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The Head, the Heart and the Hand: Co-Creating and Personalising a Client Service Charter and Culture at the University of Western Australia

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Abstract

UWA's strategic plan to enhance the student experience underpinned funding for the refurbishment of several UWA libraries in 2016/2017. The benefits of these projects were quickly realised with library visits increasing by 30% in two years. An imperative emerged: how to align a large group of frontline staff with diverse experience and skills to a shared vision, reflective of the university's strategic priority, and use this as a basis to evolve library services in line with changing client volume and expectations, without additional staffing?

In 2018 UWA Library commenced a project to create a client service charter for all frontline staff, with aim of articulating a unique, high quality and holistic standard for client service in the UWA context. All frontline staff as well as UWA students and stakeholders were invited to participate in the co-creation of the service charter. The crafting process utilised user-centred design strategies and strategic environmental scanning. Embedding the charter more deeply into the culture, as well as the interpersonal and technical practices for frontline staff involved a range of creative techniques, including peer dialogue, personalising and serious play. For the leadership team, new competencies were needed to enable a more modern client service culture to emerge. Research in the disciplines of customer service and emotional labour provided new insights into the client, employee and management perspectives, and empowered a more confident and proactive service culture.

The UWA case study presented in this paper will illustrate the necessary interconnected elements of client service transformation in the academic library context. The paper will also demonstrate the sustained performance improvements at UWA as a result of action on all three elements, the head, the heart and the hand. Finally, it will offer a framework for improving student experience via the co-creation and personalisation of a charter and service culture.

Keywords: library experience; client service; service excellence; client service charter; service culture;

Introduction and context

The University of Western Australia's (UWA) flagship library, the Reid Library, underwent a significant renovation of its ground floor in 2016. The project was driven by a strategic priority to enhance the student experience at UWA, and responded to an urgent need to create more study spaces for students on campus, and enhance and update the facilities provided. The 2016 project was limited to one floor, and was intended as the first phase in a long term plan to refurbish the remaining three floors of student space in the Reid Library, as well as improve spaces in the other five UWA libraries. Success factors in this project have been reported in detail elsewhere (Benn, Mills, Nicholls, & Sputore, 2017), but can be

summarised by the quote from a delighted student describing the refurbished space as "student heaven". The positive response from the UWA community quickly resulted in a significant increase in usage of the Reid Library, with visits more than doubling, as shown in Figure 1.
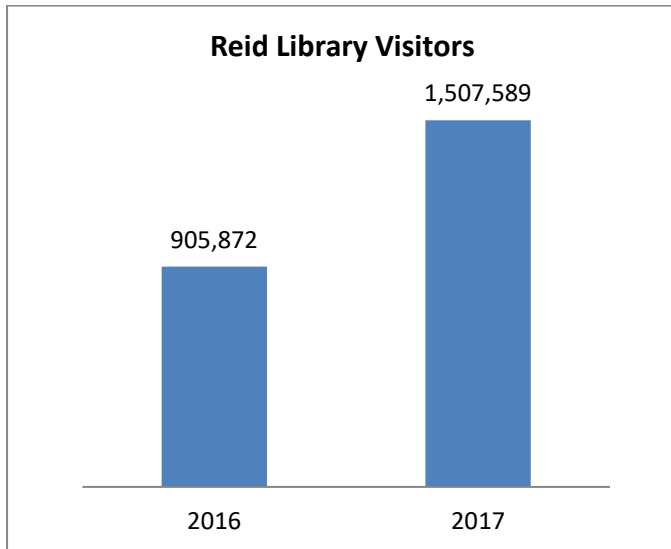

Figure 1: Visitors at Reid Library before and after renovation

The popularity of the new space led to shifting priorities for the library, as it was rapidly becoming the destination of choice for collaborative group work, student events, teaching, and many more students, staff and visitors taking advantage of the inviting facilities. New bookable spaces created in the renovation were heavily utilised (Figures 2 and 3), and use of the Library's SMS enquiry service, aimed at helping library users get assistance without leaving their seat, jumped in proportion to the number of visits (Figure 4), with the majority of these focused on noise management.

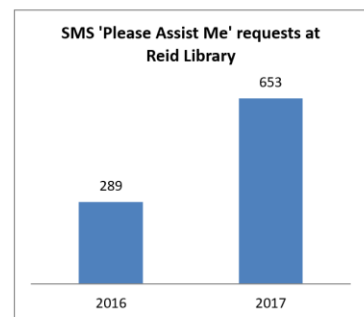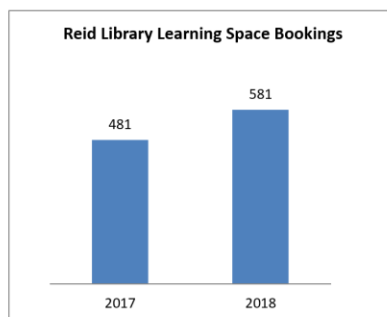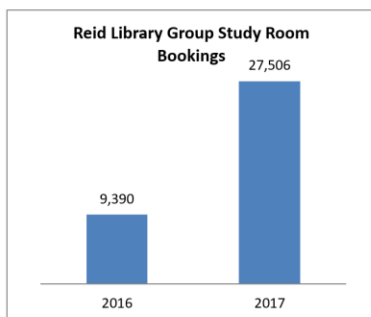*Figure 2: Group study room bookings at Reid Library before and after renovation*
Figure 3: Learning spaces bookings at Reid Library after renovation
Figure 4: Use of the SMS 'Please Assist Me' service at Reid Library before and after renovation

Similar trends followed as UWA Library continued to transform spaces in two further renovation projects, with an increase in usage following each project as shown in Figures 5 and 6.
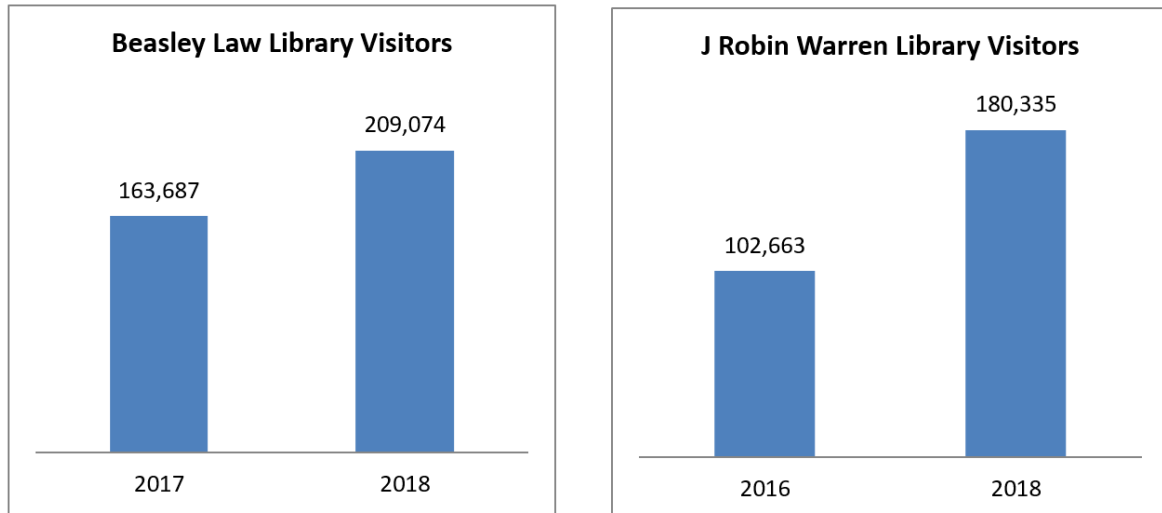
Figure 5: Entrances to Beasley Law Library before and after renovation
Figure 6: Entrances to J Robin Warren Library before and after renovation (closed most of 2017)

Given UWA's strategic driver for the refurbishment projects, it was important that every visitor to the new spaces had a positive experience, from their first impression, e.g. booking a group study room online; to the experience in the space, e.g. seeking help from staff; and also to the impression they were left with after their visit, ideally of a pleasant and helpful place to spend time on campus. Following these library refurbishments, the Library Experience team was rapidly challenged with an expanding workload to meet the needs of an increased volume of library users, and to ensure excellent service and a positive experience for every visitor.

The Library Experience team includes a leadership group of three, 17 FTE frontline staff (Client Support Officers) delivering library services during business hours, and around 40 Student Library Officers providing a slightly simpler but nevertheless comprehensive service during evening and weekend opening hours. The frontline staff work as one team: all staff members are able to be rostered across all six UWA Library sites, and rotate their 'home library' every six to twelve months. In this context, these refurbishments and the subsequent increased use of the libraries had implications for every team member.

The Library Experience leadership group was also challenged in new ways. The refurbished Library space had itself become a new service to be managed. In order to increase and enhance the services offered (e.g. cleaning and maintenance to correspond to the visitor numbers), growing and leveraging relationships with other UWA departments was becoming a significant priority. Many procedures required rethinking to build quality and service excellence into the processes. Team-wide communications channels became more crucial for sharing information and new training imperatives emerged. Where possible, use of self-service technologies was optimised to improve demand management and deliver consistent service across routine processes, such as lending and room bookings (Padma & Wagenseil, 2018). However, the client service workload was becoming dominated by complicated and varied issues that library users could not solve on their own. The volume and diversity of library visitors resulted in a need for greater sophistication in operational knowledge required to deliver frontline services and respond to a greater complexity in inquiries.

In 2017 the UWA Library carried out a biennial survey of student satisfaction, a key pillar of our evaluation and assessment strategy for over 15 years. While the Library had improved facilities for students significantly since the previous 2015 survey, and the response to the new Reid space was overwhelmingly positive in terms of utilisation, the satisfaction results were somewhat more surprising.

The students were now less satisfied that they were two years earlier (Table 1). The satisfaction scores suggested that that continuous improvement of the Library Experience should be a priority.

Survey Categories	2015	2017
Service Delivery	79.3%	78.8%
Facilities & Equipment	75.3%	74.4%
Overall	**77.8%**	**76.8%**

Table 1: UWA Student Survey - student satisfaction scores 2015 (n=2268) & 2017 (n=1079) (Note: question set differed slightly for each survey.)

To respond to this feedback, the Library Experience team needed to commit to a holistic service philosophy and standard, as a shared vision, reflective of the university's strategic priority to enhance the student experience. Each staff member needed to be personally motivated to give their best performance every day in a highly visible role on the frontline information desks. Teamwork, knowledge management, communications and operations needed to be reliable and efficient.

To enable practical change at scale, service culture across frontline library services needed to evolve, with critical cultural dimensions being caring, learning and safety (Groysberg, Lee, Price, & Cheng, 2018). A caring culture would enable each other's (and the students') success, learning culture would help with flexibility in an environment of transformation, and a safety culture would underpin the rigorous operational framework needed to assure excellent client service to the greatest extent possible. The journey towards co-creating this culture began in late 2017.

Service Excellence Theory and Practice

Customer service excellence is intentional not incidental. Recent literature identifies seven factors as essential antecedents to service excellence (Padma & Wagenseil, 2018):

1. Service Leadership
2. Service Culture
3. Quality Management & Business Excellence
4. Service Innovation
5. Customer Engagement
6. Service Brand Image
7. Service Encounters

While the Padma & Wagenseil model was developed in the retail context, the increasing expectations amongst library clients, born of customer focussed innovation in their retail journeys, are that libraries will offer the same kinds of conveniences and quality guarantees.

Customer experience (CX) literature also describes the interdependencies between customer satisfaction and employee satisfaction. Employees who feel valued bring their 'whole selves' to work rather than just their technical skills, and will deliver service in a manner which is engaging, friendly and helpful (Iszatt-White, 2013). Unhappy staff are unlikely to be able to deliver this, nor will they be inclined to 'go that extra mile' for clients, another recognisable quality of the best service interactions.

Feelings of value can be constructed and enhanced using a set of criteria stating what skills and behaviours are to be valued, and offering individual recognition of the specific skills being exercised (Iszatt-White, 2013). Feelings of value can also apply to clients, as well as employees. Clients will feel valued when they feel service offerings are fair, when they are treated as an individual, and when they are empowered through consultation on services which affect them (UCISA, 2016)

Katsabaris, 2018 summarises the interdependencies between customer service and the practices and attitudes of the employees delivering the experience as having three dimensions:

1. The Head: the connection to vision and objectives
2. The Heart: aligned values and purpose
3. The Hand: empowerment to take action

This model aligned well with the high team cohesion and engagement amongst the Library Experience Team employees, and it became our intention to use this analogy as a key part of our language around evolving the UWA library experience, to ensure each value dimension would be addressed.

These concepts from CX literature can be merged and effectively applied to the library context, as shown in Figure 7.

HEAD:	HEART:	HAND:
Service Leadership Shared vision and values, with people (employees and clients) as the foundation. **Service Innovation** Continuous improvement and utilisation of new technologies are priorities. We are always on a spectrum of innovation (Freeburg, 2018).	**Service Culture** Caring, learning and safe. **Customer Engagement** Clients feel empowered and become collaborators in shaping service delivery (UCISA, 2016). **Service Brand Image** People are valued. Valuable contributions are recognised and acknowledged.	**Quality Management & Business Excellence** A range of strategies are used to ensure quality, including surveys, data analytics on measurable items, comments and suggestions, consultation, feedback in the moment, industry benchmarks, transparency. **Service Encounters** Client service aims are consistent across time, space and channel. Frontline staff are trusted and empowered to exercise their unique individual abilities in pursuit of these aims. (Freeburg, 2018; also Chauvet, Bourbous, & Liston, 2016)

Figure 7: A model for evolving library experience

To evolve the UWA Library's frontline culture to respond to the changing environment and expectations, the leadership team felt it was essential to articulate the vision and align the team around this vision on culture, value and operational dimensions. Client service charters, or service philosophy statements, are commonly used in retail and service contexts to articulate aspirational service culture, define criteria for performance (value) and provide a transparent tool for accountability and recognition (McColl, 2013). The aim is to convey specific ways in which service is delivered during everyday interactions with employees (Moffett & Weare, 2018). A co-creation process that was driven by the frontline team and could be owned by them, rather than imposed from above, was commenced.

Co-Creating a Client Service Charter

Phase One – Staff Consultation Workshop

To commence this journey of co-creation, it was necessary to determine where the team was in alignment, where the tensions and pain points were being experienced, and to inquire into the team members' appetite for change. This was essentially an inquiry into culture, however as Groysberg et al. (2018) recommends, focusing on tangible matters, including both challenges and opportunities, can help team members connect with the drivers for culture change.

In November 2017, twenty-two members of the Library Experience team, including several Student Library Officers representing the student perspective, participated in a forum to explore the question "*What does the ideal UWA Library experience look like for our students and what do we need to do to provide this?*" Following the principles of Open Space Technology (Wikipedia, 2019), the half-day workshop enabled the team to self-direct the proceedings via multiple simultaneous discussion sessions based on the core theme. Agenda topics generated by the participants ranged from 'providing a consistent library experience (across six sites)', to 'the library as an ideal study space', to 'welcoming new students'. Through these discussions, the team was able to provide suggestions for service improvement, as well as articulate their key challenges and pain points.

The team acknowledged that there was room for improvement in the delivery of services as a consistent experience for clients at all times and libraries. The willingness of the team to implement change was a key learning point realised through the workshop. Team members were able to acknowledge current strengths of the team, such as providing a "great level of customer service" and being "highly responsive to clients at our information desks". Current issues were also identified, such as the requirement for "better visibility and understanding of library services amongst our clients" as well as a "need to offer more training to team members in a range of formats".

Through involvement in the workshop, members of the Library Experience team recognised the benefits of creating a document, such as a charter or mission statement to articulate a shared vision for the team. One participant described this as facilitating an "expected standard of service". Another participant mentioned the need to "foster a one-team culture" among members of the Library Experience team. The workshop culminated in all participants coming together to consider how library clients would recognise an excellent service experience. In particular, the collective responses to the question "*When we are delivering a great student experience our customers will notice…*" began to emerge as a shared vision of client service.

The Open Space Workshop outcomes became the foundation for the next steps of our project. Through the workshop the leadership team were able to identify influential change champions amongst the members of the frontline team. These employees were invited to participate on the project team, to represent their colleagues, contribute their authentic voice to the client service commitment and advocate for culture shift amongst their peers, through their language and actions (Groysberg et al., 2018).

Phase Two – Environmental Scan

Once the project team was formed, an environmental scan to determine best practice for client service charters was undertaken. The purpose of this activity was two-fold: to examine the content typically included in client service charters, and to expose project team members to the range of issues to consider in the creation of our own charter. The project team selected a number of organisations for the environmental scan based on the following criteria:

- similar to UWA Library
- operate in a broadly similar environment to UWA Library (but not a library)
- likely to offer services to the same clients as UWA Library

Using the charters consulted in the environmental scan as a guide, the project team considered strengths and weaknesses of each, as well as how the best qualities of charters could be applied to the UWA Library context.

Phase Three – First Draft of the Charter

Throughout the process of drafting the charter, the project team recognised that using terms such as 'we' and 'our' contributed to the authenticity of the voice presented through the charter. Service philosophy statements have more of an impact if the authorship belongs to those delivering the service

(Moffett & Weare, 2018). Moffett and Weare (2018) also note that, as distinct to library-wide mission statements, "service philosophy statements afford an opportunity for frontline service staff to communicate directly with users" (p. 121). It was imperative that our charter's authorship should be centred around the voice and perspective of the library's frontline staff. A key priority for the project team was that the statements were short and memorable.

Providing frontline staff beyond the project team with the opportunity to add their voices to the charter further enhanced the co-creation process. Wehmeyer, Auchter, and Hirshon (1996) note that "staff involved in the planning process become invested in the program" (p. 174). The challenges and frustrations identified by the Library Experience team in the November 2017 workshop were widely agreed upon, as were ideas for service improvements. These ideas helped form the draft Charter which the project team further developed.

Phase Four – Client Service Workshop Design

The next stage was for the draft Library Experience Service Charter to be tested by Library Experience staff through a series of workshops, which were designed and facilitated by members of the project team. The intention of these workshops was to apply the draft Charter to a range of client touchpoints, including library spaces, communications, service desks, entrances and signage, to test whether we could uphold the philosophy and service standards in authentic situations (Wehmeyer et al., 1996).

One of the activities, client journey mapping, provided models of client experience to examine possible derivations from the Charter, and where performance gaps might be experienced by clients (Halvorsrud, Kvale, & Følstad, 2016).

The activity first asked employees to map a familiar journey, the experience of supermarket shopping, considering themselves as the client. By applying the draft Charter to the client experience in a large supermarket, the participants were able to easily identify the gaps between the ideal student-focussed, supportive experience as articulated in the Charter, and the reality of the experience at the large supermarket chain. This playful activity established the objective, client-focussed mindset needed for journey mapping within the library.

The team looked at two examples within the UWA Library context, the busy Reid Library and one of our quieter campus libraries, to see how user numbers could affect service quality. The journey mapping facilitated new insights into the client experience, for example, how too much or too little signage could cause confusion when using self service facilities, and how clutter on the service point can suggest to users that it is a personal work area, decreasing the approachability of the service point. Through the activity, participants were able to consider key client touchpoints for the charter, what would be required to live up to the draft Charter commitments, and how they could personally re-frame their work to consider the client journey perspective.

In small groups, workshop participants also considered case studies of specific examples of client interaction within the UWA Library context. By role playing possible variations on these interactions, participants considered how they would respond in the scenario, taking into account the commitment outlined in the draft Charter and potential barriers to executing this commitment.

The workshops concluded with opportunities for all frontline library staff provide feedback on the draft Charter, including detailed discussions on the selection of words used, and the order of the statements. Skills gaps and training needs were identified, and potential challenges were named, including factors outside the control of the frontline team. These items would be worked on through the consultation and implementation phases.

Phase Five – Consultation with Stakeholders

Following the workshops, the charter was revised and circulated to Library Experience stakeholders for a consultation period. The stakeholder group included the Library Leadership Team, UWA Student Guild, librarians in the Library's Engagement (outreach) team, and trusted colleagues from other UWA departments. The aim of the consultation period was to ensure that our shared beliefs and understandings were consistent with the client service culture and norms valued by other colleagues and recognised by them. Ultimately, library experience is not just a product of frontline service, but the commitment of the entire organisation (Chauvet et al, 2016). The range of conversations utilised in the Charter design project helped to articulate implicit understandings, share differences and talk each other through the evolution of our service culture (Groysberg et al., 2018).

Phase Six – Confirmation and communication of the final Charter

Minor amendments were again made in response to the discussions in the consultation period, and the final Client Service Charter for Library Experience was confirmed (Figure 8). Frontline staff were provided with a colourful postcard version of the Charter, to serve as visual reminder of the Library Experience team's commitment to high quality client service and the skills and behaviours that will be valued.

Client Service Charter for Library Experience

Our Visibility

1. Our public spaces are open, safe, welcoming, comfortable and accessible
2. We actively manage our spaces, and report, monitor and escalate issues
3. We can be found and contacted easily (in person and online)
4. We actively promote the wide range of services we offer
5. Our signage is concise, visual, relevant, and positive

Our Approachability

6. We are here to help and we enjoy helping
7. We proactively engage with clients in a friendly and positive manner
8. We aim for active listening, clear communication and collaborative solutions
9. Where possible we work alongside our clients when interacting at service points

Our Skills and Knowledge

10. We keep our broad range of knowledge current and accurate and share knowledge with each other
11. We do our best to support our students to achieve success in their studies and to support all clients to have a positive experience in the library
12. We take ownership of enquiries we receive, facilitate effective referral when it is best to do so and ensure enquiries are followed through to resolution wherever possible
13. We are confident managing multiple enquiry channels, prioritising during busy periods, acknowledging queues and waiting periods, and ensuring complex enquiries receive sufficient attention

Our Philosophy of Empowerment and Equity

14. We provide guidance and advice to educate clients, and empower them to independently use the library and services
15. We empower our clients to tell us what they want, and we actively respond
16. We aim for a positive, equitable library experience for key client groups, and we are mindful of the need to balance the needs of all clients.

UWA
PERTH·AUSTRALIA

Figure 8: Client Service Charter for Library Experience at UWA

Implementation

A range of activities and process changes were designed around the Charter to bring it to life in the team, and ensure it became an embedded part of all practices in the frontline team. There were several aspects to our implementation plan:

Recruitment: role statements are linked to the Charter and recruitment interview questions are derived from the Charter

Staff performance appraisal: the Charter defines the client service expectations for each team member, including the leadership team, to be considered in formal annual review processes

Training and Development: the Charter provides a foundational set of competencies for induction and ongoing training and development. This applies to both formal and informal learning, and both organisation-driven and self-driven development.

Communications: the Charter is a living part of our day to day, and the language we use around our work. Our weekly Library Experience team huddle is an opportunity for all team members to share and hear new information relevant to our commitment in the Charter ('the head'), empowering us to act with confidence ('the hand'), and provides a regular opportunity to celebrate successes and share client service stories ('the heart').

Personalisation

While the co-creation process of developing the UWA Client Service Charter for Library Experience followed best practice to create shared meaning, it was important that staff members individually created personal meaning around the commitment. The leadership team hoped to design an innovative personalisation activity that would provide a unique development opportunity for each individual employee. An approach borrowed from tertiary teaching practice was utilised to commence individual and supported peer reflection, the peer dialogue.

A Peer Dialogue activity was chosen to meet the aims of encouraging critical self-reflection, creating a learning opportunity by standing back to observe a peer from a client's point of view, and reflecting with a trusted equal to gain deeper self-awareness of performance in relation to the Charter. The Deakin Learning Futures *Peer and self assessment* guide, developed by Deakin University, notes that the peer and self-assessment process is beneficial "when the evidence to be assessed is intrinsically personal in nature" (p. 3). Peer and self-assessment are also linked to self-reflection and self-development, which makes this practice a key skill for career development (Deakin University, 2013).

The purpose of the Library Experience peer dialogue activity was to provide frontline staff with the opportunity to personally reflect on their work practices in the context of the commitments outlined in the Charter, with a trusted peer providing feedback, details, and ideas (Oberlies, Buxton, & Zeidmaan-Karpinski, 2019). The activity included the following steps:

- Self-reflection on the Charter (individually)
- Task performance (30 minute review period) - one team member as Observer and the other as Performer
- Peer Dialogue – a discussion between both parties, around what was experienced and what was observed, with themes linked to the Charter
- Self-reflection on the Charter, the peer dialogue and the learning gained through this activity, following the completion of the activity

Feedback from frontline staff revealed a high level anxiety associated with the anticipation of this activity. This preliminary anxiety is also reported in the teaching context, but mitigated by the positive and productive experience of most participants when completed (Deakin University, 2013). Members of the project team, the change champions throughout the Charter creation process, acted in the role of the 'performer' during the first week to demystify the activity for their colleagues. The 'observer' of each pair then became the 'performer' during the subsequent week in a new pair. Over the course of Semester 1 2019, all frontline employees were able to participate in the activity, playing both roles.

The majority of frontline team members felt the activity was useful and just under half reported a change to their practice, shown in Figure 9.
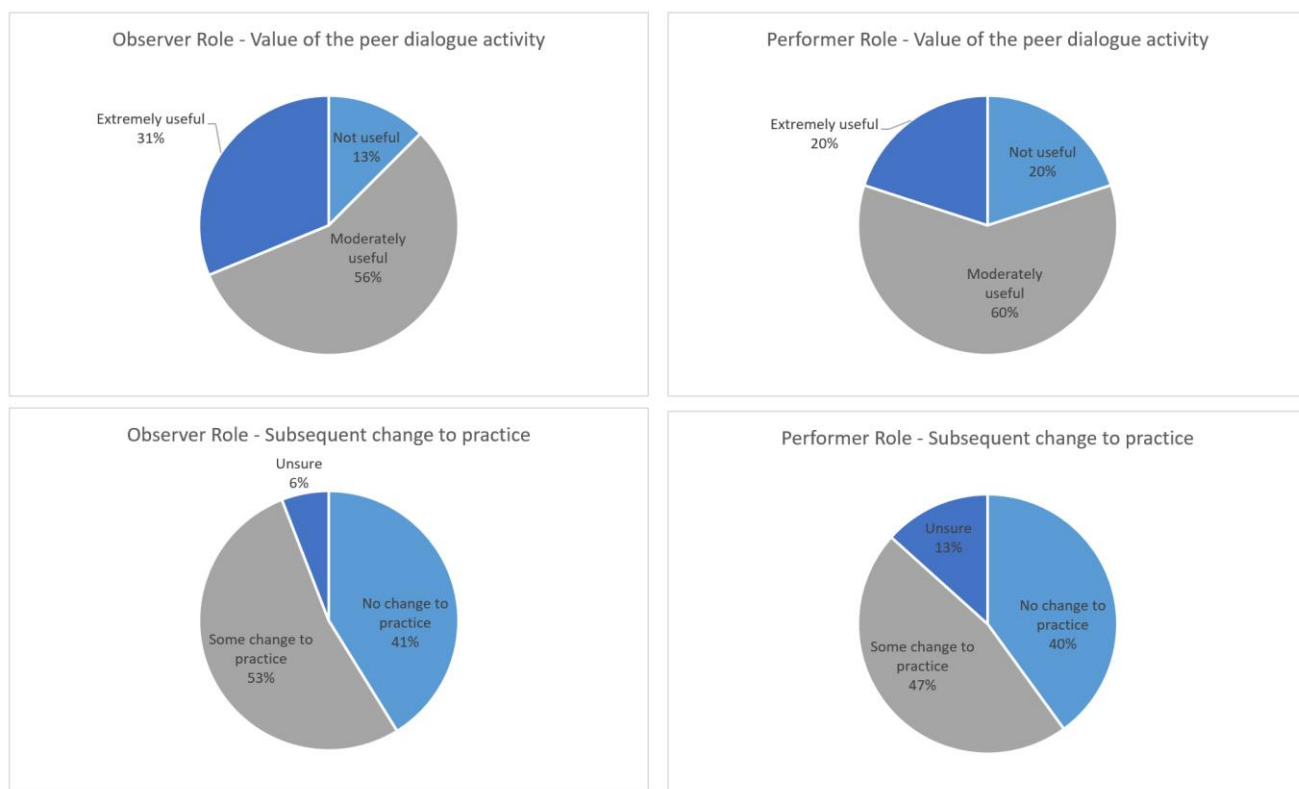
Chart: Observer Role - Value of the peer dialogue activity
- Extremely useful 31%
- Not useful 13%
- Moderately useful 56%

Chart: Performer Role - Value of the peer dialogue activity
- Extremely useful 20%
- Not useful 20%
- Moderately useful 60%

Chart: Observer Role - Subsequent change to practice
- Unsure 6%
- No change to practice 41%
- Some change to practice 53%

Chart: Performer Role - Subsequent change to practice
- Unsure 13%
- No change to practice 40%
- Some change to practice 47%

Figure 9: Outcomes reported from Peer Dialogue on Client Service

The outcomes reported by participants suggest that valuing practices should be enhanced to support frontline employees in their engagement with the Client Service Charter. Further activities could focus on improving the culture of feedback in the Library Experience team and recognition of learning moments in client service practice. The design and framing of the peer dialogue activity could be improved to ensure the process is more positive for employees. Ongoing monitoring of the effectiveness of the Client Service Charter will be necessary to ensure relevance to the organisational context, and accurate articulation of the skills and behaviours that are valued.

Evaluating Service Excellence

Four criteria can be used to evaluate customer service excellence (Asif, 2015):

1. Service excellence focus
2. Development of service excellence structures
3. Systematic management approach to implementation
4. Continuous improvement

The co-creation and personalisation of the Client Service Charter for Library Experience demonstrates the systematic development and implementation of a service excellence focus at UWA Library. Since the Charter was created, further work on the three dimensions, the head, the heart and the hand, has encompassed a range of continuous improvement activities.

One of these has been a team restructure to repurpose one frontline team member position as a second team leader position, to increase the leadership group's capacity for individual support and recognition, training and coaching. This organisational design reinforced the culture change to a more caring and learning culture, moving away from simplistic order and authority which, for a period of time, was necessitated by the constrained resources in the hectic post-renovation period.

Another continuous improvement activity has been the introduction of customer feedback app RateIt in every UWA Library. This collects 'in-the-moment' feedback on the library experience and enables the identification of trends across time and space. It has been pleasing to see that the UWA Library has a consistently high rating from library users via RateIt (Figure 10), that the best performing theme in the library experience is client service (Figure 11) and that instances of service excellence are often personally recognised by library clients (Figure 12). All members of the LX leadership group have daily visibility of the RateIt feedback and take prompt action to understand any negative comments.

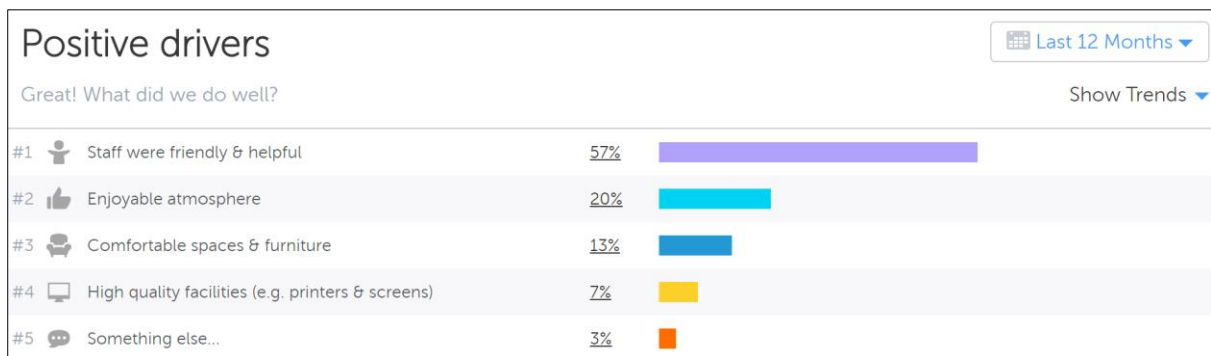*Figure 10: RateIt CX score (scale 1-10) for UWA Libraries, July 2018-June 2019*

Figure 11: RateIt themes for UWA Libraries, July 2018-June 2019
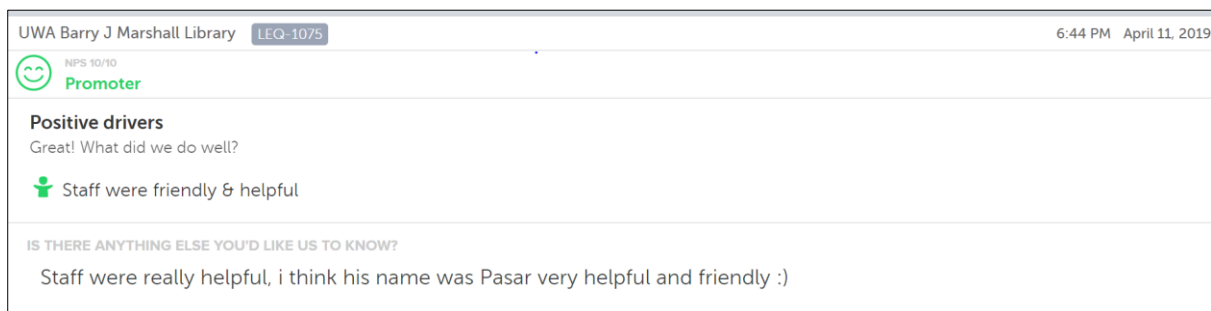

Figure 12: Personal recognition of frontline staff value, via RateIt

UWA Library recently repeated our biennial survey of student satisfaction with library services, in April 2019. Since 2017, and with ongoing work on the many dimensions of service excellence articulated in this paper, our 2019 survey results have significantly improved, with students feeling more satisfied with key aspects of the library experience (Table 2).

	2015	2017	2019
Service Delivery	79.3%	78.8%	82.1%
Facilities & Equipment	75.3%	74.4%	79.1%
Overall	**77.8%**	**76.8%**	**80%**

Table 2: Library Student Survey results over time, 2015 (n= 2268), 2017 (n=1079), 2019 (n=4009) (Note: question set differed slightly for each survey.)

This success demonstrates that performance improvements in library frontline client services can be sustained with the development of key service excellence antecedents and a structured, people-centred approach to culture change.

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