

Manchester Business Answers 24/7: a case study in providing online enquiry support at an academic library.

Abstract

The Manchester Business School (MBS) library service of the John Rylands University Library at the University of Manchester has a wide variety of customers, some of whom are not in a position to visit the library buildings frequently. Manchester Business Answers 24/7 is an online enquiry-type service to help them get the most out of a large range of e-resources and, crucially, the expert specialist knowledge of library staff. It is based around a searchable database of frequently asked questions and answers. For any online service, technology is important: we have adopted the 'Business FAQ' system from the University of Pennsylvania library. We focus on a service perspective, as our experience is that two general service issues are more important than technology. The first is service definition: how users will understand what the new service can do for them. The second is the service monitoring and improvement process: this is essential for deciding how to develop the service based on how it has actually been used rather than on the assumptions of service providers.

Keywords: Academic Libraries, Business School Libraries, Business FAQ, Business Research, Business Schools, Enquiry Service, John Rylands University Library, Manchester Business School, Online Reference, Reference Service, Specialist Research

Introduction

The Manchester Business School (MBS) library service is part of the John Rylands University Library at the University of Manchester. It has a wide variety of customers, many of whom are unable to visit the library buildings frequently. Helping these people to get the most out of our large range of electronic resources and to tap into the specialist knowledge of library staff is a significant challenge. Manchester Business Answers 24/7 is an online enquiry-type service. It is based around a searchable database of frequently asked questions and answers that is accessible on or off campus. For any online service, technology is important: we have adopted

the 'Business FAQ' system from the University of Pennsylvania (UPenn) library. While technology provides a framework, we report from a service perspective that our experience suggests is even more important. For Manchester Business Answers 24/7, the MBS library service team is the service provider and the library customers are the service users. We have observed two issues key to introducing a successful online service. The first is service definition: how the essence of the service is captured so that people understand what the new service can do for them. The second is the service monitoring and improvement process. This is essential for guiding the ongoing development of the service in response to how it is actually being used. Users do not follow the assumptions of service designers.

MBS Library Service Background

As part of its remit to support the largest campus-based Business School in the UK, and one of the world's leading Business Schools, the Manchester Business School (MBS) library service has a large and varied set of customers: academic staff, support staff, MBA students, PhD students, MSc students, undergraduates, part-time MBS Worldwide students, corporate members, MBS alumni, and delegates on executive education courses. In addition, the MBS library service is part of the John Rylands University of Manchester Library (JRUL) service, and among the wider university staff and students there will be a proportion in associated disciplines that use the MBS library service significantly. As an academic library there is a relatively high turnover of customers: 3 years for undergraduates and many PhD students, 18 months for MBAs, 12 months for MSc students and varying time periods for executive education. These people are faced with a large and varied set of resources. As part of the JRUL, they have access to one of the best-resourced academic libraries in the UK: over four million printed books and manuscripts, 500,000 e-books, 41,000 electronic journals, and several hundred databases. In the business and management area alone there are over 40 databases covering market research, company and financial information, electronic journals, economic and country statistics and more. There is a turnover in resources and also changes in the most popular resources as teaching and research topics are revised and updated.

The MBS library enquiry service helps its users to get the most out of the available resources. The enquiry service can be contacted in person, by phone or by email. Enquiry support provides assistance in finding resources, accessing resources, and searching resources to find, analyze and utilize the required information. There is a

wide range in the ease-of-use of business information resources. For some resources, once users know how to access them, they pick up how to use them very quickly, perhaps using online help. For other resources, primarily the specialist company and financial information databases, users need more dedicated assistance and advice in becoming familiar with how to find, download and analyze information. The techniques that they have to learn are also more dependent on the type of information they require.

All academic libraries have seen a growing trend towards the provision of and access to electronic resources. The consultation and photocopying of hard-copy journals has been almost completely replaced by accessing online versions. Students and academic staff expect to be able to access the library's electronic resources 24/7, giving them the maximum flexibility in fitting their study into their lifestyle. Indeed with MBS having a large number of students who are not based on-campus (e.g. MBS Worldwide students and executive education courses) there are increasing numbers for whom frequently visiting the library in person is not a viable option.

Although the enquiry service can be contacted by phone and email, the majority of enquiries are in person. One factor is that a one-to-one consultation suits the preferred learning style of some people. Another factor is that phone and email queries work best where there is a short precise question and the expectation of a succinct answer. For example, a user who needs to find out the appropriate URL, username and password for the Thomson One Banker database may phone or email, but the user who wants more advice on how to use Thomson One Banker will prefer only to contact the enquiry desk in person.

It is clear from the queries of people who do come to the enquiry desk in person that there is a demand for specialist advice on how to find the most appropriate resource, how to access resources and how to find, extract and use information from selected resources. It is a clear challenge to the library service to find ways of delivering this information to online users.

Business FAQ Background

The Library for Wharton Business School at the University of Pennsylvania created their Business FAQ service to address this problem. They created a searchable knowledgebase of frequently asked questions and answers (Halperin et al, 2006).

This provided a way of capturing the expertise of the enquiry desk staff and making it available online. Users were less dependent on the availability of a person to deal with their query, and the system helped to make some staff expertise explicit, improving the sharing of knowledge. In contrast to a typical library web page, the Business FAQ tries to provide its users with a targeted answer to a specific query.

The Business FAQ provides two ways for users to access questions and answers of interest: browsing and searching. Each of the questions is assigned to one of about 15 broad categories, e.g. business databases, finance, statistics. On selecting a category users are presented with a list of questions, and selecting the question displays the corresponding answer. The Business FAQ home page also offers a search box. Users provide a word or phrase and the system returns a list of matching questions, divided into their categories. The matching is done using a set of keywords that are linked to each question and answer.

For the service provider, the Business FAQ administration interface includes an editor for the html text of the question, answer and keywords. There is also a statistics interface that provides feedback including: how often the individual questions have been accessed, and what search query terms have been typed and the number of questions that they matched.

The UPenn Business FAQ proved to be a success. It rapidly grew to a significant database of four to five hundred questions with over 50,000 question accesses per year (Halperin et al, 2006). In addition, it was adopted by several other large academic business school libraries (Anello and Bonfield, 2007). Recognising that academic business school libraries have many resources and corresponding questions in common, the UPenn Library started a Business FAQ community. Libraries that joined the community were able to use the same hardware and software, running at UPenn. The statistics interface was extended so that the FAQ community share their recent question revisions. If one member of the community produces a question and answer of interest, others can easily adapt and incorporate this into their FAQ service.

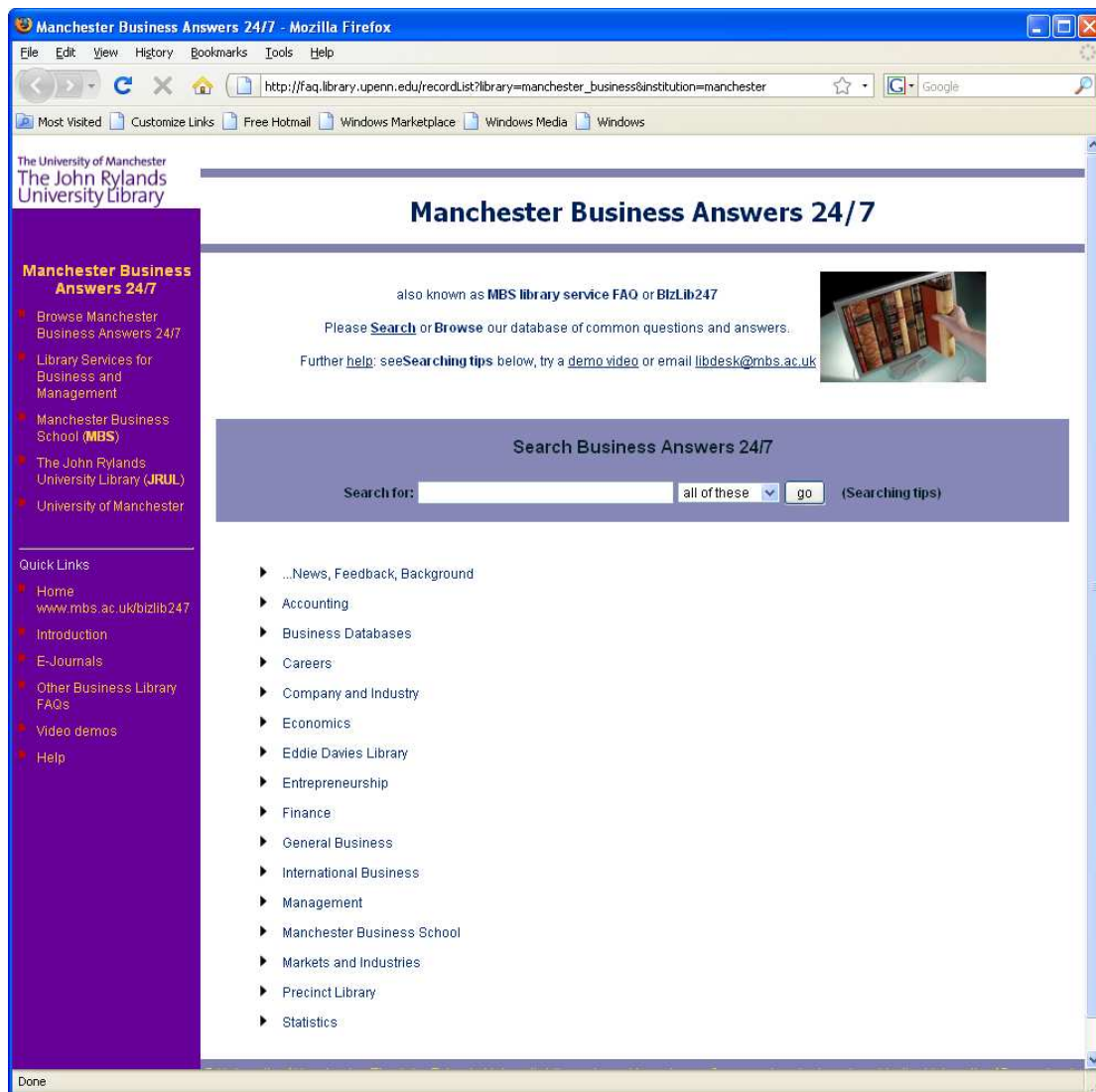


Figure 1: A screenshot of the front page of the Manchester Business Answers 24/7 www.mbs.ac.uk/bizlib247, the MBS FAQ service. The style is common to all the services by different members of the Business FAQ community,

An invitation to join the Business FAQ community was a great opportunity for the MBS library service as part of the global Business School library community. A success would provide an online service to complement existing services, without the trials of developing or acquiring the underlying technology. A failure would mean that we had learnt a great deal about how not to provide an online enquiry service.

Joining the Business FAQ community

Joining the Business FAQ community sounded simple; UPenn business library would give us a copy of their Business FAQ and we would adapt this to our resources and users. There was a well-trodden path established by previous adopters:

- Edit the look and feel options
- Edit the existing questions so that answers refer to Manchester rather than UPenn resources
- Add additional questions as required
- Declare our service ready and let people use it.

This basic structure gave lots to be done. In retrospect this contributed to a failure to clarify two important things: the key initial users of our service, and what questions and answers would be of most value to them. We just started with broad ambitious goals of who could use the service and the range of answers offered. This did not seem too ambitious as we could examine what others had done for inspiration and material.

Defining the look and feel involved choosing colours, sidebar links and various pieces of standard text. The result can be seen in Figure 1. This has proved to be more ongoing than expected as we continually look for improvements. For example, what is a useful and succinct message to return when a user's search returns zero matching questions?

The UPenn Business FAQ provided the raw content for our first draft. This gave us 585 candidate questions and answers that might be adapted to our resources and users. As with queries at the library desk, the questions divide into two broad categories: local questions and business information questions.

For local questions the answers are specific to MBS and its library service, for example, how to access a specific electronic resource to which Manchester subscribes, or how to reserve a book. In contrast, the answers to business information questions are based on the domain knowledge of the library staff, for example, where to go for analysts' reports or how to find share price information for inactive companies. In both cases being able to work from existing answers was helpful. For local questions existing questions were a useful reminder; most of the answers were re-written based around links to existing Manchester web pages

providing the requisite information. For business information and research questions, the answers were revised where our resources differed from UPenn and where our experience suggested that a different ordering or emphasis of resources was appropriate to our users. Having existing questions helped and encouraged us to think carefully about exactly what would be an appropriate answer to each question. There is a definite tension between being part of the FAQ community, thinking about sharing questions and answers, and about specializing our service to Manchester's users and resources. If in doubt we erred on the side of making things as easy as we could for our users, and being consistent with other online information and business information guides produced by the library service.

Our approach for converting existing questions to Manchester versions was to concentrate our effort where we thought it would have the greatest impact. To identify candidate popular questions we asked all the MBS library service staff for their most-asked questions, and we obtained usage statistics from other FAQ community members. Where there was no suitable existing question we added new ones. At the same time as developing our service we have also been introducing the use of Adobe Captivate demonstration videos (screencasts) as an alternative way of presenting our research support, tools and techniques. These demonstration videos proved to be well-received additional resources, and the FAQ service answers provide an excellent context for the videos. It is quite time-consuming to produce effective video demos, especially ones which have been edited to eliminate inconsequential pauses and add additional explanatory information. Once again we concentrated our resources where we thought the impact would be greatest. On balance this led to most of the demonstration videos supplementing answers to local questions, for example how to access a specific electronic journal database.

The advantage of concentrating our efforts on a core set of questions and answers was that we could create a prototype service for use relatively quickly, and rely on the statistics and feedback from use to drive the ongoing conversion of more answers to UPenn versions. The next key question was how do we market our service, and first and foremost what should we call it?

Service Definition

We realized at an early stage that naming the FAQ would be an important factor in helping users to understand what the service is and what it can do for them. A name provides an important first impression that can, in itself, influence a user's perceptions and expectations of the content, scope and purpose of the service.

Defining the service within the constraints of a short, snappy, attention-grabbing title was a challenge. We started by looking at the names chosen by our colleagues in the FAQ community and found that some of them are very creative - Yale University's 'Ask Handsome Dan Business and Economics Questions', for example. While many have chosen to use the term 'FAQ', we were concerned that it may imply a static list of questions and answers, belying the fact that the content is searchable. UPenn agreed that 'Business FAQ' was not the name that they would now choose, but for them it has already become an established brand. Other libraries have selected names that reflect the speed and 24 hour accessibility of the service, for example, 'Fast Answers' (Harvard and University of Illinois), 'Find It Fast!' (Michigan Ross School of Business) and '24/7 Help' (Columbia University). Based on this idea, and after considering a number of options, we felt that 'Business Answers 24/7' most closely matched our criteria and set about marketing the service under this name.

Having settled on a name, the next challenge was how best to describe and promote the service to potential users. We were aware that a poor impression on the first visit could undermine confidence in the service and limit the likelihood of future use and so it was important to plan our marketing carefully.

The information we extract from the statistics provides a useful indication of the numbers of queries entered and questions accessed but this information is entirely quantitative in nature. It doesn't tell us whether the user was happy with the answer we provided, whether they thought it was relevant to their query or whether they would recommend the service to other users. With this in mind, and to offer the opportunity to provide qualitative feedback, we created a category within the database called 'News, Feedback, Background' which gives information about the history of the service, highlights new and popular questions and invites feedback and suggestions for improvement.

Additionally, and in an effort to obtain first hand qualitative feedback, we drew up a list of staff and students to contact by email. Introducing them to Business Answers 24/7, we described the service as 'a searchable database of questions and answers to support Business and Management research' and invited their comments. From the first responses, however, it was clear that some people assumed this to mean that we were introducing them to a new business information database. Comments included 'I don't think it's as helpful as Factiva' and 'The databases I use for my research are not seen in the pages I checked'.

We adjusted the wording of the email to promote the service as 'a searchable online guide to supplement our existing enquiry service, offering research advice and guidance and providing links to appropriate resources'. Although the responses changed to show a better understanding of the service, some people had clearly made assumptions about the size and scope of the database. Comments included 'For a search engine to be really useful, it has to have the power of Google'. Others, however, seemed to understand exactly what the service offers: 'A good starting point to identify sources', 'It is a shorter route to the databases'.

The front page of the database plays an important role in shaping users' perceptions and offers considerable scope for us to explain and define the service. Here we have added some basic guidelines for searching as well as a link to 'searching tips' but do people read these tips in order to understand what the service can do for them? Evidence from the statistics would suggest not. Many of the searches that yield 'zero hits' include terms that are either too broad, too narrow or entirely outside the scope of the subject area.

So what else can we do to educate the users about the service? As one of an extensive range of library resources, it needs to be given a context within which the users can make an instant assessment of its purpose. Some of our colleagues in the FAQ community have addressed the problem by placing the FAQ under the heading of 'Library Help', giving a clear indication as to its function. Others have tried to set out its capabilities and limitations in the search tips that appear on the front page of the database.

There are evidently steps we can take to define the service more clearly but we have to accept that it does not suit the research style of everyone to read definitions and searching tips. Instead, they may prefer to learn by trial and error.

Feedback and Improvement

For any service there needs to be some mechanism for monitoring service delivery, gaining feedback from service users and using this information to guide future improvements. For a traditional desk enquiry service there may be some statistics gathered on the type of enquiry, the category of enquirer, time taken and so on. However much of the feedback and improvement is implicit and automatic. The people handling enquiries often unconsciously help enquirers to clarify their enquiry and tailor their response to the expertise of the enquirer. They can recognise multiple related enquiries from the same enquirer. In addition, they will automatically adjust their own learning based on the range of enquiries received. For an online enquiry service it is easier for the feedback and improvement to be explicit and planned, but it cannot match the richness and personalisation that is automatic in a traditional desk service. On the positive side, the provision of an online service and the gathering of statistics can be joined up so gathering statistics is not seen as an additional burden.

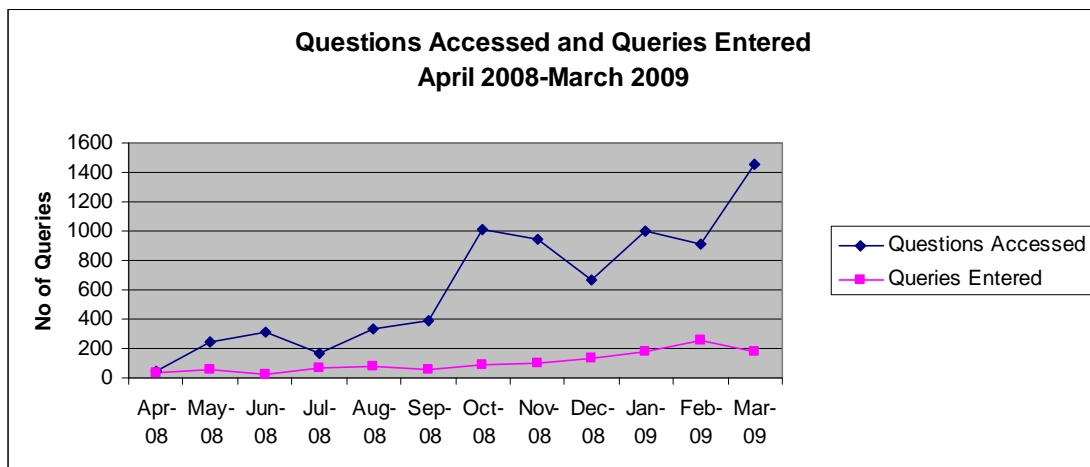


Figure 2: A summary of the statistics for the Manchester Business Answers 24/7 service (www.mbs.ac.uk/bizlib247) during its initial development and use. The lower Queries Entered line corresponds to the number of searches performed.

Manchester Business Answers 24/7, like other FAQ community services, provides a statistics interface for service administrators. Statistics are gathered on the questions accessed by service users and on their searches (See Figure 2). The 'questions accessed' statistics give an overview of service use, and also which parts

were the most popular. We have made considerable use of these statistics in guiding our development effort. The statistics on search queries provide details on the queries that have been submitted and the number of questions that matched them. The most popular searches, like the most popular questions, provide explicit feedback on service use. The number of hits also provides specific areas for improvement.

Our process for maintaining and improving the service involves collating and reviewing the statistics each month. A review of the most popular questions and search queries is used to focus ongoing development. We also focus on searches that have returned zero hits, especially those that are popular. Some zero hits indicate a user who has not fully understood the nature of the service, for example a search for a company name. Some zero hits indicate a mismatch in terminology between the library as service provider and users, e.g. 'late returns' and 'overdue books'. In these cases there is a question that could have been returned but it did not match the search terms. This type of zero hit can be easily addressed by editing the relevant keywords, making the link between the search term chosen by users and the existing question. Other zero hits indicate an area for further development. For some of these our initial UPenn Business FAQ may provide a potential question and answer. We just need to convert it to Manchester's resources as the statistics tell us it is relevant to our service users. For others we try the search on other Business FAQ community members to see if there is already a potential question and answer we can adapt.

The statistics interface also provides a list of the new and revised questions from all the FAQ community members in the last seven, thirty or one hundred days. This provides feedback on how others are developing their services and is a fruitful source of ideas for further improving ours.

On the Manchester Business Answers 24/7 home page, and in the zero hits message, we invite users to email or call if they have additional queries or comments. So far no one has provided feedback in this way, and other FAQ community service providers report similar experiences. It appears that for online services, users devote minimal effort to understanding the service. They either use the service or give up and try somewhere else.

Looking Back

Manchester Business Answers 24/7 has a wide range of potential users but we do not really know who is using the service. We have users rather than customers because there is nothing that identifies a set of searches as belonging to a single person. However this anonymity, and the online access, means the service fits the preferred learning style of some people better than a traditional enquiry desk. Through development and initial use it is very clear that the service should not be regarded as just attempting to provide an online equivalent of the traditional enquiry desk but as one of several complementary library services, each with their own strengths and weaknesses. For library customers it is just one among a range of services to help them exploit resources: the online catalogue, library web pages, MBS intranet library pages, virtual learning environment modules, library Web 2.0 initiatives and the traditional enquiry desks. The presentation and marketing of any new library service really needs to take account of this wider context.

Being part of the FAQ community has had a major influence on our service. We have been able to use what others have done with the same technology for ideas and inspiration, and to directly adapt a draft set of questions and answers from UPenn. Of course one of the biggest effects of joining the FAQ community is that we have not chosen the technology for delivering the service. We have been constrained in some ways. We do not have full control over the look and feel but have to work within the configuration options offered. We made limited changes to the question categories to encourage the sharing of questions and answers within the community. If we had to select our own technology, a Wiki is the obvious choice. Although this would have been different in the details, the core issues of developing and improving the service would be the same.

The statistical and informal feedback confirms our expectations that Manchester Business Answers 24/7 provides a useful service. Our process of ongoing monitoring and improvement of the service content, guided by the statistics, works well. In addition, being a member of the FAQ community has encouraged us to compare our online advice with other business schools. One thing that we did not expect is that the presentation and marketing of the service has proved more difficult than creating the content. It is difficult to quickly explain what the service does, and just as important does not, provide for its users. This is reflected in the difficulties we had in naming the service. There is also the 'Google dilemma': users expect a

service with a simple search box to have the power of Google and are disappointed when this is clearly not achieved. There are limits to what we can do, but we continue to seek ways to make our service easy to learn.

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