

IM Reference Roadmap

STEP 1: Determining whether or not to launch an IM Reference Service

- Talk to our users about whether or not they are on IM
- No need for a fancy survey! Ask them at the desk, use a free survey tool like Survey Monkey (<http://www.surveymonkey.com/>)
- A couple of questions:
 - Do you use IM?
 - If so, what service are you on?

Launching the Service

STEP 2: Asking the important questions

- When should we run the pilot?
 - When are our users around?
 - When can we get enough activity to evaluate the service?
 - How long should the pilot be? (Recommendation: no less than 6 weeks)
- What hours should we offer?
 - When will our users benefit from having us online?
 - More realistically, when do we have the staff?
- Who will staff the service?
 - Should it be mandated or should we ask for volunteers?
 - Anyone who does time on the Reference Desk?
- Should we do IM on the desk?
 - During slow periods only? Or all the time?
 - Leave it up to personal preference of the IM staffers?
- What are our technology needs?
 - What IM services do we want to use (AIM, MSN, Yahoo!, etc.)?
 - Is there merit in using multiple services? If so, use a Multi-protocol client like Trillian, GAIM, or meebo.
 - What features do we want from our IM client?
 - Logs
 - Group chat capabilities
 - Ability to send attachments
 - Ability to use custom status messages
 - ...etc.
 - Do we want to use a client or will meebo (<http://www.meebo.com>) do?
- What are the security issues that we're concerned about?
 - Worms & viruses
 - Unencrypted transmission
 - Weak Authentication
 - Spam/spim
 - Considerations about commercial services and IM privacy

STEP 3: Training staff

- Provide an overview of the technology & how it works
- Provide lots of time for staff to “play” with IM
- Provide good support documentation (see examples under “Best Practices” below).

STEP 4: Evaluating the Service

- ☐ How do we evaluate the pilot?
 - Ask a question or two at the end of each IM session
 - Web-based survey tool
 - What metrics should we use?
 - Logs
 - Peak times/slow times
 - How many users have added us to their buddy list?
 - Talk to IM staffers about what they liked & what they didn’t like about doing IM reference
 - Evaluate the client interface we’re using
 - Was staffing difficult to schedule/coordinate?

STEP 5: Exploring other options

- Should we consider web-integration of IM reference?
 - Chatango (<http://chatango.com/>)
 - Meebome (<http://www.meebome.com/>)
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Best Practices for IM Reference

1. If your users are on multiple IM services, you should be too.
2. If you use MSN, set up an account with an existing email account (preferably one your users already know & use for reference questions).
3. Involve your I.T. department in the planning and implementation phases of the project. This will ensure that all technology/security issues are dealt with early on in the project.
4. Staffing:
 - Offer staff training early
 - Give staff plenty of time to play with and become comfortable with the software/interface
 - Encourage the use of IM for internal communication
5. Provide good support materials for staff. Examples to use/build upon:
 - How to set up an IM account (<http://blogwithoutalibrary.net/talk/il2006/imaccount.pdf>)
 - IM tips (<http://blogwithoutalibrary.net/talk/il2006/imtips.pdf>)
 - Canned messages (<http://blogwithoutalibrary.net/talk/il2006/canned.pdf>)
6. If you do IM on the desk, use signage to indicate to in-person customers that you’re also helping “virtual” patrons.
7. Run your IM pilot when your users are around to use it (especially important in academic libraries).
8. Run your IM pilot long enough to gather good metrics & allow staff to get a feel for the service.
9. Use the pilot experience to formulate IM policies, e.g. the types of questions you will answer, a policy on “spim”, a policy on blocking and unblocking users.
10. Promoting the service:
 - Add your IM IDs to promotional materials (business cards, newsletters, blogs, web pages, etc.)
 - Add status indicators to your web site to boost the IM presence on your web page (e.g.: use <http://www.statusindicators.com>).
 - Add stickers to all public computers about your IM reference service