



[SMR International Briefing](#)  
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## CUSTOMER SERVICE IN THE KM/KNOWLEDGE SERVICES BUSINESS UNIT: SURVEY FINDINGS DESCRIBE INFORMAL EFFORTS

A recent informal survey about customer service/CRM in the KM/knowledge services workplace seems to present a “glass half-full/glass half-empty” situation. Slightly less than half (42.3%) of the respondents have a customer service/CRM management plan in place. Of these, 23% use a formal plan, a written document. The others manage customer services informally, often on an *ad hoc* basis. One respondent is beginning the development of a formal plan, mainly to document what is already being done (which is impressive).

In most cases, a team approach to customer service/CRM is used. Some of the respondents indicated that they would like to be doing more with customer service/CRM for the KM/knowledge services business unit but there seems to be little attention directed in this area. As for training in customer service/CRM, nearly half (43.3%) of the respondents indicated that they and their employees never participate in focused customer service training and 30% indicated participation only as required.

Whether customer service/CRM continues to be a focus in the KM/knowledge services environment remains to be seen and might be an appropriate subject for further study.

Customer service and client relationship management (CRM) continue to be much-discussed topics in the KM/knowledge services field. There now appears to be the possibility that the emphasis on customer service/CRM has peaked, at least in this particular environment.

Such are the findings of a recent survey conducted by SMR International. In April, 2009 the company asked 125 selected customers and clients to participate in a brief survey about customer service management in the KM/knowledge services workplace. Surveys were distributed to SMR International clients throughout the world, with particular attention to clients in North America. In addition, students in the [Click U Certification Program in KM/Knowledge Services](#), one of three Premium Certificate Programs offered by the Special Libraries Association, were invited to participate in the survey.\* Since most participants in the Click U KM/knowledge services program are mid-career students, they were included in the survey because many had expressed interest in the subject, and some were already enrolled in the then-current Click U customer service/CRM course.

Surveys were distributed to a variety of information and knowledge professionals with management and service delivery responsibility for KM/knowledge services (identified at SMR International as knowledge services directors, to include the wide variety of knowledge workers with responsibility in the

\*The SLA Click U Premium Programs, offered to both SLA members and non-members, provide participants with the opportunity to strengthen their understanding of the KM/knowledge services environment as they move through their careers as knowledge workers.

KM/knowledge services field). Likewise, the definition for the place of employment for survey participants is identified as the *knowledge services business unit*, since a wide variety of workplace descriptions can be categorized as providing KM/knowledge services, including specialized librarianship, competitive intelligence, RIM (records and information management), literature services, archives management, research management, enterprise content management (ECM), knowledge asset management, and the like.

The SMR International Customer Service/CRM survey consisted of six questions and was designed to elicit a short response time (as well as requiring only limited time for participants to respond). 30 participants (a 24.8% return) completed the survey, and all participants starting the survey completed the survey (although about half skipped the one open-end question).

When asked if the KM/knowledge services business unit in which they are employed has a customer service management plan, 42.3% responded affirmatively and 53.8% of the respondents indicated that they do not have a customer service management plan. For those who have a plan, 23% indicated that they use a formal plan, a written document used as a reference when required. 86.7% of the respondents responded by indicating that they have an informal plan, “mostly common sense, which we talk about when we need to.”

One respondent described how the KM/knowledge services business unit had begun the process of developing a plan, “mainly to document our current program.” In this participant’s description of the specifics of that particular workplace, useful background for others dealing with customer service/CRM planning in the KM/knowledge services business unit is provided.

In this organization, the KM/knowledge services business unit consists of a library, a call center, and Website content management services. With these different functions, a variety of techniques are used to manage customer service, according to the respondent. For the call center, for example:

1. we conduct an annual customer satisfaction survey, following up with real callers
2. we set service standards and listen in on calls to assess whether they are met
3. at least quarterly, we mine our CRM database to identify trends and escalate them to management, with recommendations for changes and improvements

For the library, customer service/CRM management also includes attention to feedback from customers, including regularly meetings with client groups to assess their needs and gather feedback on ways to assist. A survey is also conducted annually.

For Website content management services, this organization has a third (but related) list of customer service/CRM activities, as listed by the survey participant:

1. we do periodic customer surveys
2. we do stakeholder focus groups when planning Website changes
3. we do formal usability tests with real users
4. we meet quarterly with internal stakeholders to report on Website performance and suggest ways to improve

Moving to the bigger picture, this respondent noted that an overall assessment of service delivery was undertaken recently, identifying all user needs and assessing how well those needs are being met with current services being provided. The result was that in some cases the KM/knowledge services business unit “scrapped low value services” and in some cases “completely re-engineered how we are serving our customers.”

Other survey participants were equally open with their comments as they described how customer service/CRM is managed in the KM/knowledge services business unit. Some indicated that they wish they were doing more in this area, and one respondent replied simply about how customer service/CRM is managed: “Frankly, and embarrassingly, on an *ad hoc* basis.” Another described the customer service management program more directly and succinctly: “Instincts! Newsletter articles! Training! Blast e-mails! And customer service by walking around (CSBWA!”

For several respondents, though, customer service appears to be “just part of the job” and special attention is not required, with one response linking customer service to the business unit’s designated purpose: “We focus our daily work on our mission statement, one component of which involves customer service.”

Similarly, another respondent linked customer service for KM/knowledge services to the work of the larger enterprise (even when, as in this case, that situation causes problems): “Although we have no formalized plan, customer service is very much a part of the corporate culture. The lack of a plan does, however, mean the individual librarians can err in two ways: by not providing clients with aggressive service, but also by providing excessive service to people who are not members of our constituency.”

Only 30% of the participants in the survey indicated that customer service management is the responsibility of a single staff member. In one organization, that person is a “VP-level manager with overall responsibility” but noted that “project-specific client services managers” also have some input in customer service/CRM management. A similar situation was described by another respondent: “The customer service/CRM function is divided between the Reference Librarian and the Circulation Librarian. Whenever needed, other library staff members are ready to help.”

Several other respondents also made it clear that customer service responsibility is divided among the entire staff of the KM/knowledge services business unit. One commented that “Everyone in the group is responsible for ensuring our customer service levels are quite high. We work collectively to monitor customer service performance.” Another noted that “Responsibility is shared within the group, with leadership from the manager,” and another participant added to this comment about shared responsibility that “customer service is brought up at meetings when needed to highlight potential spot-light or areas needing improvement.” Yet another respondent closely echoed that survey participant: “We operate as a team so everyone has customer interaction. The more senior staff members help coach others in how best to assist our customers.”

That collaborative framework was also emphasized by other participants: “In our workplace, each staff member is responsible for their piece. While we all work collectively and do many things together, each person has responsibilities specific to them, and thus are responsible for the customer service aspect of that responsibility.”

Another survey participant also commented that customer service is handled by “all members of the team,” and indicated that it was the understanding of management that customer service/CRM is simply “built in” to the work. “Each person deals with the customers in their own way,” this respondent commented. Another participant also described a top-down approach to customer service/CRM and commented that “the director of the library guides employees and tells them what is expected.”

Naturally there is no separation of customer service/CRM management in small-staff situations, as noted by one respondent who stated that “There are two people who work in the library and we try very hard to make sure that our customers get what they ask for and what they need. We always ask and follow up with each patron (but there is no formal agenda).” And when there is no choice, the

wise knowledge worker makes sure to take advantage of the situation: “As a solo librarian, I feel that customer service is my first priority. Although if I think about the context of my organization, we are all responsible, and customer service training would be a good thing.”

In the KM/knowledge services workplace, professional development and training with a specific focus on customer service does not seem to be a high priority. Nearly half (43.3%) of the respondents indicated that they and their employees never participate in focused customer service training, and 30% indicated participation “only as required.” 13.3% participate in some form of customer service training once a year, and about 3% participate between 2 and 4 times a year. Only 3% have focused customer service training more than 4 times a year.

Customer service/CRM will, of course, continue to drive much effort in the workplace, regardless of the environment or the particular product- or subject-focus of the organization. Whether there is a requirement for specific attention to customer service/CRM in KM/knowledge services might be further studied. Certainly for those KM/knowledge services business units that evolved from specialized librarianship, the concepts of customer service/CRM are simply integrated into the overall management and service delivery function. Probably few other professions give attention to the needs of the customer (whether referred to as a “user,” “patron,” or other historical diminutive for the people who make use of the specialized library’s services, products, and consultations) as does the library and information science profession, and specialist librarians bring those time-honored historical associations to their work. Whether the future workplace for specialist librarians will have that same emphasis—particularly as specialized librarianship moves into knowledge services—remains to be seen, but the general responses to this informal survey indicate that activities relating to customer service/CRM are already in place in the KM/knowledge services business units or, in some environments, do not bear any particular relevance to the service sphere of the business unit.

#### About SMR International

SMR International ([www.smr-knowledge.com](http://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 enterprise-wide knowledge asset management.