Library questions? Ask us! Embarking on virtual reference at Anglia Ruskin University

Carol McMaster
Faculty Liaison Librarian,
University Library, Anglia Ruskin University
Tel: 0845 196 4643
E-mail: carol.mcmaster@anglia.ac.uk

Judith Wells
Customer Services Manager,
University Library, Anglia Ruskin University
Tel: 0845 196 2312
E-mail: judith.wells@anglia.ac.uk

Jenny Cefai
Staff Learning and Development Manager,
University Library, Anglia Ruskin University
Tel: 0845 196 2264
E-mail: jenny.cefai@anglia.ac.uk

Matthew Smith
Web Editorial and Development Officer,
University Library, Anglia Ruskin University
Tel: 0845 196 3747
E-mail: matthew.smith@anglia.ac.uk

INTRODUCTION

The SCONUL vision 2010 identifies personalised support as a trend for the future:

'The focus will be on delivery of personal help, either face-to-face or via web-based services.' [1]

We wanted to extend choice of customer access to personalised support and services, to increase the uptake of off-campus support and to improve consistency of response from our four site libraries. From a strategic perspective we aimed to improve marketing, integrate the management of our enquiry services and use new management information to inform future developments. A feasibility study suggested that we could develop our enquiries service by offering online synchro-

nous chat with the existing staff establishment managed across sites. We selected OCLC's QuestionPoint as the platform to develop our virtual reference service.

THE PROJECT

Our online enquiries cover the range from access and procedural questions to requests for more detailed subject support, compliments, comments and concerns.

Before the project commenced, enquiries from the library website were routed to a number of mailboxes – for example to the four individual site libraries and to the systems team for login enquiries – and there was no service-wide overview.

The first phase of change was to route all online enquiries through QuestionPoint and to share responsibility for responding. At the same time a staffing re-structure was being put in place, with a renewed focus on collaborative working and the sharing of specialist expertise across the service divisions. The four members of the project group were given specific areas of responsibility, representing roles within our new staffing structure. The project leader, from the academic services division, liaised with external contacts and kept an overview of marketing and promotion, both internally and for the launch of the new service. The implementation manager, from the customer services division, developed the operational aspects. The new staff learning and development manager advised on the training programme, and system-administration was supported by the web development officer.

The training commenced in September 2008 and we implemented the new cross-site rota for online enquiries received via our revised website question form in November. We asked the enquiry desk librarians at each site to log in to the new system and answer enquiries at the beginning of each shift change. This establishes a new service level during staffed hours by increasing the number and frequency of staff who are checking and responding to enquiries, and customers receive a faster initial response. The new way of working began to foster a change of culture from a site or functional focus by developing cross-service awareness.

The second phase of the project, introducing online chat, required more preparation. This would be the new element promoted to our customers and, although a few staff members used online chat socially, the majority had no experi-

ence of this in a professional context. The training commenced in December 2008 and the new chat service was launched in March 2009.

TRAINING

If you read the literature, there is a commonly reported experience of 'rabbit in the headlights' for librarians who are new to online chat. We planned a training programme to accommodate different learning styles. Librarians were encouraged to discuss issues such as chat etiquette, virtual reference techniques, anticipating messages in text-speak and maintaining a friendly and professional contact if inappropriate requests arrive. We aimed to promote ownership of the new service, with the staff being involved in developing competencies for online chat. The programme included:

- hands-on training with the OCLC trainer
- cascaded training to accommodate individual staff needs
- self-audit checklists to establish skills and confidence levels
- online material made available for extended and refresher training
- timetabled learning hours for discussion of best practice in chat and to agree guidelines for staff
- planned time for hands-on practice with 'chat buddies' based at other sites
- supporting documentation building up to a staff training manual
- encouraging less-confident staff to shadow colleagues.

We have independent acknowledgment of the quality of the programme, noted in our Charter Mark 'health check' this year:

'Your introduction of new services such as the "Ask us" chat facility has been accompanied by the development of staff guidelines on how to work with the new etiquettes required.'

MARKETING AND PROMOTION

We focused on a student competition to design a logo and used the winning design, by Monika Umba, to develop a brand for the new 'Ask us' online chat service. (See Figure 1.) The final design appears as an easily identifiable link to online help and support. Experience from other service providers suggests that prominent placement on web pages is the key to attracting enquiries. The new chat service was soft-launched by placing

the logo in selected pages on our library web site, with the aim of a main launch in the new academic year, starting in September 2009.

Figure 1. Monika Umba, logo competition winner with her winning design and Roddie Shepherd, Assistant Director. Monika won £100 in Amazon vouchers.

'Ask us' chat is available during teaching weeks, Monday–Friday, 11.00–16.00. At times when chat is not available enquiries are re-directed to the online enquiry web form.

New ways of working have been tested during the project and wider promotion is planned as opportunities arise to embed the logo further within our web site, digital library, new portal and VLE (Virtual Learning Environment). In addition, we are preparing promotional items using the logo, such as mouse mats (Figure 2) for site libraries and post-it notes for students at induction, and incorporating the logo and brief text with links in the student network PC desktop advertising widget.

Figure 2. The mouse mat

The logo intended for the new chat service has developed as a link promoting all our online library enquiry service points.

CHALLENGES

The availability and workload of staff following the re-structure required careful management. The project required us to use our staff resources across sites to deliver the new chat service, and line managers have to be aware that commitments such as meetings scheduled during service hours affect staff rotas.

Individual time-management and prioritisation are also highlighted as we have introduced an additional commitment into a busy portfolio of activities. Communications across the service were reviewed and a new mailing list was started for 'Ask us' librarians, to support the information flow required to develop a cross-site perspective and facilitate swapping rota duties.
Good practice explored with other providers suggested that staff on front-line desks would find it hard to maintain quality of service if they were also trying to chat online. 'Ask us' chat is timetabled in addition to existing desk duties and is delivered by librarians multi-tasking from their work station, or if they are visiting another site they can hot-desk for their rota duty.

Archived transcripts enabled the project team to review current practice in answering enquiries. It became apparent that we needed staff training and support to improve the consistency and accuracy of responses. Maintaining a high quality of knowledge-management across sites and teams will require commitment in our learning and development programme.

The next stage will be to develop our growing archive of questions and answers as a local knowledge-base within QuestionPoint. The database will help us build and share expertise, supporting consistency in answering customer enquiries.

The system gathers quantitative and qualitative data that we can use to evaluate our services. Statistics obtained during the first year of the new service will provide a baseline from which to agree service-level standards. We code the transcripts for type of enquiry and use this as a diagnostic tool where recurring questions may identify services that require further explanation and to provide evidence for areas of future development.

The co-browsing feature requires more testing. We anticipated using this to offer guided searching by academic librarians promoting information literacy. In practice this is compromised by authentication procedures and technical advances

in external suppliers' websites, for example Ebsco databases which are incompatible with co-browse.

WHAT DO THE LIBRARIANS THINK?

There is a range of views, as expected, from those developing confidence to those who have become expert users, enthusiastic about the new way of offering individual support for our customers. The team is committed to training and developing new competencies for virtual reference while undergoing a year of rapid change. Will we be overwhelmed by online chat requests when we promote the service in the new academic year? We have anticipated increased demand by agreeing guidelines and by preparing scripts and a web-page that librarians can 'push', if needed, to offer our customers alternative routes.

WHAT DO THE CUSTOMERS THINK?

We have a pop-up customer-survey form that follows the chat and librarians appreciate the instant feedback since the response has been overwhelmingly positive.

We identified that, in addition to core site-based students, we would receive enquires from online and distance learners who will not visit a site library because they are studying at collaborative partners in the region or internationally. The service has also been used by students on-campus who may be unwilling to come to the enquiry desk, for example to report noise issues in the library. ARU staff also use the new chat service.

Some of the comments we have received:

'Very quick service – exactly what I needed.'

'Brilliant service – an effective communication tool which helps the more remote of us to not feel as remote. A positive interaction experience.'

'Fast service very impressed they are very helpful would definitely use this service again.'

'The journal was correct and I'm getting a lot more info now, I wish I'd used chat earlier.'

The majority of the customer-survey responses are positive and indicate that they would use chat again.

MOVING FORWARD

Our library's vision for Anglia Ruskin University is of 'a university community empowered by accessible, innovative, responsive library services and supported by an excellent range of high quality resources and committed staff'.[2]

Our ongoing commitment to service development will be scrutinised externally by the Charter Mark/Customer Service Excellence cycle of continuous improvement, which we successfully maintained this year. Our 'health check' report commented:

'Services continue to develop across a wide range of fronts, examples being the extension of the 24-hour opening of library facilities and the online chat facility "Ask us".'

User-group meetings and webinars give us the opportunity to network and share good practice with colleagues in the sector and to feed back our experiences and wish-list to OCLC. We are interested in new features in development such as a customisable 'qwidget' for chat, mobile apps and a Twitter module.

The next academic year will see the 'Ask us' project move into 'business as usual' and daily management will be devolved to the customer services librarians. The new service guide will transfer into an easily updated wiki format for librarians working collaboratively online.

First impressions from our customer surveys show appreciation of the instant response and personalised experience of the 'Ask us' online chat, which is a valued extension to our services.

REFERENCES

1   SCONUL vision 2010 report (2007), available at http://www.sconul.ac.uk/publications/pubs/vision%202010 [accessed 19 August 2009]

2   Anglia Ruskin University Library vision, available at http://libweb.anglia.ac.uk/policiesplans/mission.htm [accessed 19 August 2009]