

# IM the Library! Launching an IM Reference Service

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Tech Tuesdays: Talking with Techies  
May 15, 2007

## about me...

- User Experience Librarian, McMaster University Library
- Launched IM Reference in 2005
- <http://blogwithoutalibrary.net>

## our agenda

- Intro to IM
- Launching an IM service
- Challenges
- Best practices
- Taking IM ref to the "next level"!
- Q&A

## Instant Messaging: What, How, Why

## What is IM?

- "...a form of real-time communication between two or more people based on typed text. The text is conveyed via computers connected over a network such as the Internet."

[http://en.wikipedia.org/wiki/Instant\\_messaging](http://en.wikipedia.org/wiki/Instant_messaging)

## What is IM?

- a real time conversation
- synchronous
- "email on steroids"

## How does IM work?

- Services (protocols):
  - AOL Instant Messenger (AIM)
  - Google Talk
  - ICQ
  - MSN Messenger
  - Skype
  - Yahoo! Messenger

## How does IM work?

- Register for an account
- Download the client
- Add friends' user IDs to your buddy list
- Click & chat!

## IM Technology

- Services are proprietary with limited compatibility
- MSN & Yahoo! Messenger "speak" to each other
- AIM & Google Talk? Maybe soon...

## IM Technology

- What if you want to offer IM Reference over multiple services?
  - A multi-protocol client is the answer!
  - (More about this later...)

## The most important question: Why?

## Why IM?

- Virtual reference software hasn't fulfilled the promise!
  - Growing frustration with bloated vendor software
- .

## Why IM?

- User-centred
- Minimal staff training
- No start-up costs
- Lightweight software

## Why IM?

- 75% of online teens use IM
- 89% of teens who go online daily use IM

[http://www.pewinternet.org/report\\_display.asp?r=162](http://www.pewinternet.org/report_display.asp?r=162)

## Why IM?

- 69% of online teens use IM multiple times a week
- About 1 in 5 teens use IM as the main way to communicate with friends

<http://www.pewinternet.org/reports/toc.asp?Report=36>

## Why IM?

- Our users don't all come into the library
- Take a look around: what are your users doing on the public computers?

## Why IM?

It's where our users are!

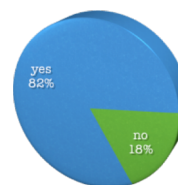
## Planning & Launching an IM Pilot

## 1. Talk to your users

- Ask if they're on IM
- If yes, which service are they on?

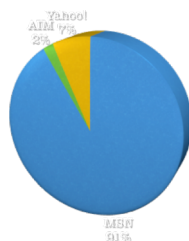
## What we did...

Do you use IM?



## What we did...

If so, what service are you on?



## What we did...

- We determined that yes, there was a need
- We had never done "traditional VR"
- We piloted!

## 2. Asking the important questions

- a. when should we run it?
- b. what hours do we offer IM?
- c. who is going to staff it?
- d. what are our technology needs?
- e. what are the security concerns?
- f. how do we evaluate the pilot?

### a. When should we run the pilot?

- When are your users around?
- When can you get enough activity to evaluate the service?
- How long should the pilot be?
  - Recommend no less than 6 weeks

## What we did...

- Our users are NOT around in the summer, but that's when we piloted!
- Timing
- June-August 2005

## b. What hours do we offer the service?

- When will your users benefit from you being online?
- When do you have available staff (realistically, it will come down to this!)?

## What we did...

- Tough to know when our users would benefit most from us being online
- Talked to local VR veterans
- Took our own staffing situation into account
- Settled on 11 am to 3 pm, Monday to Friday

## c. Who will staff it?

- All reference staff?
- All librarians?
- Subject specialists?
- Ask for volunteers
- Whomever is available!

## a related question...

- Should we do IM on the desk?
  - Try personal preference?
  - Use signage
  - Don't be afraid of success!

## What we did...

- Called for volunteers from all Reference staff
  - 12 answered the call!
  - librarians & library assistants

## What we did...

- IM on the desk?
  - Left it to personal preference
  - Used signage on the desk
    - "I'll be with you in a minute, I'm helping a patron over IM"
  - Philosophy: "too busy" is a good thing!
  - Continuous assessment

## d. What are our technology needs?

- single client or multi-protocol?
- how many staffers at how many computers?
- how many copies of the software?
- cheap? Free?
- open source? Proprietary?

## d. What are our technology needs?

- what IM services do you want to use?
- is there any merit in using multiple services?
- chances are, all your users aren't using a single service.
  - best practice: multi-protocol client

## Choosing a multi-protocol client

- Interface considerations
- Features
- Technical constraints

## Choosing a multi-protocol client

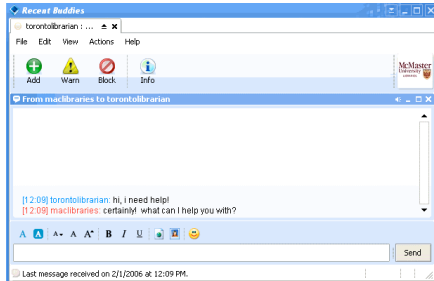
- Features:
  - Logs
  - Group chat
  - Sending attachments
  - Custom status messages

## Choosing a multi-protocol client: Trillian

- Simple, attractive interface
- Feature-rich
- Hardly any learning curve
- Proprietary: what happens if Trillian disappears?

<http://www.ceruleanstudios.com>

## Trillian



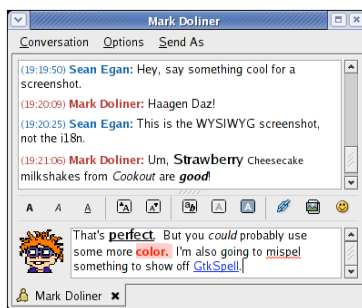
## Choosing a multi-protocol client: Pidgin

- Used to be "GAIM"
- Clean interface
- Open source
- Open development community

<http://gaim.sourceforge.net/>

<http://www.pidgin.im>

## Pidgin



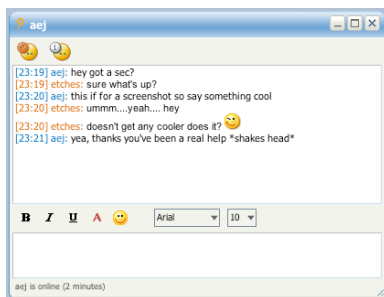
[image credit](#)

## Choosing a multi-protocol client: meebo

- Web interface
- Nothing to download
- Devoted development team!
- Start-up: what happens if meebo disappears?

<http://www.meebo.com>

## meebo



## What we did...

- Technology requirements:
  - Want to be able to chat across services
  - Need software on multiple PCs
  - Free
  - No learning curve!

## What we did...

- Decided on Trillian:
  - Free!
  - Best interface
  - Feature-rich
  - Logs
- Use meebo as a “fall back”

## e. What are the security concerns?

- Worms & viruses
- Unencrypted transmission
- Weak authentication
- Spam
- Commercial service considerations

## Security Concerns

FACT: IM is not as secure as email

## Security Concerns: worms & viruses

- Virus protection
- If you use a multi-protocol client, you're less susceptible
- Don't add your users to your buddy list
- Provide links to more information
  - Good site: Symantic IM Threat Center  
<http://tc.imlogic.com/threatcenterportal/pubIframe.aspx>

## Security Concerns: unencrypted transmission

- Warn your users
- Use disclaimers & point to more information
- Good site: Top 5 IM Security Risks  
<http://www.networkworld.com/research/2004/0628imfeat5.html>

## Security Concerns: weak authentication

- A little bit of user education goes a long way!
- The importance of GOOD passwords  
<http://www.mcmaster.ca/uts/ITsecurity/passwdrdsbp.htm>

## Security Concerns: spam

- "Spim"
- More of a nuisance than a security issue
- Don't let fear of off-colour messages stop you!

## Security Concerns: commercial service considerations

- What does AOL/MSN (etc.) do with the messages you send over their service?
- Read the usage/service terms
- User education can help here too
- Link to more information

## Security Concerns: commercial service considerations

- "We consider your use of the Service, including the content of your communications, to be private. We do not routinely monitor your communications or disclose information about your communications to anyone."

<http://messenger.msn.com/help/terms.aspx>

## Security Concerns: commercial service considerations

- "By registering with or using AIM Products, you consent to the collection and use of your personal information and the transfer of this information to the United States or other countries for the processing and storage by AOL."

<http://www.aim.com/tos/tos.adp>

## Security Concerns: commercial service considerations

- Read the usage/service terms
- User education can help here too

<http://www.npr.org/templates/story/story.php?storyId=6200960>

## What we did...

- Use a multi-protocol client
- Do NOT add our users to our "buddy list"
- Provide links to more info on our IM page:

<http://library.mcmaster.ca/justask/chat.htm>

## "SPIM"

- "I M a Turkish man :D"
- "Can I tell you a joke?"
- "wanna hear the quote of the day?"
- "hey why is the sky blue?"
- "OMG that \*guy\* is sitting next to me! :0"
- "omg I think julie is stuck with christine!"
- "is that you man?"

## f. How do we evaluate the pilot?

- Consider a user survey during the pilot
  - Ask a question or two at the end of each session
  - Use a free survey tool

## f. How do we evaluate the pilot?

- Metrics: statistics, buddy-list check
- Review logs
- Peak times? Slow times?

## f. How do we evaluate the pilot?

- Talk to your staffers
- Do you like the client interface? Any software issues?
- Was staffing difficult?
- Ongoing feasibility in terms of staff time

## What we did...

- Surveyed users during pilot:
  - Where are you located?
- Metrics:
  - Did usage increase throughout the pilot?
  - How many users have added us to their "buddy list"?

## What we did...

- Discussions with staff:
  - What do you like about IM?
  - What don't you like about IM?

## The Challenges

(yes, there are a few,  
and you should know about them!)

## Staff comfort with the technology

- New technology for most staff
  - practice!
  - have a "point person"

## The tyranny of the "instant" in IM!

- Expectation that users want an "instant" response!
  - Relax!
  - "instant" = speed of transmission NOT response time
  - "Digital natives" anyone?  
([http://en.wikipedia.org/wiki/Digital\\_native](http://en.wikipedia.org/wiki/Digital_native))

## The "shift change"

- No more than one login at once
- "dropped conversations" at the shift change
  - IM accounts for all staff
  - message the library before signing in to your shift
  - pick up the phone!

## Limited Collaboration Capabilities

- No queuing means multiple messages at once must be handled by ONE staff member
  - Tell the user you're helping someone else (wait or try back in a few minutes)
  - Have a back-up staff member online to accept "spillover"

## IM Lingo

IMPOV  
YT?  
BRB TTYL ROTFL  
IMHO  
LOL AFAIK  
TTFN  
TYSM  
A/S/L ATM BFN

## IM Lingo

- "But I don't speak IM!"
  - Again, relax!
  - Get help:  
<http://www.aim.com/acronyms.adp>
  - Users don't talk to us the way they talk to their friends!

## IM Lingo

IMPOV  
YT?  
BRB  
TTYL ROTFL  
IMHO  
AFAIK TTFN LOL  
TYSM  
A/S/L ATM BFN

## The time issue

- Reference over IM takes approximately x3 longer than F2F
- Do what works for you
- Refer
- Some things are handled faster over the phone (e.g.: tech issues)

## The popularity problem

- If you build it, they might come!
- Don't be afraid of success!
- On the desk: work in an environment of continuous assessment - if it's getting too busy, take it off the desk
- Consider a back-up login to handle "spillover"

## Best Practices

15 tips to keep in mind

## 1. Choosing a service

- If your users are on multiple services, you should be too.
- Use a multi-protocol client like Trillian or meebo

## 2. MSN IDs

- Do you have an existing email account for reference?
- Use it to register a .NET passport rather than setting up another account over hotmail!

## 3. Timing the pilot

- Run the pilot when your users are around!
- Summer in an academic library? Not great!

## 4. Planning the pilot

- Run your pilot for long enough to:
  - gather good metrics
  - allow staff to get a feel for the service

## 5. Technology

- Involve your I.T. Department in the planning & implementation
  - Software decisions
  - Identify security concerns & issues
  - Put security concerns/issues "to bed" early!

## 6. Staffing

- Offer staff training early
- Give staff time to get used to the technology and the "feel" of IM
- Encourage the use of IM for staff communication

## 7. Provide good support materials

- How to set up an IM account
  - <http://blogwithoutalibrary.net/handouts/imaccount.pdf>
- IM Tips
  - <http://blogwithoutalibrary.net/handouts/imtips.pdf>
- Canned Messages
  - <http://blogwithoutalibrary.net/talk/il2006/canned.pdf>



## 13. Make it easy for your users to "see" you

- Add "status indicators" to your site
- <http://www.onlinestatus.org>
- Examples:
  - <http://library.mcmaster.ca/justask/chat.htm> (McMaster)
  - <http://sjcpl.lib.in.us/asksjcp/asksjcp.html> (SJCPL)
  - <http://library.wlu.ca/askus.htm> (Laurier)

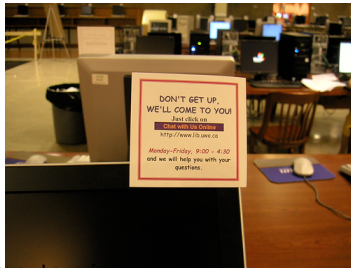
## 13. Make it easy for your users to "see" you

The screenshot shows the McMaster University Libraries website. A green circle highlights the 'Need Help? Just Ask! Contact the Library via Live Chat' button. Below this, a table lists IM services and their status:

IM Service	Library Screen Name	Status
MSN	library@mcmaster.ca	Available
AIM	maclibraries	Available
Yahoo! Messenger	maclibraries	Available

Below the table, it states: 'When is the library available via instant messaging? ...'.

## 14. In-library promotion



Public computers in the library? Captive audience!

## 15. Evaluate

- Definitely at the end of the pilot
- A simple survey at the end of your first year
- Constant evaluation: monitor your logs, talk to IM staffers

Taking IM reference to the "next level"!

## IM on your web page

The screenshot shows the Norwich University Kretzberg Library website. A green circle highlights the 'Ask us now' button, which is a red speech bubble icon with the text 'Ask us now' and 'Send a message'.

## IM on your web page



## IM on your web page

- Chatango
  - Sign up for an account
  - Grab the code & add it to your website
  - Instant chat box!
  - Good for users who are visiting your site
  - Not great for visitors not on your site

<http://chatango.com/>

## IM on your web page

- Meebome Widget
  - Multi-protocol client
  - Use for your IM accounts (AIM, MSN, etc.)
  - Instant chat box!
  - Good for site visitors AND non-visitors (if they've added you to their buddy-list).

<http://www.meebome.com/>

## IM on your web page

Home Catalog Databases & Websites Events Calendar Technology Children Teens Community  
Sitemap About Us Contact Us

## IM on your web page

## IM on your web page

## IM on your web pages

- Think about the user experience... where do your users need your help the most?
  - in the catalogue?
  - in other databases?
  - in computer labs?
  - in their course management space?

## IM on your web pages

- Wherever your users need you online, that's where you should be!
- Make use of IM widgets on your web pages, on the desktop, anywhere you can think of!
- **HOT** off the press: meebo announced "meebo rooms" **today!**

## Extending IM: co-browsing

- MSN Messenger 8
- Yahoo! Messenger plugin from WebEx

## Extending IM: VOIP & video conferencing

- Requires a webcam, microphone, speakers
- MSN, Yahoo! Messenger
- Maybe not for your traditional service but how about IM Voip/Video kiosks in large libraries?

Questions?

Thank you!

<http://blogwithoutalibrary.net/talk/ei2007/im.pdf>

<http://blogwithoutalibrary.net>  
AIM/Skype: torontolibrarian  
e/MSN: amanda@blogwithoutalibrary.net

## IM Resources

## IM Resources

- Library Success Wiki
- Online Reference:

[http://www.libsuccess.org/index.php?title=Online\\_Reference](http://www.libsuccess.org/index.php?title=Online_Reference)

[http://www.libsuccess.org/index.php?title=Online\\_Reference#Libraries\\_Using\\_IM\\_Reference](http://www.libsuccess.org/index.php?title=Online_Reference#Libraries_Using_IM_Reference)

## IM Resources

- Blogging about Libraries & IM:

<http://www.tametheweb.com/>

<http://www.walkingpaper.org>

<http://librarianinblack.typepad.com/>

<http://www.teachinglibrarian.org/weblog/blogger.html>

## IM Resources

- Your "roadmap" for planning an IM reference service:

<http://blogwithoutalibrary.net/handouts/imroadmap.pdf>