Time well spent - fine-tune your communications - session notes

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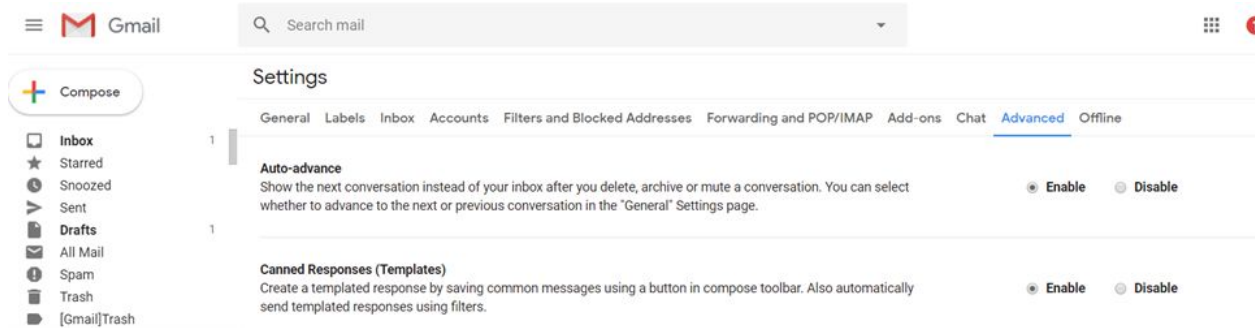Kay Westergren - University of Minnesota Duluth kwester@d.umn.edu

Email tips

General email communication tips
- Start with a brief greeting.
- Identify the purpose (what, why, and when) and make sure your point is easy to understand.
- Include relevant request information - titles, request numbers, dates.
- Use white space, bullets and/or bold text if it will help the reader find the pertinent details.
- Include the next steps, who will do each step, and by what date.
- If additional information is necessary, try to provide it as an accessible link or attachment.

Save yourself some time by creating templates for often used messages

- Google canned responses: Create a template of your commonly sent email messages and quickly re-create that when needed. Go into your email settings to enable the feature which you may find in Advanced or "Labs" tab, depending on how Google is set up at your institution. There are some good videos on YouTube if you need additional instructions on how to do the setup and how to create a canned response.

Other b

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Recipients

Circulation policies

Dear colleague,
Thank you for your request. Our circulation policies are:

- Our standard loan period is 13 weeks, with one 13-week renewal, for most items.

- Reference materials, music CDs, and special collections are non-circulating.

- Some periodicals may circulate on a case-by-case basis.

- Microfilm and PhD Theses can not be lent overseas. Contact Proquest for more information about acquiring dissertatio...

- No renewals on microforms or periodic...

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New canned response...		Canned responses ▸

- Items that are more than 90 days over... copy.

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Plain text mode

Print
Check spelling

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ring and Delivery PAC report - Invitation to edit - Elizabet
Hi Dale, Thanks so much for your reply. I completely und
n of Google-digitized books for resource sharing - Than
Relais D2D interlibrary loan renewal 2019-20 - Yes, soun
s: Office Hours and Staff Vote - Hi Everyone, I think this
C: Congratulations on acceptance! - Thanks, Carol! I rece
nvitation: Zoom online meeting tool kickoff - I'm sharing
ll (Online) @ Thu Feb 28, 2019 10am - 11am (CST) (Caro
our for staff - Hi Luann, The time from 1:30-4:30 works g
Lost Book Form responses (mid-pilot evaluation) - Good
for staff on verification - Agnes, I'd like to send out the
ests FY14-18 - Hi Carol and Cassie, Here is the updated
re! I'm really curious about the borrowing requests too. I
Handwritten Notes. The Guide to Creating Workflows. A
ck-up at Boynton Health Dental Clinic - CAROL, It's time
r ILL - Carol, My understanding is that Janet Bishop wou
signments - Hi everyone, I'm finished putting together a
aning Hathi copies - As discussed this afternoon. John _

- Email signatures: If you use another email program, it may allow you to create multiple signatures. If so, take advantage of this feature to include the body of the email as a part of your signature and name it accordingly to match your commonly sent email messages. This works just like a template.
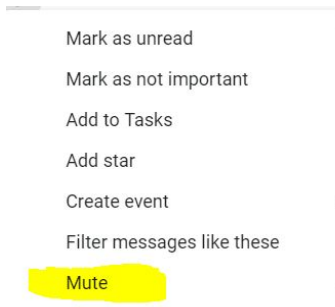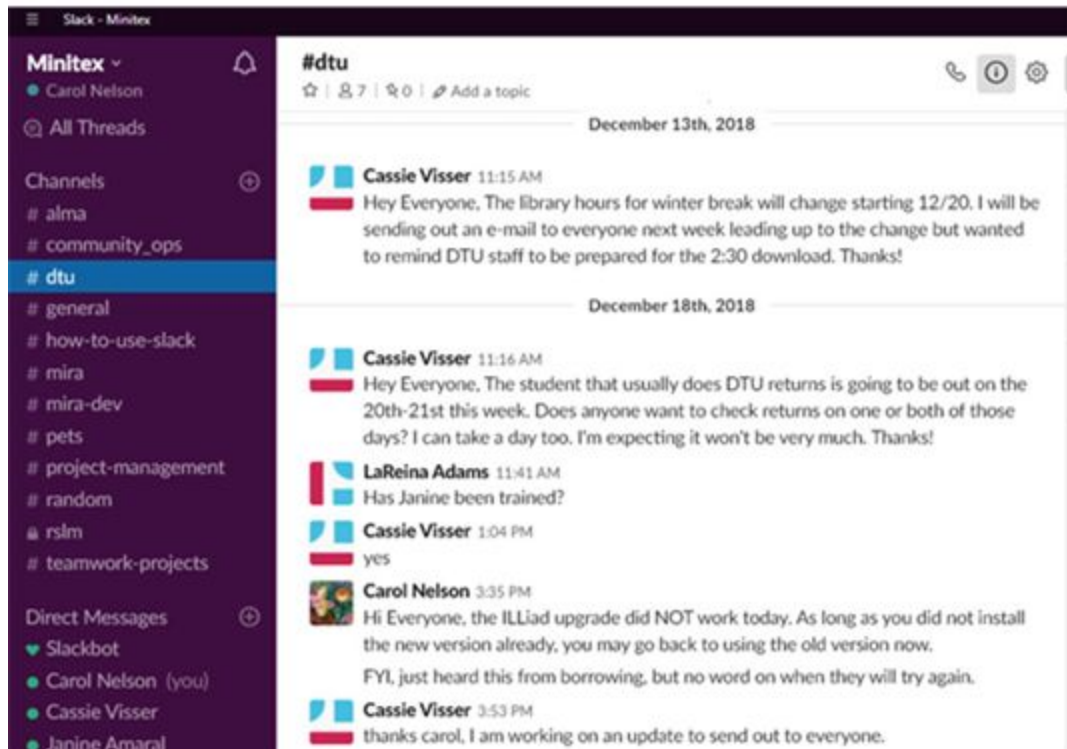

Email lists

Use good subject lines

Avoid subjects like "Can anyone help?" and instead try: "Looking for article in Journal of International Studies, 2017"

Mute a thread when the message isn't pertinent to you or your work (available on Google)

Slack

[Slack](#) is a way to communicate with coworkers instantly. It allows for direct messages, group messages. Can use on desktop or mobile device.

Communication with Patrons
Email

- Does your patron have a preferred email account? Is it possible for you to use it for notifications?
- For tips on email formatting to improve comprehension, see: Clark, Thomas [Messaging in a Mobile Era: Preparing students to shine on the small screen](#), website, on August 29, 2017.

Editing email for improved readability

Edit and reformat your emails to make them easier to read on various devices:

Text

Use text whenever possible if your patrons prefer it. Text notifications are now available on OCLC WorldShare ILL, Tipasa, and ILLiad.

Text can also be helpful between co-workers when you need to communicate quickly from different locations.

Bibliographic instruction and patron tips

Communicate helpful tips for patrons to the people who have contact with your patrons. Consider talking to bibliographic instructors or reference staff so they know what patrons struggle to understand about ILL. You may want to provide examples where you have seen users confused, for example:

- Explain why it is important to download or print a scanned article received via ILL before it expires.
- Help them understand how copyright allows them to legally able to use and save articles under fair use for their personal educational needs.
- Communicate that it costs money to borrow physical items, ensure they will be able to pick up an item before they order it.
- Help them understand that shipping will take time.
- Remind patrons that the borrowed items don't belong to your library. If they return items by the due date they help your library maintain good relations with lenders for future ILL transactions.
- How to hit that "sweet spot" when asking for renewals by making sure it isn't too late or too early.
- Does your ILL system have a confirmation request notice where you are able to add information pertaining to the above points on an email notification?
- What other staff at your library might benefit from knowing more about ILL? Consider providing some of this information to the Circulation/Access service department.

Taking communication with patrons a step further:

Check out the slides for last year's #OCLCRSC18 presentation by Zheng Ye (Lan) Yang from Texas A&M University. By communicating more with patrons throughout the borrowing process, they were able to significantly reduce ILL costs. Look for it in "Stop Chasing Chickens and Let the Fences Do the Work: Data Supported Service Policies in Action."

Communication with co-workers

When staff move between work areas such as different buildings, stacks versus shared workroom, text can be helpful.

Slack is a helpful tool when several staff members need to get instant messages about requests or workflow.

Your library's website
Your website can help make it easier for patrons to be successful with interlibrary loan. Take a look at examples of how these libraries are helping educate and inform patrons:

> [Ryerson University](#)
> [Furman](#)
> [Florida State University Music Library](#)

Communication with other libraries.
- Use a departmental account instead of a personal email address.
- Reply all if the email has been sent to more than one address so everyone is seeing all responses.
- Avoid subjects like: "Need help with a request" or "Can I ask you a question?"
- Make it easy for the library to locate the item or request by using the title and/or the ILL number in the subject line. It also makes it easier to locate the email if someone needs to search for it later.
- Use an easily readable format.
- Use bullet points or a new line to make it easy for the reader to see each question or request you have.
- Provide information for next steps or stating the outcome you would like to happen.

Keep good records - communicate damage early

Keep good records of the condition of any items you lend or borrow, this is especially helpful for issues of material damage. Consider taking a quick photo of any item conditions you want to document during a transaction.

Lenders, if you are noting an item's condition when you send it, make sure to let the borrower know that you noted any marking or other damage when it was sent.

Borrowers - keep good records on the material when you receive the item and let the lender know right away. It is easier for someone to recall that damage a couple of days after preparing it for shipping than it will be weeks or months later when the item is ready for return.

USPS - Formatting address labels
Yes, USPS does provide free tracking for Library rate shipping. If you use USPS tracking you will be able to see if your labels are working. If you discover issues try to work with your shipping department to figure out what can be done to get better results. You can avoid having your items turned around or just bounced from one USPS station to another by specific placement of the shipping label:

- When return addresses are placed too close to the sending address it can confuse the system.
- Make sure there is plenty of white space around the sending address.
- Place the return address toward the left corner.

Good to know:
With USPS automation there is no need to state: "Library rate"
No postal inspection statement is necessary.

Interlibrary Loan,
University of Minnesota Duluth
Kathryn A. Martin Library
416 Library Drive
Duluth, MN 55812-3001 US

Interlibrary Loan
University of Minnesota Duluth
Kathryn A. Martin Library
416 Library Drive
Duluth, MN 55812-3001

Make sure there is plenty of white space around the address of the library you are sending to.

LIBRARY MAIL

ADDRESS SERVICE REQUESTED

TO:
Interlibrary Loan
Library
University of Minnesota Duluth
416 Library Drive
Duluth, MN 55812

MAY BE OPENED FOR POSTAL INSPECTION IF NECESSARY

_____ PARCEL POST _____ EXPRESS COLLECT
_____ PREINSURED _____ EXPRESS PREPAID
$_____ VALUE

FROM:
Interlibrary Loan
Library
University of Minnesota Duluth
416 Library Dr.
Duluth, MN 55812

For label that looks like this, remove and separate the "From" portion. Place the "From" portion on the upper left of the package. Remove all other information leaving just the address. Place address in the middle of the package.

New label should look like this

FROM:
Interlibrary Loan
Library
University of Minnesota Duluth
416 Library Dr.
Duluth, MN 55812

Interlibrary Loan
Library
University of Minnesota Duluth
416 Library Drive
Duluth, MN 55812

Policy Directory
Make sure your Policy Directory is up to date and that your policies are clear and current.
- Are your addresses and contacts correct?
- Do your links work properly?
- Have you entered days on the system when your library is closed (going lower case on OCLC)?
- Consider making a habit of checking your directory information during breaks or whenever you have slow times in ILL.

***In an emergency situation, you can call OCLC directly 1 (800) 848-5800 and ask them to set your supplier status to "no" (LOWERCASE). OCLC Support can also help you if you need assistance changing information on your WorldCat registry or service configuration.

Additional tips from attendees at the in-person session:

Patron attention, how do you get patrons attention? Try supplying a *need response by* date to create a sense of urgency. If there's no date, your patron may overlook retrieving or picking up the item.

Work on the subject line *your Interlibrary loan request has arrived* may go to a SPAM filter. Often the word "loan" is caught in email filters.

Try putting the status of the item in the subject line.

A library frustrated by ILL items not being picked up asked patrons for an entire semester why they did not use their ILL items. They learned the reasons and took steps to ensure they made changes in processes where they were able. It greatly reduced the non-pickup rate.

Go ahead and send a second message if you don't receive a response the first time.

Sent email notifications to patrons indicating a date we need a response by.

Younger patrons don't seem to respond to email. We need to find better ways to communicate with them in their preferred methods (text). Texting works with requesting in ILLiad. But how do we text patrons in other situations?

Regarding using highlighted colors in emails to bring attention to things. Colors may be rendered differently or not at all depending on the viewing device. Accessibility issues such as color blindness may also be an issue.

Basic ILL training for staff that helped everyone understand how and which questions they

could answer along with tips on what should be referred to ILL staff.

Penn State uses a chat service to make things easier - building an FAQ and is working with reference staff to provide more questions on ILL. They also have a channel devoted to ILL and have ILL staff answering them. *Ask us* goes directly to ILL staff.

During patron education sessions have an ILL staff member in attendance.

Check email filters if your institution uses them. Check SPAM periodically as legitimate messages can show up there.

Requesting with other countries? In another language, you can use Google translate to write in another language. Or, use English, but greet in the library staffs' native language.

Notes on the item's condition can be recorded in the special instruction or staff notes.

Think about using a *damaged item slip* - the lender can check off any concerns about the condition of the item and it also really helps students who are processing items to know what to look for. The patrons can also see right away that there is a record that the item was received damaged.

Library rate now includes tracking. Work with your mailroom to see how it might work best for you. The official tracking number at some libraries is added in the mailroom. Check to see how your institution might get it to work.

You can order tracking numbers from USPS to scan and help you keep records in your ILL office.

USPS [URL for tracking information](#)
USPS [order tracking labels](#)