Chat about Chat Webinar
25 May 2021

Customer Services Group UK

Outputs from the Breakout Discussions: "one piece of advice to someone setting up a chat service for the first time or looking to extend it"

- Make sure you don't miss chats – keep your volume on!
- Don't panic when you get a query – take a breath – you know the answer or where to find it.
- Don't assume co-op members know your systems/terminology
- Carefully plan where you put the chat option widgets on your website if you want to maximise take-upusage of chat. If placement of these widgets is going to make your chat enquiry option more prominent then do prepare your staff for the potential increased traffic
- Good idea to work out what your peak times are likely to be (eg assignment times; periods when there are new starters) to allow for correct staffing
- Get your FAQs up to date and also create 'canned messages' for your staff to use to answer the basics
- Worth considering a chat option specifically for the Librarians as well as one for general Customer Services
- When expanding services: if moving from a small team staffing chat to a larger team then worth bringing in the new staff gradually and have them paired online with more experienced staff to help them out as staff can be intimidated by staffing live chat if they are new to it. Worth also have a Teams chat or other application channel for staff working on chat to use to support each other
- Taking learning points and advice from other universities is helpful - but don't just replicate this – think about requirements of your own library primarily
- Make sure you harness support from IT colleagues in the right way and at the right time – but don't let them impose a solution on you
- Good idea to take a gradual approach to extending the service – e.g. staff can be logged in and available for chat, but wait until you're confident it's working ok before publicising extended hours
- Use know-how from other libraries or chat service users when you can – Springshare Lounge is very useful for this
- Beware of malicious spammers hijacking your chat service

- Opportunity for new staff to gain knowledge of your services and of enquiry work in a less pressured environment
- Watch out for missed chats especially at change over periods
- Watch out for staff forgetting to log out at end of day
- What a positive experience online chatting can be for both parties.
- Consider carefully where to place the chat box/connection. Library home page, Libguides and catalogue all good locations.
- The ability for staff dealing with chat enquiries to chat amongst themselves internally and share advice is really useful.
- Make sure chat complements other methods of communication (face to face, phone calls, social media, texting etc.) and it's presented as a cohesive whole.
- Think from a learner/student perspective – in particular avoid jargon and too much formality.
- Importance of effectively promoting the service through existing channels (e.g. by including as a link in email signatures).
- Staff should feel confident about chat – it's the same enquiries in a different format – there's nothing to be nervous about.
- Consider where you put the link to chat
- FAQs create and or update service FAQs
- Introduce gradually
- Working with peers to build up confidence
- Dedicated chat team
- 2nd chat facility consider referral to a librarian for follow up on initial response
- Ensure clear instruction to users on how to use chat- missed chats and people leaving chat but not realising it lead to poor satisfaction
- Having access to Microsoft Teams to provide a way of liaising with colleagues to answer enquiries at first point of need – using this they aim to answer a wider variety of specialist enquiries while the person is on the chat
- If on a chat make sure chat can be triaged effectively by asking the right questions – ensure effective triaging is part of the staff training
- Ask if the chat system can be integrated into your Library Management system / Resource Discovery system and if it can also create tickets or email enquiries if chat cannot fully satisfy the enquiry
- Create canned responses and, after some time, go through them as a team and share chat transcripts to give constructive feedback to colleagues
- Realise that the chat service will develop and change over time so be willing to change with it in terms of training, staffing and hours of operation
- Ensure your FAQs, web pages and subject guides are always up to date as chat operators will refer to these to respond to queries