Insights into the patron experience of resource sharing services

MIA PARTLOW, NC STATE UNIVERSITY LIBRARIES

#OCLCRSC19
25,000 Item Requests
6,000 Document Delivery Requests
21,000 Holds
Dolly: my life and other unfinished business

Dolly Parton.
1st ed.
Book
Print

Where to find it

Hunt Library — bookBot

Call Number: ML420 .P28 A3 1994
Status: Checked Out (Due 05/10/2019, 11:59 PM)
Service Insight Cycle Model

• 8-10 weeks of data collection and analysis around a single question, service, or problem
  – Weeks 1-2: scoping the question and planning for data collection
  – Weeks 3-5: data collection at service points
  – Weeks 6-8+: data analysis -- coding, identifying patterns, brainstorming solutions
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- Topics arise from data analysis, anecdotal evidence of a problem, or from the libraries’ strategic priorities.
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• Identifies patterns and potential solutions to problems
• Focusing on patron interactions creates a holistic picture of how the service is experienced by our patrons
Data Collection

93 chat transcripts

18 desk interactions

4 stakeholder conversations

Empathy mapping
What roadblocks do users experience with our request services?
Identified Challenges:

Patron account interface

Request interfaces & processes
Patron Account Interface
Account Interface: Challenges

My Account

NCSU LIBRARIES
- Checked Out
- Holds/Requests
- Fines
- Account Info

TRIPSAVER
- Digital Deliveries
- Checked Out
- Request an Item
- Request History
- Tripsaver Settings

ROOM RESERVATIONS
- My Reservations
- Reserve a Room

LOGOUT

logged in as MIA PARTLOW

TRIPSAVER: CHECKED OUT
Click on the Transaction number to request a renewal.

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Title</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1068190</td>
<td>Pachinko</td>
<td>6/2/2019</td>
</tr>
</tbody>
</table>

This list only includes items borrowed from other libraries through Tripsaver. Renew NCSU items here!

NCSU Libraries Tripsaver
(919) 515-2116 | library_tripsaver@ncsu.edu

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Request Status: Challenges

Patrons asked about the status of their request in 27% of our interactions

"Did you get my request?

I just requested this PDF, where is it?

When will I get my item?

What does this status mean?"
Request Status: Identified Solutions

“Request received” notices

Improved on-screen message upon successful request

Shipped notifications
Account Interface: Item Renewal

Item renewal:

In 5% of all interactions, patrons asked about renewing an ILL item.

“Can I renew my book?”

“How do I renew?”
Item Renewal: Identified Solutions

More obvious interface change when a renewal has been requested.

Communicate renewal policies more clearly in patron account and on renewal screen

Include renewal link in pickup email
The Request Process
Request Process: Challenges

Many users do not understand the request button

"If I request a pdf how do I pick it up?

How do I provide my email?

It says you don’t have access, can you help me?"
Request Process: Challenges

Mental Models for E-book platforms are being applied to article requests

Belief that a separate login will be required to view the PDF.

During the profile setup, we ask for a pickup location, so patrons ask “will I get the PDF by email or will I have to pick it up?”
Requesting from the ILL homepage presents a challenge as well

Exit rate for this page: 63%
Request Process: Identified Solutions

Ongoing staff training:

• How to send direct links to pre-filled request forms
• How to explain our ILL services in an approachable way.
• How to use ILLiad to answer basic questions about the status of a request
Request Process: Challenges

The form...is it read by a human?

I didn’t notice the Submit Request button

Do I have to fill out all of the fields?

What does ISBN mean?
Request Process: Identified Solutions

- Hiding certain fields in the request form
- Display error when user leaves page without submitting
- Redesigning page to be in line with current UX standards
- Encouraging use of the Notes field
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1. Week 0
   - Identify scope & timeframe
   - Identify & collaborate with stakeholders

2. Week 1
   - Identify & build collection method(s)
   - Identify collectors

3. Weeks 1 - 2
   - Inform & train collectors

4. Weeks 2 - 4 (~2 weeks)
   - Collect raw feedback
   - Research

5. Week 5
   - Code feedback
   - Prioritize findings by assumed impact
   - Package insights & recommendations

6. Weeks 6 - 7
   - Share & collaborate with stakeholders

7+. Weeks 8 - x
   - Implement changes
   - Record impact
   - Post-pilot debrief

* week of Thanksgiving
**Team will discuss plan for final week after week 5