THESE ARE NOT NORMAL TIMES…IMPLEMENTING A CUSTOMER RELATIONS MANAGEMENT SYSTEM DURING A PANDEMIC

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Conflict of Interest Statement

The authors certify that they have no affiliations with or involvement in any organisation or entity with any financial interest , or non-financial interest (such as personal or professional relationships, affiliations, knowledge or beliefs) in the subject matter or materials discussed in this manuscript.

Introduction

Northern Sydney Local Health District (NSLHD), located on the north shore of Sydney Harbour, has a workforce of more than 10,000 staff. The workforce include nurses, allied health, medical professionals and health service managers, serving a community of over 900,000 people. NSLHD Libraries consist of five hospital libraries as well as a well-developed online service. NSLHD Libraries support the NSLHD Strategic Plan 2017-2022, in particular, three of the key themes: Evidence Based Decision Making, Responsive & Adaptable Organisation, and an Engaged and Empowered Workforce. Patient care and supporting clinicians and health professionals in carrying out this care stand at the forefront of all NSLHD Libraries services and activities.

The last 10 years have seen significant growth in the range and complexity of library services. There has been an increase in literature searches and research consultations. In response, NSLHD Libraries has had to innovate to meet the demand and continue to support client needs and expectations. The Library provides the traditional services including article and book requests, and literature searches. The Library also provides a systematic review service, one on one, and group training sessions, general reference enquiries and other assistance. These services are supported by online forms underpinned by multiple, sometimes cumbersome, data collection systems, including spreadsheets and an old document requests database. Unsurprisingly, this infrastructure lends itself to inaccurate data collection and errors. A considerable amount of time was required every month to collate statistics and present these in a format usable for reporting, evaluation and governance.

To maintain sustainability and innovate, NSLHD Libraries sought a technology solution in the form of a customer relationship management (CRM) system. It needed to support our client-centred approach to services, as well as capture operational data. We needed to identify and implement a system, a single source of truth, that would support multiple purposes including evaluating services, reporting operational statistics and managing a client's needs.

Methods

Selection of the CRM
Of the CRMs currently available, Altarama's RefTracker came highly recommended. Altarama is an Australian company with over 18 years experience in the library and information sector.

A working party made up of the Library Manager, the eServices Librarian and a Librarian was established and met with the proprietor of RefTracker in November 2019. RefTracker was selected for of the following reasons:
- it is highly customisable and could easily incorporate the services we wished to integrate;
- there is locally hosted support as well as an excellent reputation amongst Australian and international libraries;
- At the time NSLHD Libraries was developing a new remote access platform, Springboard, as well as a new link resolver and Single Sign On (SSO) for remote users. The proprietor was able to demonstrate how RefTracker might fit within this framework and how Altarama could offer support at a time that suited us;
- the price of implementation, support and on the ongoing licensing was reasonable and could be accommodated within the existing budget; and
- RefTracker also offered a Desk Stats module to replace a paper form.

After meeting with RefTracker, a project brief was drafted to ensure the implementation team had a shared understanding of form development and technical requirements. Several stages were required for development and testing of each group of forms. Work commenced on the project in December 2019, with the vendor able to provide access to RefTracker at a time of low demand for library services allowing the project to get under way.

Library forms
The first task was building the required forms. Many pre-determined forms already existed within the software, giving the project team the opportunity to copy and customise them for our needs. The project team audited each of the existing services that the Library offered, and created, reviewed and assessed the new forms to ensure they met the needs of both clients and library staff. Forms for the following services

were identified for inclusion: literature searches, reference requests, desk statistics, including daily head counts, document delivery, book requests, training and online consultations.

NSLHD Libraries also has a register of marketing activities to various hospital teams, staff and students – both continuous and ad hoc. The aim of the register is to capture and identify effective marketing strategies and key individuals who can promote the library, so we can reuse the content, method, format or assistance of the individual at a later date or a different setting. This marketing register was also included in the project brief.

In February 2020, the majority of the initial nine required online forms had been built and were ready for testing. Two of these forms – marketing and training - were for internal Library staff data collection. It was anticipated that additional forms would be developed for other workflows at a later stage.

COVID-19

On March 11 2020, part way through the development of the project, a worldwide pandemic was declared and soon after, on 31 March, NSW went into lockdown. To reduce potential exposure to COVID-19, but at the same time maintain Library services, NSLHD Libraries staff worked part of the week from home and part onsite. This decision presented major challenges in the allocation of work, delivery of services and collection of data in order to be able to demonstrate sustained staff productivity and service delivery during the pandemic. It became more important than ever that staff were able to keep track of the allocated work. At the same time, literature search requests increased by 42% compared to the same period of March/April the previous year. As a result the build of RefTracker and pace of development was accelerated. Whilst working from home, the project team were able to devote additional time to RefTracker development.

Library staff induction and training

Whilst working from home, most Library staff did not have access to shared network drives where most of the information recording service activity was stored. The workaround was a shared Google Drive. Staff were able to complete tasks from home, and still record their tasks. This was far from ideal giving further impetus to work on RefTracker project.

Just prior to the implementation of RefTracker, NSLHD Libraries also introduced Single Sign On (SSO) remote access and a new Discovery platform. This, along with working from home and the movement of many work practices to RefTracker, was asking staff to take on massive changes within a very short period of time. This required creativity and clear communication as to what was taking place, and why, so that all bought into the changes. It required a high level of support from the project

team to give other staff the knowledge and skills they needed to operate RefTracker. Lockdown and social distancing made it impossible to deliver onsite training for staff. Training videos were created for certain aspects of the system and made available on Google Drive. We also held a live demonstration for the NSLHD Library team at the bi-monthly NSLHD Librarians' videoconferencing meeting to allow for staff questions. Staff were also encouraged to contact the NSLHD working party to video conference and share screens to ask questions. Staff were given test exercises to complete, to help familiarise themselves with the new system – they were asked to back date their recent reference enquiries for the earlier part of April and record marketing statistics from July 2019 onwards. RefTracker went live on Monday 20th April 2020.

Results

Library staff

The majority of staff felt that the system would improve their overview of their workload and provide efficiencies including data entry. The library manager was also able to get a broad overview in the supervisor statistics, to ensure that work was being completed in a timely manner. The training videos were well received, as staff could go back and review the videos to ensure that they felt competent doing the particular task required.

Our setup of RefTracker allowed for continuous client contact recorded in the one form. The client is able to request their search with a form developed by library staff, based on years of experience in undertaking literature searches. Once the search or enquiry was completed, the librarian can select a set text known as "Quick Text" from a standard template so that the client receives the information in standard format. Literature searches are sent as MS Word documents with EndNote attachment, depending on client requirements, and are retained in the RefTracker database. A brief satisfaction survey is included with the results sent to the client, which allows them to rate the service. There is an option for a longer survey to obtain more detailed information from the client around the results and what the results were used for, i.e. improved patient care, updated information for policy and procedures. If needed, clients are able to add additional information to their request, to give context to their question.

Initially all new requests were reviewed by one librarian who distributed the requests based on staff availability. Since launch in April we have a developed a monthly roster so that all librarians get experience in the management of RefTracker and allocation of requests. This has been very useful for all staff to have a better understanding of the type of requests being submitted. We have also set a target date for fulfilling service requests, aligning with the NSLHD Libraries key performance indicators. Staff are sent reminders as the due date approaches. If a staff member is

unable to complete a task, due to unplanned leave for example, it is easy for another staff member to take over the work as the whole correspondence and request is saved in RefTracker.

A variety of statistical reports can be generated from RefTracker. During the first phase release of RefTracker to Library staff, statistics were checked to ensure data quality and staff compliance. Several issues were picked up, including how the daily head count was added. Due to the design of the online desk statistics form, it wasn't always clear where the staff should enter the data. A brief training video was created and distributed highlighting to staff where they should include the head count at the end of the day.

Previously we had tallied desk statistics and head counts on a hard copy form. This was sometimes forgotten and data was often inaccurate. The new online desk statistics form in RefTracker allowed us to add our statistics on the fly, by left mouse clicking in an interactive form. The time of the statistic is also recorded, allowing us to retrieve peak periods of usage in the libraries. Desk statistics collected include reference citation management assistance, IT support enquiries, library collection and resources information provision and other more general enquiries.

The RefTracker system implementation during April/May of the COVID-19 pandemic, although stressful for staff learning to use a new system, meant that we could get live statistics and have a full overview of staff workloads. Work could then be allocated and distributed to the available staff, resulting in a more equitable distribution of searches and other requests for information from clinicians and staff of the district.

The project was an excellent development opportunity for the Librarian on the project team. She gained confidence and showed an aptitude in the development and troubleshooting of RefTracker forms. She went on to develop forms outside the original scope of the project such as a form to manage and record pursuit of long overdue books.

Technology issues
RefTracker has a number of technological benefits. It uses cloud based technology, is able to integrate and replace existing systems, and required minimal interaction with, and no approval from, the District ICT Directorate. As requests for literature searches and document supply had previously been via Jotform, it was a simple task to replace the link on the Libraries' intranet and internet sites. The only problem experienced was ICT blocking emails sent by RefTracker as they were identified as spam. This was easily rectified.

Library clients

Whilst the main aim of the project was to streamline Library processes, customer service experience was always a consideration throughout the project. The project team aimed to transition to RefTracker seamlessly, with no impact on Library clients and we believe that has been achieved. It is too early to say whether the new system has generated benefits for our clients, but that will be the focus of ongoing evaluation. Anecdotally clients have reported that the system is intuitive and easy to use. Clients are also using the feedback evaluation option, allowing them to provide a rating of service out of five stars with comments around the service. A total of 22 evaluations have been received, with 70% providing an evaluation of "excellent". We will be conducting further assessments of the system in the future to ensure that it is beneficial for client service.

Conclusion

The implementation of RefTracker at NSLHD Libraries in mid-April 2020 has already proven to be worthwhile, ensuring that our service data is effectively captured and that our clients continue to receive the same high quality service. Some staff continue to work part time from home and are able to easily remotely access all the systems and resources they need to ensure service continuity. Should we need to go into lockdown again, NLSHD Libraries' staff now have the skills and infrastructure to manage and deliver requests for service at a high volume.