AskAway Proactive Chat Pilot: Final Report

AskAway Proactive Chat Pilot Task Group

November 2021

Pilot Overview

In spring 2021, the AskAway Advisory Committee approved a proactive chat pilot to investigate the feasibility of offering this feature as part of the AskAway collaborative chat reference service. In June 2021, the AskAway Proactive Chat Pilot Task Group was formed to launch a proactive chat pilot, test the feature, analyze its impact, and make recommendations to the Advisory Committee.

Proactive Chat Pilot Task Group Membership
Tina Bebbington, University of Victoria Janelle Haley, Alexander College Tomoko Kitayama Yen, University of British Columbia Kealin McCabe, University of Northern British Columbia Cristen Polley, AskAway Admin Centre, BC ELN

The four libraries represented on the Task Group participated in the pilot: Alexander College (AC), University of British Columbia (UBC), University of Northern British Columbia (UNBC), and University of Victoria (UVIC). Service providers at all AskAway libraries participated in the pilot by responding to proactive chats. The Proactive Chat Pilot was active from July 12 until August 13, 2021.

Process

The Task Group met virtually through early June to mid-October. In June, Task Group members agreed on the pilot framework and timeline and attended a proactive chat demo with the vendor LibraryH3lp. To prepare for implementation, the Task Group developed pilot settings (see Appendix A) and assessment tools, and identified research starting points and other points on the library website where users could benefit from proactive chat. The Task Group implemented proactive chat with support from LibraryH3lp and staff at participating libraries. Prior to the launch, the Task Group created and shared FAQs and communications to support service providers through the pilot phase. During the pilot, the Task Group continued to meet regularly to test widgets and report technical issues, monitor the impact on traffic, and review user and service provider feedback. In late August through October, the Task Group analyzed the pilot data and developed recommendations.

Timeline	
Early to mid-June	Develop pilot framework and timeline; proactive chat demo with vendor (LibraryH3lp)
Mid-June to early July	Implement proactive chat at participating institutions
Mid-July to mid-August	Run proactive chat pilot and gather data
Mid-August to September	Analyze proactive chat pilot data
November	Make recommendations to AskAway Advisory Committee

Methodology

To measure the impact of proactive chat, the Task Group gathered usage statistics and individual chat session metadata and developed survey tools to gather feedback from users and service providers.

User feedback

To gather feedback from proactive chat users, the Task Group developed a user survey (see Appendix B). This voluntary survey included six questions to assess who was using the feature and why, its usability and usefulness, and if the invitation wording and branding was clear.

The survey was linked from within the chat box, and users were invited via an automated prompt at the beginning of the chat to click this link and fill it out at any time. A second automated prompt and a link to the survey was sent to the user when the service provider ended the chat (see Appendix A for the two prompts).

Types of questions

AskAway has a series of tags that service providers use to describe the type of question(s) a user asks. At any time during the chat, the service provider can choose from a list of tags to apply to the chat transcript, and the tags are saved as part of the chat metadata in LibraryH3lp. The Task Group analyzed tags during the pilot to assess what types of questions were being asked via proactive chat versus the AskAway service as a whole. As not all proactive chat sessions had been tagged, the Task Group added tags to the proactive chats in their dataset so that all proactive chats were described.

To understand what types of questions were asked via different locations on the library website where the proactive chat widgets were implemented, the Task Group categorized and defined five location categories (see Appendix C for locations of the proactive chat widgets at the pilot libraries, how these locations were categorized, and how the categories were defined).

The Referring URL of each chat session was used to determine where the chat originated and to categorize the chat. If the referring URL was not captured in the chat metadata, the chat was categorized as "Unavailable."

Usage statistics

Usage statistics during the pilot were gathered to understand the impact to the service as a whole and to individual pilot libraries. The Task Group analyzed the number of proactive chats versus non-proactive chats for each pilot library as well as the service to determine the increase in traffic as a result of proactive chat. Chats tagged "Test" and "Practice" were removed from the data.

Service provider feedback

To gather feedback from AskAway service providers, the Task Group sent out a survey to the service providers mailing list (see Appendix D). The purpose of the voluntary survey was to learn if providers felt comfortable responding to proactive chats using the information provided in FAQs and communications, how the volume of chats matched their expectations, and if they had any additional feedback to share.

Impact and Recommendations for Interested Libraries

Impact on users

There were 23 survey responses received from users at the following institutions: Alexander College (AC), UBC, Trinity Western University (TWU), and Okanagan College (OC). The users from TWU and OC likely accessed proactive chat while visiting one of the four pilot participating libraries.

Based on the survey results, proactive chat has the ability to reach a high number of new users at their point-of-need (see comments below). 87% of respondents to the proactive chat user survey were new users versus 52% of respondents to the general AskAway exit survey in July and August 2021 (Figure 1).
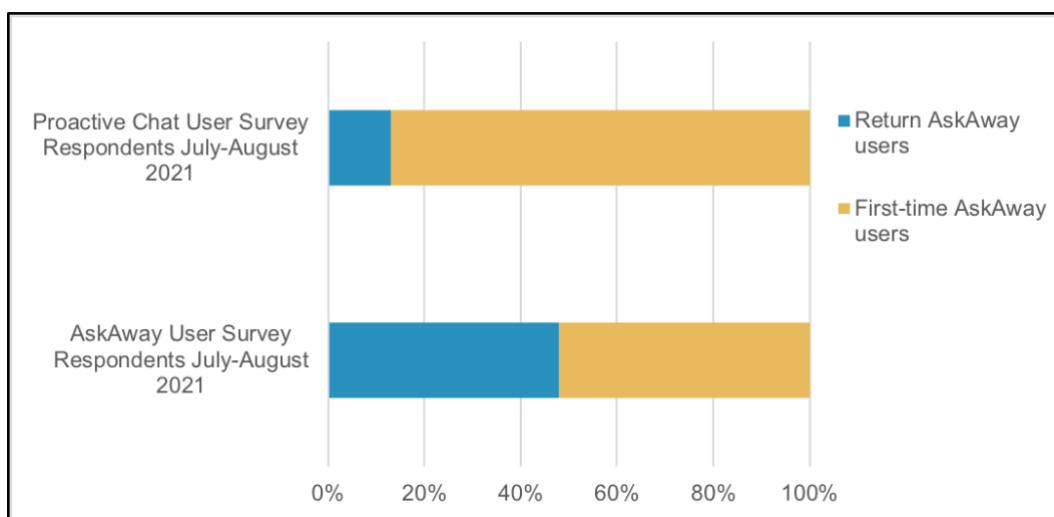

Figure 1: The number of return vs first-time AskAway users in July and August 2021. Those responding to the Proactive Chat User Survey initiated chat via the proactive chat widgets;

those responding to the AskAway User Survey initiated chat via the traditional (non-proactive) AskAway widgets.

Comments in response to the survey question "What made you decide to 'Click to chat' today?" demonstrate the ability of proactive chat to meet users at their point-of-need and included:
- "I saw the pop-up box"
- "To find [a] dissertation"
- "Need of immediate help. Difficult to navigate."

The survey results also indicate that the proactive chat invitation made clear the service was for research and library help. Once connected to the AskAway service, respondents generally had a positive experience, with 91% strongly agreeing that they like having the proactive chat option available and 78% strongly agreeing that they found it easy to use. Most of the comments in response to these two questions were in response to the AskAway service more broadly, indicating that users were engaging with AskAway as usual and not limited by the proactive chat feature.

The Task Group noted that the survey only included responses from users who had "Clicked to chat" and not from those who clicked "No thanks."

Recommendation: Libraries that would like to reach out to new AskAway users should consider proactive chat as an effective option. Libraries that are interested in getting feedback on the proactive chat feature from their users could link to the proactive chat user survey when the feature is first launched.

Types of questions

As expected, the types of questions asked via proactive chat reflected the location of the widget. For example, the most common type of question that came in via pages categorized as a Research Starting Point were Research questions. On Library Service Point pages, Circulation and eResources questions were the most common but there was also a wide variety of question types.
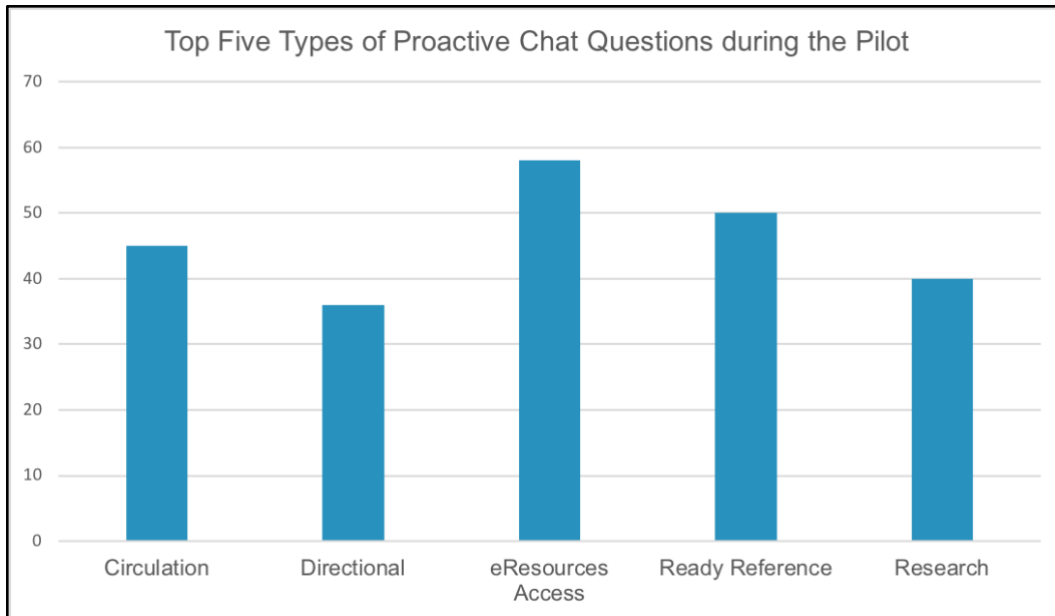
Figure 2: The top five types of proactive chat questions during the pilot, by number of chat sessions (e.g. there were 40 chat sessions that were tagged as Research questions). Note that each chat session can be categorized as more than one type of question (e.g. a chat session can be tagged as Circulation and Research). Chats tagged Referred or Referred to Home Library are not included; for All Proactive Chats, there were 81 chats that had been tagged Referred and/or Referred to Home Library.
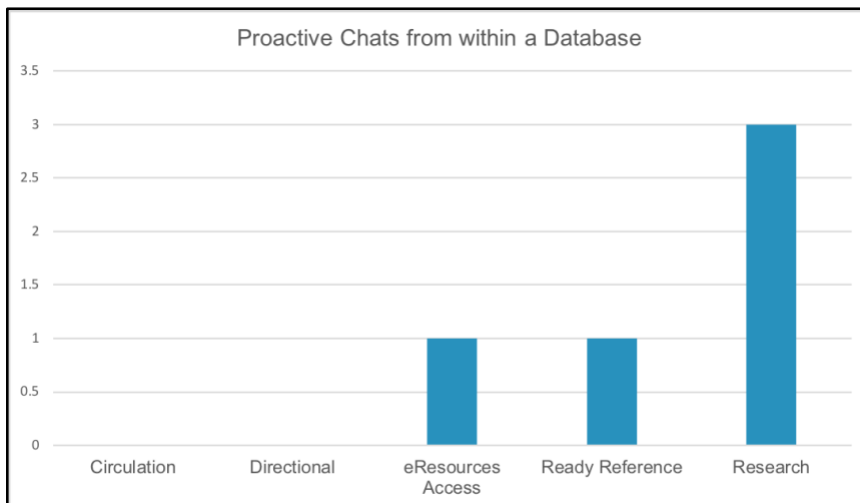

Figure 3: The number of proactive chat sessions from within a Database, for the top five question types during the pilot.
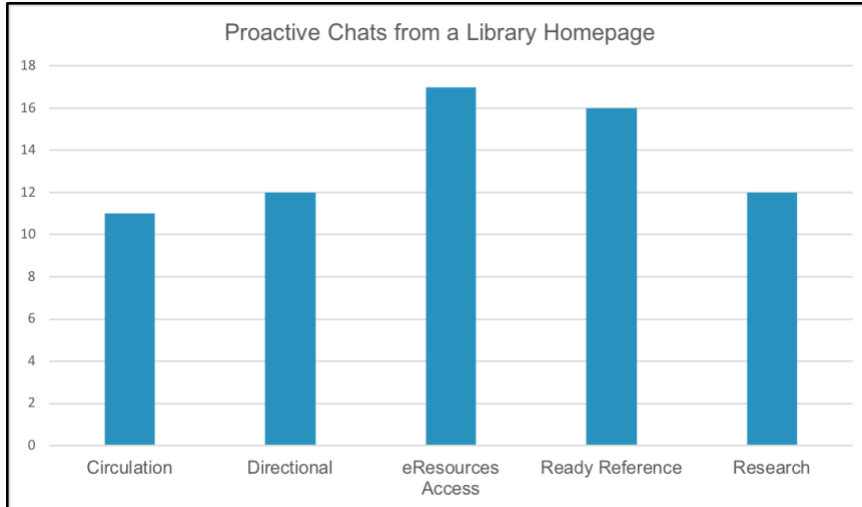
Figure 4: The number of proactive chat sessions from a Library Homepage, for the top five question types during the pilot.
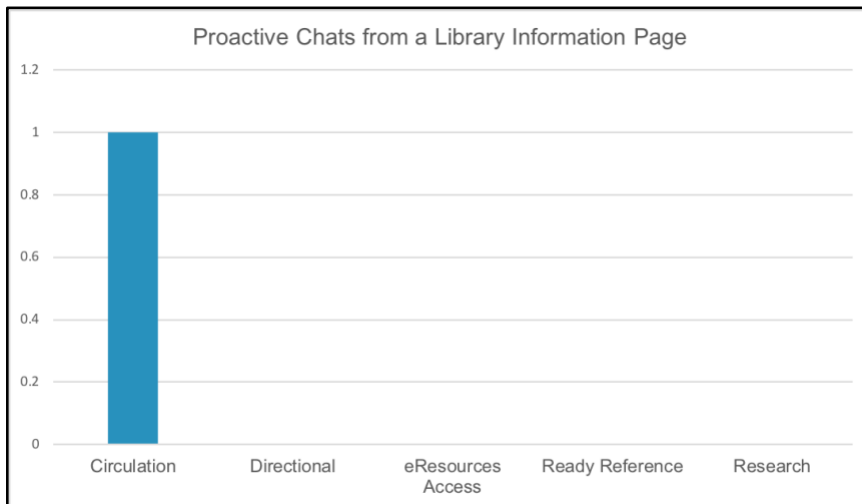

Figure 5: The number of proactive chat sessions from a Library Information Page, for the top five question types during the pilot.
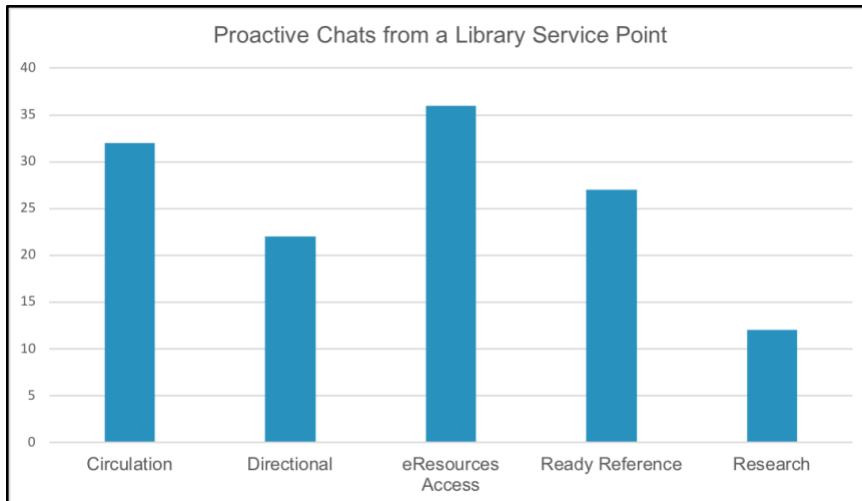
Figure 6: The number of proactive chat sessions from a Library Service Point, for the top five question types during the pilot.
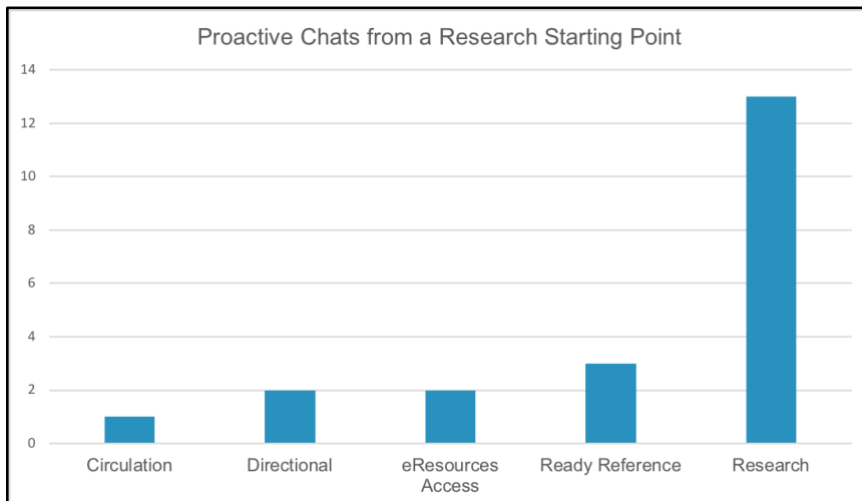

Figure 7: The number of proactive chat sessions from a Research Starting Point, for the top five question types during the pilot.

Recommendation: When deciding where to place proactive chat, institutions should conduct their own self-assessment to determine student needs and institutional goals and resources. For example, if an institution wants to reach students with research needs, it's recommended they add proactive chat to research starting points and databases. If they want to reach new users more broadly at their point-of-need, they could add proactive chat to the library homepage, high-traffic pages, or pages where users encounter barriers to using the library. Furthermore, these decisions should be reviewed periodically to ensure the widget placement continues to meet the needs of the institution.

Impact on traffic

Service-wide

During the pilot, AskAway saw a 10% increase in traffic across the service due to proactive chat and a 1% increase from the same time period the previous year (Figure 8). The Task Group noted that traffic in 2020 was generally higher due to the transition to emergency remote teaching and learning. The increase due to proactive chat during the pilot was a manageable increase for the service.
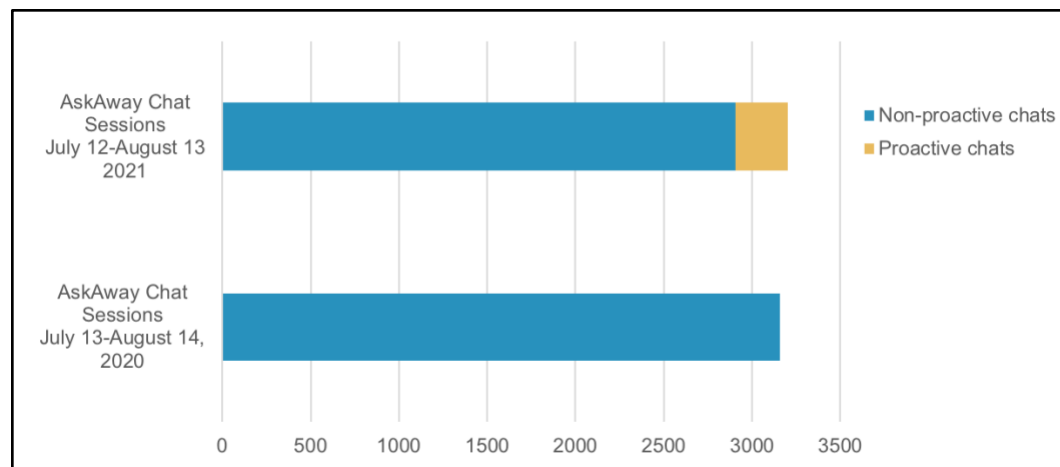

Figure 8: AskAway chat sessions during the pilot (July 12-August 13, 2021) and the same period in 2020.

Individual libraries

For the four participating pilot libraries (AC, UBC, UNBC, and UVIC), all but one saw an increase in the range of 43% to 50% (Figures 9 and 10). At these three institutions, proactive chat was successful at increasing usage of the service.

UVIC did not see an increase in chat sessions as a result of adding the proactive chat widget. This is because UVIC expressed concern about potential usability and user experience aspects of proactive chat, which were addressed by the Task Group via a literature review but were otherwise out of scope. Pending a future user experience/usability study, UVIC tested the technology by adding the widget to a small number of informational web pages rather than to their databases, research tools, or overall website, which already have a visible AskAway presence.
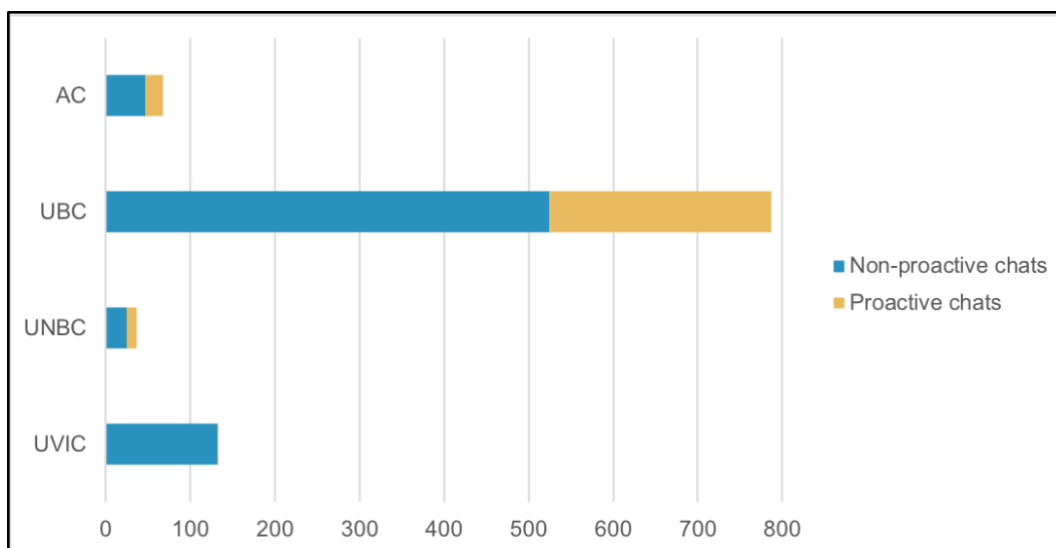
Figure 9: AskAway chat sessions for pilot participating institutions during the pilot (July 12-August 13, 2021)

	Total	AC	UBC	UNBC	UVIC
Proactive chats	295	20	263	11	1
Non-proactive chats	728	47	524	25	132
Total	1,023	67	787	36	133
% Increase	41%	43%	50%	44%	1%

Figure 10: The number of chat sessions during the pilot phase (July 12-August 13, 2021) as well as the percentage increase.

Recommendation: Roll out proactive chat to interested libraries in phases to help keep the growth in traffic manageable and allow the service to monitor and respond to the volume of traffic as needed. The Admin Centre should continue to monitor the volume of traffic and, together with local coordinators, make adjustments as needed to control the volume. For example, increase the timer length of the invitation or remove proactive chat from high-traffic pages if the volume is too high. Alternatively, institutions could add proactive chat widgets to more of, or a different selection of, their pages or research databases if the growth in chat sessions is slow.

Impact on service providers

There were 35 respondents to the service provider survey from 12 AskAway participating libraries. The majority of respondents were not impacted by the proactive chat pilot. There were no respondents that did not feel confident using the information in the FAQs and communications to answer proactive chats. Additionally, the majority of respondents did not describe the volume of chats during the pilot as more than expected, and some respondents noted that AskAway is typically quieter during the summer. There were some exceptions, and 12% of respondents, notably from UBC Library – the library that saw the largest increase – said there were more chats than expected.

Some of the comments spoke to the value of institutional support, including communications from the local coordinator regarding the pilot launch and support for service providers staffing high-traffic shifts.

Several respondents also expressed support for the pilot and the feature:
- "I'm really glad you piloted this feature. Great idea to help inform future service options."
- "I think it's wonderful to 'meet users where they are.'"
- "I like how visible it is on our webpage, and hope that it is well liked by patrons as I think it's a great extension to the service."

The Task Group also noted that there were no Swamped calls or reports from service providers about proactive chat to the Admin Centre during the pilot phase, indicating that the service was not overwhelmed and service providers in general did not face challenges with the new feature.

Recommendation: If additional libraries implement proactive chat, this should be communicated clearly to all service providers, so they have the information they need to staff the service. FAQs should be updated to include additional information that would be helpful to service providers such as what types of questions to expect. Service providers should also be encouraged to provide feedback on a continual basis, for example via email or a survey.

Recommendation: Similar to the recommendation for the Impact on Traffic, the Admin Centre should continue to monitor the volume of traffic and, together with local coordinators, make adjustments as needed to control the volume. For example, increase the timer length of the invitation or remove proactive chat from high-traffic pages if the volume is too high.

Institutional impact

Although the Task Group did not have tools to measure institutional impact on pilot participating libraries, the Task Group identified an impact at the institutional level. Three areas were identified: Planning, implementation, and maintenance.

Planning
Prior to implementation, pilot libraries dedicated staff time and expertise to discussing and deciding where proactive chat will be located on the library's website.

Recommendation: It's recommended that institutions discuss whether proactive chat is a good fit for their library (e.g. timing, resources) and user community and specifically where widgets will be located on the library website and within research databases. This phase will involve the local coordinator and may also involve other library staff such as IT and web experts.

Implementation

During and shortly after implementation, libraries spent time testing chat widgets and reported issues to the Admin Centre. There were some unforeseen technical issues that were resolved together with the vendor, LibraryH3lp.

Recommendation: During the implementation phase, institutions should test for usability on different platforms (e.g. on mobile, in databases). We recommend aligning the widget branding with institutional branding so the proactive chat invitation is clearly associated with the library.

Maintenance

At some pilot libraries, additional staff time was needed by IT staff to make pilot changes permanent moving forward.

Recommendation: Once implementation is complete, institutions may need to dedicate staff time to further maintain and test the proactive chat widgets.

Support

Throughout the planning, implementation, and maintenance phases, the AskAway Administrative Centre is available to provide support to libraries.

Conclusion

Proactive chat is highly effective at inviting new users to access research and reference support via AskAway. The Task Group found that for users and service providers, proactive chat is business as usual. Users recognize that proactive chat is a library or research support service and once they "Click to chat," they engage with the AskAway service as normal. Provided with information about proactive chat and clear expectations, service providers feel confident with this new feature.

For individual libraries, resources such as staff time are needed to support proactive chat. The amount of resources will vary widely depending on the size of the institution and its structure. The volume of traffic, at a service-wide and institutional level, should be manageable if roll-out of the feature is controlled. As recommended, a phased roll-out of proactive chat will allow the service to grow slowly and to monitor and respond to new growth.

Appendices

Appendix A: Pilot-wide Settings

The Task Group agreed on the following pilot-wide settings for the pilot:
- A 15-second delay before the proactive invitation appears on the page
- Default alignment of the proactive chat invitation at the bottom-right of the page unless otherwise specified by an institution
- Two automated user survey prompts:
  - After user enters first message:
    - "At any time during our chat, click the "Tell Us!" link in the bottom right corner to fill out a short survey and provide feedback on a new feature we're testing."
  - After the service provider ends the chat:
    - "Thank you for using AskAway. We're testing a new feature and would value your feedback. Let us know what you think by filling out this short survey [link to proactive chat user survey]."
- Invitation wording and design
  - Libraries could customize the color to match institutional branding

Appendix B: AskAway Proactive Chat Pilot User Survey

Question 1: Your institution
- [Select from drop-down, all AskAway participating institutions included]

Question 2: Is this your first time using AskAway? (Choose one of the following answers)*
- Yes, it's the first time I've used AskAway
- No, I've used AskAway before

Question 3: What made you decide to "Click to chat" today?
- [Short free text]

Question 4: I like having the proactive chat option available (Choose one of the following answers)*
- Strongly agree
- Somewhat agree

- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

[Please enter your comment here:]

Question 5: I found it easy to use the proactive chat option (Choose one of the following answers)
- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree
- No answer

[Please enter your comment here:]

Question 6: When you saw the proactive chat invitation appear, was it clear that this service was for research and library help? (Choose one of the following answers)
- Yes
- No
- No answer

[Please enter your comment here:]

*Mandatory question

Appendix C: Locations of Proactive Chat Widgets at Pilot Participating Libraries

Institution	Location Name	Location Category
AC	Articles & Databases page	Research starting point
AC	Research Help	Research starting point
UBC	Okanagan Library Homepage	Library homepage
UBC	Okanagan Library Spaces	Library service point
UBC	Okanagan Library About	Library information page
UBC	Okanagan Library Research	Research starting point
UBC	Library Homepage	Library homepage
UBC	Library Search	Research starting point
UBC	Library Services	Library service point
UBC	Library Hours and Locations	Library service point

UBC	Ask Us	Library service point
UNBC	Library Homepage	Library homepage
UNBC	EBSCO Databases	Database
UNBC	Nursing Research Guide	Research starting point
UNBC	Social Work Research Guide	Research starting point
UNBC	Citation Styles Research Guide	Research starting point
UVIC	Citation Help	Library information page
UVIC	Style Guides	Library information page
UVIC	What is Summon	Library information page

Location Category Definitions

Database: Inside of a database

Library homepage: The starting page for the library/libraries

Library information page: Informational page, not homepage/landing page

Library service point: The page describing/inviting to a service

Research starting point: Where research is done

Unavailable: No distinct referring URL

Appendix D: AskAway Proactive Chat Pilot Service Provider Survey

Question 1: My institution
- [Select from drop-down, all AskAway participating institutions included]

Question 2: Before the proactive chat pilot launched on July 12th, the Task Group sent a message to the service providers mailing list with information about the upcoming pilot as well as FAQs with further information about how to staff AskAway during the pilot. I felt confident using the information from the message and FAQs to answer questions received via proactive chat: (Choose one of the following answers)
- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
  - [If selected] Can you please tell us why you chose 'somewhat disagree'?
    - [Long free text]

- Strongly disagree
  - [If selected] Can you please tell us why you chose 'strongly disagree'?
    - [Long free text]
- No answer

[Please enter your comment here:]

Question 3: Describe the volume of chats during your shifts from July 12th to present versus what you expected following the launch of the proactive chat pilot: (Choose one of the following answers)
- Fewer than expected
- Matched my expectations
- More than expected
- I did not notice a change / I did not have any expectations
- No answer

[Please enter your comment here:]

Question 4: Is there anything else related to the proactive chat pilot that you would like the Task Group to know? Please share below.
- [Long free text]