Ask Us! Creating, Assessing, and Improving Chat Reference Services in Your Library

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Once upon a time in 2004(ish)...

Chat @
UMD

AskUs! - History
Docutek, 2004:

“Robust” co-browsing experience not preferred by patrons; interface difficult for librarians

Chat @ UMD
Chat @ UMD

2005, Trillian, Librarian view:
Unreliable, single-librarian monitoring

2005, User view

2009, Library H3lp:
Embedded widget woes

Google Voice for texting, 2009:
Slow delivery time

AskUs! - History
Chat @ UMD

2011, Twilio:
SMS Gateway integrated with Library H3lp

2011, Library H3lp:
Pop-out widget

AskMN (QuestionPoint):
24/7 coverage

characters remaining
Software is a means...

- **Client**
  - OS / web-based
  - License
  - Features
    - Offline messaging
    - Message logging
    - File transfer
  - Protocol support

- **Protocol**
  - Groups
  - Security
  - Audio/VOIP
  - Video
... to an end

<table>
<thead>
<tr>
<th>Time</th>
<th>User</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:13</td>
<td><a href="mailto:umd-refdesk@libraryh3lp.com">umd-refdesk@libraryh3lp.com</a></td>
<td>Did you find the journal title though?</td>
</tr>
<tr>
<td>10:14</td>
<td><a href="mailto:16093522781333379303559963@libraryh3lp.com">16093522781333379303559963@libraryh3lp.com</a></td>
<td>yep i think i got it now thanks to you!</td>
</tr>
<tr>
<td>10:14</td>
<td><a href="mailto:umd-refdesk@libraryh3lp.com">umd-refdesk@libraryh3lp.com</a></td>
<td>Oh good</td>
</tr>
<tr>
<td>10:14</td>
<td><a href="mailto:umd-refdesk@libraryh3lp.com">umd-refdesk@libraryh3lp.com</a></td>
<td>Anything else I can do for you?</td>
</tr>
<tr>
<td>10:14</td>
<td><a href="mailto:16093522781333379303559963@libraryh3lp.com">16093522781333379303559963@libraryh3lp.com</a></td>
<td>nope thats everything thanks :)</td>
</tr>
<tr>
<td>10:14</td>
<td><a href="mailto:umd-refdesk@libraryh3lp.com">umd-refdesk@libraryh3lp.com</a></td>
<td>Great</td>
</tr>
<tr>
<td>10:14</td>
<td><a href="mailto:umd-refdesk@libraryh3lp.com">umd-refdesk@libraryh3lp.com</a></td>
<td>Your feedback is important to us. Please take this brief anonymous survey to help us improve our service. <a href="http://z.umn.edu/chatsurvey">http://z.umn.edu/chatsurvey</a> Thanks!</td>
</tr>
<tr>
<td>10:14</td>
<td><a href="mailto:16093522781333379303559963@libraryh3lp.com">16093522781333379303559963@libraryh3lp.com</a></td>
<td>ok!!</td>
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Discussion

• If you have a chat service, what criteria did you use to select it?

• What features are most important to you in a chat service?

• http://z.umn.edu/arldaskus
ASSESS
Why assess?

- Understand usage patterns
- Gauge user satisfaction
- Evaluate quality of service
- Identify potential improvements in promotion, usability, and service quality
Statistics

Chats per year, 2007-2011

<table>
<thead>
<tr>
<th>Year</th>
<th>Chats</th>
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<tbody>
<tr>
<td>1</td>
<td>668</td>
</tr>
<tr>
<td>2</td>
<td>2,321</td>
</tr>
<tr>
<td>3</td>
<td>2,959</td>
</tr>
<tr>
<td>4</td>
<td>2,474</td>
</tr>
<tr>
<td>5</td>
<td>2,441</td>
</tr>
</tbody>
</table>
Statistics

Chats as a percentage of FTE

Year

2007 2008 2009 2010 2011

0% 5% 10% 15% 20% 25% 30%
Surveys

• Exit survey to gauge patron satisfaction

12:16 me can I help you with anything else?
12:16 16018968731335201276904190 nope that is it. thanks!
12:16 me sure thing, have a good afternoon
12:16 me Your feedback is important to us. Please take this brief anonymous survey to help us improve our service.
http://z.umn.edu/chatsurvey Thanks!

• Additional survey to evaluate awareness of chat and reasons for non-use

Got a minute?
please take a brief survey about our chat service :)
Surveys

- Created using Google Forms
- Guerilla survey testing
- Link delivered by macro and included in chat box

Chat Patron Survey
This brief survey should take about 2-3 minutes to complete. UMD Library is committed to providing excellent service to you and your sincere feedback is crucial to our focus on improvement and patron service.

* Required

On a scale of 0-5, where 0=Very Dissatisfied and 5=Very Satisfied, please indicate your satisfaction with the following:

Librarian’s ability to understand your question(s) *

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<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
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</thead>
<tbody>
<tr>
<td>Very Dissatisfied</td>
<td></td>
<td></td>
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<td></td>
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</table>

Promptness of librarian’s replies to your question(s) *

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<tr>
<td>Very Dissatisfied</td>
<td></td>
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Quality of the response to your question(s) *

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<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Dissatisfied</td>
<td></td>
<td></td>
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Are you likely to use the library’s chat reference service again? *

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<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very unlikely</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

If there were one thing UMD Library could do to improve our chat reference service, what would that be?
Our exit survey results

- Librarian’s ability to understand your question(s)
- Quality of the response to your question(s)
- Promptness of librarian’s replies to your question(s)
- Are you likely to use the library’s chat reference service again?
Phase 2 results

Chat Patron Survey

This brief survey should take about 2-3 minutes to complete.

UMD Library offers 24-hour chat reference service. This service allows you to contact a librarian with your questions using instant messaging. UMD Library is committed to providing excellent service to you and your feedback will help us improve our chat service.

* Required

Have you ever used UMD Library’s chat service? *

- Yes
- No

Powered by Google Docs

Report Abuse - Terms of Service - Additional Terms
Phase 2 results: Chat non-users

Prior to this survey, did you know that the library's chat services offer you the option to chat online with reference librarians about your research or other library questions?

- Yes [26]
- No [24]

How did you find out about UMD Library’s chat service?

- Classmate
- Instructor or TA
- Library website
- Library instruction
- Library publicity
- Other

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- Classmate
- Other

Chat users

Chat non-users
Phase 2 results: Chat non-users

Please comment on why you have not used the library’s chat services.

- Prefer other modes of contact with a librarian (in-person, email, phone) 8 (32%)
- Prefer to rely on others for research help (instructors, peers, parents) 4 (16%)
- Usually don’t need help with research 19 (76%)
- Have heard of bad experiences with chat service 1 (4%)
- Other 0 (0%)

People may select more than one checkbox, so percentages may add up to more than 100%.

Which of the following forms of publicity for our chat service would be most likely to catch your attention?

- UMD Statesman advertisements 5 (23%)
- Digital signs on campus 5 (23%)
- Posters on campus 9 (41%)
- Table tents in campus dining 1 (5%)
- Recommendation by instructor 7 (32%)
- Recommendation by classmate 5 (23%)
- Librarian demonstration in class 3 (14%)
- Content on library website 8 (36%)
- Other 2 (9%)

People may select more than one checkbox, so percentages may add up to more than 100%.
Phase 2 results

In which of these situations would you be most likely to use the library's chat services?

- Request information about library hours: 4 (17%)
- Request information about library services (renewals, fines, group study rooms, etc.): 5 (22%)
- Research help (choosing search terms, using article databases, finding sources, etc.): 17 (74%)
- Request technical assistance with computers, printers, etc.: 4 (17%)
- Other: 1 (4%)

People may select more than one checkbox, so percentages may add up to more than 100%.

Which of the following categories best describes you?

- Student [65]
- Community Patron [8]
- Faculty [2]
- Staff [2]

If you are enrolled as a student at UMD, what is your status?

- Freshman
- Sophomore
- Junior
- Senior
- Graduate student
- Other
Other evaluation methods

Transcript analysis

• Quality of answer: completeness & accuracy
• Compliance with RUSA guidelines/use of reference interview
• Librarian behaviors and communication strategies
• Role of teaching & learning

Focus groups/interviews

• With non-users
Discussion

• What chat evaluation techniques have you used at your library?
• Would you recommend these to others?

• If you haven’t implemented chat evaluation at your library, why not?

• http://z.umn.edu/arldaskus
IMPROVE
Widget Generation

Naked LibraryH3lp widget

Chat is offline.
Location, location, location

Staff profile pages

LibGuides

Library homepage

AskUs! - Improve
Never at rest

- **The** librarian is in

- **A** librarian is in

- **No UMD** librarians available
Where else?

• 404s
• Link resolver pages
• Course management system
• Library catalog
• Mobile site
Training

• “Think like a user” exercise
• Transcript review
• Emphasis on service quality, not mechanics
A picture is worth...

- **Screencasting**
  - In-person > screencast > text/audio only

- **Issues**
  - Audio
  - Editing
  - File output
... and video is even better

- **Shareability is key**
  - Screencast.com (TechSmith)

- **Free**
  - Jing (TechSmith)
  - Many others

- **Paid**
  - Captivate (Adobe)
  - Camtasia (TechSmith)
URL shrttnrs

• *TinyURL, Bit.Ly, Goo.Gl, others*

• Essential for texting
• Avoid line breaks
• Click stats (bit.ly, goo.gl)
Shrtnr Bookmarklets

- Short JavaScripts
- Halve the time and clicks
- Available for TinyURL, Bit.Ly, and Goo.Gl
From this

To this

To script, or not to script, ...

- **Tools**
  - Intra-app
  - AutoHotKey (f/oss, Windows only)
  - Keyboard Maestro (proprietary, Mac only)
  - Macro Express (proprietary, Windows only)

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**MACROS**

When in Pidgin (or Webchat), during a conversation, press:

**F1** HOW MAY I HELP?
Hello, you’ve reached the UMD Library reference desk. How may I help you?

**F2** BUSY - I NEED A FEW MINUTES
Hello, I am helping another patron at the moment and need a few more minutes. Please leave your window open and I will be with you shortly. Or, you can e-mail us using this form: [http://www.d.umn.edu/lib/askus/email.htm](http://www.d.umn.edu/lib/askus/email.htm). Thank you for contacting umdlibaskus.

**F3** HOLD ON WHILE I LOOK
I need a few minutes to look that up, could you please hold on?
... that is the question:

- **Pros**
  - Fast
  - Easy
  - Accurate/consistent

- **Cons**
  - Impersonal
  - Texting char. limits
  - De-professionalization?
“Outsourcing”

• **QuestionPoint:** 24/7 chat coverage
  – A complete reference management system integrating chat and email

• **Prospects**
  – Greater coverage, potential cost savings

• **Perils**
  – Local vs. non-local Qs
Discussion

• What tools (free or otherwise) do you use to improve the user or operator experience?
• What training techniques or exercises have you found most effective?

• http://z.umn.edu/arldaskus
References, pt. 1


References, pt. deux


QUESTIONS?
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CONTACT