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
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

Google Voice for texting, 2009:
Slow delivery time

2009, Library H3lp:
Embedded widget woes
Chat @ UMD

2011, Twilio: SMS Gateway integrated with Library H3lp

2011, Library H3lp: Pop-out widget

AskMN (QuestionPoint): 24/7 coverage
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

10:13 umd-refdesk@libraryh3lp.com Did you find the journal title though?
10:14 160935227813333793035559963@libraryh3lp.com yep i think i got it now thanks to you!
10:14 umd-refdesk@libraryh3lp.com Oh good
10:14 umd-refdesk@libraryh3lp.com Anything else I can do for you?
10:14 160935227813333793035559963@libraryh3lp.com nope thats everything thanks :)
10:14 umd-refdesk@libraryh3lp.com Great
10:14 umd-refdesk@libraryh3lp.com Your feedback is important to us. Please take this brief anonymous survey to help us improve our service. http://z.umn.edu/chatsurvey Thanks!
10:14 160935227813333793035559963@libraryh3lp.com ok!!
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

668
2,321
2,959
2,474
2,441
Surveys

- Exit survey to gauge patron satisfaction

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

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

- Librarian's ability to understand your question(s)
  - Very Dissatisfied: 0
  - Very Satisfied: 60

- Quality of the response to your question(s)
  - Very Dissatisfied: 0
  - Very Satisfied: 60

- Promptness of librarian's replies to your question(s)
  - Very Dissatisfied: 0
  - Very Satisfied: 60

- Are you likely to use the library's chat reference service again?
  - Very unlikely: 0
  - Very likely: 60
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

Continue »

Have you ever used UMD Library’s chat service?

- Yes [31]
- No [50]

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] 26
- No [24] 24

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

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

AskUs! - Assess
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)
- Prefer to rely on others for research help (instructors, peers, parents)
- Usually don't need help with research
- Have heard of bad experiences with chat service
- Other

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
- Digital signs on campus
- Posters on campus
- Table tents in campus dining
- Recommendation by instructor
- Recommendation by classmate
- Librarian demonstration in class
- Content on library website
- Other

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?

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

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
Location, location, location

Staff profile pages

LibGuides

Databases

Library homepage
Never at rest

• **The** librarian is in

  ![Ask Gabriel]

• **A** librarian is in

  ![Ask a UMD librarian]

• **No UMD** librarians available

  ![Gabriel's chat is offline. You may send an e-mail to gardnerg@d.umn.edu]
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 shrtfrs

• 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)
... 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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