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Putting KM to Work

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MANAGING THE USER EXPERIENCE (UX):
A NEW LOOK AT CUSTOMER SERVICE FOR THE KNOWLEDGE CULTURE

Key Points:

1. "Customer service" might be transitioning to a focus on "user experience" in some KM/knowledge services environments.
2. User experience as a management methodology attempts to connect the user's overall experience and satisfaction (with the service or product) to organizational strategy or, specifically, to organizational knowledge strategy development.
3. The user's personal experience determines the success of the information- knowledge- or strategic learning-delivery transaction, both during the transaction and after the transaction.
4. User experience—as a management methodology—is also connected to services science, the new academic discipline that seeks to identify how technology and business practices are linked (to each other and to KM/knowledge services).
5. Competition and escalating user expectations are requiring librarians and other knowledge professionals to re-frame how they manage and deliver services.
6. For success with user experience in the LIS environment, managers must have a clear understanding of core values and be willing to match service delivery to elements of experience (and the appropriateness of those experience elements).

Key Words: user experience, UX, customer service, services science, knowledge management, KM, knowledge services, knowledge culture, knowledge strategy, knowledge asset management, information management, strategic learning, collaboration, information technology

Customers. Users. Usable. Usability. The user experience. UX.

New words. And new thinking about customers and how service providers meet their needs.

For many who deal with knowledge management (KM) and knowledge services, "customer service" has been the guiding mantra. The phraseology might be changing now, for a new approach to service delivery seems to be falling into place. Service providers are re-thinking how they deal with the people on the receiving end of services being delivered, now looking through the lens of the "user experience."

Transforming that user experience and incorporating the user experience as a defining strategy for management was the subject of a recent meeting in New York. At the Memorial Sloan-Kettering

Cancer Center Library on April 24, a group of librarians spent the day talking about the subject, with the topic of the day offered as "From Transaction to Interaction: Transforming the User Experience."

The program was presented by the MSKCC Library and co-sponsored by Rockefeller University Library, Weill Cornell Medical Library, the Library Association of the City University of New York (LACUNY) and ACRL/NY. Organized by MSKCC Library Associate Director for User Services Donna Gibson and the MSKCC Library staff, the program brought together academic librarians and other invited library and information science professionals to share their ideas about the user experience. It was a good match, since the subject of user experience related closely to the MSKCC Library's own efforts in this area. At MSKCC, the customer focus is built on understanding the needs of the stakeholders and establishing usability before any new tools and services are launched, a management framework described in a 2008 SMR International e-Profile, ["Knowledge Services Means 'Just Say Yes'"](.).

For many of the participants, concepts discussed at the meeting—particularly those of Dr. William Gribbons, the keynote speaker—provided the opportunity for taking a new look at how service delivery can be managed in a library. And while most of the attendees did indeed seem to come from academic libraries, it became clear early in the proceedings that user experience is a customer service approach that can provide handsome rewards for any information or knowledge professional with management and service delivery responsibility for KM/knowledge services. As described at the meeting, the techniques and concepts of user experience can strengthen service delivery in any information- or knowledge-related functional unit, regardless of whether that unit is a library or operates as some other business unit delivering services to an identified customer base.

The idea of user experience as a management methodology (sometimes identified with the "UX" or "UE" acronym) comes from the attempt—on the part of those with responsibility for providing a service or product—to connect the overall experience and satisfaction of the user when using or participating in the service– or product-delivery activity. B. Joseph Pine III and James H. Gilmore, in *The Experience Economy* (Boston: Harvard Business School Press, 1999) point out that "experiences are events that engage individuals in a personal way" and note that while the service-delivery provider moves out of the picture once the experience occurs, "the value of the experience lingers."

So it is with the "value of the experience" that involves the services of KM/knowledge services professionals. For the value of their transactions to linger, however, these knowledge professionals must actively seek to enhance and strengthen the information- knowledge- or strategic learning-delivery transactions, whether the environment is an academic library, one of the many branches of specialized librarianship (corporate, medical, legal, government, or non-profit), or any of the other information- and knowledge-focused service delivery business units in organizations, and whether identified with librarianship or not. The value of the experience does not come from the service provider's success in simply providing the service; it builds on and is strengthened by the perception of the user as (and after) the service transaction takes place.

That transaction relates closely, in management terms, with the growing interest in services science, with the combination of attention to the user experience and an understanding of services science providing an approach to KM/knowledge services delivery that puts the customer/user at the center of the interaction. For the last few years, services science has been more and more talked about, and it is not hard to see why. Paul Horn, writing in *Business Week* ("The New Discipline of Services Science," January 21, 2005), described how the "melding of technology with an understanding of business processes and organization" is crucial to the success of organizations dealing with service delivery with respect to information and knowledge.

"As companies build more efficient IT systems, streamline operations, and embrace the Internet through wholesale changes in business processes," Horn wrote, "a huge opportunity exists. The IT-services sector is in dire need of people who are talented in the application of technologies to help businesses, governments, and other organizations improve what they do now—plus tap into totally new areas. The complex issues surrounding the transformation of businesses at such a fundamental level require the simultaneous development of both business methods and the technology that supports those methods. This is the seedbed for a new discipline that industry and academia are coming to call 'services science.'"

As Horn sees it, the new discipline "brings together work in … computer science, operations research, industrial engineering, management sciences, and social and legal sciences, in order to develop the skills required in a services-led economy."

Of course. And at the MSKCC meeting, attendees were quite willing to consider how the service-delivery model used in libraries might be re-framed to add library management to Horn's list, since the idea for the meeting, according to Dr. Gribbons, was to incorporate the user experience into the library management framework and to identify how librarians could contribute to a total customer experience. It can also be stated at this point, despite the fact that the focus for the meeting was librarianship, that there are numerous other functional operations in which attention to the user experience, as a management strategy, can reap a variety of rewards. One only has to think of interactions with colleagues in HR, accounting, project management, or any number of other organizational functions to recognize that the transactions that succeed and provide the most benefit to all parties are those in which the user experience has been recognized.

Certainly these were some of the themes in Gribbons keynote address to the librarians. Gribbons is Director the Human Factors and Information Design programs at Bentley University, where he teaches human factors and information design at both the undergraduate and graduate levels. He has consulted with hundreds of companies internationally on issues related to product design, usability, and the user experience as business strategy, and his exceptional qualifications and experience made him a singularly appropriate keynote speaker for providing ideas about how to transform the user experience in libraries and other information- and knowledge-delivery business units.

Gribbons began his presentation quite explicitly, stating that the goal for the day was to help the audience understand people as they interact with systems, however those systems are structured. With this nod to the importance of giving attention to the relationship between technology and knowledge, Gribbons used a variety of examples and case studies to describe how competitive forces are influencing service delivery, noting that simplicity and matching user expectations are key to the successful user experience, especially in any situation in which information or knowledge transfer are involved. Gribbons cautioned librarians to recognize that "the bar is constantly being raised." It is only human and natural, he said, for users to expect more, once the previous expectation has been met.

Despite this, though, it is also important (particularly with organizations that are so well established in society as libraries) to identify how to retain value associated with the organization, if the values of the experience economy are to be recognized. The key for success here, Gribbons suggested, is market segmentation, to understand that different market groups have different expectations and to acknowledge and understand that these must be identified, codified, and reacted to if the user experience for each of the market segments is to be positive. The key, Gribbons said, is to focus on value, "on what people value most" and not to make the mistake of "losing sight" of what people are looking for.

Librarians, especially, are in the unique position of being able to study the relevance of the services they provide to the user's value and to undertake, Gribbons suggested, "detailed study and assessment of the 'people' in the appropriate use environment." One example, provoking interested and considerably detailed reactions from meeting participants, was the development of a new user-focused library facility at Bentley University where, Gribbons noted, the planning team recognized that transitioning the library from a "quiet space" to a social environment was required. Though retaining some quiet space, since it was expected, this simple recognition provided a dramatic upswing in library usage. Just by acknowledging that the contemporary student is as much interested in social networking (both in person and electronically) as in finding a tranquil spot for *not* networking turned out to be an uncomplicated yet striking finding that led to better overall library management.

Moving on to other case studies from a variety of industries and environments—including office supply stores, drugstore chains, plumbing fixture manufacturers, toy manufacturers, healthcare, financial services, and telecommunications—Gribbons identified a variety of "elements" of user experience that could—probably with not a great deal of restructuring—be moved into the library or other information- or knowledge-delivery environment. These included:

- Define the most appropriate user experience, from the user's perspective
- Drive development of user experience through market segmentation
- Determine "touch points" with clients and users
- Engineer common experience across user groups and markets
- Build a management structure for the user experience
- Ensure that the user experience mission is communicated by key management leaders
- Measure and communicate results by using metrics that match user and management expectations (and align with other organizational and departmental business units)

As for incorporating user experience elements into the LIS environment (or, for that matter, into any environment in which the transfer of information and knowledge and the KD/KS function is experienced, whether related to a library or not), Gribbons provided thought-provoking steps managers might take and even offered some "first-step" ideas:

- Define and re-define core values
- Identify elements of experience that support values
- Segment the market by user demographics and characteristics
- Consider all touch points and how the library space might incorporate different functions into its "library" framework (as a campus-wide writing center, for example, or as a central focus for all institutional research)

As for what to do first, Gribbons recommended beginning with the identification of sponsors, organizational leaders who would recognize and support the changes in focus that would be required. He then recommended the development and implementation of focus groups, to identify different population segments and the unique needs of each of the segments. Ethnographic studies are also valuable, Gribbons noted, as are usability studies of technology services and, if might be added, for "front-line" service delivery staff involved in the KM/knowledge services delivery process.

Interestingly, Gribbons ended the presentation with an acknowledgement of the value of appropriateness, noting that every organization, company, or institution has different value systems, different customer expectations, and, certainly, different individual goals and objectives from organizational leaders, staff, and users. Thus every organizational effort toward defining and enhancing the user experience seeks to determine the appropriateness of user experience as a strategy for the

organization. At the same time, though, organizational management must determine appropriate experience and how that experience productively matches the organization's core services and mission. Finally, looking again at measurement and communication, Gribbons encouraged knowledge professionals with responsibility for the management and delivery of knowledge services to constantly assess the relevance of the experience as the organization moves forward.

Not surprisingly, this happy depiction of the information- knowledge- and strategic learning-delivery process (happy, that is, from the customer's point of view) connects naturally with the current attention in the management community to the emphasis on the enterprise-wide knowledge culture. A primary characteristic (perhaps *the* primary characteristic) of the knowledge culture is the willingness of all parties in the service-delivery transaction to collaborate. Collaboration is a given, and an emphasis on collaboration can strengthen the relationship between technology and knowledge, becoming a critical driver in the knowledge development/knowledge sharing (KD/KS) process. For knowledge professionals dealing with both knowledge asset management and the management of KM/ knowledge services delivery, the connection is obvious. In an organization that has developed and is managed as a knowledge culture, attention to "the user experience" can be expected to be a given, if the established knowledge culture is to be effective in supporting the organization in achieving its mission.

About SMR International
SMR International (www.smr-knowledge.com) is a New York-based consultancy firm focused on change and its impact on people, organizational effectiveness, and knowledge services delivery within the larger enterprise. SMR International specializes in helping institutions and organizations explore alternative future programs and then assists in crafting these visions into functional definition. In its work, SMR International helps organizations re-conceptualize, transform, and support the management of knowledge services, particularly in transitioning existing knowledge-focused business units into enterprise-wide functional units for managing knowledge assets. The result is the development of a *knowledge culture*, an organizational environment enabling accelerated innovation, better contextual decision making, strengthened research, and enhanced enterprise-wide knowledge asset management.