

# From Transaction to Transformation: Seizing the Opportunity of an RFID Implementation ----- Strategic Library Webinar, April 27, 2016

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Lori Ayre, principal consultant at The Galecia Group.

- Began consulting on the topic of RFID over a decade ago
- Controversial technology because it is invisible – can identify books a patron is carrying (good or bad?)
- We've accepted that the technology has benefits that outweigh concerns

Today

- Most libraries see RFID, like self-check-out machines,
- Expectation is that everyone will go to RFID eventually

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The Libraries Transform campaign communicates that libraries are more than places where circulation transactions take place, libraries can be transformative. And technologies like RFID, automated materials handling and self-service technologies are the tools that increase opportunities for libraries to provide enriching experiences to their communities.

What we promised.

You will learn how to leverage an RFID initiative to:

- Fulfill your strategic goals
- Maximize transformational interactions with staff
- Build awareness of all library services
- Keep library staff in the foreground of library service
- Free up staff to do new things
- Properly adjust library spaces

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RFID is just one aspect of a set of self-service technologies that can help you dramatically change your library environment...

Consulting with libraries about RFID, self-service technologies, and automated materials handling for 10 years

My belief is every new library built today should be equipped with

- Self-check-out and self-service holds pick up
- Automated materials handling (self-check-in and sorting)
- RFID
- With self-service rates at 85% or higher

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Today, most people that come into a library interact with clerical staff performing circulation tasks.

The probably go to the Circulation Desk.

They don't interact with a Librarian.

But they think they do.

- Most people come to Circ desk
- They probably go to the Circ desk
- They don't interact with Librarian
  - Butte County study showed **50% of all staff time** was spent on routine circulation tasks
  - < 7% spent on "librarian" activities such as planning and leading programs or outreach
- But they think they do

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"Librarians" are the people...

- running literacy programs
- helping new immigrants learn the ropes
- doing outreach to the homebound
- creating community partnerships
- facilitating community meetings
- running media labs and maker spaces
- delivering storytimes
- running summer reading programs
- developing community partnerships
- helping jobseekers with resumes and finding jobs
- connecting the homeless and mentally ill with services that can help them
- providing a safe, positive environment for kids to be after school gets out

When I talk about librarians, I am not necessarily talking only about people with masters degrees

I'm talking about anyone doing something with patrons other than routine circulation functions.

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**Heart of a Librarian**

The vocational or "heart" work of a librarian isn't transactional.



The work of a Librarian is transformational, involving activities that changes lives.

These transformational activities do not happen at the circulation desk.

The heart of a librarian is more important than the degree.

David Lankes defines librarians by what they do. He says if you are responding to the vocational call of library services, you are a librarian.

Not all people in libraries have this vocational calling. Some are just doing their job at the circulation desk.

When it comes to the patron experience of using the library

- I think we need to shift the balance away from transactional interactions
- and increase the number of transformational interactions

That means we have to talk about that circulation desk.

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A very brief look back into time

**FUN WITH SERVICE DESKS**

We've struggled with service models and staffing models over the years and "service desks" are always part of the conversation.

As libraries have gotten bigger and busier

And as budgets have been cut

In the early days, there was one desk and a librarian was at that desk

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### ONE DESK

- Grand tradition
- Big, imposing, front and center
- where the person was who could help you with EVERYTHING!

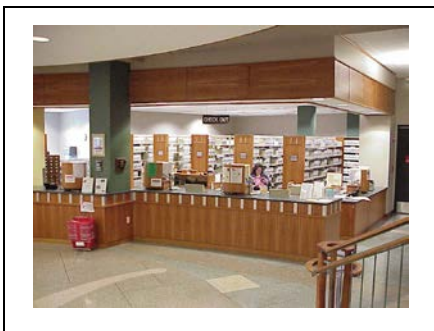
Ballard Historical Society of their Carnegie Library

“Stepping through the front door and up to the information desk where the librarian sat forebodingly is a memory which many from the old days have held fondly”

Source

<http://www.ballardnewstribune.com/2012/11/02/features/scenes-old-ballard-old-carnegie-free-library>

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Then we started getting very, very busy and we had to cut costs.

We couldn't afford to have librarians doing circulation work.

So, instead of a big imposing reference desk with a librarian.

We moved to big imposing circulation desks. And we moved to a smaller Reference Desk, where our most expensive employee, the Librarian worked.

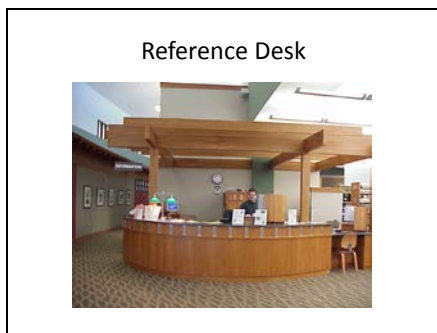
I found this photo online, the caption was...

“Here is where we are greeted first and where we check out materials when we are ready to leave.”

And it goes with this other photo from the same website...

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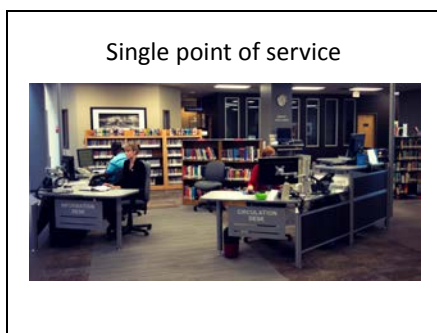
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Caption: The Reference Services Desk is on the second floor!

Then, we started thinking maybe we should bring reference services back together with circulation and we experimented with the ...

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Single point of service with a Librarian and Circ Person on the same spot ....or shared desk. The point being we didn't want people to have to figure out who they were supposed to talk to.

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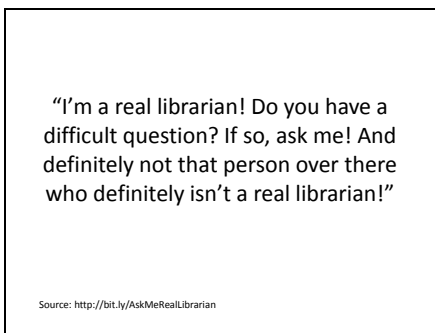
Patron: Do I need circulation or reference?

This library swapped out the jargony "circulation" in favor of Check-out/Return and "reference" for "ask here" but it can still be confusing. The woman in the foreground is sussing it out....who should I try to talk to????

It's been frustrating for everyone, including people working these desks. I bumped into a funny blog post by the Annoyed Librarian

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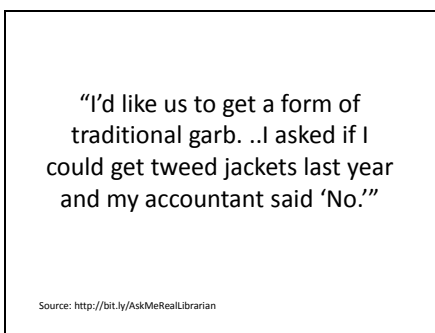
In this blog post, the Annoyed Librarian was suggesting (in jest) how to help people decide if they should talk to him (the librarian) or that other person at the desk....I think he was venting.

Commenters to that same post suggested maybe we just needed to identify the librarians better.....

Source:

<http://lj.libraryjournal.com/blogs/annoyedlibrarian/2014/05/29/telling-the-pros-from-the-nonpros/>

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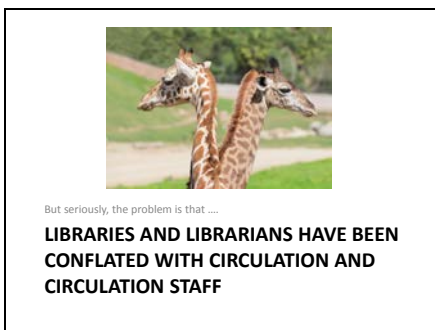


A number of ideas for identifying the Librarian were bandied about but this was my favorite.

Tweed jacket as librarian identifier

<http://lj.libraryjournal.com/blogs/annoyedlibrarian/2014/05/29/telling-the-pros-from-the-nonpros/>

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Anyway, the point is that normal people (meaning patrons) don't distinguish between circulation staff and librarians

As a result, there is a widespread misunderstanding that a librarian is that person who checks out your books.

While I have NOTHING against clerical staff, I believe this has hurt the profession and it has hurt the image of the library.

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Patron's Lament

*"We are used to friendly **librarians** checking out our books. Never talking to anyone or seeing anyone is something we are going to have to get used to....."*

I read news coverage of libraries rolling out RFID and self-checks to see well they do on messaging and to see how it is covered.

Too often I read something like this one:

*"We are used to friendly **librarians** checking out our books. Never talking to anyone or seeing anyone is something we are going to have to get used to..... < heavy sigh>"*

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Library sort staff as librarians....

*"At the end of the day, these librarians were wiped out! They left everything on the conveyor!"*



This one killed me. In this example, the location wasn't even inside a library. It was covering the King County Library Systems Service Center where people unload delivery bins onto a high speed sorter.

The reporter was covering the annual sorting competition between KCLS and NY Public, who has a similarly gigantic high speed sorter.


I was enjoying the coverage until the reporter said

*"At the end of the day, these librarians were wiped out! They left everything on the conveyor!"*

My point is not that there's anything wrong with circulation staff or people working on the Preston sorter....my question is...How can we increase the likelihood that people coming into the library engage with a someone with a Librarian heart so everyone understands what libraries are really about?

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How can we increase the likelihood that people coming into the library engage with a 'librarian' so everyone understands what libraries are really about?

Or put another way, and probably more importantly, how can we increase the likelihood that people coming into the library actually engage with a Librarian - as I've defined librarian - (potentially transformational)

instead of someone just putting in their time at a circulation desk (hopefully pleasant, but probably not transformational)

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**USE TECHNOLOGY AND PEOPLE STRATEGICALLY**

My belief is that the key is to use technology and people strategically

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Utilize people for what people do well



Plan  
Welcome  
Assist  
Strategize

Collaborate  
Greet  
Socialize  
Support

Utilize people for what people do well – make a human connection

- Collaborate
- Greet
- Welcome
- Support
- Socialize
- Plan and deliver programs
- Coordinate activities
- Go out into the community and bring library services there



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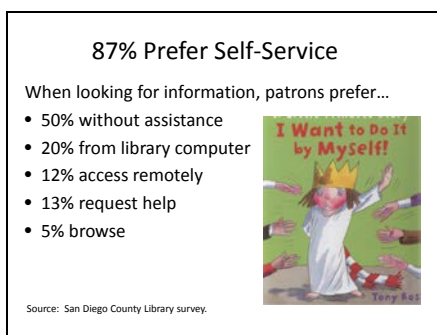
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Utilize technology to do the things technology does well

- Conveyors to move material
- Sorters to sort material
- RFID readers for reading barcode numbers and handling security
- Wayfinding technology to empower people to find what they need
- Good self service technology to empower them to do what they need to do

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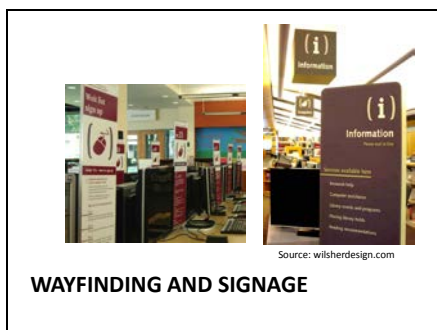
San Diego County worked with Counting Opinions to do a survey about what patrons prefer.

They asked “When looking for information, indicate the method your prefer”

- 50% without assistance
- 20% from a library workstation
- 12-13% access remotely/request help
- 5% browse

Only 13% wanted help. That’s why I encourage libraries to think about 85% self-check use minimally. The vast majority of people prefer to do things on their own.

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Wayfinding and signage

Definitions:

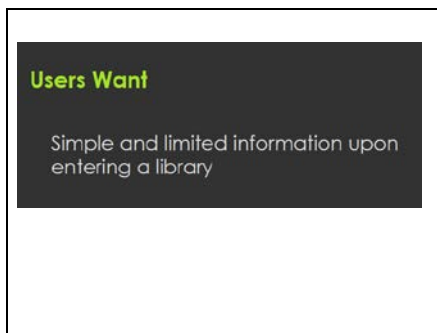
Wayfinding – broadly - how to intuitively people move from the entrance to the building ---- instead of making them ask

Signage: a strategy composed of a set of interrelated signs that support the person moving through the space and provide the right amount of information at the right time

Source of photos: Wendy Wilsher, Wayfinding Consultant. More info at [www.wilsherdesign.com](http://www.wilsherdesign.com)

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The truth is that people want to be able to do things on their own.

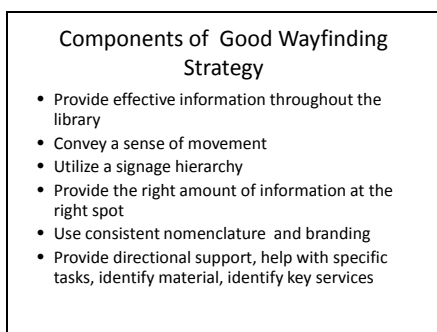
Ryan Hess of DePaul University (now at Palo Alto Library) did a study on “Digital Wayfinding: A User Study” by Ryan Hess DePaul and found that

what people really wanted when they entered the library was

Simple and limited information

That’s a good first step.

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A good wayfinding strategy is critical to making self-check and other self service technologies work.

It is almost always a component of my recommendations to a library (along with change management).

So, real quick, here’s some tips on a developing a good wayfinding strategy - beyond the scope of this one hour webinar but it is important

Use Wayfinding to provide

- directional support
- help people perform specific tasks
- identify material, and
- Identify key services: information, accounts, computers, holds, check-out, check-in

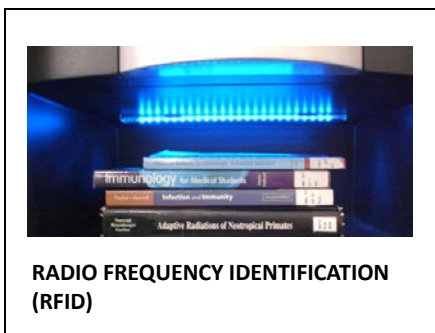
Provide effective information throughout the library

Good wayfinding expert will help focus on  
Location, language, content, consistency, attractive

Source for above: Wendy Wilsher, Wilsher Design, wilsherdesign.com

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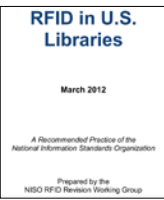
Similarly...RFID is another technology that we choose for a reason. One reason is to improve security. Another reason is ergonomics. And another reason is to support your self-service goals. Ideally all three.

Today, we'll focus on RFID as it pertains to self-service.

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Your "RFID Must Do" List

1. Read NISO RP-6-2012 which defines the standards and data model  
[bit.ly/NISO\\_RP-6\\_2012](http://bit.ly/NISO_RP-6_2012)
2. Familiarize yourself with the Library Communication Framework (LCF)  
[www.bic.org.uk/145/Information-about-LCF/](http://www.bic.org.uk/145/Information-about-LCF/)



- Read NISO RP-6-2012 which defines the standards and data model to use to ensure you don't get locked into a proprietary RFID solution.
- If you learn more about the current standard, it will help you leverage RFID technology as much as you can at this point.
- Familiarize yourself with the Library Communications Framework which is a set of library interoperability standards for defining the communication between our library systems and other things that might want to interact with our library systems.
- LCF provides the framework for supporting new development while using a common set of principles, variables and values.

Quick History...

URLs for  
NISO RFID in Libraries Recommended Practice  
[bit.ly/NISO\\_RP-6\\_2012](http://bit.ly/NISO_RP-6_2012)  
LCF [www.bic.org.uk/145/Information-about-LCF/](http://www.bic.org.uk/145/Information-about-LCF/)

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	2000	2002	2004	2006	2008	2010	2012	2014	2016	
RFID				Danish Data Model is first national library RFID standard adopted	RFID vendors can choose from their own proprietary solutions or choose one of the other country standards.		NISO RP-6 2012 released standard being RFID Data Model for US libraries	LCF 1.0 released announcing attempt to standardize communications between ILS and RFID vendors	No new RFID products	
ILS	All communications between the ILS and RFID vendors is limited to SIP messages (e.g. check-in and check-out)							APIs being released expanding opportunities for using ILS data but no standardization (may be "open" but all proprietary)		

1. RFID for libraries introduced in 2000.
2. Tags contained only the barcode number. Tag encoded however the vendor thought made sense.
3. No interoperability - my tags wouldn't work on your self-check machine even though we both had RFID
4. In 2006, the first national standard announced (Danish Standard) and some vendors use it. Some didn't.
5. Until 2012, US libraries had no standard. Finally NISO published a "Recommended Practice" establishing a US Data Model.
6. As long as vendors successfully followed the Recommended Practice, we had interoperability.
7. Now my tags could be read by any vendor. Now I can mix and match self-checks, and security gates, etc.
8. But still stuck with SIP to communicate with ILS – and SIP is all about check-in and check-out and nothing else.
9. Everyone wanted more from ILS than check-in and check-out (ebooks integration being a big pressure) so vendors began developing APIs (application programming interface)
10. Each ILS vendor has own proprietary set of APIs.
11. To do anything beyond check-in and check-in, you need to use these proprietary APIs.
12. LCF was created to try to standardize some aspects of the APIs to make it easier for RFID (and other 3<sup>rd</sup> party vendors) to communicate with the ILS without having to write a custom solution for each product.
13. Some US vendors have signed onto the LCF including SirsiDynix, Innovative, D-Tech, Bibliotheca/3M.
14. Hopefully, going forward we'll see some new RFID products using LCF but RFID product development has been pretty stagnant for the last couple of years. Probably because Bibliotheca has been too busy buying companies (including most recently 3M).

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### RFID and Set Info

- Field defined in NISO RP-6-2012 that allows you to encode tagged items as a set
- Use for single disc media items so that technology can verify disc and case match instead of having people open cases to check
- Requires tagging the case and the disc as a set
- Requires RFID-enable technology that reads the Set Info field

Even though the new Data Model (RP-6-2012) defines 26 fields, most libraries only encode the barcode number on their RFID tags. But should encode:

- Barcode
- Owner Institution (your library OCLC code)
- Set Info

Set Info is an important field. This field is used to tag items as a set. For example, a DVD inside a case would have to be tagged as a set with the tagged case being one tag in the set and the tagged disc being the other tag.

With Set Info, your RFID system can verify when a disc is missing or when the wrong disc is inside the case.

With the right self check-out and check-in equipment, the Set Info field can reduce the likelihood that patron will return an empty case or check-out a case that is empty or has the wrong disc.

This has nothing to do with the ILS (library system). It is all about how you tag your collection and the equipment you purchase.

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Today, RFID is the lubrication that keeps all self-service transactions running smoothly



Beyond Set Info, almost everything else we are doing with RFID is limited by our communications with the ILS which is limited by SIP communications.

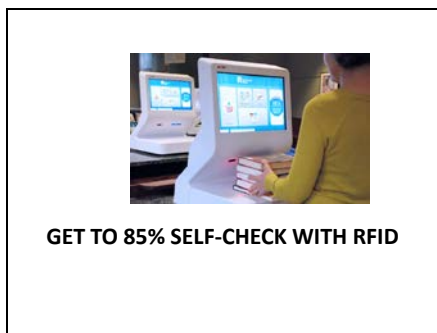
So, today, what we are mostly doing with RFID is using it to improve self-check and making all materials handling functions smoother.

Luckily, RFID is a very effective lubricant!

Example of not easy: <https://youtu.be/BfO3xftFk-g>

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One of the points I want to make today is that you really need to get to AT LEAST 85% self-check use to make a big impact.

To be able to transform your library spaces and change the likelihood of meaningful interactions instead of transactional interactions, you need to achieve 85% - 90 – 99% self-check use because that's when we can start changing our service models and create a on a different kind of engagement with our patrons.

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- No issue of finding the barcode. RFID tags are detected via the RFID pad which is usually built into the self-check tabletop.
- Patrons just put a stack of 3-4 items on the counter and the titles display on the screen
- Reduces errors
  - Set Info data on the RFID tag can help prevent the user from checking out a DVD with no disc or the wrong disc inside.
- No line of people behind you tapping their foot waiting for you to be done
- Informative
  - recommendations for other books
  - ebook downloads
  - info about upcoming library or community events
- More private
  - don't have a staff person seeing everything you check out
  - items stay in a stack

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What Staff Like About RFID Check-out

- Open fewer media cases
- No scanning individual items
- Even better, eliminate check-out from staff workflows



With RFID and the Set Info field on the RFID tag, you can reduce dramatically, the number of media cases staff need to open. The RFID system can verify that the right disc is in the right case.


Everything is checked in by sliding items over an RFID pad or setting a stack of 3-4 items on the pad. Whatever is easier. Staff no longer have to scan one item at a time.

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Case Study #1

- Single branch library circulating 450,000 items/year
- Self-check rate: 60%
- Staff check-out 156 items/hour

✓ Four (4) self-check machines  
✓ Self-service holds pick-up



### *#1: 60% Self Check:*

Working with a library now that checks out 450,000 items per year (not including renewals)

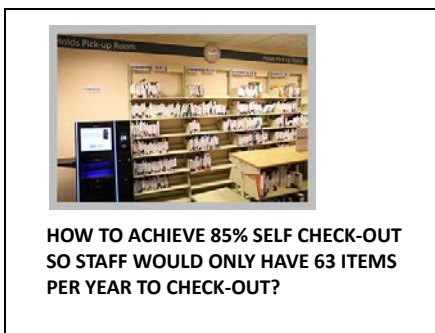
- The library has 4 self-check machines and provides self-service hold pickups
- 60% of the check-outs are done at the self-checks
- This means staff only need to check-out 183,000 items per year

at 60%, they do 156 check-outs per hour

Question is...

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How to achieve 85% self-service use so staff would only check-out 63 items per hour

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**Recommendations**

1. Implement RFID
2. Eliminate staffed circulation desk
3. Move self-checks OFF the big circulation desk
4. Make sure ALL Holds are self-service pick-up with nearby self-check
5. Add supportive signage
6. Add fines/fees payment by CC on self-checks
7. Introduce more appealing machines (now using component style)



What they are doing right:

Convenient self-service holds pick-up  
Enough check-outs

What they could be doing better:

- Add fines/fees payment by CC on self-checks
- Add supportive signage
- Introduce more appealing machines (component style)
- Go RFID
- Make sure ALL Holds are self-service pick-up
- Eliminate staffed circulation desk
- Move self-checks off the big circulation desk




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**Case Study #2**

- 11 branch system circulating 2.6 million items per
- Dabbling with self check-out at some locations
- Self-check rates at 13%
- ✓ RFID
- ✓ Appealing self-check kiosks



Case Study #2  
11 branch library system

What they did have

- RFID
- Appealing kiosk style self-checks

Going from 13% self-check to 85% would save them 9612 hours...

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**HOW TO GET TO 85% SELF CHECK-OUT AND SAVE 9612 STAFF HOURS?**

How to save 9612 hours of staff time?

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**Recommendations**


1. Get more self-checks  
– recommend 1 per 125,000 circulations
2. Add fines/fees payment by CC on self-checks
3. Add self-service Holds pick up at all locations
4. Add supportive signage
5. **Address signage (move “Check-out” sign from service desk to self-checks)**
6. **Help patrons check-out at the machines, not at the desk**
7. **Modify circulation policies**



- What they didn't do
- Not enough self-checks (recommended 1 per 125,000 circulations)
- Fines/fees payment by CC on self-checks
- Self-service holds pick up at only some locations
- Supportive signage
- Staffed circulation desk – unfortunately well signed
- Modify circulation policies – too many blocks forcing people to desk

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Rethink Some Policies 

- Eliminate policies that impede use of self-service technology
- Everything must be check-out-able using RFID at the self-checks
- Create policies for the 99.9% of the patrons that are trustworthy instead of the few that are not.


Eliminate policies that impede use of self-service technology, e.g.

- Keeping discs separate from media cases
- Only RFID tagging some items (e.g. not tagging magazines so they are hard to check-out at self-checks)
- Not uniquely tagging items (e.g. shared barcode number for paperbacks so people don't know how to check them out)

Things some libraries have needed to change:

1. Stop having library cards expire (get notified if a text message or e-mailed bounces and physical address only used for billing)
2. Increase amount of fines that generate a block
3. Review statuses that might block items: missing, in route, checked out [on another card], etc.). These are the items that can be the final changes that bump the last 3-5% of the circulation after they do all the bigger things you have below.

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Case Study #3 

- 33 branch system circulating 3.5 million items per year
- 90% of all check-outs are self-service
- Freed up at least 8750 hours for staff to do something else

Case Study #3


350,000 staff check-outs instead of 3.5 million (MCPL)

Would require over 4 more staff to handle that volume (assuming just 10 seconds per check-out)

But probably more because you'd have to have people sitting at the circulation desk whether they were actively checking out or not

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What they did and are doing to achieve 90% self-check rate 

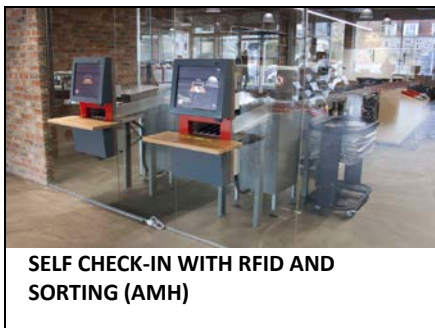
- ✓ Excellent implementation that broadly involved staff
- ✓ Moved service desk away from front door and put self check kiosks in the same area
- ✓ Provided adequate number of attractive kiosks and strategically placed them in library
- ✓ Good wayfinding and signage
- ✓ Eliminated Circulation Desk - added Customer Service station
- ✓ Excellent staff and patron training

1. Excellent implementation that broadly involved staff
2. Moved service desk away from front door and put self-check kiosks in the same area
3. Adequate number of attractive kiosks strategically placed
4. Good wayfinding and signage
5. Eliminated Circulation Desk - added Customer Service station

### **Also excellent staff and patron training**

- Staff train patrons how to use the kiosks at the kiosks
- Trained staff to train patrons and provided talking points
- Assured patrons that no staff were losing their jobs because of self-check

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A self-check-in connected to a sorter is generally just called automated materials handling or AMH.

Is a self-service technology and automation on the staff side (the sorting and hold slip printing).


Great thing about AMH is it takes the check-in process completely out of staff hands. Now all they have to do is organize a cart and shelve most returns.

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### How RFID and AMH Works

1. Patrons insert material into slot
2. Material is conveyed to sorter
3. Items are sorted to a bin, distribution tote, or ready-to-shelve cart
4. Holds routed to one location and Hold slip printed automatically
5. Book returns and single-disc media sets can be immediately shelved without further handling



1. Patrons insert material into self-service return slot  
\* Returns can be inside or outside (both is best)
2. Material is conveyed to sorter
3. Items are sorted to a bin, distribution tote, or ready-to-shelve cart
4. Holds routed to one location and Hold slip printed automatically
5. Book returns and single-disc media sets can be immediately shelved without further handling


All the above is possible without RFID except #5. With RFID and Set Info, discs inside the case can be verified automatically (single disc DVDs only)

As I said before, RFID makes everything easier. With RFID self-service returns, patrons can insert items any whichway. They don't have to have barcode facing up or spine aligned any special way.

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### What Patrons Like About Self Check-in

- Immediate check-in
  - No special request required to get immediate check-in
- Verifiable Check-in
  - Display verifies check-in
  - Receipt options (print, email, SMS)
- Prevents mistakes
  - Won't let patrons return empty DVD case
  - Can prevent returns of school books to library



Immediate check-in

- Instantly clears your record.
- No special request needed

Verifiable

- Option to see that the item is received
- Receipt options
- No worries.
- Fewer arguments about fines and fees and claims returned.

Prevents mistakes.

- Verify certain sets are intact
  - Option to reject incomplete sets or route to a special "exception" bin for immediate staff handling
  - One library monitors their exception bin very closely so they can find the patron inside the library before they leave to let them know something was amiss

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### What Staff Like About Self Check-in and Sorting (AMH)

- NO more check-in
- Holds slip print out automatically and are ready to attach to Holds
- Transiting items sort directly into distribution totes
- Faster shelving – items are rough sorted to bins or possibly even RTS carts
- Intact single disc media sets don't have to be opened

- NO more check-in in backroom
  - just fine-sorting to carts and shelving
  - Save at least 1 FTE per sorter
- Holds slip print out automatically
- Items that go into transit go into distribution totes
  - no sorting or labeling needed
  - Just swap out delivery totes as needed
- Faster shelving
  - items are rough sorted to bins
  - or sorted directly to RTS carts
- Impact of the Set Info and field...
  - how many single disc media do you circulate each day/year?
  - That's how many you won't have to open any more with RFID (possibly 2x that number)
  - big impact especially on ergonomic injuries

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### Case Study #4

- 13 library system circulating 6 million items per year
- Implemented RFID and AMH at three busiest locations
- Sorters each had an outside and an inside return and 5-7 sort destinations
- Branches with sorters circulate 400-450K items per year



### Case Study #4

- 13 libraries circulating 6 million items per year
- Implemented RFID and put sorters in their 3 highest circulating libraries (> 400K)
- Each sorter had 5-7 sort destinations and a 24/7 outside return and an inside return.

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**Impact of RFID and AMH**

- Saved 1.54 FTE in check-in time alone
- Clerks time checking in went from 30% to 15%
- Drastically reduced number of Claims Returned
- Found over 7800 items marked MISSING in the system
- Improved accuracy of catalog by over 12%
- Reduced theft (due to RFID security)

### AMH Benefit

- Saved 1.54 FTE in check-in time alone
- Clerks reduced their check-in time from 30% to 15%
- Drastically reduced number of Claims Returned


### Extra benefits from RFID

- Found over 7800 items marked MISSING in the system
- Improved accuracy of catalog by over 12%
- Reduced theft (RFID gates)

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**What to do with those extra hours?**

- Add more shelving hours (you'll need them)
- Move clerks to other duties and be prepared to train them
- Keep the library open longer hours
- Add more locations for Holds pick-up
- Get out into the community
- Expand programs




### Who will have more time on their hands?

- Mostly clerks
  - Some shelvees
1. Add more shelvees
  2. if you are backlogged because you are going to be even more backlogged once you don't have people doing the check-in but have the AMH system doing
  3. Move clerks into other roles
  4. Example: one library moved clerks to the call center to answer basic references questions, renewal questions, hours, etc
  5. Keep library open longer hours
  6. Add more locations – added pick-up lockers around town – convenient but requires staff to manage
  7. Send staff out into the community to build relationships with potential community partners, raise awareness about the library, find out what people need.
  8. Be prepared to train clerks in their new roles.

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Case Study #5



- Four branch library circulating 1.3 million items/year
- RFID, self check-out and AMH at two busiest branches
- Achieve 92-94% self service check-out AND check-in

Case Study #5

4 branch library circulating 1.3 million items per year

Implemented RFID and self-check-out everywhere

Self check-in with sorting at 2 busiest branches

Achieving 94% self check-out AND self check-in

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What They Do Right

- ✓ RFID-based self-service and AMH
- ✓ No circulation desk but service point near entrance
- ✓ Self service Holds pick-up
- ✓ Appealing, intuitive self-checks
- ✓ Fines and fees payment on self-checks
- ✓ Conveniently located self checks (for check-outs and returns)
- ✓ Trained patrons to use new check-outs and check-ins (and still train)
- ✓ Readily available and visible cross-trained staff

Doing a lot of things to make that happen including

1. RFID-based self-service and AMH
2. No circulation desk but service point near entrance
3. Self service Holds pick-up
4. Appealing, intuitive self-checks
5. Fines and fees payment on self-checks
6. Conveniently located self checks (for check-outs and returns)
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### Library Impact

- Consider their library an “indoor park” with many learning, cultural and recreational activities
- Culture of self-service with customers empowered to do the basic library functions themselves
- “Customer Service Staff” provide personalized service
- Delivered 8100 library programs last year

- Consider their library an “indoor park”
- with many learning, cultural and recreational activities
- That service point at the entrance is a stand-up desk with a Librarian and Library Assistant staffing it
- Both are cross trained
- They make no distinction between the two
- both are “Librarians” in my book because they are there to help patrons with whatever they need

Quote:

“We’ve created a culture of self-service, and empowered our customers to do the basic library functions themselves.

This leaves our customer service staff free to answer directional questions, reference questions, billing questions, and to give personalized service....

....it frees us up to greet people as they come in and leave – something that we didn’t have time for when we had lines of customers...

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## Case Study #6

- Three branch library circulating 1 million items/year
- Implemented RFID, self check-out and AMH
- Knew they had to do more to deliver the ROI they promised to Friends.
- Implemented new S-E-R-V-I-C-E Model based on Zones



## Case Study #6 Zones and Service

Three branches, 1 million circulation  
RFID, self check-out  
Self check-in with sorting Main library

Got funding from Friends and promised a big impact

They completely transformed how they provided customer service

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### Their definition of “Service”

#### Social

- be prepared to interact
- Wear visible ID badge (instead of a tweed jacket)
- Engage in friendly banter while mindful of individual boundaries

#### Enthusiastic

- Be excited to help people connect to what they need and want.
- Have a 30-second pitch ready about your favorite program, service, or initiative (library, department and City)

#### Responsible

- We’re in the information business -- give correct information to your best ability.
- We are entrusted with customer’s privacy and money. Take that seriously.

#### Vibrant

- Connect with your customers
- make them feel how exceptional it is to work here, play here and/or live here.

#### Intelligent

- be part of customers’ “Information Hub”.
- Ask them the right questions and Listen!
- Stay informed about Library news, City events and relevant information and share information freely.

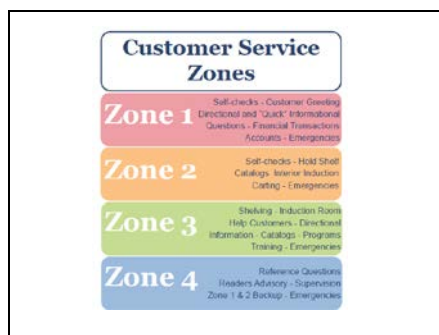
#### Courteous

- Speak directly to the person you are helping, not their caregiver, unless they address you.
- Be the customer advocate and empathize with their needs.

#### Engage

- Smile. Make eye contact. Verbally acknowledge people.
- Welcoming gestures reinforce your words and expressions.
- Anticipate customers’ needs to create a seamless experience.
- Say farewell.

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Zones are flexible. They can shift in size, overlap, and vary by need. Think of your zone on the basketball court (go Warriors). Everyone has a walkie talkie and most have iPads and no desk

Service-first, space-second.

- They happen in a space, but they always focus on customer's needs first

Actually more than these 4 but these four represent a different way of thinking about pages, clerks and reference staff.

**Zone 1: first and last contact, located around the entrance**

*Primary responsibilities: Customer Greeting and Self Checks, Quick Questions*

Selfcheck – monitors self-checks and does basic troubleshooting, proactively helpful, responds to all gate alarms

Handles directional and "Quick" Informational Questions and knows how to handoff to others without feeling "handed off"

**Zone 2: backs up person in Zone 1**

*Primary responsibilities: Self checks, circulation, holds shelf, catalogs, interior inductions*

Handles longer interactions such as accounts issues, assists patrons with their self-service inside returns, troubleshoots

Keeps up on Holds, monitors them as they are returned

**Zone 3:**

*Primary responsibilities: shelving, outside self-service returns, projects, housekeeping, help/directional*

Get material back to where customers can find them Work on lost report, shelf reading, cleaning, displays

**If customer needs help, they provide it making clear it is not an interruption**

Assist patrons and troubleshoot self-service outside returns

**Zone 4:**

*Primary Responsibilities: Reference, Readers Advisory, Supervise Zone 1 & 2*

Acknowledges customers, in-depth questions are her specialty.

Works at Info Desk but is free to leave to show customers things.

Expert in databases and catalog

Know how to tactfully insert herself into a reference interview in Zone 1 or 2 or provide guidance.

Steps in when there are problems (patron behavior issues, equipment problems, etc)

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Library Impact

- 98.8% self-check
- 30% of all fines are collected at the self-check kiosks
- Increased overall programs/attendance by 10%
- Added 200 more open hours for the library
- 60% of people who attend programs have heard about them from library staff working the zones
- Increased number of programs by 320%

1. 98.8% self-check
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3. Increased overall programs/attendance by 10%
4. Increase number of programs by 320%
5. Added 200 more open hours for the library
6. 60% of people who attend programs have heard about them from library staff working the zones

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RFID is a fantastic opportunity to transform library services



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