1

00:00:02.909 --> 00:00:14.730

Judy Markowitz: Hello everyone welcome, and thank you for attending watching our presentation Crisis Mode from surviving to thriving what we did to transform our ask us service.

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00:00:15.210 --> 00:00:29.370

Judy Markowitz: we're from the University of Maryland college park I'm Judy Markowitz I'm a subject specialist librarian I also coordinate our reference services, and I am also the Co coordinator of our virtual reference ask us service.

3

00:00:31.200 --> 00:00:43.320

James V Spring: Hello I'm James Spring I'm the coordinator for the Library Services Unit within our User Services and Resource Sharing department, I also co-coordinate the virtual reference askus! service with Judy.

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00:00:44.760 --> 00:00:52.260

James V Spring: Now, before we get fully started, we wanted to give you a little background about what we did before we changed.

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00:00:53.400 --> 00:01:03.150

James V Spring: So just as a heads up, we were quite proud of our services before the pandemic broke out up until March 2020 the University of Maryland College Park libraries

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00:01:03.840 --> 00:01:12.540

James V Spring: provided information reference and other customer services to library users through many venues and methods that are five physical location.

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00:01:12.990 --> 00:01:19.080

James V Spring: including six service desks, numerous phone lines, chat, tickets submission and email.

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00:01:19.800 --> 00:01:31.800

James V Spring: Most of our customer service revolved around the services desk at the various locations with employees station they're being responsible for assisting users in person, as well as answering the phones and chat questions during their assigned shift.

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00:01:32.970 --> 00:01:42.270

James V Spring: In our main library McKeldin the reference Librarians covering chat we're also available to answer reference questions in person on an on call basis.

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00:01:46.080 --> 00:01:58.740

Judy Markowitz: So I think it's good for you to know a little bit about how our virtual reference program was originally set up and that will shed some light on how we were able to pivot and have a somewhat smoother ride during the pandemic.

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00:01:59.490 --> 00:02:10.860

Judy Markowitz: James and I head a triage group with three other staff members and we oversee all aspects of what we consider our virtual reference service that includes email.

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00:02:11.280 --> 00:02:32.250

Judy Markowitz: chat and questions submitted via our ask us form, we provide quality control, we meet weekly to discuss issues we read and follow up on chat transcripts, we develop canned messages we provide training we troubleshoot and we also answer and assign email and ticket questions.

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00:02:36.450 --> 00:02:44.640

Judy Markowitz: Our regular chat coverage schedule includes a minimum of three people for almost every day time hour, we have chat covered.

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00:02:45.450 --> 00:02:54.270

Judy Markowitz: We have a primary service point staff member who is the first point of entry and claims those chats ASAP.

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00:02:54.840 --> 00:03:05.580

Judy Markowitz: We also have a staff member from our resource sharing and reserves department and they act as a backup and also are available to answer ILL and reserves questions.

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00:03:06.120 --> 00:03:17.190

Judy Markowitz: We also have me kelton librarian, who is also a backup and available to receive the transfers of reference questions, and it was all working so well.

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00:03:19.380 --> 00:03:21.000

James V Spring: And then COVID happened.

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00:03:22.710 --> 00:03:31.920

James V Spring: So, like all of you and the rest of academia everything blew up first we thought we'd be back after two weeks, then after spring break.

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00:03:33.060 --> 00:03:39.570

James V Spring: And then slowly things went away at the university finally did move fully remote.

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00:03:41.190 --> 00:03:52.770

James V Spring: In mid March and we thought, like our blank screen here what What should we do what we definitely knew that our users still needed, our help, maybe even more than they ever had.

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00:03:57.420 --> 00:04:05.400

James V Spring: So just as an example, I wanted to explain, or just to explain how close we were so our five physical locations six desks all closed.

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00:04:05.850 --> 00:04:13.860

James V Spring: Our phone lines weren't really able to be supported, effectively right away our group line, some people could eventually get there were eventually able to get their.

23

00:04:14.430 --> 00:04:30.390

James V Spring: phone setup with remote access but not everybody right away what we did, still have was chats are ask us questions for our group emails and our individual emails, and so we did see a small uptick in email.

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00:04:31.500 --> 00:04:40.020

James V Spring: But we didn't see an uptick in chat questions equal to what we would have expected during such and sort of unprecedented time with all these closures.

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00:04:40.800 --> 00:04:57.570

James V Spring: And what that meant was that we really needed to figure out what was going on and then quickly, even though was unexpectedly reposition chat and our askus! to be the primary means of receiving and answering questions. so Judy How did we do that?

26

00:05:00.540 --> 00:05:14.490

Judy Markowitz: Well, recognizing that chat is the primary means of receiving an answer user questions we have to increase the service's visibility and we have to improve its user experience.

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00:05:14.970 --> 00:05:22.890

Judy Markowitz: We also needed significant alterations to the staffing model to support the changes and the switch to complete remote work.

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00:05:27.810 --> 00:05:37.230

Judy Markowitz: So the first thing we did was to implement springshare's integrated zoom screen sharing component, there were other things we could have used sorry Microsoft.

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00:05:38.010 --> 00:05:51.120

Judy Markowitz: But Luckily, we were able to meet with our administration to quickly upgrade our chat system with the screen sharing and webinars module within two weeks of closing and it was surprisingly inexpensive.

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00:05:51.930 --> 00:06:04.020

Judy Markowitz: So screen share was introduced on Monday march 30 and although it was a little slow to take off once chat operators and patrons used it they loved it and we're going to prove it.

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00:06:05.370 --> 00:06:16.230

Judy Markowitz: For the first year from March 30 2020 to March 30 2021, we had 299 chats that utilize screen share.

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00:06:17.250 --> 00:06:30.960

Judy Markowitz: We were always proud of our general average chat rating of 3.81 out of four but chats that included screen share were even higher a 3.94 out of four.

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00:06:36.510 --> 00:06:45.360

James V Spring: So, adding screen share was great we definitely hit those users that were using it, but we're still a little hidden.

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00:06:47.190 --> 00:06:56.430

James V Spring: on how to get to our chat so take a quick look at these two photos which of these seems easier to approach, and I think I think we all can agree.

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00:06:57.900 --> 00:07:09.030

James V Spring: So again, all the changes we're going to talk about today are valuable to our service, but we think the most impactful change was what we like to call our new front door and Judy.

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00:07:10.410 --> 00:07:25.650

Judy Markowitz: So, since we lost our physical presence our users needed an obvious way to reach us and sorry to say, our chat entry point was very like that alley you saw in the previous slide.

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00:07:26.190 --> 00:07:34.410

Judy Markowitz: And it was buried behind a small insignificant little ask us button on our homepage you can see, by the arrow.

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00:07:34.950 --> 00:07:48.210

Judy Markowitz: And that linked to another page where a chat could be started I don't know what we were thinking, but if this was now meant to be the primary place for our users to get help this location was not going to cut it.

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00:08:03.090 --> 00:08:14.160

Judy Markowitz: So James and our web services developer presented to the rest of the triage group, an idea about adding a floating pop up to every page of the library's website.

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00:08:15.000 --> 00:08:25.200

Judy Markowitz: So you can see a green button here shows up as active on the website if chat operators are logged into the chat system.

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00:08:25.890 --> 00:08:36.540

Judy Markowitz: When a user clicks on the button or it's inactive for 10 seconds, the floating widget expands above this is what you're seeing now we're arrow to is.

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00:08:37.440 --> 00:08:47.790

Judy Markowitz: So we did consider that there might be some people who would be annoyed at this pop up, but in the end we thought that the benefits outweigh the possible issues.

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00:08:48.330 --> 00:09:02.250

Judy Markowitz: So, finally, on April 20 after a month of tweaking testing and approvals, the new floating chat widget was added to all of our pages and James will explain if we saw any effect.

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00:09:03.930 --> 00:09:06.930

James V Spring: Oh boy did we see an effect.

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00:09:08.820 --> 00:09:09.630

James V Spring: In the first week.

46

00:09:10.860 --> 00:09:20.610

James V Spring: We had 147 chats to put that into perspective that is more chats than we had gotten in any month in the last five years.

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00:09:21.990 --> 00:09:22.590

James V Spring: Maybe ever.

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00:09:24.030 --> 00:09:40.140

James V Spring: If you're thinking hey, maybe it was just that the library was closed remember that we had already been closed for about a month at this point, and our previous week's numbers actually showed that we had only 29 chats so just take a look at that.

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00:09:41.160 --> 00:09:54.090

James V Spring: April 13 the week of April 13, 29 chats that we, the highest number of chance we had in one visit our was nine and then April 20 when we turned on the new widget.

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00:09:54.960 --> 00:10:18.210

James V Spring: That week was 147 and the highest number of chats we had an a busy hour is 24 so just a huge huge change and it didn't stop in the first week in the year after implementation we've had an almost eight fold increase in chats from about 1000 the year before to about 7856 chats.

51

00:10:19.320 --> 00:10:23.850

James V Spring: For those bean counters in the room, that is a 663% increase.

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00:10:25.530 --> 00:10:27.570

James V Spring: Having ostensibly solved our

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00:10:28.710 --> 00:10:35.730

James V Spring: door problem, we can now admit publicly how unfriendly our chat entry point had been previously.

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00:10:36.780 --> 00:10:49.890

James V Spring: And it was also really exciting to see that the users really still needed us. The scary part is if we hadn't actually fixed this, we would have missed out on probably 87% of user questions that year.

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00:10:51.540 --> 00:10:53.190

Judy Markowitz: DO you want to show that slide James?

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00:10:53.460 --> 00:10:53.880

James V. Spring: I do.

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00:10:56.670 --> 00:10:57.150

Judy Markowitz: yeah.

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00:10:58.560 --> 00:11:00.420

James V Spring: here's the numbers again again.

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00:11:02.190 --> 00:11:07.080

James V Spring: year over year 653%.

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00:11:10.470 --> 00:11:20.880

Judy Markowitz: Okay, so now that we had such an audience, we needed to make life easier for our chat operators and get everyone on the same page when responding.

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00:11:21.150 --> 00:11:28.020

Judy Markowitz: To users about all the changes in our services and facilities, as well as our normal library questions.

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00:11:28.830 --> 00:11:36.570

Judy Markowitz: So we made continuous additions and revisions to our canned messages and communicated those changes to all of the chat operators.

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00:11:36.930 --> 00:11:46.830

Judy Markowitz: services were changing so rapidly, there were times we would get a new change or directive in the morning, and we would immediately revise the canned message and let everyone know.

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00:11:48.090 --> 00:12:01.560

Judy Markowitz: Providing and using the canned messages were a lifesaver for everyone, but especially since we had so many operators really providing chat at this level, for the first time it was imperative that we had these canned messages.

65

00:12:02.460 --> 00:12:13.710

Judy Markowitz: The ones that we use the most are probably about our book returns, whether people could come to campus and return their books or if they'd already left our curbside pickup once that started.

66

00:12:14.370 --> 00:12:18.060

Judy Markowitz: Visiting McKeldin and making reservations to come into the building.

67

00:12:18.660 --> 00:12:35.580

Judy Markowitz: ebooks access through hathitrust and we had so many patrons of the public who were used to coming into the library and now could not access our materials, we had a non affiliated research options canned message to help them out.

68

00:12:41.610 --> 00:12:49.410

Judy Markowitz: So staffing and training for that new front door, we still have a minimum of three people on at any one time.

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00:12:49.920 --> 00:12:59.280

Judy Markowitz: The main difference is that the COVID staffing model is comprised of student employees, along with our staff members and faculty Librarians.

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00:12:59.790 --> 00:13:13.830

Judy Markowitz: And we come from eight different units within the research and academic services division for a total of 50 plus chat operators covering 140 shifts per week, we also add chat shifts during our finals.

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00:13:14.670 --> 00:13:29.760

Judy Markowitz: We increase the schedule chat hours of the mckelvin Librarians by about 20% we added seven hours a week so reference coverage became 9 to 6 Monday through Thursday and then 9 to 5 on Fridays.

72

00:13:35.370 --> 00:13:38.370

James V Spring: So talking about those teleworking students.

73

00:13:39.780 --> 00:13:50.880

James V Spring: That really helped us through everything just to say that the pandemic hit our student body as hard in their wallets as it did in their studies, I think this was sort of true across the country across the world.

74

00:13:51.930 --> 00:13:54.540

James V Spring: And our department students supervisors were.

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00:13:55.950 --> 00:14:04.620

James V Spring: very open to listening to them about it and they advocated strongly that our students, be allowed to telework along with everyone else, and they actually succeeded.

76

00:14:05.730 --> 00:14:16.590

James V Spring: Initially, and the students were given a certain sort of basic data entry tasks of telework but later when our main library started offering limited on site pickup services.

77

00:14:17.790 --> 00:14:29.130

James V Spring: We ended up not having enough dedicated staff teleworking to cover all the chat shifts, we were doing so, since we had a lot of chat volume and now we had teleworking student.

78

00:14:29.670 --> 00:14:36.540

James V Spring: We went ahead and added them to the chat schedule in July 2020 and it is a very good thing that the student supervisors

79

00:14:37.500 --> 00:14:52.710

James V Spring: advocated to keep them on staff because again they fully answered in that year, and the first year 837 chats out of our 7850 from from April 2020 to April 2021 and really it was July 2020.

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00:14:54.270 --> 00:14:59.670

James V Spring: But that doesn't even include the many, many questions that they picked up and then transferred to staff and librarian.

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00:15:00.750 --> 00:15:08.700

James V Spring: As the pandemic dragged on we even had to continue and hire some new students to work on site and telework on alternating weeks.

82

00:15:09.120 --> 00:15:16.710

James V Spring: And then that meant, since they had never even worked in the library before the training was needed not only for the mechanics of how chat works.

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00:15:17.130 --> 00:15:28.350

James V Spring: But, on the very basic reference and referral as well, so all in all, about 36 students and numerous staff, some of which, at this point had never been on campus before attended these trainings.

84

00:15:30.690 --> 00:15:43.230

James V Spring: And I just wanted to reiterate a big thanks to our User Services and Resource Sharing student supervisors are hiring and backing up our chatting student workforce, it was a really good idea, and it was a great success.

85

00:15:46.140 --> 00:15:53.910

Judy Markowitz: So back to our quality control, we like this logo so we're going to revisit quality control, as was mentioned.

86

00:15:54.270 --> 00:15:55.080

James V Spring: She loves the logo.

87

00:15:56.880 --> 00:16:04.290

Judy Markowitz: was mentioned part of our quality control is reading the transcripts and following up when needed with patrons and the chat operator.

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00:16:05.190 --> 00:16:13.110

Judy Markowitz: The triage group previously email the chat operator if the answer was not up to snuff, but it was difficult to track whether a problem had been addressed.

89

00:16:13.620 --> 00:16:17.850

Judy Markowitz: And to correct this uncertainty and because of the volume of chats.

90

00:16:18.210 --> 00:16:28.770

Judy Markowitz: And due to the number of new chat operators, we incorporated a partially automated system it's a macro within our spring share ticketing dashboard to handle follow ups.

91

00:16:29.070 --> 00:16:41.970

Judy Markowitz: So when the question is finally answered correctly and closed in our ticketing system we use this macro and the ticketing system itself to inform the initial chat operator of the better or correct answer.

92

00:16:42.390 --> 00:16:47.640

Judy Markowitz: And this gives the triage group a trackable piece of documentation on those follow ups.

93

00:16:54.330 --> 00:16:55.620

Judy Markowitz: so Fall 2021

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00:16:56.700 --> 00:17:07.800

Judy Markowitz: Moving forward through the opening what have we learned and when we fully reopen, what are we going to keep what we will definitely keep our screen share.

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00:17:08.310 --> 00:17:14.400

Judy Markowitz: And while our real front door is reopening our virtual front door widget is here to stay as well.

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00:17:15.090 --> 00:17:27.750

Judy Markowitz: With the return to in person service our chat staffing model will be changing to reflect the onsite needs so staffing will initially be much more like our original pre-COVID staffing model.

97

00:17:28.350 --> 00:17:41.370

Judy Markowitz: We are looking to the fall semester with open eyes and reading minds, we plan on reviewing how well the new chat entry point works with the previous staffing model after the fall of 2021 semester comes to a close.

98

00:17:43.830 --> 00:17:45.750

James V Spring: So what are we going to see happen, I wonder.

99

00:17:48.150 --> 00:17:54.840

James V Spring: I wonder if we're going to see an increase in chat numbers as academia gets back into the swing of what what we consider normal.

100

00:17:55.410 --> 00:18:02.550

James V Spring: I wonder if we'll have more in person visits than pre-COVID even as the students and faculty are allowed on campus.

101

00:18:03.540 --> 00:18:19.500

James V Spring: there's a lot of research, about whether people are starved for contact, will all those online 2020 freshmen students come into the library to get their questions answered or just continue with chatting as they have been for the last 18 months.

102

00:18:21.180 --> 00:18:25.530

James V Spring: We don't know yet, but we are here and we can't wait to find out.

103

00:18:28.680 --> 00:18:39.450

James V Spring: And with that we are closing our presentation and we just wanted to give some thanks out to folks and give some credits Judy do you have any one you want to give a special shout out to.

104

00:18:39.870 --> 00:18:47.430

Judy Markowitz: I think the shout out goes to everybody who worked during the pandemic to get our services changed and up and running.

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00:18:47.700 --> 00:18:55.890

Judy Markowitz: So that's our digital services and technologies department, our administrators, our students and staff working from home.

106

00:18:56.220 --> 00:19:09.090

Judy Markowitz: and actually we were the triage group we'll give a little shout out to the triage group because we were recognized and with a spirit of innovation award for improving our ask us services.

107

00:19:10.410 --> 00:19:18.180

James V Spring: it's nice to get credit for your work, you like so again, this is the end the real in person live James and Judy.

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00:19:18.510 --> 00:19:22.710

James V Spring: Are there to answer your questions, but we're even now looking forward to answering them.

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00:19:23.460 --> 00:19:30.570

James V Spring: During the q&a period will leave this slide up for a moment and then transfer you over to the live folks thanks everybody.

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00:19:30.930 --> 00:19:31.890

Judy Markowitz: Thanks everyone.