

# We Got the Message: Creating an Instant Messenger Service Point

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## ABSTRACT

Figuring out the best way to communicate with and serve students is one of the paramount challenges facing library and technology organizations today, including Bucknell University's merged Information Services and Resources organization (ISR). In an effort to resolve this issue, we went straight to our students, asking, "How should we communicate with students in order to better meet their service needs?"

The response was unanimous: students prefer to communicate via instant messenger (IM). They suggested that we establish a screen name to handle technology and library questions.

ISR formed a committee to plan a pilot IM service, and less than a year later introduced "ISR Buddy". This central triage screen name is another entryway to our broad organization that helps students navigate our services. The service expectation was that ISR Buddy would answer simple questions (often using our online knowledgebase) and direct complex questions to specific service desks. Logistical considerations such as software, scheduling, staffing, and assessment were planned well in advance of the pilot launch, which occurred in Spring 2006.

Our pilot semester of ISR Buddy taught us many things about our students, including what type of information they need, their work patterns, and the level of service they expect from an online help point. After the successful pilot, we made several modifications to the service for Fall 2006.

## Categories and Subject Descriptors

H.5.3 [Information Interfaces and Presentation] *Group and Organization Interfaces*

## General Terms

Design, Experimentation, Human Factors

## Keywords

Instant Messenger, help desk, communication, consulting, staffing

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## 1. INTRODUCTION

Bucknell University is a private, primarily undergraduate university. The student population is approximately 3,450, with a small graduate program of about 150 students. Most students live on campus, or within a mile of campus. In 2004, Bucknell's merged Information Services and Resources organization (ISR) formed the Student Advisory Group – a team consisting of ISR staff and 7 to 10 students, and charged with exploring how to best communicate with and serve the university's student population. Over the years, we have used many different means to communicate with students: our campus portal, e-mail, reference chat, and others. As this group pointed out, the one medium we had not yet harnessed was instant messenger (IM).

According to a 2004 Pew Study, "53 million adults send instant messages (IM) on a daily basis".<sup>1</sup> Many of them are part of our target constituent group, the "Millennials," as they are often called. According to Stephen Abram, Vice President of Innovation at SirsiDynix Corporation, "IM [in library and technology organizations] is essential because it aligns library [and technology support] services with the preferred technology of this target population of users".<sup>1</sup>

Indeed, that is what the student members of our Student Advisory Group told us. We asked them: Why are our online reference chat service and tech/reference email services underutilized? Their answer was, in no uncertain terms, that IM was their preferred method of communication. For them, e-mail is too slow, campus phones are an outdated technology, reference chat is not user-friendly, and traditional service desks are seen as time-consuming roadblocks to their productivity. They also told us that the majority of students at Bucknell use AOL Instant Messenger (AIM) as their preferred IM platform.

## 2. DESIGNING OUR PILOT PROGRAM

During Winter 2005, we designed the pilot of our IM information service. Again, we asked our Student Advisory Group what type of questions they expected that their peers might ask over IM. They suggested that students would ask questions that could be answered quickly and easily. We decided to create a central triage screen name, ISR Buddy, that would answer quick questions (often pointing users to our online knowledgebase), and would forward more complex questions to the service desks. The key component of the service was that it would not replace any existing service points or resources; it would serve as another entry point into ISR's services and resources.

Logistical considerations such as software, scheduling, staffing, and assessment were planned well in advance of the pilot launch. The choice of instant messaging software was integral as we wanted to reach as broad a student audience as possible. For that reason, we ultimately decided to use the freeware version of Trillian. Trillian supports all of the most popular IM services, including AIM. Another important feature of Trillian is that it permits logging of IM conversations. We decided to keep logs of every conversation for analysis and assessment at the end of the pilot.

### **3. STAFFING**

The next issue that we discussed was when to staff the service. We used question logging data from the library's reference desk to figure out when students needed the most assistance. Even though we found that evenings and Sundays were peak times, we decided that, for the pilot, we would staff the service from 9AM to 2AM, Mondays through Thursdays; 9AM to 5PM on Fridays, Noon to 5PM on Saturdays and Noon to 2AM on Sundays. We felt that the convenience of the IM service might change peak hours somewhat.

It seemed logical to use full-time library and technology staff during normal business hours and have student employees take over during night and weekend hours. Each participating full-time staff member was asked to cover between one and four hours per week, while students covered shifts up to six hours long (and were paid for their efforts). While this allowed us to staff all of the hours relatively easily with a set schedule, it also created challenges, as there were fifteen different staff members and seven students serving on the ISRBuddy team. Because of the sheer number of staffers, keeping the service continually signed on during regular hours became difficult, as people would often sign on late, or forget their shift entirely. This sometimes resulted in breaks in coverage, last minute scrambles for backup staff, and inconsistency in level of service and expertise.

In an effort to alleviate student staffing snafus, and to ensure that students were indeed signing on for their post-business hours shifts, we created a PERL script (called ISRBuddyChecker) that checks on the students. This script automatically sends a message to the ISRBuddy account during student hours. The students have a set amount of time to respond to the automated message. If no response is received in the allotted time, an email is generated and sent to the student's supervisor, detailing the date and time at which no response was received.

### **4. TRAINING FOR STAFFERS**

Professional staff members manning the service were concerned about things like how fast to type, how quickly to answer, level of formality, and so on. We addressed this and more in the afternoon-long training session we conducted for the staff and students who would be manning the service. In the session, we had people with laptops asking sample questions of the trainees. The trainees were allowed to collaborate with each other to answer the questions, and were expected to point users to the proper place on the ISR website, or direct users to the knowledgebase. If they could not answer the question, they had to decide to which service desk to refer the user.

We also trained the staffers on how to log their IM interactions with patrons. We created a space on our university portal where

all the staffers could save their interaction logs as well as a discussion board where announcements could be posted and issues could be discussed.

The point of the training was to demonstrate to the staffers that they do not have to know everything about all of ISR's services and resources. However, they do have to know where to look for answers, where to direct users, and how to complete a referral if they cannot find an answer themselves.

### **5. PROMOTION AND LAUNCH**

The pilot ISRBuddy service was launched at the beginning of the Spring 2006 semester, after extensive marketing. We promoted it via posters hung in the residence halls, table tents in the dining halls and at the ISR service desks, and via an all-campus e-mail. We also promoted it informally to students in library user education sessions, and made links to it on ISR web pages. The pilot lasted the entire Spring 2006 semester, and in Summer 2006, assessment and redesign began.

### **6. WHAT WE LEARNED**

Our pilot semester of ISRBuddy taught us many things about our students, including what types of information they need, what their work patterns are, and the level of service they expect from an online help point. We kept detailed logs of every conversation, including screen name of user, date and time, and content of the interaction. Staff then analyzed the logs for patterns. Over the course of the semester, the service received 219 questions, 100 of which were referred to another service point. From the logs, we learned that approximately ninety percent of the questions asked by users were of a technological nature, and the remaining ten percent were of a reference/research or service nature.

Two obvious patterns emerged almost immediately: 1) students expected the service to function primarily as a technology support line, and 2) students conducted the bulk of their work after 7PM, Monday through Thursday, and on Sundays after 3PM. Anecdotal conversations with students suggested that many were excited that ISR finally was embracing IM. Many students who IMed the service asked during the course of the conversation if they were speaking to a live person or interacting with a 'bot'. Many were surprised and relieved to learn that they were indeed talking to a live person who could assist them.

Many students seemed to view ISRBuddy only as a source for technology support. Some were disappointed when they could not get the level of service that they wanted, but were instead referred to a specific service desk. Because the service was staffed by librarians, reference desk students, and other students who were not trained in technology triage service, a good portion of the technology questions were referred to the technology desk. During our analysis of the conversation logs, we noted the technology questions that were most frequently forwarded to the technology desk, and added answers to them to the training regimen for Fall 2006.

### **7. MODIFICATIONS**

As we mentioned earlier, we had some problems with staffing the service during regular business hours. Because we had fifteen different people manning the service during the day, there was a

greatly increased chance that someone would miss a shift, or sign on late.

To alleviate this problem, we decided to change the service hours and staffing plan. Beginning in Fall 2006 the service was staffed by the reference desk from 9AM to 7PM, the times that we found were off-peak in terms of usage. From 7PM to 2AM, the times we found to have the heaviest usage, the service is staffed by students. By having the reference desk staff monitor the service during business hours, we have ensured that the service will be continually signed in during that time period, thus alleviating the scheduling problems that had arisen. Also, by having students staff ISRBuddy during overnight hours, student users can ask questions of their peers in ISR's employ, and communicate in the informal manner to which they are accustomed while interacting on IM.

## **8. FUTURE CONSIDERATIONS**

A student life dean at Bucknell offered the following insight in a meeting of our recently formed campus-wide Student Outreach Group, "For students to truly embrace a service or idea, it has to be theirs." Thus, our ongoing challenge is to enhance the service such that students feel like they have ownership of ISRBuddy. How do we make them feel at home with the service, yet still retain its viability as an extension of ISR? This is the question that we will be continually grappling with as the service evolves to meet the needs of Bucknell's student community.

## **9. REFERENCES**

- [1] Schmidt, A. and Stephens, M. IM me: instant messaging may be controversial, but remember, we also debated telephone reference. *Library Journal*, 130, 6 (April 1, 2005), 34-35.