

Oregon State Library

Customer Service Standards and Guidelines

Overview

It is the goal of the State Library to provide uniform high-quality service to State Library customers and to colleagues. High-quality customer service includes:

- Responding to requests quickly
- Timely completion of tasks
- Professional and effective communication
- Operating with integrity
- Promoting accountability
- Assume positive intent

Minimum Standards for All State Library Staff Members

These minimum standards are the minimum expectation of all staff members. This section is followed by guidelines and suggestions for providing excellent customer service.

Use of State Library communication tools

- **Email**
 - Check email two (2) times per day at a minimum and respond to all queries within one business day. The response should indicate your progress/ability to complete the request. Use the X by Y or Notify process to clarify expectations for completing requests as needed.
 - Use the out-of-office auto-reply email option and coordinate with other division members for email management when unavailable.
 - Keep customers informed when referring emailed questions to other staff.
 - To ensure that recipients can respond to messages easily, use a signature block that at a minimum includes: Name, Title, Phone Number, Email Address.
- **Telephones/Voicemail**
 - Answer phone call when you are available during work hours.
 - Answer call indicating the agency's name and your name.
 - Example: Hello. This is Jane Doe from Library Support at the Oregon State Library.
 - At a minimum, the voice mail message should include Name and Agency Name, your inability to take the call, and instructions for leaving a message so a call can be returned or press 0 if that option is available.
 - Example: This is Jane Doe from the Oregon State Library. I'm away from my desk at the moment. Please leave a message and I will call you back.

- Check voicemail a minimum of two (2) times per day and respond to all queries within one business day. The response should indicate your progress/ability to complete the request. Use the X by Y or Notify process to clarify expectations for completing requests as needed.
 - If you are going to be away for any amount of time that will not allow you to return the call within one business day, your voicemail greeting should indicate the length of your absence and an alternative option for the caller.
 - Example: This is Jane Doe from the Oregon State Library. I will be away from the office May 1-4. Please leave a message and I will contact you when I return, or press zero to speak to another library staff member.
 - Follow established division procedures for how to update voicemail greetings for absent colleagues.
 - Maintain adequate space in your voicemail box for incoming messages.
- **Instant Messaging (IM)**
 - Log into the IM tool during working hours.
 - Use status settings to indicate periods of unavailability.
 - Respond promptly when receiving a message from another employee.
 - **Outlook Calendar**
 - Use Personal Outlook Calendar to list meetings, leave, work schedule, and other obligations impacting availability during work hours.
 - Use meeting invitations to schedule meetings with colleagues.
 - Respond to all meeting invitations within one business day.
 - Offer alternative meeting times when you are unable to accept a meeting request or work with the meeting convener to explore alternative options for participation.
 - When going out of office make adjustments to meetings already scheduled.

Meetings

- When convening a meeting, ensure that all the appropriate people are invited to the meeting.
- ⊖ Make an agenda available to all participants before the meeting.
- If you have agreed to attend a meeting but later find that you cannot, inform the convener or someone else scheduled to attend the meeting. Work out alternatives for giving and receiving information, as appropriate.
- Be on time for meetings.

- If the meeting will run longer than the scheduled time, clarify participants' ability to continue.
- Review decisions and follow-up items at the close of the meeting so everyone is clear on the meeting's outcomes and next steps.
- To ensure that all participants remain informed of activities, the convener (or a designee) should record ideas, decisions, and action items and distribute these notes to all participants within five business days.
- The convener may contact participants who were expected but not present to follow up. It is also the responsibility of the absent participants to seek out information that was missed.
- Be prepared for the meeting

Guidelines and Suggestions for High-Quality Customer Service

This section further defines and explains concepts of high-quality customer service and can be used to assist staff as they work towards meeting customer service standards of the agency.

General

- Make service to library customers and each other a priority by making yourself available to all customers and colleagues. Business calls, meetings, and emails are not interruptions to your job; they *are* your job.
- Stay informed about all State Library services so questions may be accurately routed to the best staff member or resource.
- Understand customer or staff needs at the time of contact. Ask questions to make sure needs are understood and expectations for completing the request are clear. This practice will help assure timely responses and accurate referrals to appropriate staff members or resources.
- Keep customers and colleagues informed on your progress if you cannot immediately answer a question or complete a task within the time frame that was agreed to. Use the X by Y or Notify process to ensure accountability. (Described on page 6)
- Make sure encounters with customers and colleagues are positive by being courteous, pleasant, and professional.
- Maintain a consistent, courteous demeanor and tone in all communications.

Professional conduct

Professional conduct in the context of the State Library's Customer Service Standards includes exhibiting a courteous, respectful, conscientious, and generally competent manner in the workplace. It also includes general awareness and adherence to the [Code of Professional Ethics of Librarians](#). Relevant elements of this code include:

- Providing the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests.
- Protecting each library user's right to privacy and confidentiality with respect to information sought or received and resources consulted, borrowed, acquired or transmitted in accordance with Oregon law.
- Treating co-workers and other colleagues with respect, fairness, and good faith, and advocate conditions of employment that safeguard the rights and welfare of all employees of our institutions.
- Distinguishing between our personal convictions and professional duties and do not allow our personal beliefs to interfere with fair representation of the aims of our institutions or the provision of access to their information resources.
- Striving for excellence in the profession by maintaining and enhancing our own knowledge and skills, by encouraging the professional development of co-workers, and by fostering the aspirations of potential members of the profession.

Professional Communication

Professional communication is a key element in high-quality customer service. Please consider these suggestions for promoting professional communication in the workplace.

- Use clear and concise language when presenting ideas
- Logically and completely present ideas and try to stay on topic
- Always consider the purpose of your communication and think about your audience's perspective
- Actively listen to other's ideas and question them for further clarity
- Show enthusiasm about what you are talking about and use a strong, active voice
- Be friendly, polite, respectful and confident
- Allow for each member of a group to voice their opinion
- Avoid jargon, acronyms and buzzwords
- In oral communication, be aware of the tone and pitch of your voice. Strike a friendly and sincere tone. Prepare your ideas in advance to assure clarity
- In written communication, use a style of writing that is easy for the reader to read such as bullet points and small paragraphs
- Arrive at meetings a few minutes ahead of time to ensure meetings start on time.
- Participate in discussions during meetings as appropriate. Ensure all participants have an opportunity to contribute to discussions.
- Speak up if the meeting is getting off track and not accomplishing stated goals.

- Forward calls to the appropriate service or person once you understand a customer's needs. Whenever possible, check the availability of the service/person before forwarding a call, and inform the customer they are being transferred.
- Use a courteous and professional tone during all phone calls and voicemail greetings.
- Clearly indicate when an IM conversation is complete.
- Ensure readability of email messages by minimally using non-standard colors, backgrounds, fonts, and images.
- Proofread messages to assure clarity and professionalism.
- Share Outlook Calendar with staff members you work with closely and with others as needed.

Courtesy

Courtesy is expressed as a wide range of respectful behaviors and positive attitudes. Personal characteristics and behaviors that are commonly identified as courteous include:

- A willingness to discover opportunities to exceed the customer's expectations
- Sincerity
- A friendly smile (even over the phone)
- A neat appearance
- Clear and understandable use of language
- Exceptional listening skills (attentiveness)
- A relaxed and natural tone of voice
- Appropriate eye contact
- Clear communication at the customer's comprehension level
- Knowledge and/or interest in the topic of conversation

Giving Feedback

Good customer service among staff requires honest and open communication. Providing feedback to colleagues is an effective method for promoting communication. Use these concepts when formulating and receiving feedback.

- Think through your feedback first. Thoughtful and well articulated comments are more likely to be considered and found to be helpful
- Be specific and use examples
- Be constructive
- Make requests; not demands
- Address actions; not attitudes
- Be sensitive
- Invite the other person to share their view

- Listen openly
- Check for understanding
- Be aware of your emotions
- Don't interrupt to argue, correct, or defend
- Analyze the information
- Take time to think about the information to see what you can gain from it

Promoting Confidence

Effective customer service relies on healthy workplace relationships. It is easier to provide high-quality customer service when colleagues have confidence in one another. Elements of confidence include:

- Be aware of different communication styles, personal background, work history, etc. when interacting with staff and customers
- Consider the perspective of the colleague or customer making a request
- Pay attention to the little things that promote or can undermine friendly interactions, such as negative body language, active listening, etc.
- Clarify expectations to prevent misunderstandings
- Keep all commitments and promises or directly communicate inability to do so; collaborate on finding solutions and alternatives
- Show integrity (walk your talk)
- Apologize when warranted
- Openly and respectfully discuss problems and work toward solutions
- Support decisions once they are made
- Take the initiative to make things better

X by Y or Notify

X by Y or Notify is a method for communicating expectations about the completion of work.

Agree to do **X** by a given time **Y**. **Notify** if the work cannot be completed. For example:

I will try to get that document to you by 5:00 today, or I will let you know if it takes longer.

When agreeing to work commitments, remember to:

- Negotiate time frame and priorities when you initially make a commitment. Renegotiate when needed, establishing a new time frame and clear understanding of revised priorities or expectations.

- Be sure there is mutual understanding between you and the colleagues making the agreement. To assure mutual understanding, restate the agreement and seek a verbal or written acknowledgement.
- Be clear about your ability to fulfill the commitments and be specific about the tasks that make up the commitment.
- Keep track of what you have committed to do to help manage your workload
- If you are unable to meet your commitment, let your colleagues know (i.e., Notify). Offer a revised X or Y and renegotiate your agreement.
- Communicate openly about roadblocks keeping you from completing your work. This will reduce any stress or misunderstandings among you and your colleagues.

Adapted from:

- Customer Service Policy (2010)
- New Employee Orientation training materials
- [Information Asset Use, Implementation, and Security Guidelines](#)
- [World-Class Courtesy: A Best Practices Report](#)