Connecting with AIM: The Search for a Virtual Reference Niche

Lucretia McCulley and Olivia Reinauer

Path of Experimentation

Experimentation with virtual reference at Boatwright Memorial Library (main library at the University of Richmond) began in 2000. The University Libraries are part of the larger Information Services Division, including the Computing Help Desk. Help Desk colleagues were interested in exploring interactive virtual software to answer computing questions, so in early 2000 both librarians and computer specialists attended an on-campus demonstration of "Dr. Bean On Call", an interactive software program developed by Sideware Systems, Inc. The Dr. Bean software was intriguing and staff moved forward with testing it in both the Help Desk and Reference Service environments. Its biggest drawback was that it was sold by individual "seats", meaning that it was not a shared, web-based product and therefore it could not be accessed easily from each librarian's computer. Due to costs, it was installed on only one computer in the Reference office and this proved to be a hindrance with training and regular use by the librarians. Limited advertising was distributed on campus and through the library's website, but librarians received very few virtual questions. In 2001, the Sideware company went bankrupt and Dr. Bean was no longer supported. Although this first experiment was not successful in terms of reaching large numbers of users, it was a good opportunity for librarians to test and learn more about the new technology.

By the summer of 2001, there were several virtual software developments underway, particularly for libraries. Boatwright reference librarians attended a Virtual Reference Seminar at the Library of Congress in spring 2001. During this seminar, the Collaborative Digital Reference Service (CDRS) project, a new endeavor sponsored by the Library of Congress and OCLC was introduced. As a result of attending the conference, the library decided to participate in the new pilot project for several months. Eventually CDRS turned into OCLC's Questionpoint (virtual reference service), but at the time, both staff and administrators thought the relatively high cost of Questionpoint would not equal the use. Another option was 24/7 Reference, a round-the-clock reference cooperative and service developed by the Metropolitan Cooperative Library System in Southern California. There were many appealing features on 24/7 Reference, including the ability to co-browse and push pages to users, but there were also several difficult technical issues with the software, primarily around firewall issues at the university. Another option was InstantService, a web-based chat service headquartered in Seattle, Washington. The fact that InstantService was web-based and not sold by "seats" was very appealing. Another excellent selling point was that at that time, InstantService was offering no-cost access to nonprofit institutions.

During 2002-2004, InstantService was used on a regular basis by librarians. It is a very user-friendly system and offers features such as the ability to push pages to users, create pre-scripted responses, transfer questions to another librarian, and record transcripts of chat sessions. Librarians were reluctant to integrate InstantService at the reference desk, so a "virtual reference" schedule was created so that librarians could answer InstantService messages at their desk. However, after two semesters, statistics remained low. Reference staff then experimented with expanded evening hours by employing student assistants to serve as the first contact for questions and then transfer them to the reference desk if further assistance was needed. Although the idea of using student assistants was a good one, in reality it presented several problems, primarily the provision of consistent training and supervision for the student assistants. In addition, usage continued to remain low and the student assistants were bored with the work.

Librarians were discouraged with the low response of questions and wrestled with the issues of providing time and training for the service, with the return of very little use. Although

---

McCulley and Reinauer
University of Richmond

InstantService was easy for the librarians to use, it posed a barrier for student use, in that they had to go to the library's website, click on the InstantService icon, complete the online form with name and user information and then connect to the librarian. The search for a more appealing library virtual reference software continued. Although none of the reference staff were using it, instant messaging, particularly AOL's Instant Messenger (AIM), was growing in popularity. Would libraries turn to this technology as a way to reach users?

IMPLEMENTING AOL INSTANT MESSENGER AT BOATWRIGHT MEMORIAL LIBRARY

After hearing that the University North Carolina – Chapel Hill (UNC-CH) had been experimenting with AIM and had good response from students, the reference staff at Boatwright Library decided to try it. In comparison with previous experiments in virtual reference, the processes of acquisition, setup, staffing, and training for AIM were remarkably simple. The software itself is free and easy to download. The reference staff decided to handle AIM at the reference desk, so no additional staffing was required. AIM also requires very little specialized training. The reference staff practiced using AIM to communicate with one another before launching the virtual reference service. It turned out to be a convenient tool, which the staff has continued to use regularly. Those who had experience using AIM also provided informal training sessions, and the reference staff agreed on some informal guidelines for this new form of reference provision. The buddy name chosen was "boatwrightinfo" and the service was launched in late November 2004. The buddy name and service were advertised through small stickers on all the library computers and through *Spiderbytes*, the university's daily online announcement newsletter. In the first three months of service, 117 questions were answered via IM. This number surpassed all of the librarians' expectations and any previous attempts with other virtual reference services.

Since its initial implementation, use of the AIM reference service has remained strong. During the spring 2005 semester, 189 IM questions were received. In fall 2005, the number rose to 298. Traffic at the physical reference desk is relatively high, in part because the University of Richmond has a small student body, 95 percent of whom reside on campus for their entire undergraduate education. When compared to the total reference questions received, IM composed 6 percent in spring 2005 and 9 percent in fall 2005. In comparison, e-mail questions comprised only 4.5 percent of total reference questions in spring 2005 and 3 percent in fall 2005.

Staffing AIM at the reference desk has worked well in our particular environment. A single reference staff member is available at the integrated main service desk from 8:00 a.m. to 10:00 p.m. Monday-Thursday, 8:00 a.m. to 5:00 p.m. on Friday, 1:00 p.m. to 5:00 p.m. Saturday, and 1:00 p.m. to 10:00 p.m. on Sunday. He or she staffs AIM, telephone reference, and face-to-face service simultaneously. Speakers attached to the computer are turned on at low volume so that when a new IM request is received, the librarian is alerted both by sound (chime) and sight (popup window). Face to face and telephone queries take precedence over IM questions, but AIM patrons have proven to be patient in waiting when necessary. This may be because they are accustomed to using AIM while simultaneously engaging in other activities. Reference staff do try to acknowledge incoming chats and let them know when a wait is expected.

Prior to beginning the service, the reference staff agreed that a level of professionalism should be maintained even though the medium is informal. While basic customer service practices of politeness and attentiveness are employed by all, each staff member also has a unique IM style. Friendliness and humor are particularly effective in establishing a rapport with the patron. The use of AIM between library staff members has been important in raising their comfort level with instant messaging, and has also proven to be an effective method of interoffice communication. The customizable "away message" and "buddy info" features are particularly useful.

WHY HAS AOL INSTANT MESSENGER WORKED?

There are a number of interesting issues to consider in determining why AIM has been successful when prior attempts were not. In terms of acquisition, setup, training, and staffing, AIM has certainly been simpler than many other chat software offerings. First of all, the software itself is free. And because the decision was made to handle AIM at the reference desk, no additional staffing was required. Second, it can be quickly and easily downloaded and installed on all staff computers. Before implementing it as a virtual reference service, the reference staff was encouraged to begin using AIM with one another as a tool for interoffice communication. AIM is also convenient from the patron's perspective. If the patron is not using AIM already, then he or she must download it from the AOL Web site and add *boatwrightinfo* as a "buddy." This process is fairly intuitive, and requires little or no instruction for most users. Following the initial download and account setup, the patron can ask questions anytime simply by opening AIM and selecting the *boatwrightinfo* buddy. Unlike some Web-based chat software, there is no need to navigate to a specific Web site or fill out a form.

At Boatwright Library, it seems that the convenience and familiarity of AIM is more important than the various "bells and whistles" offered by some of the other virtual reference technologies. Many users are already using AIM frequently and have it installed on their computers. They use the library reference service just as they use IM recreationally – as a multitasking communication tool. When they have a point of need question, they want quick, convenient answers. The necessity of recalling a particular URL, filling out a form, and potentially waiting in a queue or having to remain in a chat window interrupts the flow of their work. Similarly, they do not appear to miss features such as co-browsing or page pushing. Furthermore, patrons generally do not become impatient waiting for answers because they can continue their work in the meantime.

-LUCRETIA MCCULLEY AND OLIVIA REINAUER-

The features of AIM combined with the flow of activity at the Boatwright Library main service desk make it possible to staff AIM, telephone reference and face to face reference service simultaneously. When a staff member logs in to the reference computer, he or she is automatically signed on to the *boatwrightinfo* AIM account. Speakers attached to the computer are turned on (low volume), so that when a new IM request is received, the librarian is alerted both by sound (chime) and sight (popup window). Face to face and telephone reference queries take precedence, and IM patrons have proven to be very patient in waiting when necessary. This is most likely because they are accustomed to keeping their AIM window open while working on other activities. Questions are not archived automatically, so it does require a conscious effort. Boatwright Library staff must remember to save each IM session after it has been completed.

USEFULNESS OF ARCHIVING QUESTIONS

One of the benefits of chat or instant messaging reference is the creation of a transcript of the reference transaction. These documented questions and responses are enormously helpful in making reference service improvements. One use for these transcripts at Boatwright Library is training. Past IM sessions have been printed and organized in a binder by general topic. New hires read through the questions to find out the types of questions commonly asked as well as the answers to those questions. Another use is to clarify library policies and responses. It is helpful for librarians and supervisors to browse chat transcripts in order to identify areas where there may be confusion or incongruities in the reference staff's responses. These are topics that may need additional attention or training. Because AIM does not provide identification of the individual librarian providing the response, transcripts are saved anonymously, thus avoiding accusation or negative criticism directed toward a particular individual. Finally, transcripts are used to identify and respond to patron needs on a larger scale. For instance, 26 percent of reference questions (17 percent of the total volume of questions) received on AIM between January and April 2005 related to citing sources. Reference librarians responded to this need by purchasing a subscription to NoodleBib, a web-based citation builder that guides students through the process of creating an MLA or APA citation.

WHAT'S NEXT?

Although AIM was only implemented at Boatwright Library eighteen months ago, new products have already emerged that could improve our service. This summer the reference staff plans to explore the use of a free or low-cost multi-network IM client, such as Trillian or Meebo. These IM aggregators allow librarians to accept messages from a variety of IM services (e.g. AIM, MSN, Yahoo, etc.), which would be more convenient for users who prefer an alternative to AIM. Boatwright Library recently formed a "Technology Team" committee that has been exploring, among other things, library services for handheld mobile devices. With their help, the reference staff will test reference provision via SMS, or short message service, during the summer of 2006. If all goes smoothly, it will be implemented in fall 2006, allowing users to send reference queries using mobile phones and to receive responses in the form of text messages.

10 TIPS FOR USING AIM AT YOUR LIBRARY

1. Experiment!
Don't be afraid to test new products and staffing models to find the best fit for your library.

2. Practice among staff
Use AIM (or the appropriate IM client) to communicate with one another before offering the service to your users. It will increase your level of comfort, and you may find it to be a helpful tool in the office.

3. Utilize knowledgeable staff
Find out which staff members have experience with AIM (or the appropriate IM client). Ask if they are willing to provide training. Don't forget about student assistants!

4. Integrate into existing services
How can instant messaging complement other forms of reference service, such as telephone, e-mail and in-person assistance?

5. Market your service creatively
Your users can't take advantage of the service if they don't know about it!

6. Save your transcripts
These can be useful in a number of ways, including training, service evaluation/improvement, and data collection.

7. Personalize
Allow each librarian to communicate in the style most comfortable for him or her, while still maintaining a sense of professionalism. Watch out for robotic-sounding scripts. Users need to know that they are communicating with a live human being.

8. Evaluate
After its implementation, be sure to evaluate your IM service among both staff and users periodically. Even if it is successful, it is important to consider ways to increase effectiveness.

9. Respond quickly and often
Since the user can't see you, it is important to monitor your IM service closely, and to respond to new requests promptly. When responding to a query, check in often to update the user on your progress.

10. Stay current
Pay attention to news and developments relating to instant messaging, particularly the service you are using. Alter your service as necessary to respond to user wants and expectations.