

Sharing expertise

Using reciprocal training and peer support for real enquiries to deliver a shared telephone/online chat service staffed by teams with different core competencies



Lisa Jeffery
Assistant Librarian (Enquiries)
University Library
University of Portsmouth
lisa.jeffery@port.ac.uk

At the University of Portsmouth library, two teams who handled different types of enquiry were brought together to jointly staff the library telephone/online chat service. The enquiries team specialised in supporting information literacy and helping library users to access and use electronic information resources, while the user services team had exclusively handled user registration, renewal and circulation enquiries. Telephone and online chat enquiries would require a detailed knowledge of both and accurate referral of some enquiries to the appropriate specialist teams. We started by identifying the knowledge and skills common to both teams and what areas of expertise were unique to each. Examples of previous online chat enquiries were categorised accordingly and used by colleagues working collaboratively in an informal setting as a basis for discussion and information sharing. During each telephone / chat session, one member from each team was paired with a member of the other team and asked to follow a training programme in which they took turns to train each other in an area in which they had expertise.

Partnering library teams

Telephone enquiries have long been a traditional part of the services we provide, whether answered at an enquiry desk or taken in the office. However, technology is increasingly changing the work of academic libraries and we introduced online chat at the beginning of the 2012–13 academic year. Following a survey of chat services used by other university libraries, we chose a free web-based service called Zoho Chat. The online chat service was given a soft launch and staffed by someone from a small cohort of the enquiries team from 11:00 to 15:00 Monday to Friday.

With the introduction of self-service for borrowing and returning loans, it was envisaged that staff from the user services team whose time was freed up from circulation transactions would be trained alongside existing enquiries staff to deliver a joint telephone / online chat service. While those who were unfamiliar with the mechanics of chat software would be able to try it out for themselves, the challenge for training was to enable staff working in different teams to develop enquiries knowledge and the skills required to deliver the shared service.

Core competencies

Identifying the core competencies required would ensure that the transfer of knowledge through peer support covered the majority of enquiries likely to be handled at the telephone / online chat service point. We decided that core knowledge comprised general library information such as opening hours, access, membership, borrowing and lost property, as well as the location of, and information about, library collections, services and facilities such as dissertations, printing, group study rooms and interlibrary loans. Core skills included confidence in operating the telephone and online chat, active listening, customer service and referring on appropriately. Knowledge and skills for the enquiries services team to share with the user services team included accessing electronic resources, searching for information on a topic, troubleshooting e-resources problems and referencing. Knowledge and skills for the user services team to share with the enquiries team included lost or missing books, user registration queries and issues with fines.

Real enquiries

Once we had identified the core knowledge and skills required, we wanted to provide corresponding enquiry examples – and what could be better than using real-life enquiries? (See Fig. 1)

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Knowledge / skill	Sources of training / support	Enquiry examples
General library information: <ul style="list-style-type: none"> • Address • Opening hours • Study zones • Layout of stock, book loan types, borrowing limits etc. • Lost property 	<ul style="list-style-type: none"> • Library update session: supporting students with the new library website • Library guide • Library website • Staff wiki 	<ul style="list-style-type: none"> • Hi, I just wanted to ask if I could send a book to the library by post? (6 Mar) • Is the library open on a Saturday? (23 Oct) • Where are the areas I can eat located? (26 Oct) • Hi, is it possible to borrow journals from the library? (5 Feb) • Hi, I have lost my phone and wanted to ask if anything had been handed in? (21 Nov)

Fig. 1 Core knowledge and skills and examples of real-life enquiries

A standard feature of chat software is the automatic recording of online chat conversations, often referred to as the chat history, and these transcripts can be forwarded to the enquirer. By collating online chat enquiries received during the past academic year, we discovered the surprising breadth and often complex nature of questions asked via online chat. The enquiries were extracted from the chat history, preserving the anonymity of enquirer, and saved into a template in order to create a worksheet for each enquiry (Fig. 2).

Enquiry 2	
1 Text of the enquiry	I am an ex student and I have a number of old Mathematics books which I would be happy to donate to the Library. Is there any facility for this? (4 Oct)
2 Where would you find the information to help answer this enquiry	Library website (http://www.port.ac.uk/library/about/policies/collman/selection/)
3 Is there anything about this enquiry that you might have to check?	Yes, the size of the donation
4 At what point would you refer on and to whom?	Refer on a Subject Librarian because donations need to be approved before they are added to stock.

Fig. 2 Enquiry example worksheet template

The enquiry was then given a number corresponding to the transcript of the enquiry. Enquiries were divided into the categories described above according to the area(s) of knowledge or particular skill(s) that could be demonstrated for training purposes. A table was created to bring together all the enquiries, grouped by category, with links to each worksheet and somewhere for staff to record their initials and date as each was completed (Fig. 3).

Knowledge and skills common to the enquiries and user services teams		Knowledge and skills for the user services team to share with the enquiries team		Knowledge and skills for the enquiries team to share with the user services team	
Enquiry 1	24/06/13 JH CT	Enquiry 61	24/06/13 JH CT	Enquiry 85	24/06/13 JH CT
Enquiry 2	24/06/13 JH CT	Enquiry 62	25/06/13 JB PT	Enquiry 86	25/06/13 JB PT
Enquiry 3	25/06/13 JB PT	Enquiry 63	25/06/13 JB PT	Enquiry 87	25/06/13 JB PT

Fig. 3 Telephone and online chat enquiry worksheets

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Peer support

Although library staff had access to formal training in managing interviews at the reference desk (e.g. developing skills such as using open questions in order to ascertain exactly what information was being sought), peer support or peer coaching offered a way to share the training load through team learning. During the summer of 2013, enquiries and user services staff were paired up for an hour a day to enable them to practise using online chat and to progress in a structured way through each worksheet containing real-life chat enquiries. They were expected to work together on at least one enquiry from each category, agreeing a model answer to the enquiry, and generating a basic knowledge base. As well as discussing the enquiry, they were asked to use the time as an opportunity to show each other important tools for the enquiries service; where to locate information on the library website, how to use the library management system to answer questions, and ways to use the staff wiki as a 'how to' manual.

Supporting staff to build confidence and hone their skills in a non-threatening environment promoted team building to some extent. From September 2013, a member of the enquiries and user services teams jointly covered a newly created dedicated telephone / online chat service point. This gave staff the chance to put theory into practice by continuing to coach each other while also staffing a live enquiries service. During quiet periods, they were asked to review the worksheets completed during the summer or, in a less structured manner, to simply look through transcripts from previous online chat enquiries and reflect on how they were handled. Support from peers went beyond the 'sitting by Nelly' approach to learning about enquiries, and encouraged staff to feel comfortable about sharing knowledge. They also acquired a sense of ownership, which motivated a member of the enquiries team to develop a 'theme of the fortnight' for training. Aside from very occasional chaos when the telephone and online chat bell rang simultaneously, feedback from staff supporting each other to learn and adapt to new technologies was positive. They felt that working together proved particularly useful when one member of staff was unsure how to answer and needed to refer the enquiry.

Delivering a shared telephone/online chat enquiries service

From September 2014, the telephone / online chat service point became a shared service delivered by a single member of staff from the enquiries or the user services team. Cover for the service was split between mornings and afternoons, easing the pressure on busy lunch times. The advantage of having a larger pool of staff from which to provide cover was that we were able to extend the online chat service to 09:00–17:00 Monday to Friday. Meanwhile, the collection of real-life enquiries and the rudimentary knowledge base created through peer support has offered us a starting point for further enquiries training.

During the first year of operation, we focused on building confidence by praising the friendly, informal but professional tone being used, and reinforcing the practice of sending links to library web pages instead of typing lengthy replies. We also conducted a small online chat survey with students, and while we were encouraged that those who had used the service gave positive feedback, numbers were lower than expected. As a result, we are looking to increase use of the service through additional promotion and are investigating alternative online chat systems to upgrade the reliability of the software.

One year on, we are responding to feedback from the user services team by looking at providing consistent backup support for staff covering the telephone / online chat service, revisiting the peer support model. We are also working on developing a robust system for enquiry referrals, as we observed a slight reluctance among staff to refer on using our online referral form. By encouraging staff to refer on in this way, we hope to use virtual peer support to

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share with them additional information given to the enquirer by the appropriate specialist team, as a way for staff to continue to improve their enquiries skills and knowledge.

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