Walking the Talk
Tools for creating an embedded library service action plan

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Hello there.

Our communities are changing. Technology and hyperconnectivity is affecting the ways people work, learn, and interact. No organization is better suited to this new environment than the library. Our ability to embed ourselves in the community affords us a unique opportunity to synthesize community needs, create new models for service, facilitate civic discourse, and model public participation. We are islands of humanity in a sea of noise.

Let’s build new things together.

In today’s workshop, we’ll engage in a few exercises designed to evaluate our current capacities and create better outcomes. By taking a comprehensive look at our organizations, we’ll be able to build new relationships with our stakeholders and create truly memorable library experiences. In doing so, we’ll learn how to embed library work in the life of the community, demonstrating our value by showing rather than telling.
Today’s Workshop

The following exercises are designed to help you work through specific library problems. You’ll use these to go through a rudimentary design sprint process, and interact with your fellow learners to start the process of testing and iteration. Depending on where our initial conversations lead us, you’ll likely only do one of these exercises today. If you find this experience useful, please take the rest of the exercises back to your organization and try them out with your colleagues. Feel free to remix, mashup, or edit these to suit your needs.

I would be remiss if I didn’t apply the same iterative principles to my own work. Do you have comments or feedback? Can you adapt, adopt, or improve anything? Do you have suggestions for making the exercises better? Don’t hesitate to let me know.
An Extremely Brief Guide to User-Centered Design

1. **Know your users.**
   Talk with your stakeholders - those who are in your building, those you encounter online, and those who may not be stakeholders yet. Get a sense of their aspirations, their interests, and their passions. Use all this information to build your own sense of empathy and gain a more accurate perspective on how your organization works in practice. What makes people happy? What parts of visiting the library make folks want to tear their hair out?
   Be creative in your conversations - if you’re trying to change people’s perspective on what a library is, it’s best not to start with library-centric questions.

2. **Define the need.**
   Based on the information you’ve gleaned from your stakeholder conversations, assess the needs and opportunities that lie before you. What’s working? What’s broken? What are the niches the library can operate from? The more confidently you can answer this question in terms of your user’s needs, the better you’ll be able to make an impact.

3. **Launch quickly.**
   You know how they say “perfect is the enemy of good?”
   It turns out that “they” are right.
   Even if your idea isn’t fully formed, you can at least start the conversation and work from there. Using this idea of the “design sprint” can help you keep your startup costs low and your “other duties as assigned” manageable.

4. **Fail fast.**
   No one ever gets it right on the first try. By releasing your ideas to the public quickly and revising in real time, you can demonstrate just how nimbly you can respond to user needs. Creating an efficient feedback loop will help create a healthy cycle of gradual improvement - and allow you to build closer stakeholder relationships in the process.

5. **Keep connecting the dots.**
   As you iterate on your ideas, you’ll likely find other services, users, or external organizations worth connecting to. If you can find ways to fit your work into these processes, you’ll build a sustainable model for your services and reinforce the interdependent nature of library work.
Planning for Staff Skills and Technology Empowerment

Using the Tech Competency evaluation tool on the next page, you and your group will strategize a plan to help your organization build a culture of confidence toward new and unfamiliar skills. In doing so, you’ll help create tools to model the spirit of ongoing learning and personal growth that serves at the heart of the library.

Designate a discussion group leader for this exercise. Their library will serve as the test subject for the Tech Competency environmental scan, and spend the initial discussion period working through the evaluation.

During the project design phase, your group members should take on the roles of staff members within the model library, and use the conclusions from the environmental scan to design a learning plan for your organization.

Focus on how this learning plan will translate to individual staff. It may help if members of your group member role-play specific archetypes within your organization.

Questions to consider

- Of the needed skills, which ones really should be organization-wide? Which are only necessary to smaller groups? Are there any skills that should be only held by one person?
- How will you get the right skills to the right people, and how will you create learning pathways that stick?
- How will you hold people accountable for their own ongoing learning?
- How will you deal with resistance from staff who feel like learning these skills is not necessary?
- Which competencies does your organization have a knack for? How can you play to these strengths?
- Assuming these skills take hold, how will your staff use them to benefit the public and the organization?
- As time goes by and you perform subsequent evaluations, how will staff build on these skills?
Assessing Technology Competencies

Goals:
1. Understand your patrons’ technology needs.
2. Discover the types of technologies and/or processes that patrons often need assistance with.
3. Define the technology needs that are unique to your department or location as applicable.

Please answer the following questions in regards to your patrons’ use of technology and digital resources. Include equipment, software applications, mobile devices, research databases, downloadable resources, websites, and any other relevant technologies. Elaborate on your responses using explanations and examples whenever possible, specific to the department/location in which you work.

1. What are the technologies that are most unique to your department?
2. Are there any unique software applications or devices that your staff frequently use for library programming or outreach events?
3. What types of tools and resources do your staff regularly recommend to patrons to help them reach their goals?
4. How frequently do patrons ask for help with downloadable resources, such as Overdrive, Zinio, Freegal, Hoopla, OneClick, etc.? (Daily, Weekly, Monthly, Rarely, Never?)
5. How frequently do patrons ask for help with your library’s subscription research databases?
6. Where do patrons often get stuck when using technology and digital resources in your branch or department?
7. What types of questions do your staff often refer to others, and to whom do they refer them?
8. What other technology skills aren’t essential to the daily needs of your patrons, but add an extra level of surprise and delight to our services?
9. What new or emerging technologies do your patrons bring into the library?
10. Are there any technologies or tech-related classes that you do not currently offer that your patrons have requested?
Reworking Existing Services: Mapping the Customer Service Journey

Understanding the patron experience is about seeing the library from the customer’s point of view. Certain aspects of the work that we do - be it technological, procedural, or something else entirely - can have unintended effects on the customer. Often it’s the combination of disparate elements that creates surprises.

To that end, the Service Journey is a good way to come to terms with all the touchpoints a user goes through. Sometimes the simplest tasks can require interaction with a complicated set of rules, procedures, and software.

Creating the Journey:
Imagine a persona for this task. What’s the user’s age and gender? What brings them to the library? What are their passions and interests?

Be sure to take note of:
• Where the experience is mediated by technology
• Where human intervention is required
• Where the experience is driven by other factors - or if the patron isn't given any guidance to get from one step to the next.

Create a visual map of this service experience, noting each touchpoint needed to deliver the service. Get creative! You can illustrate the journey however you like. Perhaps you want to color-code the touchpoints, or create a flowchart system using shapes. Maybe you want to represent each touchpoint by its Patronus. Your call. Think about the sample questions below and be ready to discuss.

What compels a person to seek out this product or service? Why do they come to the library for this experience?
What other services does this patron use? What other types of library users engage with this particular journey?
What points on the service journey require technology? What points require a human element? Are there any touchpoints where the actual service journey is “wired” the wrong way?
What other services or products are affected by this journey?

Adapt and Improve:
How would you make this particular journey better - not just for efficiency, but to create a more delightful experience?
Rework the journey using these improvements, and get ready to share with your peers.
Thinking Holistically about New Library Services

When all you have is a library, every problem looks like a new program. Or a sign taped to the wall. Or a vague need for “marketing.”

In this exercise, you and your group will develop a new service or program that functions as a direct response to a stated problem.

Spend the initial discussion segment discussing your chosen issue. By the end of the time period, you should have a new service in mind. We’ll call this your “Big Library Idea.”

Your idea could be anything: a proposal to build a makerspace. A series of “innovation grants” to foster community initiatives. An entrepreneur-in-residence program to help small businesses in the area. Be as creative (or as practical) as you like - but make sure you’re grounding it in the needs of your organization.

In the discussion segment, you’ll take this Big Library Idea and create a strategy for making it work within your organization.

Questions to Consider

1. What need does this idea address?
   How do you find the data that indicates this product or service actually serves your audience?
2. What outcome do you hope to accomplish through this service?
3. Who in your organization will ultimately be responsible for the service?
   How will other departments and staff members be involved?
4. What challenges will your product face as you move to launch?
   How will you overcome them?
5. What will constitute success?
   How will your users be able to show the idea’s impact in public?
6. How will you connect this Idea to other library services, departments, and/or community efforts?
7. How will you further revise and build on this service in the future?
8. Will it ever be possible to hand this service off to your users, and allow them to make it their own?
Strategic Thinking About Partnerships

How do we build partnerships that create mutually beneficial outcomes? Is it possible for outside groups to work “through” the library in which the added elements your organization provides are visible to the outside public?

In this exercise, you and your group will develop such a partnership. Within your group, choose a partner organization you’d like to collaborate with. This could be a group you are already working with, or a group you’ve had on your radar. With that group in mind, work through the following rubric to design a partnership that embodies your desired outcome.

1. What is the established need?
2. What outcome do you hope to produce with this partnership?
3. Who in your organization will “own” this partnership, and who needs to be involved or informed?
4. How often do you need to be in contact to maintain a viable partnership?
5. What does your organization need from the partnership?
   What does the partner group need?
   Can these two needs be reconciled?
6. What challenges will this partnership face to bring to fruition?
   How will you overcome them?
7. How do you make this partnership visible to the public?
   How will the community know the library has had a role in this?
8. Is it possible to hand it off (to the partner group, or to the public itself) while still maintaining the library’s presence?
   What would this handoff look like?
9. Bonus Question: How do you add that extra element to the partnership activity?
Thank you.

I hope you find these resources and exercises useful as you seek new ways to serve your community. Effecting positive change is hard work, and it will likely take time to see results. As you experiment with new ways to serve your community, make sure you give your efforts time to breathe. Keep in touch with your stakeholders, and iterate on your changes as necessary. Even if something fails, you’re more likely to learn from the experience - and you’ll build stronger connections with your patrons in the process.

I wish you the best of luck.

Let’s stay in touch.

Do you have questions? Want to share a story? Don’t hesitate to drop me a line. Send me an email at toby@theanalogdivide or tweet me at @theanalogdivide. I look forward to hearing from you.
Suggested Resources:

I've found the following resources to be particularly helpful as I think about ways to work through. Some of these deal specifically with libraries, while others are meant to provide other types of creative thinking.


