

Site visited: _____

Customer Service Walkabout

Instructions:

1. Working with a partner, use the attached Customer Service Checklists to record your observations about how well your library responds to public expectations and needs.
2. If you have trouble deciding on the answer to a particular question, skip it. Add a note to that item if you'd like to discuss it later.
3. Be sure to base your answers on what you can actually observe.
4. Please be an observer only. Do not interview or otherwise engage customers or staff at the site.
5. Complete this worksheet and use it to develop a Construction Challenge Grant application.



A. Welcoming Service Checklist

	Yes	No	If yes, how?
A1. Is the facility well marked/easy to identify?			
A2. Can you see inside before entering?			
A3. Is this site accessible for people in wheelchairs, scooters, or pushing baby strollers?			
A4. Do staff acknowledge/welcome customers on arrival?			
A5. Do staff reflect the local community in terms of age, race, gender, language?			
A6. Is this site inviting?			
A7. Are returning customers recognized?			
A8. Jot down your thoughts on how your library can be perceived as welcoming.			

B. Comfortable Service Checklist

	Yes	No	If yes, how?
B1. Does the facility look clean?			
B2. Is the lighting good?			
B3. Are the aisles or other public spaces comfortably proportioned?			
B4. Do customers have a choice of seating?			
B5. Are there pleasing views from inside the facility to the outdoors?			
B6. Are quiet areas separated from livelier/ noisier zones?			
B7. Are food and drink allowed?			
B8. Jot down your thoughts about how your library can be perceived as being comfortable.			

C. Easy to Navigate Service Checklist

	Yes	No	If yes, how?
C1. Is facility/service set up to be simple on the surface?			
C2. Is it easy for customers to figure out how or where to get started?			
C3. Is it easy to identify staff?			
C4. Do staff seem to be knowledgeable about the products/services?			
C5. Are the products/ services easy to see/get to?			
C6. Does the site feel uncluttered?			
C7. Do the signs describe what customers can do, rather than what staff do? <i>E.g. "pay here" not "cashier"</i>			
C8. Jot down your thoughts about how your library can be perceived as being easy to navigate.			

D. Successful Service Checklist

	Yes	No	If yes, how?
D1. Are there plenty of customers?			
D2. Are the facilities in good repair?			
D3. Do the customers appear to be satisfied with the products/services?			
D4. Do staff appear to be committed to the success of the organization and its customers?			
D5. Do staff behave as if this is a great place to work?			
D6. Jot down your thoughts about how your library can be perceived as being successful.			

E. Efficient Service Checklist

	Yes	No	If yes, how?
E1. Are customers allowed to help themselves rather than “go through” staff to get to products and services?			
E2. Does this site offer express service?			
E3. Does the organization that operates this site also offer its products/services online?			
E4. Is there minimal waiting for service?			
E5. Do staff empower customers rather than regulate them?			
E6. Jot down your thoughts about how your library can be perceived as being efficient.			

F. Up-to-Date Service Checklist

	Yes	No	If yes, how?
F1. Does the exterior (or what you can see from outside) of this site change from time to time?			
F2. Do the computers or other technology used at this site look up-to-date?			
F3. Do staff seem to be knowledgeable about the technology they use?			
F4. If visitors also use technology here, do staff know how to assist them?			
F5. Is the décor up to date?			
F6. Does this organization project a consistent brand image?			
F7. Jot down your thoughts about how your library can be perceived as being up-to-date.			

G. Convenient Service Checklist

	Yes	No	If yes, how?
G1. Are the hours of operation reasonably consistent from day to day?			
G2. Is this site located near other sites/services likely to interest its customers?			
G3. Does this site take reservations or appointments?			
G4. Does this site offer "walk in" service?			
G5. Does this site accommodate visitors who want to use their own equipment – computers, cell phones, etc.?			
G6. Does this site accept credit and debit cards?			
G7. Jot down your thoughts about how your library can be perceived as being convenient.			

H. Fun Service Checklist

	Yes	No	If yes, how?
H1. Is this a pleasurable, even playful environment?			
H2. Do staff exhibit an upbeat attitude?			
H3. Does this site emphasize what visitors may do rather than what they may not do?			
H4. Is spontaneity part of this environment?			
H5. Is humor part of this environment?			
H6. Does this site offer free treats or giveaways?			
H7. Jot down your thoughts about how your library can be perceived as being fun.			

I. Conclusions

To help libraries meet these challenges, the SALS Board of Trustees has initiated a competitive grant program to help libraries perform repairs, renovations, or touch-ups to improve the library's physical space. Library staff and boards will be required to complete a walk-through of their building and use it to complete the grant application.

Based on your observations:

I1. How will the building project improve the library experience of the library user?

I2. How will this project improve the library's physical space?

I3. How will this project improve services to people living in your community?

I4. How will this project make the library more welcoming?