Using Software to Manage Patron/Customer Interactions at the Kresge Business Administration Library (University of Michigan)

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The Kresge Business Administration Library[2] at the University of Michigan uses Footprints (from Numara Software[3]) to centralize our customer relations management. We count among our patrons a wide diversity of people, including: current students, faculty and staff at the Ross School of Business, students, faculty and staff elsewhere at the University of Michigan, Ross alumni and community members. Our goal in using an electronic management system is two-fold. First, we want to enable patrons to easily submit requests to the library. Second, we want an easy way to retain closed transactions for statistics gathering, assisting with future requests, and identifying people who make redundant requests.

About Kresge Library

The Kresge Business Administration Library is an independent library at the University of Michigan. Instead of reporting to the University Libraries, the Kresge Library reports to and receives funding from the Ross School of Business, mirroring the reporting structure of most law libraries. Despite being at one of the largest universities in the United States, the population of students, faculty and staff at the Ross School of Business is relatively small. As of Fall 2008, there are approximately 3100 students at the Ross School (BBAs, MBAs, Evening MBAs, Global MBAs, Executive MBAs, Ph.Ds, and Masters of Accounting Students) and an additional 500 faculty and staff. This population of 3600 is far less than the comparable population of the University's main campus (approximately 39,000 plus faculty and staff) or the system-wide count (approximately 49,000 plus faculty and staff). By virtue of having a relatively small number of students, we are able to provide more customized services. While we are an independent library, we collaborate with the University Library at Michigan on a number of projects and services. Among these are the SFX Link Resolver product, collaborative purchases of databases and use of the Footprints software for managing our customer interactions and other library activities.

Using Footprints for Customer Relations Management

At Kresge Library, we are utilizing software systems to create a seamless experience for the patrons. Currently, our patrons contact the library using all means of communication: in person (through scheduled reference hours), phone, Instant Messenger (through a variety of services), email (both directly to individual librarians & staff members and generic messages to the library), and via web-forms we have on our site.[4] The goal in providing different means of contacting the library is to ensure that we meet our patrons 'where they are' and 'where they

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[2] For more about the Kresge Library, visit: http://www.bus.umich.edu/KresgeLibrary/ or http://webservices.itcs.umich.edu/mediawiki/KresgeLibrary/index.php/Kresge_Library

[3] Please see http://www.numarasoftware.com/FootPrints/service_desk_software.aspx

[4] For contact information, see http://www.bus.umich.edu/KresgeLibrary/HELP/

want to be.' Since we have all of these means of communication, having a single place to record these transactions is very critical.

There are two basic ways that requests get entered into the system. All incoming emails to our generic account (kresge_library@umich.edu) or those submitted with our web-form automatically get entered into Footprints. Librarians are scheduled on a rotating basis to check the incoming questions into Footprints. Because this is web-based, librarians can answer these questions from any location, which increases our flexibility. For all other requests, librarians enter the information into Footprints, typically after the transaction is complete. The means for logging these transactions into the software is very easy and takes only a few moments.

Currently, we have seven "projects" or groups of calls in the Footprints software. These are broken down by type of transaction. Different web-forms send messages to different projects based on what was selected by the patron. These projects are:

- Kresge Circulation (for problems with checked out books, course packs, etc.)
- Kresge Copying (for our evening copying service)
- Kresge Document Retrieval (for our Inter-library services)
- Kresge FRS (for the Faculty Research Service)
- Kresge Help Desk (for technical problems such as connection issues)
- Kresge Reference (for basic reference queries)
- Kresge Technical Services (for materials processing - to track changes made by staff)

We originally set up our systems to have patrons send their queries into the specific queue. Our new approach is to encourage all patrons to write to "kresge_library@umich.edu" which goes into the Kresge Reference. From there, the librarians would route it to the correct project and the proper contact in the library. So often, we find that people assume the problem is a particular nature, but we discover that it is something else. This often happens when people contact us with Reference problems that turn out to be connection and technical issues. By having all questions come into a single queue which is continually monitored, we feel that we can move requests to the correct project and actually save the patron time. This also takes the burden of determining the correct type of question that is a continual problem with phone decision trees.

Each of these transactions typically includes all the email communications or an outline of what transpired. We do not include files that we sent, instead rely on the librarian or staff member's email account. Also, the librarians and staff can flag fields in each transaction that identify the submission method, type of request, affiliation, and any special programs that we serve. These are critically important as it relates to statistics about the services performed by the library.

This software has been critically important in our operations of the library. We are able to track, in a single database, all our transactions with the school. We can see not only trends, but we can also identify people who are contacting multiple people with the same question (we call "double-dipping"). We can also use the answers we have provided in the past to help with the questions being asked today. Finally, we can use this to build statistics to provide critical information about the ROI for the library.