personal belongings	Create campaign around educating parents about educational value of digital technology Parents setting time restrictions on computers for children	Specific displays in children's section for parents In-branch delivery special help for parents who can not leave their children Programs that increase children's independence in library Creation of family spaces that have collections for everyone in the family	Call button for customers who can not go up to the front desk to ask for help Increased amount & findability of catalogue stations Review Staff Training for roving and anticipating customers' needs Increased staffing	Explore possibility of creating a family card More communication around children's library cards Evaluate the use of new memberships as KPIs Explore possibility of app that can allow several different cards to be signed in at the same time

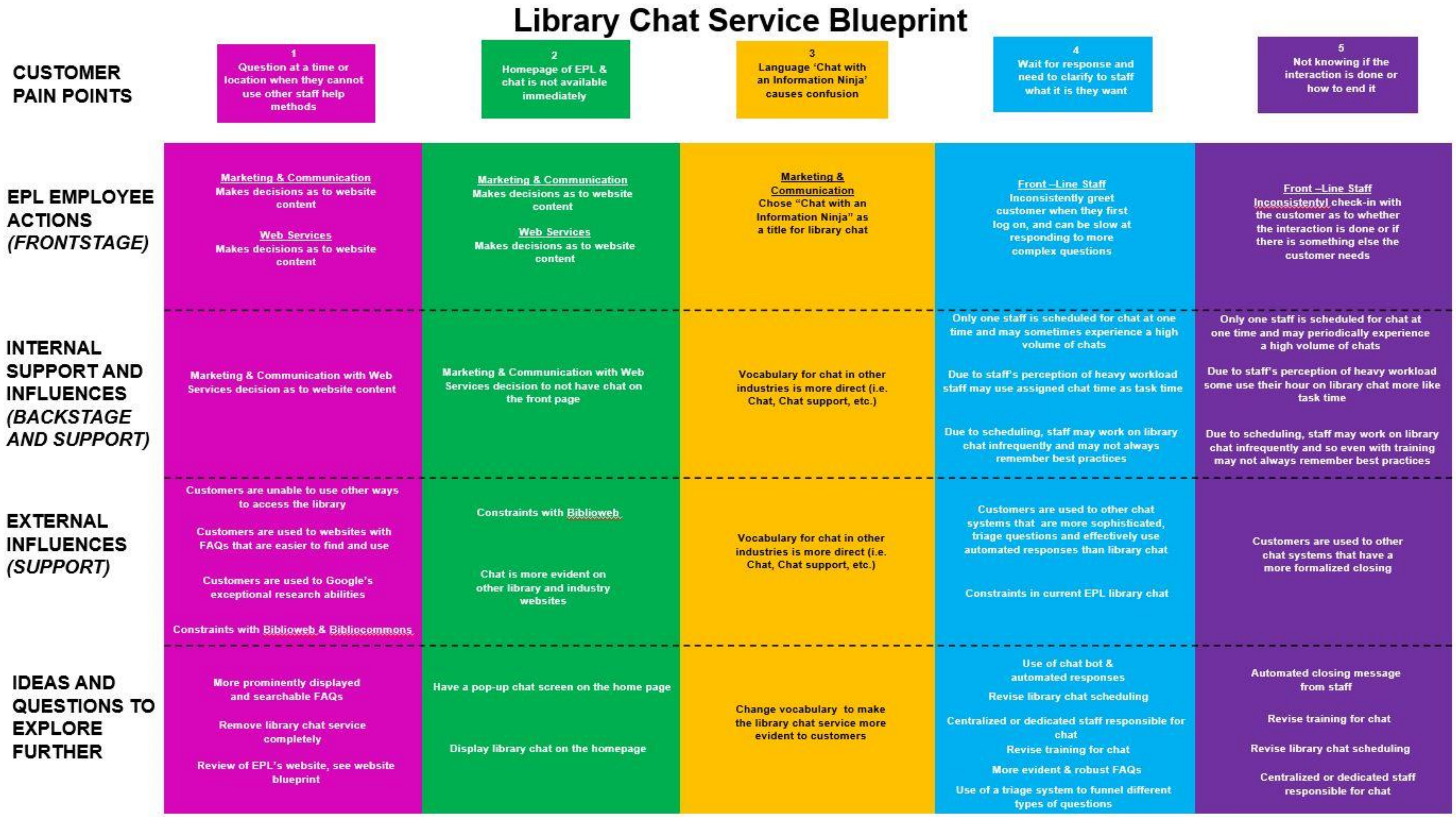
Appendix D8 – Membership Service Blueprint



Membership Service Blueprint

CUSTOMER PAIN POINTS	1 Google does not consistently use branch names, every branch is displayed as Edmonton Public Library	2 The front entrance & the hours of operation are not always clear	3 Concerns about cost of card or previous fees	4 Customers will not have appropriate ID (i.e. proof of address)	5 Not knowing how or where to wait for help	6 Information Dump
EPL EMPLOYEE ACTIONS *(FRONTSTAGE)*	Marketing & Communication Decide that all locations on Google appear as "Edmonton Public Library"	Marketing & Communication Makes decisions as to how the outdoor signage works	Front –Line Staff Communicates limited access to library services due to library fines. Lack of emphasis of the fact that the card is free?	Front –Line Staff Communicates need for ID to obtain a library card in-branch, create options to get library card to customer in the future but often no immediate solution	Marketing & Communication No specific signage for lineups or memberships Front –Line Staff Lack of staff greeting and anticipating customer needs	Front –Line Staff Do not personalize the information and feel they have to tell customers everything; staff feel overwhelmed by volume of customers, leading them to rush and have a more transitional relationship with customers
INTERNAL SUPPORT & INFLUENCES *(BACKSTAGE & SUPPORT)*	"One Library," organizational emphasis on brand consistency	Cautiousness to not overwhelm the customer with too many signs	Library Use Policy EPL cards are free, big push for memberships in 2014	Library Use Policy	Lack of signage real estate in some branches Cautiousness to not overwhelm the customer with too many signs Staff feeling overwhelmed by volume of customers Staff's perception of time pressures from other job responsibilities (i.e. selling bus pass)	Pressure from previous Secret Shopper Assessment A lot of resources and services are available to EPL customers Staff's perception of time pressures from other job responsibilities (i.e. selling bus pass)
EXTERNAL INFLUENCES *(SUPPORT)*	The City of Edmonton Recreation Centers show up on Google maps as their individual title	Modern aesthetic of simplified signage	Customer's previous experience & knowledge of other library systems	Customer's lack proof of address Library Funding Model	Library best practice of flexible space More organized lineups at other business & organizations that customers frequent	Customer expectations from other organizations
IDEAS & QUESTIONS TO EXPLORE FURTHER	Add branch name to Google EPL locations in addition to EPL	Make front entrance and whether the library is open more evident through signage Push notifications to customer phone as to if library is open when driving nearby	More communication as to the ease of getting a library card	Review Library Use Policy and explore possibility of newcomer card	Free standing signage for where to wait for help More specific training of staff greeting & anticipating customer needs & line management Electronic ticketing system More staff at branches during front-desk initiatives (i.e. selling bus passes)	Emphasis on training staff to provide personalized service More staff at branches during front-desk initiatives (i.e. selling bus passes)

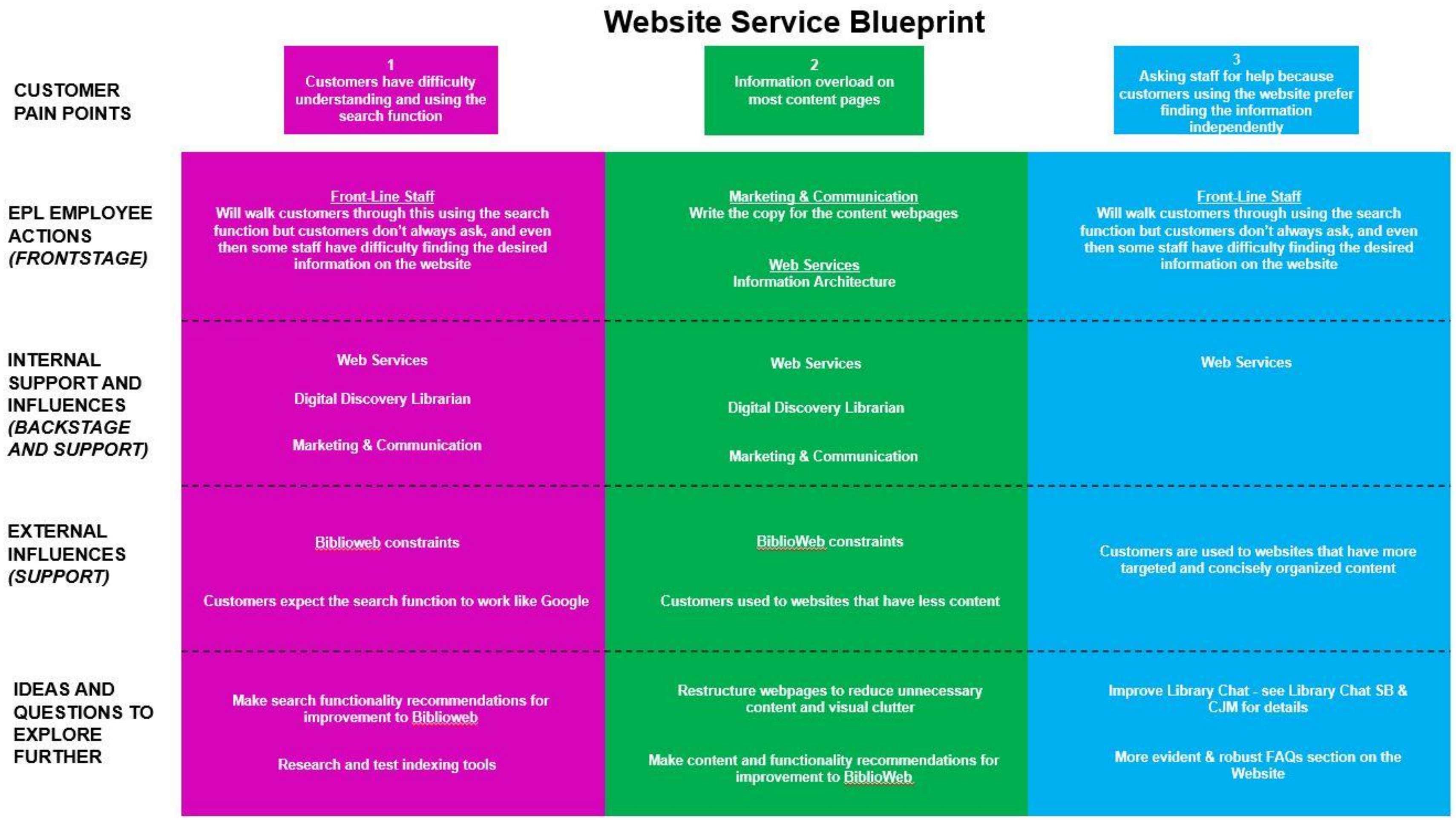
Appendix D9 – Library Chat Service Blueprint



Library Chat Service Blueprint

CUSTOMER PAIN POINTS	1 Question at a time or location when they cannot use other staff help methods	2 Homepage of EPL & chat is not available immediately	3 Language 'Chat with an Information Ninja' causes confusion	4 Wait for response and need to clarify to staff what it is they want	5 Not knowing if the interaction is done or how to end it
EPL EMPLOYEE ACTIONS *(FRONTSTAGE)*	Marketing & Communication Makes decisions as to website content Web Services Makes decisions as to website content	Marketing & Communication Makes decisions as to website content Web Services Makes decisions as to website content	Marketing & Communication Chose "Chat with an Information Ninja" as a title for library chat	Front –Line Staff Inconsistently greet customer when they first log on, and can be slow at responding to more complex questions	Front –Line Staff Inconsistentyl check-in with the customer as to whether the interaction is done or if there is something else the customer needs
INTERNAL SUPPORT AND INFLUENCES *(BACKSTAGE AND SUPPORT)*	Marketing & Communication with Web Services decision as to website content	Marketing & Communication with Web Services decision to not have chat on the front page	Vocabulary for chat in other industries is more direct (i.e. Chat, Chat support, etc.)	Only one staff is scheduled for chat at one time and may sometimes experience a high volume of chats Due to staff's perception of heavy workload staff may use assigned chat time as task time Due to scheduling, staff may work on library chat infrequently and may not always remember best practices	Only one staff is scheduled for chat at one time and may periodically experience a high volume of chats Due to staff's perception of heavy workload some use their hour on library chat more like task time Due to scheduling, staff may work on library chat infrequently and so even with training may not always remember best practices
EXTERNAL INFLUENCES *(SUPPORT)*	Customers are unable to use other ways to access the library Customers are used to websites with FAQs that are easier to find and use Customers are used to Google's exceptional research abilities Constraints with Biblioweb & Bibliocommons	Constraints with Biblioweb Chat is more evident on other library and industry websites	Vocabulary for chat in other industries is more direct (i.e. Chat, Chat support, etc.)	Customers are used to other chat systems that are more sophisticated, triage questions and effectively use automated responses than library chat Constraints in current EPL library chat	Customers are used to other chat systems that have a more formalized closing
IDEAS AND QUESTIONS TO EXPLORE FURTHER	More prominently displayed and searchable FAQs Remove library chat service completely Review of EPL's website, see website blueprint	Have a pop-up chat screen on the home page Display library chat on the homepage	Change vocabulary to make the library chat service more evident to customers	Use of chat bot & automated responses Revise library chat scheduling Centralized or dedicated staff responsible for chat Revise training for chat More evident & robust FAQs Use of a triage system to funnel different types of questions	Automated closing message from staff Revise training for chat Revise library chat scheduling Centralized or dedicated staff responsible for chat

Appendix D10 – Website Service Blueprint



Website Service Blueprint

CUSTOMER PAIN POINTS	1 Customers have difficulty understanding and using the search function	2 Information overload on most content pages	3 Asking staff for help because customers using the website prefer finding the information independently
EPL EMPLOYEE ACTIONS *(FRONTSTAGE)*	Front-Line Staff Will walk customers through this using the search function but customers don't always ask, and even then some staff have difficulty finding the desired information on the website	Marketing & Communication Write the copy for the content webpages Web Services Information Architecture	Front-Line Staff Will walk customers through using the search function but customers don't always ask, and even then some staff have difficulty finding the desired information on the website
INTERNAL SUPPORT AND INFLUENCES *(BACKSTAGE AND SUPPORT)*	Web Services Digital Discovery Librarian Marketing & Communication	Web Services Digital Discovery Librarian Marketing & Communication	Web Services
EXTERNAL INFLUENCES *(SUPPORT)*	Biblioweb constraints Customers expect the search function to work like Google	BiblioWeb constraints Customers used to websites that have less content	Customers are used to websites that have more targeted and concisely organized content
IDEAS AND QUESTIONS TO EXPLORE FURTHER	Make search functionality recommendations for improvement to Biblioweb Research and test indexing tools	Restructure webpages to reduce unnecessary content and visual clutter Make content and functionality recommendations for improvement to BiblioWeb	Improve Library Chat - see Library Chat SB & CJM for details More evident & robust FAQs section on the Website