Let's Get Technical — Improving Electronic Resources Management Communication with Chat Solutions

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Let's Get Technical — Improving Electronic Resources Management Communication with Chat Solutions

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*Column Editor Note: In this month's column, we feature the experience of trying out different forms of communication to be used within a small department. **Michael Fernandez**, Electronic Resources Librarian at **American University Library**, explains the challenges he and his staff faced with communicating amongst themselves and the steps that were taken to improve communication. — SM & AM*

Introduction

There are numerous communication streams impacting electronic resources management (ERM). External communications, such as access issues and vendor correspondences, reach ERM staff through multiple channels, while ERM staff themselves utilize a variety of methods to communicate with individuals and groups both inside and outside of the library. While best practices for many of these modes of communication have been developed and refined, internal communication among ERM staff can remain complex and inefficient. This article will describe communication challenges faced by the ERM Unit at **American University (AU) Library**, methods undertaken to address them and what the results were, as well as lessons learned for communication improvement.

The Situation

The ERM Unit at **AU Library** is housed within the Technical Services Division, and consists of one librarian and two specialists. The ERM Unit manages all stages of the e-resources lifecycle: trialing and acquiring new e-resources, licensing, setting up access, responding to troubleshooting requests, and generating usage reports for assessment. Within the ERM Unit, each specialist has a different area of concentration. One specialist focuses on access and serves as a primary contact with vendors for price quotes, trials, and making e-resources discoverable. The other specialist focuses on assessment, and works on collecting and maintaining usage statistics in the electronic resource management system (ERMS), as well as generating usage reports. Both specialists have been cross-trained, allowing them to fill in for each other when the situation calls for it. Troubleshooting access problems accounts for a sizable amount of the work in the ERM Unit. The specialists have been cross-trained in this area as well, which is vital; depending on the access problem, troubleshooting often requires collaboration, consultation with external parties, or rerouting of reported issues.

Access problems can reach the ERM Unit in a variety of ways. The primary method is an online form that library users are prompted to fill out when they encounter an e-resource problem. This form will generate a troubleshooting ticket within iSupport, the library's request management software program. When a new ticket is generated, a

notification email is sent to the ERM Unit's shared email account. This shared email is the preferred contact for the ERM Unit, and is the one associated with vendor correspondence for financial communications such as billing and renewals as well as being tied to administrative accounts for vendor platforms. Multiple staff in the ERM Unit handle vendor correspondence, so this shared email account ensures that the correct staff sees relevant vendor communications and protects against messages being lost amid staff absence or turnover. Access problems can also be directly communicated to the shared email; this is typically done by public services staff, who also report problems over the phone, via the reference chat service, and in person. For these direct communications, ERM Unit staff will manually create a troubleshooting ticket, so that the problem can be tracked.

With this variety of methods for reporting access problems, it could be difficult to determine who was responding to what. These communication issues tended to become exacerbated during peak times for troubleshooting tickets, typically occurring at the beginning of the semester and during finals. The shared email served as a good triage point for access problems, albeit an imperfect one. For one, being associated with hundreds of vendor and publisher accounts, it receives no small amount of spam emails. Secondly, access issues from library colleagues may be directed to a specific member of the ERM Unit, and might be done so informally or in passing. Or it could be directly communicated by one library staff member and also reported by a patron's troubleshooting ticket. Faced with the problems of email clutter and potentially wasted staff bandwidth through duplication of efforts, the ERM Unit looked to ways of improving internal communication channels.

The Process

The ERM Unit began investigating the use of chat programs for internal communication in December of 2016. This move was precipitated by a few factors. First, the ERM Unit had recently filled a vacant specialist position after being short-handed for the better part of the previous year. Second, the other specialist had just begun working from home one day a week. Shortly after that, both specialists' schedules included teleworking once a week. Having a fully staffed ERM Unit doing regular remote work made chat communication a necessity.

Initially, the ERM Unit piloted Slack, a chat service platform that can be used freely online via a browser or with a downloadable app. Trying Slack came at the suggestion of the newly hired specialist, who had used it at her previous position, working for a library vendor. Slack had a number of attractive features that made it a logical candidate for piloting. One of these features is that Slack archives chat history and makes it fully searchable, so if there was a question about who had responded to a particular e-resource access issue, or how it

was answered, the digital trail of that question could be easily followed up on. Slack also gives users the ability to create dedicated chat rooms, or Channels. This was a feature that was potentially useful given the number of special projects that the ERM Unit focuses on. Through the use of Channels, we could keep general access troubleshooting conversations separate from conversations on projects such as our Unit's accessibility inventory. Other appealing aspects of Slack were its collaborative features, such as file sharing and ability to sync with apps like Google Calendar and Google Drive.

Slack was piloted by the ERM Unit for about three months, and during that time, it was found to be useful for communication. Delegating tasks through chat was particularly helpful, as a large volume of the unit's work comes through the shared email address, and chat allowed us to determine who was covering what without the inbox clutter of additional emails or worrying about cc'ing everyone on a response. Chat was also useful for collaborating on ERM issues, for example, brainstorming on what level of technical language to use when responding to a patron's access issue or messaging a URL for link checking. Even on days when both specialists were on site in the office, Slack was useful for troubleshooting an issue and not having to worry about disturbing other Technical Services staff hearing the conversation. If there were any drawbacks to Slack, it was that the small size of our unit meant we really weren't taking advantage of all its functionality. For example, separate Teams and groups can be setup within Slack; this wasn't necessary within our small unit. Organizationally, Slack would have been better suited if the library as a whole adopted it as a chat solution.

In March of 2017, around the same time we were gathering the pilot feedback for Slack, the Director of Technical Services asked us to investigate Skype for Business. This was part of a larger push to use Skype, as it had recently been adopted at **AU** after an institution-wide migration to a Microsoft Outlook email server the previous summer. Additionally, Technical Services was in the midst of being relocated off-site, so we were looking for ways to retain communication lines with colleagues on campus and potential options for holding more meetings remotely. Overall, the transition to Skype in the ERM Unit was smooth, and it was found to be more suited to the size of our group. Skype retains similar functionality to Slack, such as file sharing. Skype's integration with Outlook also allows for preserving chat histories, which get archived within a designated folder in the Outlook client. Scheduling is also facilitated via the integration with the Outlook calendar. Another positive for Skype was that the chat client was pre-installed at the specialist's workstations, so they could login that way or configure the client to auto-login when the desktop was booted. The specialists found this preferable to logging onto our Slack

instance via web browser, although Slack does also provide downloads for a desktop client or mobile app.

Lessons Learned

As a chat solution, Skype quickly became integrated into the regular workflows of the ERM Unit. Communicating via Skype is done every day in the unit and now feels like second nature to the specialists. Certain types of communication, like link checking or collaborative troubleshooting, lend themselves to chat and can be handled more efficiently than they would be verbally or over email.

The initial three month pilot of Slack was informative and useful for determining what type of chat solution worked best for the ERM Unit. While Slack offers excellent functionality and integration potential, it wasn't necessarily suited to our small unit of three. For larger organizations, where job duties may be more diffused, Slack can potentially be a more effective communication tool. In adopting a tool like Slack, it's advisable to take a top-level approach in order to achieve staff buy-in across the organization. The customizability and flexibility of Slack is an asset, as it allows staff to use it however they feel comfortable, whether by logging into the web-based client or through an app on their mobile device. For the ERM Unit, we found that the scalable ease of Skype was more suited to our needs. Skype's chat client was as simple and natural as text messaging, and its automatic integration with Microsoft Outlook was another positive.

Our overall takeaway was to be willing to experiment with different chat solutions and find what works best in terms of organizational size and staff communication style. In the ERM Unit, chat is used daily, typically initiated with a "good morning" check-in. Another takeaway was to identify what types of communications were better suited to chat, and which ones leant themselves more to email or verbal communication. Chat hasn't exactly replaced all other communication in the ERM Unit, but it has become a preferred tool for interactions that can be handled more immediately or less formally than via email. Despite its immediacy, it's also important to be patient when awaiting responses; someone may not hear or see a chat notification right away because they are engrossed in another task or stepped away for a minute.

For the immediate future, the ERM Unit plans to continue using Skype as its preferred chat solution. At the time of this writing, other units at **AU Library** are experimenting with using the Microsoft Teams application for larger cross-departmental projects, such as our upcoming migration to Alma. The robust functionality of Teams bears a number of similarities to Slack, so it will be interesting to observe how it gets utilized. As our experience has taught us, scalability to the organization's size is a key factor in the success of a communication solution. 🐾