

QUALITY MANAGEMENT IN THE APPLE LIBRARY

By Monica Ertel

Abstract: One of the key components in looking at quality in an organization is to focus on continuous improvement. The Apple Computer Library has designed a tool which helped them measure how effectively they were fulfilling the needs of their information customers on a continuing basis. This paper discusses the Apple Library's experiences putting together this means for assessing their clients needs. This paper is also about the need for the information manager to constantly evaluate library and information services, to never take the user's perspective for granted and always be clear about the clients needs and expectations before offering new services. It does not discuss the specific results of their study although it does discuss some of their questions. The purpose of this paper is to share how and why the Apple Library decided to do this and some of the lessons they learned along the way.

Introduction

You have now heard several excellent presentations about the concept of quality and the importance of quality management in libraries and information centers. What I would like to do for the last presentation of this session is to focus on a specific project we undertook in the Apple Library to improve the quality of our services.

I will spend my time today talking about the need to constantly evaluate your services, never to take the users perspective for granted and to always, *always* check in with the people you serve. I am going to talk about our experience putting together a tool for assessing our clients needs. I am NOT going to talk about the specific results of our questionnaire although I will discuss some of our questions. What I want to do is to share with you how and why we decided to do this and some lessons we learned along the way.

One of the key components in looking at quality in an organization is to focus on continuous improvement. We take this very seriously at Apple and we wanted to be able to design a tool which would help us measure how effectively we were fulfilling the needs of our information customer on a continuing basis.

Services provided

The Apple Library has nineteen fulltime staff members who offer a wide range of information-related services. The most active service offered by the Library is our literature search service. Our reference group consists of four full time searchers and a supervisor and they access a wide variety of databases from DIALOG to NEXIS to DataTimes to external newswires. Quite naturally, we do a tremendous amount of document delivery as a result of our heavy literature search workload. Throughout all that we do, our foremost goal is to provide the best possible service to our customer. Service is key in all that we do and the Apple Library is well-known for setting a very high standard within the company.

Our main emphasis this past year has been to provide desktop access to library and bibliographic information. By this I mean giving Apple employees the ability to search the Library catalog or other bibliographic databases on their own personal computer in their office or home. Through our dealings with library clients, through attending conferences, reading papers, and talking to colleagues in other libraries, it seemed apparent to us that our clients probably wanted to be able to access information without having to come to the Library. And we assumed that our clients would only want to have to learn one interface in order to access this information. With this in mind, we began to work on a couple of projects we call Electronic Information Delivery and Personal Apple Library or PAL. We established the project goals, set up teams, put together timelines and got to work. However, it occurred to us as we began to investigate the very thorny and complicated issues surrounding these ideas, that we had better be sure that this was something that our clients truly needed and wanted. But our question was, how do we do this? How do we make sure that the services we currently provide are useful and necessary and how do we make sure that new and upcoming services meet our client needs? Acquiring the electronic information, providing access to it, and requesting the significant additional funding needed to make this a possibility made us want to be very sure that we were on the right track. And we also wanted to make sure that the current services we were providing were meeting the research and business needs of Apple.

Why we chose a survey

We tossed around several ideas such as conducting focus groups, holding small meetings of select employees, sending questionnaires along with literature searches and document delivery requests but we finally decided to do a comprehensive survey of current users of all of our Library services. We had several goals in conducting this survey:

- To obtain feedback on the perceived quality, usefulness and timeliness of current Library services
- To obtain feedback on which services are most important to our clients
- To obtain recommendations on future services, especially electronic delivery of information.

We decided to only target those Apple employees who had used any of our Library services in the past year. This did not include walk-in clients or those clients who accessed the information we already had available on servers throughout the company. We consciously decided not to survey everyone in the company because at this point we wanted to get feedback on the services people were currently using. We realized that it was important to also question those who do not use the Library and find out why, but we felt that it was important to concentrate on those users who currently used our services and we already had more clients than we felt we could comfortably handle anyway.

How we put it together

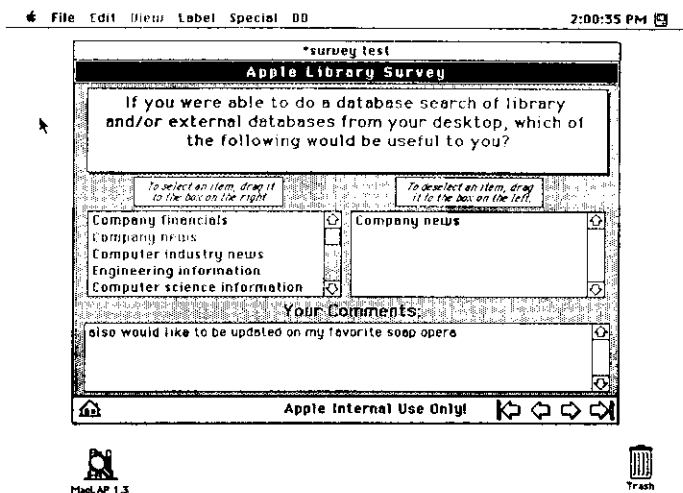
We decided to send out an electronic version of the survey. We did this for several reasons. One was that people at Apple are enamored with technology and respond to this type of request. Another was that people at Apple have an aversion to receiving paper questionnaires - many of them end up in the garbage or recycling bin without even a glance. Finally and most importantly, we thought that an electronic survey could have an automatic statistic compilation feature built into it which would be tremendously helpful as we began to compile our results. We decided to use HyperCard as our vehicle since another department at Apple had recently had very successful results and they were willing to share their scripts and ideas with us. After all, why re-invent the wheel.

We decided to have face-to-face interviews with a select number of our users in order to test our questions and get some feedback on the survey. This was invaluable and gave us some excellent feedback as we started to put together the final survey. We learned that our clients did not really differentiate between our various departments within the Library and we had to be very careful to describe services in a specific way, so that there was no confusion in their mind about what they were giving us feedback on. For instance, many of our clients didn't understand the difference between our Table of Contents service (whereby we send out table of contents for our current serials) and our Document Delivery Service (which is our interlibrary loan service for articles and documents not available in the Apple

Library). To us, these were very distinct services but not so to our clients. This was an important consideration as we put together the final list of questions.

We began to modify the HyperCard survey to incorporate our questions into the stack. This required a small amount of scripting but we were able to do this within our Library staff. We pretested the stack on the Library staff and a few employees outside the Library. We made changes, tested again, made changes again, tested again and made changes again! It was an iterative process but one which I think was very valuable in helping us create a useful evaluation tool.

Finally, we were comfortable enough to send the survey out to all 2,050 clients. The survey took about two minutes to send and we could send it to about 18 people at a time. Despite the time this took, which was about four hours total, because it was easy to cut and paste the client list, we could do this over the course of a week, inbetween other work and it really didn't impact us that much. Each client then had to spend about two minutes downloading the stack onto their own machine and we anticipated from our tests, that it took about five to twenty minutes to fill it out. Folowing is an example of a page from the survey:



Once the client finished filling out the survey, all they had to do was to click a "send" button and it was automatically sent to us via our local server or e-mail. We gave people two weeks to fill out the survey and return it to us, and we sent out reminders a couple of days before the deadline to remind people to send it in. We had a 31% return rate, which we felt pretty happy with. It was better than the

return rate for another survey sent out by another group - and people were offered a gift as a free incentive for filling it out! So we felt fairly satisfied with the return.

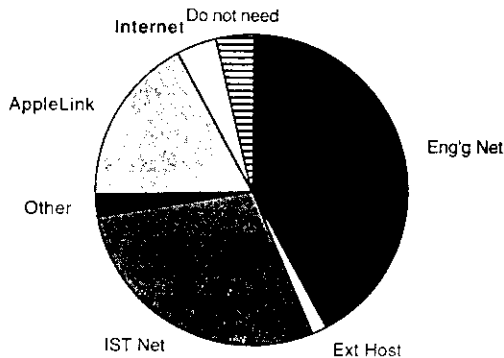
What have we learned?

As noted before, clients could make comments after each question. We ended up with a binder three inches thick with helpful comments which couldn't be compiled into the statistics. But they did give us a very good picture of how our clients view our services. These themes were as follows:

- Our staff is clearly our biggest asset
- The Library is a very valuable but underutilized resource
- Our clients overwhelmingly want more electronic delivery of information.

Based on the survey feedback, we were able to discover some very interesting and useful information with regards to our EID and PAL projects. Some of it was surprise to us. When asked how people liked to get news about Library - ie: new materials in the Library, new services, etc., - they preferred to get this information via AppleLink, our intercompany e-mail system. However, when it came to accessing databases, such as Compendex or ABI/Inform, they wanted to do this via our internal network, which bypasses our AppleLink e-mail system. The results were overwhelmingly in favor of the network approach. We were happy to see this because we had incorrectly assumed that people would want the information via AppleLink, which is a much more expensive way to serve this information. We were also able to get this information in chart format as well as text which made it very easy to interpret the results. Following is a chart which illustrates data received from our question "Which access method would you prefer when searching databases from your desktop?"

DATABASE SEARCHES--ACCESS METHODS PREFERRED



We were also very surprised to find out that the majority of our users didn't want full text, at least right away. They wanted to be able to get an abstract and citation immediately and only get to the full text if they wanted the article or document. We had anticipated that our clients would want the full text immediately.

This has been extremely valuable information as we plan our upcoming projects and think about future services. Without the survey, we may have made some very costly mistakes.

Problems with the survey

We of course, found some problems with the survey. The biggest problem was that the stack did not accommodate European date formats. We are a global company and we are a corporate library so we sent surveys all over the world. If someone's system used the date convention of day/month/year instead of our American convention of month/day/year, it couldn't open the stack because it said that the date had passed for returning the survey. When we first started getting these questions, we were baffled but once we figured it out, we told people that if they reset their system date, it would work. But I have a feeling that we didn't get as many responses from outside the US as we could have due to this problem.

Another problem was that clients were sometimes confused about where the results were sent or not. They clicked on the send button but didn't get any feedback telling them that it had been. And, even though we thought that we were very careful, many of our clients were still confused about the differences between the various services we offer.

Factors affecting the return rate

Apple is a company which constantly changes, sometimes much too often. Unfortunately, when we sent out our questionnaire, there was a major reorganization in the sales and marketing group and people were preoccupied with this. Another problem was the fact that people already had very heavy workloads. They just didn't have the time to fill out the survey. Some people felt that they did not use the Library enough to comment on the services and as I said before, the stack did not accommodate European date formats.

What's next?

We initially discussed the results of the survey with the Library Management Team, a group made up of the various supervisors in the Library. We then held an hour and a half meeting to go over the results of the survey with all of the

Library staff members and to discuss how we might proceed. Our next plan is to incorporate the results of the survey into our project plans for the EID and PAL projects. We plan to do more advertising of Library services through our company paper, AppleLink and the various networks. We have given results from each specific area (many taken from the comments section of the survey) to the appropriate Library supervisor and his or her team will put together plans as to how to approach these. We also plan to put together an executive summary of the results and share these with the people who responded to the survey, assuming that if they took the time to answer the questionnaire, they would be interested in a very brief summary of the results. And finally, we plan to survey everyone in company to determine how we can provide more effective services to those who don't make use of Library services.

Conclusion

Concern and attention to quality must be an integral part of our jobs if we are to be considered legitimate and valuable service providers. Constructing and conducting this survey took a great deal of time and energy but we feel that it was well worth the effort. A comment found on one of the surveys from an appreciative customer sums up what we had hoped to accomplish with this survey: "You know a service is being used when people can be critical of it and you've given us that opportunity here. However, you should know that the Apple Library is an extremely valuable corporate resource and aids me significantly in doing my job. Thank you for your hard work in providing us with the information and services we need."

Monica Ertel
Apple Computer Inc.
Library and Information Services
1038, Bandley Dr. M58C
Cupertino, CA 95014
USA