Implementing A Context-Sensitive Chat Reference Service

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Traditional reference service is already dead. If we have not done so yet, we should bury it.

-- Lewis 1995
Most librarians attribute the decline in reference transactions to the advent of the internet and the ease with which users can find information online without entering a library.

-- Stevens 2013
# Complexity

<table>
<thead>
<tr>
<th>READ Scale</th>
<th>Professional Staff or Students</th>
</tr>
</thead>
</table>
| Level 1    | • Answers that require the least amount of effort  
|            | • No specialized knowledge, skills or expertise  
|            | • No consultation of resources |
| Level 2    | • Answers given which require more effort  
|            | • Require only minimal specific knowledge, skills or expertise  
|            | • Answers may need nominal resource consultation |
## Complexity

<table>
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</table>
| **Level 3** | • Answers that require some effort and time  
|            | • Consultation of resources are needed  
|            | • Minimal instruction of the user may be required  
|            | • Reference knowledge and skills come into play |
Complexity

Visitor: I’m looking for articles on housewives and working wives. Any help?

Charley: It depends on what kinds of sources you want. Business?

....

Charley: Do you want to find articles that examine both in the same article?

....

Charley: In Academic Search Complete, I did a search like this: housewives and wife n6 work
## Complexity

<table>
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<th>Librarians</th>
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| Level 4    | • Answers or research requests which require the consultation of multiple sources  
             • Subject specialists may be need to consulted  
             • Reference knowledge and skills are needed  
             • Exchanges can be instruction based |
| Level 5    | • More substantial effort and time spent assisting with research and finding information  
             • Efforts are cooperative in nature, between the user and the librarian  
             • Research, reference knowledge and skill required |
Complexity Trends

- 62% for St. Clair & Aluri 1977
- 78% for Gerlich & Berard 2011

1 & 2: 62%, 78%
3: 32%, 20%
4+: 6%, 2%
Freshman Composition Is Not Teaching Key Skills in Analysis, Researchers Argue

By Dan Berrett

Students in first-semester composition classes are routinely assigned to write a research paper, but this exercise rarely succeeds because they do not yet grasp how to analyze their sources, say the chief researchers of a multi-institutional study of college students' citations.
STRESS LOVES COMPANY
Ask us anything!
Taking Blue Crew Digital

- Make it easy to identify reference service on our website
- Improve access to reference service online
- Get closer to the users’ point of need -- within the research workflow
How chat worked on our website

Need help finding information for a paper? Can't find that journal article you need for class? Like some help navigating our catalog? We are here to help! Use any of the methods below to receive assistance. We will be happy to respond to you just as soon as we can, during Information Desk help hours.

Chat with a librarian using the box on the right.

Text us your question. Text your question to (210) 239-9257

Call us for assistance: JPL (Main Campus): (210) 458-4573; Downtown: (210) 458-2446

Visit the Information Desk at the John Peace Library on Main Campus or the Downtown Library during open hours.

We are currently unavailable for chat. Please text or email us your question and we will respond as soon as possible.
How chat worked on many commercial websites

"More than 65% of shoppers have engaged in live chat"  
_Live Chat Effectiveness 2012_
Users spend most of their time on other websites

--Jakob Nielsen
2012 Survey of Shoppers --Live Chat Effectiveness 2012

What about in Libraries?

**Convenience** was a leading feature in virtual reference surveys and interviews, when users were asked to compare different service vehicles.

Connaway, Dickey, and Radford, 2011.
Zopim – our live chat solution

• Ubiquitous presence across website (including Summon)
• Chat stays while user moves through website
• Full text searching of all chat transcripts
• Customizable look and feel
• Triggers
Blue Crew chat widget

Awaiting a user’s message

A triggered chat box
We defined criteria and actions for specific chat events.
Our Users Respond to Triggers

In October 2013:

• 42% of chats were initiated by the visitor

• 58% of chats were initiated by a trigger

• 33% of all of our chats were initiated with the Find Databases trigger
When prompted with the trigger, what kinds of questions did they ask?

Do you know of any peer review journals over Marc Chagall and his painting Dream Village?

Need to find journals on ecosystem services and have no idea where to start looking.

Know any good data bases with peer reviewed articles?

I'm trying to do research on Description, Characteristics and Analysis of Competition for e cigarettes in Italy. Is there anything on here that can help me?
The Transition to Zopim

On July 22\textsuperscript{th}, we had 8 chats total.

Beginning July 23\textsuperscript{th}, things changed dramatically.
Comfy?

Get help without leaving your seat.

BLUE crew
Ask us anything!

text us: 239-9257
call us: 458-4573
chat with us: lib.utsa.edu/ask
email us: libraryask@utsa.edu
Total Reference Questions
Sept-Oct 2012 and 2013

Sept-Oct 2012: 4819
Sept-Oct 2013: 6032

+26%
Reference Questions Received Via Chat and Non-Chat, Sept-Oct 2012 and 2013

- **2012**
  - Non-Chat: 4325
  - Chat: 494

- **2013**
  - Non-Chat: 2801
  - Chat: 3231
Chat as a % of Reference

Sept-Oct 2012

- Reference: 90%
- Chat: 10%

Sept-Oct 2013

- Reference: 46%
- Chat: 54%
Launch of New Chat Client

The number of chat questions increased immediately

• July 22 – 8 chat questions (pre-launch)
• July 23 – 42 chat questions (new chat client)
• July 30 – 50 chat questions
Chat Usage Increased
600% from Oct 2012 – Oct 2013

Chat Questions

256 226 122 192 257 210 304 101 99 212 444 1,440 1,791
7,891 SEARCH RESULTS?
BLUE CREW CAN HELP!
Complexity of Questions
Desk Compared with Chat, Sept-Oct 2013

- Desk:
  - READ Scale Rating 1: 512
  - READ Scale Rating 2: 311
  - READ Scale Rating 3: 145
  - READ Scale Rating 4: 9
  - READ Scale Rating 5: 0
  - READ Scale Rating 6: 0

- Chat:
  - READ Scale Rating 1: 95
  - READ Scale Rating 2: 166
  - READ Scale Rating 3: 328
  - READ Scale Rating 4: 137
  - READ Scale Rating 5: 0
  - READ Scale Rating 6: 0
Complexity Trends

- St. Clair & Aluri 1977
- Gerlich & Berard 2011
- Desk (sample)
- Chat (sample)
Ask us anything!
Works Cited

• Connaway, L. S., T. J. Dickey, et al. (2011). ""If it is too inconvenient I'm not going after it:" Convenience as a critical factor in information-seeking behaviors." Library & Information Science Research 33(3): 179-190.

