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# Creating a successful chat library service: 'Ask a librarian live' at Cardiff University



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## INTRODUCTION

In an environment where social tools and communication technologies are constantly evolving and developing and where library users are long familiar with instant messaging, Cardiff University's Library Service aimed to align its means of communicating with users more strongly with the preferred communication methods of students in their social spaces.

Having researched the relevant literature (see Haerkoenen 2007<sup>1</sup>), the extension of streamlined specialist support for library users via chat was deemed to be of particular value to our remote users, distance learners and part-time students (e.g. Haynes's 2008 Wolverhampton study, which demonstrated that 85.7% of their chat users were using the service off campus<sup>2</sup>), as well as to users who would not normally have contacted the library (see Pomerantz and Luo 2006: 'nearly 20% had never used any other reference service'<sup>3</sup>). Subject librarians were also hoping to enhance

the students' learning experiences by being able to provide more accurate answers to enquiries more quickly, as well as guiding users to the right resources or through the correct steps. Furthermore, efficiency gains were expected as an outcome of providing one single enquiry point for all Cardiff University's then 16 libraries. Finally, it was hoped that an additional benefit of the project would be the promotion of library resources and services, thus creating a better return on information resources allocations.

The initial project was to run the new service as a pilot for the full academic year 2010/11 to gather evidence about the perceived need for such a feature. This article provides a summary of the service set-up and an evaluation of chat transcripts and qualitative user survey data, as well as recommendations for the future.

### SERVICE SET-UP

A number of different products were considered at the outset. LibraryH3lp was chosen for its simple technical implementation, low licence cost and list of features which matched the university's requirements most closely. It works using a queue system whereby each instance of the chat widget on a web page can be assigned to a separate queue, each queue being monitored by the same or a different group of library staff. Several queues were set up to enable more granular usage statistics and the creation of subject-specific enquiry services (see Fig. 7 for a list of queues).

These LibraryH3lp queues were then branded Cardiff's 'Ask a librarian live' chat enquiry service, the intention being to offer flexible, one-to-one advice and assistance provided by dedicated, approachable library staff, online and in real time at the users' points of need.

During the pilot (this includes all chat requests received between 27 September 2010 and 31 August 2011), the service was staffed Monday to Friday 09.00–17.00 and proved extremely successful. The hours were therefore extended during the month 14 February – 11 March 2011 into the early evening (from Monday to Thursday the chat was kept open additionally between 17.00 and 19.00) to provide data on a potential future systematic extension of the service hours. This initial one-month trial period enabled the project team to

collect data on user requirements for out-of-hours support, as well as to determine how such an extended service could be staffed in the longer term. A concurrent user survey provided valuable feedback from the user community itself.

The original decisions about the staffing structure of 'Ask a librarian live' were based on expressions of interest by site librarians and individual staff members. As this service uses a communication method that is quite specific to this medium, and this was a pilot service, it was felt that not all staff should be expected to participate.

A rota of 10 four-hour slots was set up (09.00–13.00 and 13.00–17.00 daily); these were then assigned to two libraries simultaneously. The intention was that at least two members of staff should be available at any one point in time to provide continuity of service and back-up throughout the day. Additionally, all volunteers were encouraged to log in to the service as and when they were available to support their on-duty colleagues. Over 70 members of staff attended hands-on training sessions that were supported by an online community providing a wiki, communication guidelines, stock phrases and supplementary materials.

### PILOT SERVICE EVALUATION

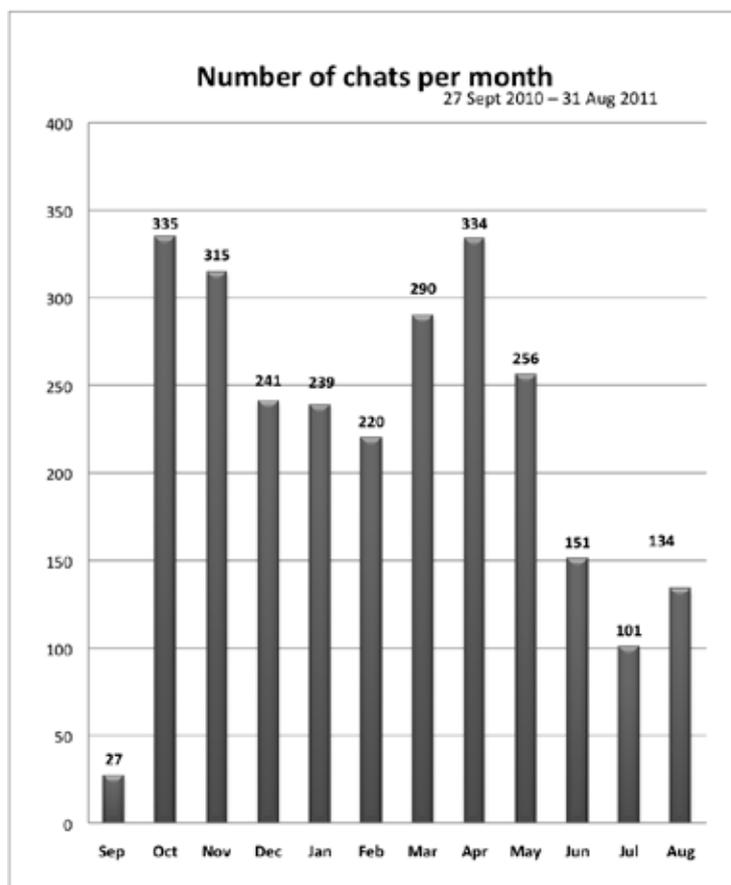


Fig. 1: Year 1: Chat requests by month

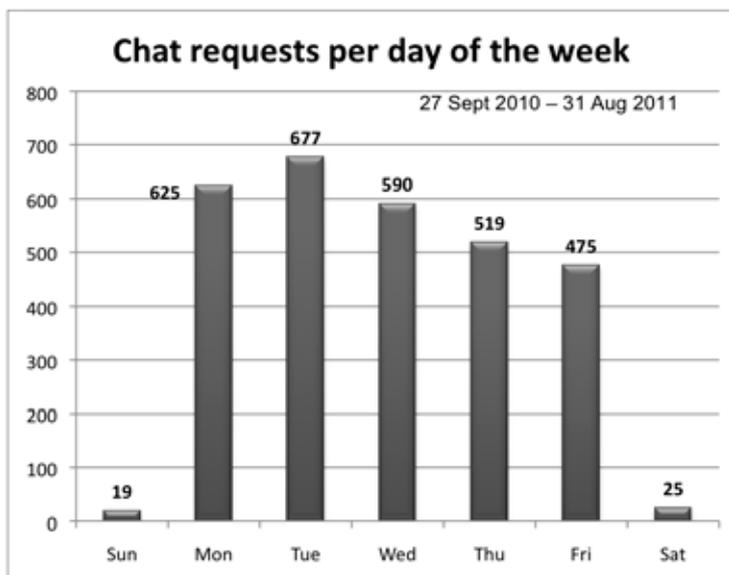


Fig. 2 Year 1: Chat requests by day of the week

During the pilot, chat transcripts, informal user feedback and staff and user survey data were analysed to determine the user requirements for the continuation of such a service beyond the academic year 2010/11.

**General usage analysis: Who was using the service, and when?**

Over the course of the first year 2643 chat requests were received. Of these, 26% were from on-campus users, 74% came from off campus. Fig. 1 shows a breakdown of chats per month.

Chats were distributed fairly evenly across the week, with Tuesdays (677 requests) experiencing the highest volume of chats and Fridays (475) the lowest (see Fig. 2).

The busiest time slot was between 13.00 and 14.00, the least busy 16.00 – 17.00. Fig. 3 shows the spread of chats across the service hours.

The 'Ask a librarian live' service received an average of 11.3 chat requests per day (233 service days, 2643 chats). This demonstrated the demand for this service despite the absence of any publicity campaign. The pilot had purposely been soft-launched in order to avoid the potential rush of

chat requests that might have exceeded the staff resource available.

Where individual users identified themselves (in 44% of chats), data regarding their status with the university and their school was gathered.

The assumption that mostly undergraduate students would use a chat enquiry service was unfounded. Only 47% of known users fell into that category, 20% were taught postgraduates and 5% could be identified as distance learners. Over a quarter of the chats (28%) were initiated by users outside the taught student community: staff made up 12%, external users 9% and researchers and postgraduate research students represented the remaining 7% (see Fig. 4).

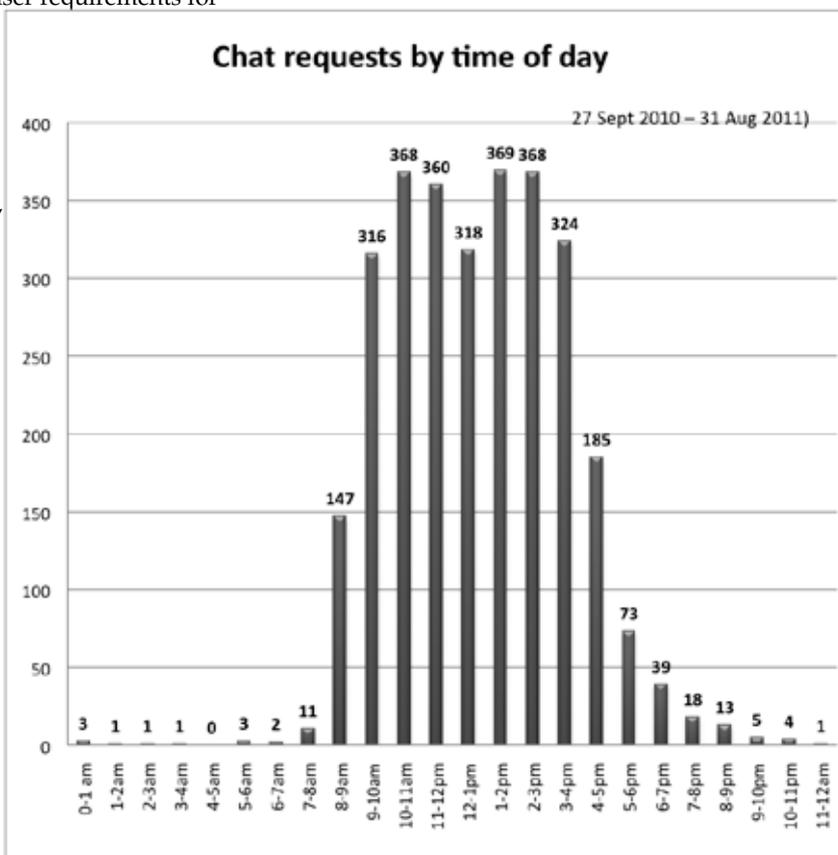


Fig. 3 Year 1: Chat requests by time of day

**Individual chat analysis: What was being asked and how was it answered?**

As part of the pilot evaluation, chats were also analysed by subject on a month-by-month basis to identify any patterns of interest. PIN and renewal queries made up 23.2% of all chat topics in the first year and peaked at the beginning of each semester. This became a strong driver to change

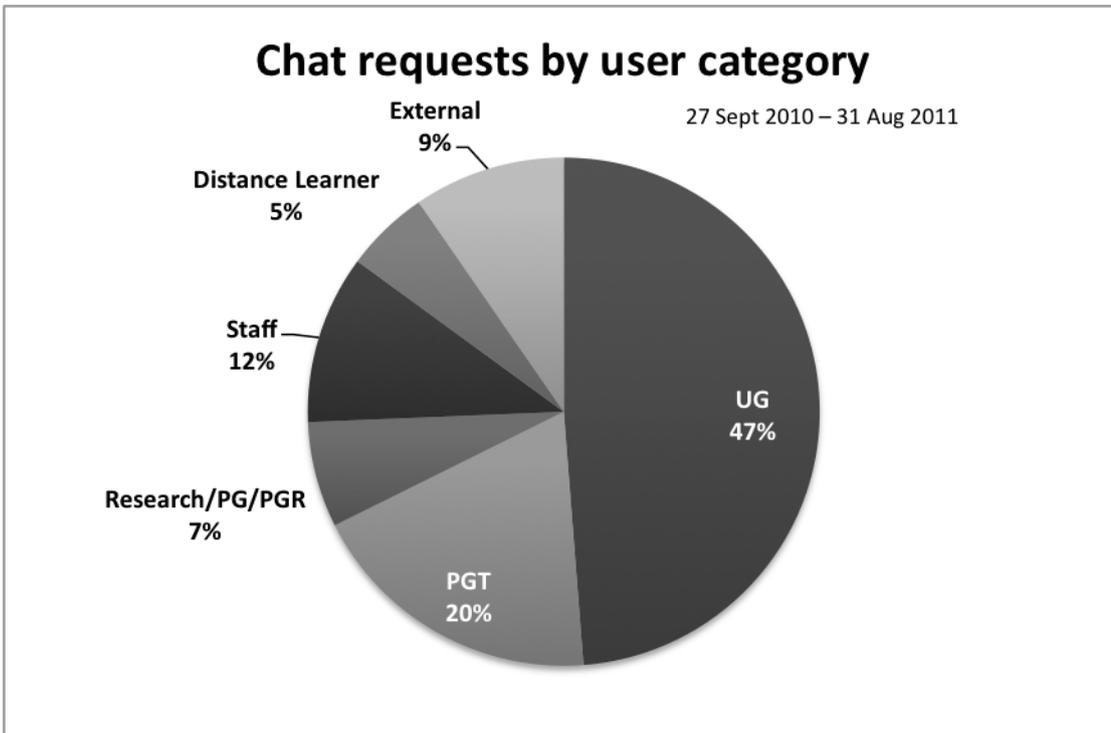


Fig. 4: Year 1: Chat requests by user category

the software on the library management system to eliminate the need for PINs for most users; this was achieved in 2011. Renewal enquiries showed marked increases just before the Christmas and Easter vacation periods. Subjects raised clearly followed the student lifecycle with e-journal, database and catalogue queries at their highest in October. November saw the highest number of requests for library contact details and December recorded the highest number of referencing enquiries. Fig. 5 provides a breakdown of the top ten subjects raised during the pilot year.

The queries recorded so far indicate that this enquiry service requires both the availability of experienced professional library staff as well as senior library assistants, as a considerable number of queries can require complex and subject-specific knowledge of our resources, procedures and information literacy skills. However, the premise that many questions might be too complex to be answered via chat was not proven as 93% of chats could be answered directly. Only in 7% of cases did library staff need to follow up the chat with further details via email or phone.

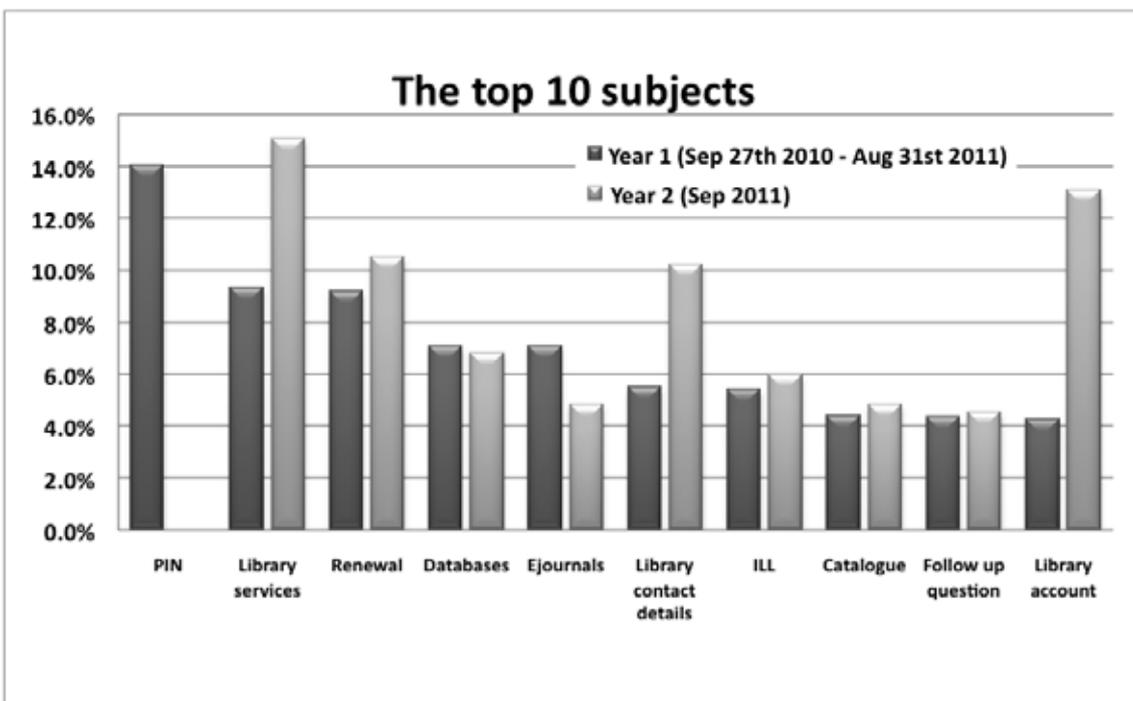


Fig. 5: Years 1 and 2 compared: Top ten chat subjects

### User feedback & survey results

Right from the start users were very complimentary about the chat service during individual chats or at library information desks. Additionally, almost half of all users filled in the brief survey that was made available to them (without any incentives) during the four weeks of the extended hours pilot, demonstrating how positively they felt about the importance of providing feedback in order to assist with shaping the future of this service. Particularly noteworthy are the following observations:

- 99.1% of users found the service useful or very useful. This was higher than expected from other studies. (E.g. Pomerantz and Luo 2006 found satisfaction rates between 80 and 95%<sup>4</sup>, and Davis 2007, reported positive feedback of up to 97%.<sup>5</sup>)
- If the library had not provided this chat service, 38% of users would have visited the library in person, 24.1% would have phoned, 17.6% would have emailed, 13% would have given up and 6.5% would have searched for the answer themselves. This suggests that the service is reaching 19.5% of the University community who would otherwise not have contacted the library for help.

The following selected user feedback shows that we managed to achieve our initial aims of reaching off-campus and external users, as well as providing information literacy support via chat.

*The more hours the better, I study at all ours [sic] of days, evenings, weekends, etc. Often use the service in moments of desperation! Excellent, excellent service to have!*

*I used the 'Ask a librarian' service a few weeks ago and wanted to pass on feedback as it is an absolutely fantastic, innovative service, particularly as I am enrolled in a distance learning course.*

*Great customer service, really quick and easy, great as I work away from Cardiff and cannot visit the library at normal office hours.*

*She was very fast and described how to get to electronic databases step by step. and was very clear and concise! was very impressed!*

*This service is great. I'm becoming a frequent flyer – do you do reward points?*



Fig. 6: Word cloud diagram created at [www.wordle.net](http://www.wordle.net) on 29 February 2012, using a sample of feedback from user chats 27 September 2010 – 31 August 2011

### MOVING FROM A PILOT SERVICE TO A FULLY SUPPORTED SERVICE

Thanks to the success of the one-year pilot, the decision was made to continue 'Ask a librarian live'. In addition to the creation of the necessary service level agreements and policy documentation, this required the development of a permanent staffing rota and agreed service times. A member of the chat project group adopted the role of chat service manager to facilitate this new core library service.

The core hours of the service remain Monday to Friday, 09.00 – 17.00. However, in light of the pilot evening extension and observations of library staff, we recognised that calls were often made outside these hours. As some staff working evening shifts and weekends were able and willing to staff the service, it was decided to offer 'Ask a librarian live' beyond office hours when staff are available. As well as enabling the service to be extended into the evening, inclusion of these staff in the pool of volunteers could result in higher job motivation, a greater sense of belonging and a personal development opportunity. Staff feedback indicates that volunteer staff are also using the chat transcripts to enhance their professional knowledge.

As 'Ask a librarian live' is now a core service, a promotional campaign was organised. Subject librarians promoted the service during library inductions and information literacy sessions. In addition, news items were included in internal Information Services and other Cardiff University publications, and in various social media used by the library service, such as Twitter and blogs. All these marketing tools were expected to increase traffic on the service.

An additional, indirect form of promotion occurred through the introduction of a series of university apps for android and smartphones, such as the 'Find a PC' service, which resulted in the development of an app-based version of 'Ask a librarian live'. There was some concern that a library-based app appearing alongside other university services might create an influx of queries not related to the library. This concern was unfounded as the take-up of the app has not been as high as expected. In addition, the calls that have been received have been related to library issues. Fig. 7 shows that the vast majority of calls still come from the library web pages (general queue) and from our library catalogue.

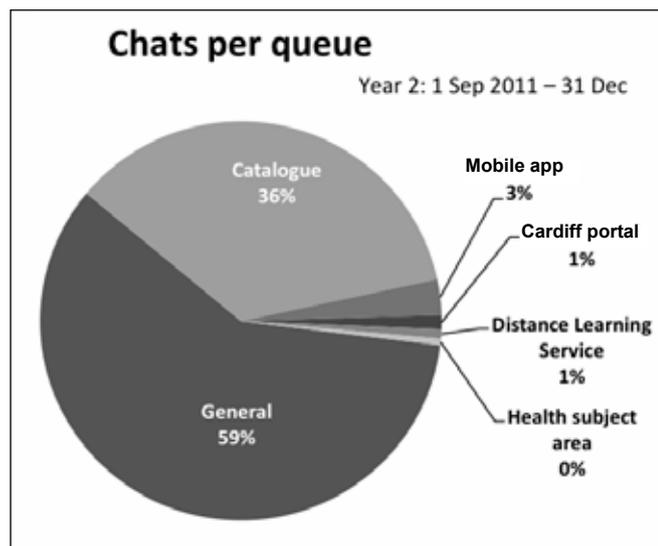


Fig. 7 Year 2: Chats per queue

Although the app did not create the additional demand on the service that had been expected, the number of calls we received overall in the second year increased far beyond our estimation. Whilst a total of 2643 chat requests were made during the entire pilot year, between 1 September and 30 December of 2011 the service has already answered 2001 enquiries. This equates to an average of 23.5 chats per day (across 85 service days), with the maximum number of queries received on a single day currently 51.

#### THE FUTURE

The introduction of an instant chat service is being investigated by an increasing number of higher education libraries in Europe. Since the commencement of our pilot in September 2010 we have been contacted for information and advice by institutions in the UK and from as far afield as Germany, Spain and Finland. There has also been interest internally from other Cardiff University divisions seeking alternative and additional ways

to be contacted by users and stakeholders, e.g. for student support, research & commercial development and counselling.

We wish to explore a few avenues with our own service, including perhaps having a dedicated Cardiff University Library3lp server rather than relying on the European shared server. A current development is the investigation of utilising remote PC support software. This 'push and pull' technology would allow us (with the user's consent) to take over a person's computer for troubleshooting purposes, as many of our off-campus queries relate to access issues, including locating off-campus links and accessing the Cardiff portal. We shall continue to monitor how this evolving service is meeting the current needs of our users and make use of horizon-scanning activities to identify any future requirements.

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