

**Stick or Twist: how have the experiences of 20-21 shaped customer services?**

**#CSGUK21**

**Questions, Answers and Comments from Chat**

**CSGUK Conference 26.11.21**

Names removed but please get in touch with Helen Loughran if you need to contact anyone from the institutions mentioned. Apologies if any comments are attributed to the wrong place – it was a busy chat!

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| **University of Teesside Presentation** | |
| **Q.** | **Did I hear 'every new student is given an iPad?'** |
| **A.** | Yes, there is some criteria attached but in essence new UGs are issued with an iPad that contains a set of pre-agreed apps to support them in their learning.  We have a partnership with Apple and also are an Adobe Creative Campus.  Here is a bit more info on our Apple links <https://www.tees.ac.uk/sections/news/pressreleases_story.cfm?story_id=7722>  And here some info on our Adobe partnership <https://www.tees.ac.uk/sections/news/pressreleases_story.cfm?story_id=7512>    We gift new laptops at Northampton too, really came into its own in lockdown! <https://www.northampton.ac.uk/student-life/university-living-laptops-trips-and-internships/> |
| **Q.** | **Are you aware of the numbers of hits on self-service increasing? you wanted it to be self-service first. 3000 enquiries per week sounds quite a lot?** |
| **A.** | We are currently working with our marketing department to determine numbers hitting our self-service areas and also to pull out how many enquiries have been resolved by the knowledge base before they reach us.  Yes, it is true that the majority of enquiries are not self-served, we have ongoing meetings with our system provider to highlight this and look to improve. It is a journey! |
| **Q.** | **How do students get support on the "library floor" in relation to quick questions, finding books etc. that won’t be appropriate for appointments** |
| **A.** | We have a clearly defined referral pathway to any 2nd line service, including Library so we can get support to the student quickly at point of need. |
| **Q.** | **Do staff worry about job losses when things are moving more online?** |
| **A.** | Our team are busier than ever, just in a different way. |
| **Q.** | **Did staff adapt ok from the old skool librarian role?** |
| **A.** | This is still a work in progress, but we have had some success in sharing front line across all of our front facing services. Always some resistance, largely around confidence issues, but staff tend to do themselves a disservice around their levels of knowledge and skills. We are now asking our librarians to deliver skills sessions in Student Life so we encourage flexibility in approach etc. This may be more of a challenge. |
| **Q.** | **Where do the front line staff come from? Library or student services or both?** |
| **A.** | Our front line covers library and student life. |
| **Q.** | **What size is your student body?** |
| **A.** | Over 18500 students at Teesside. |
| **Q.** | **How do you prioritise staffing between face to face (desk based) and virtual (chat etc.) especially going forward as students have returned to campus?** |
| **A.** | At Teesside we have a rota that we constantly review and revisit (sometimes daily) in order to re-prioritise where we need our staffing resource to be. |
| **Q.** | **What software/app is used to manage the Knowledge Base?** |
| **A.** | We use TOPdesk as a tool to manage our enquiries. It is quite a flexible tool and works for us, clear referral pathways and a simple web front end. |
| **Q.** | **Would be interested to know more about the experience of the chat bot** |
| **A.** | Mixed experiences with the automated chatbot. It has around a 60% accuracy response which I feel is not good enough. We need to review the pilot and agree how best to invest in the technology. It operates on a keyword response but students often don't realise they are talking to a chatbot so enter a long chat ahead of asking what they actually want to know! The chatbot then struggles to identify the appropriate keyword(s) |
| **Q.** | **Can you say what system you use for chatbot?** |
| **A.** | I think it is a Microsoft product, here is the URL <https://www.qnamaker.ai/>. However, it requires investment in staff time to "train" the chatbot so it can identify the appropriate keywords. We are looking to invest in something that will reduce this need (led by our IT Services department). |
| **Q.** | **What does your enquiries manual consist of?** |
| **A.** | This is a very interesting question. We actually have a staff only section in the knowledge base ‘N’ referred to that staff can refer to within the enquiry system. It is keyword driven so they don't need to navigate a manual and the system is intuitive enough to start to identify which knowledge item / FAQ the staff member might need from the wording in the enquiry. We also use a Teams site that all of our front of house team can access for more logistical guidance and sharing of information |
| **University of Sussex / Regent’s Uni – Chat services** | |
| **Q.** | **We're looking to procure a chat service ATM, any recommendations or ones to avoid? Currently looking at LibChat and Libraryh3lp, will also check out Olark.** |
| **A.** | We use LibChat at GCU and it's really fantastic. Does a lot of the things ‘A’ was talking about too with Olark.  We use Springshare (LibAnswers and LibChat) at Sunderland. We really like it as we can embed the chat widgets on our website/catalogue/discovery service, either as a fully embedded widget or as a slide-out. We find it straightforward to use, and we can collect really good analytics for e-mail tickets, chat transcripts, and social media as we link Facebook and Twitter to it. We rely a lot on the FAQ feature too which students can search and staff can also use to answer enquiries. We also embed the FAQs into our website to try to reduce any replication of info. Our FAQ viewing figures really increased during the pandemic.  We use LibChat and have slide-out links on a variety of webpages. We're experimenting with different ways of promoting the Chat, changing colour of the buttons and moving to pop-up on some pages (Royal College of Nursing).  We use Comm100 when we are open and switch to LibAnswers out of hours (when we are closed) where Springshare staff support enquiries on our behalf (Open University).  We have been using LibChat which was good but have just moved over to Salesforce Omnichat as part of whole Uni trying to put all its student facing enquiries onto Salesforce to join enquiry management up a bit more (London South Bank).  We have LibGuides as well as LibAnswers and you can embed LibAnswers FAQs in the LibGuides -saving duplication of work. (Anglia Ruskin)  We use Springshare (LibAnswers and LibChat) at Sunderland. We really like it as we can embed it on our website/catalogue/discovery service and have it as a slide-out on each page of the website. We find it straightforward to use, and we can collect really good analytics for e-mail tickets, chat tra…  Interested to hear how you integrate it with Social Media ‘H’! That's something we've been discussing recently.  We don't get a huge amount of enquiries via social media so it's been manageable so far - tweets to us tend to have a short delay before they come into the dashboard which isn't ideal depending on the question although I think DMs are pretty instant. Facebook messenger messages come to the dashboard too but any comments/anything public on Facebook goes to the 'social' tab on the top menu (so means another place to check).  I really like the functionality of LibChat but am slightly frustrated with LibAnswers tickets in terms of searching and reusing standard responses from previous answers an FAQs. Also the inability to link tickets. It's possible others have configured the system in a superior way.  I do find the search function for tickets rather clunky. For linking tickets, we tend to use the 'merge' feature or use the 'history' option linked to people's e-mail addresses. Could be more streamlined though I think! (Sunderland) |
| **Q.** | **Can all staff e.g. Learning staff see your chat transcripts of chats done by frontline team?** |
| **A.** | They can (unless the person asking the questions selects the 'redact' option), and then the transcript is not saved |
| **Q.** | **Have you tried sign-posting the chat from different web pages? Its very difficult to highlight chat through a large array of web pages.** |
| **A.** | We have, we've promoted online through the University's Skills Hub, Student Hub and further |
| **Q.** | **You say all Library staff run the chat service. Is that really all library staff or just the LATS and FoH team? Do you also include staff from Resources, Systems etc.? How did that go down with them as answering student queries is often very much considered to be a front-line service.** |
| **A.** | We do have people from all teams (but not everyone): we've got staff from admin, systems, research support, cataloguing and more. |
| **Q.** | **I'm interested to know which libraries have library assistants doing online chat (i.e. not just the enquiries team).** |
| **A.** | We have library assistants doing webchat - but they pass on enquiries they can’t do. They can answer a lot of the enquiries as they are often very basic (Cardiff Met)  Our online chat at the Uni of Sheffield is run by our Customer Services Team and everyone in that team from G4 and above are rota'd on the service. We refer queries to other teams in the Library if necessary and they answer via email. We use LibAnswers.  We have library assistants working on Chat but they only answer queries they would answer on the desk- otherwise a ticket is made so students aren't hanging around in Chat for an answer (Northampton).  Our equivalent of library assistants do chat (or did when we had it). It was part of the frontline enquiry offer run by a dedicated frontline team (Edge Hill).  At Lincoln we use the whole CST Team.    Our live chat (Newman Uni) is only staffed by the subject librarians, as pretty much all of the stuff that comes through our chat is related to either referencing or e-resource access. We don't seem to get much of the basic stuff come through this stream.  We have Lib Assistants on chat with Professional staff they refer what they can't answer - but they answer a lot of queries. They are an excellent addition (University of South Wales)  The Open University library has dedicated Helpdesk library assistants but also Library assistants from other Library teams also have rota-ed time on the enquiries Helpdesk - Helpdesk uses webchat, phones and emails.  At Exeter we have Information Assistants as frontline team referring on to second line for complex eResources enquiries and making tickets (email managed enquiries) for other referrals - subject librarians, copyright team etc. Information Assistants on chat working office and at home but not on desks.  I feel that online chat is just another way for students to speak to us - they can either go to our front desk (run by our Customer Services Team) or ask virtually (also - and I think really importantly - run by our Customer Services Team) (Sheffield). |
| **Q.** | **What does your enquiries manual consist of?** |
| **A.** | It contains answers to our most frequently asked questions, instructions to staff on how to perform certain key operations (e.g. using LibCal for Click & Study bookings), contact details if they need to talk to other staff about how best to support students, and more. We did also setup an FAQs page on the website but found that more students were coming to chat than going to the FAQs. The Enquiries Manual is a Google Doc and the idea is that departments can add what they think other staff will need to know to answer questions about their area (e.g. what to do with an enquiry about ILR) |
| **Q.** | **Also, where are your onsite librarians and enquiries staff based in the library. Are they in the FOH area or in a separate room somewhere?** |
| **A.** | We have an office where our Virtual Enquiries team work. It is on campus. If you are rota'd on this, you would work in that office for the two-hour shift. This means there are others around to support. We don't usually do chat now from home as we found that staff found it isolating Sheffield) |
| **Q.** | **What was the driver for ditching Springshare LibAnswers/LibChat?** |
| **A.** | We were looking for a solution to monitor enquiries from all channels, which Bailey Enquire offered. However, it didn't really work for us. In all honesty Olark was meant to be a bit of a stop gap when we found something new, but it's been so good that we've just stuck with it (smile). |
| **Q.** | **Have you considered a chatbot service? Or would you prefer to stick with staff answering queries?** |
| **A.** | We haven't as of yet, but we'll be reviewing at the end of this year and I'm sure will come up |
| **Q.** | **Do you do anything encourage getting feedback from chats? We've found our uptake on this is quite low!** |
| **A.** | No, we don't currently.  At Sunderland we have purchased the Microsoft Teams screen sharing module for LibAnswers, so we can start a meeting with students in Teams directly via live chat. This then takes the students to Teams where the staff member can audio call/video call/ or screen share with the student. It's not dissimilar to just sending a link to a meeting but we do get analytics and stats through LibAnswers for how often it is used, how long the meeting was, etc. This has made me think we should explore recording these too so students can have a copy of the video plus a copy of the chat transcript to refer back to.  I've been trying to implement this, but have met some resistance from IT. I'd be really interested in talking to you about your experience of both implementing and using the screen sharing option. (Royal Holloway)  We are operating MS Teams for screen sharing in LibAnswers chat. Had some positive student feedback. (Anglia Ruskin) |
| **Q.** | **Does everyone canned messages to ensure consistency of approach with chats?** |
| **A.** | We use them at Durham for any message we know we will need to use a lot.  Canned messages are there to help with links etc. but we do answer in our own voice (Lincoln).  The OU uses certain canned messages but our enquiries are invariably unique and so require individual response.    We always aim to have a personal, friendly tone and find that difficult to implement with Canned Messages so we really just use them for easy access to links. (Glasgow Caledonian).    We used a live chat during lockdown and some students didn't realise it was actually staff! So some chatbots now are quite sophisticated in private companies so I can see why users are confused! Our survey suggests that students didn't like talking to what they thought was a robot, but don't seem to have a problem if they Know that a real person is at the other end.! (Edinburgh).    We use a combination of canned messages for opening, closing and holding messages and staff voices in-between.  Sets the right tone and works well for us smile (LSE). |
| **Q.** | **How do you prioritise staffing between face to face (desk based) and virtual (chat etc.) especially going forward as students have returned to campus?** |
| **A.** | At Uni of Southampton front of house staffing and virtual chat support are covered by different teams - foh doing face2face customer service are not expected to undertake virtual support. Uni of Southampton developed a really intensive training program for chat in a very short time. Staff confidence was reasonable to low initially but the training, which includes a few sessions in a training (non-live) environment has helped to raise confidence. Some staff have really flown and some have struggled.  At Teesside we have a rota that we constantly review and revisit (sometimes daily) in order to re-prioritise where we need our staffing resource to be.  Same here, we have the desk, virtual support (phone, service desk) and roving that the rota covers so it's constant reshuffling and adjusting depending on absences and responding to time of year (Edge Hill).  All of our 9 site libraries at Edinburgh University take part in a rota whereby they have an hour in which each site supports LibChat as well as enquiries in our email queue. Over last summer all staff were trained in LibChat and using Unidesk enquiry system. Desk enquiries are supported at the same time, so increased juggling for site staff. |
| **University of Northampton - screen sharing** | |
| **Q.** | **Did you save these recordings and have them available as a library of recordings?** |
| **A.** | I didn't/wouldn't share recordings with anyone except the student. I'd let them know this when I was making the recording. I did have a couple of students asking if they could share the recording with a friend, which was fine with me.  I wouldn't save them or make them available more widely because of protecting the students' privacy. For some though they had quite common questions/tasks to complete (for me exporting stuff to RefWorks) so I would create generic videos that could be re-used. Some students would ask if they could share the recordings with friends on their own initiative and I'd tell them I was fine with this so long as they were. |
| **Q.** | **What about users who would have preferred written instructions? Sometimes a bullet point list is easier to follow then having to watch a video, depending on the topic of course.** |
| **A.** | Some might yes - and for some enquiries written instructions were better so I'd just do that. I would sometimes give them the recording plus a link to an FAQ page so they had options. For appointments I don't think written instructions would ever have been practical (they'd have run for pages and pages) but I guess the transcript would also provide something like these.    Link to original research  <https://pure.northampton.ac.uk/en/publications/evaluating-a-recorded-appointment-service-for-individual-research>  <https://www.emerald.com/insight/content/doi/10.1108/RSR-04-2021-0011/full/html> |
| **Q.** | **Have staff felt confident using screensharing or needed a lot of support?** |
| **A.** | All team used to using MS Teams for meetings, so easier than using Zoom that came with Libanswers chat. Some of team more willing than others to go into screenshare but they are also now providing MS Teams library guide 121 sessions now and we encouraging all the team to participate. So yes support and encouragement needed for some less confident team members. |
| **Birmingham City University - gathering feedback** | |
| **Q.** | **Graffiti Wall for feedback:** |
| **A.** | We had a 'talk wall' white board that had a surprising array of phalluses each Monday morning. We also have a magnetic feedback/suggestion board where we can answer students as well as capture data. (Leeds Trinity).  Not sure what it says about our students but they used the graffiti wall for comments about the service (Cardiff Met).    In our experience it depends where you put the graffiti wall. Nearer the desk/staff inhabited areas = less "fruity" input |
| **Q.** | **Christmas Tree** **for feedback:** |
| **A.** | We have a tree beside our desk and people hang 'decorations' which are just feedback cards shaped like baubles! But it's hugely popular (Glasgow Caledonian).  We've done this before, asking people to leave messages on tags on the Christmas tree (Edge Hill).  Although it does exclude anyone allergic to Christmas trees (there's a story there)  Yes, we do Xmas wishes which is tags on a tree (London Met).    We put a Christmas tree up each year and students hang messages on paper stars on it. its called our Festive Feedback tree (Strathclyde).    Christmas tree idea is a fantastic idea. Is there a specific Q asked next to it, or is the scope a more general "feedback" tree?  We're experimenting with some prompt questions with our festive feedback tree this year (King’s)  We do 'wishes' and they often put ... to pass my exams or win the lottery or see my family … (London Met)  We usually do a variation on a theme of "what do you want from the library for Christmas?" (Roehampton).  We also do an Xmas wishes tree (Greenwich).  Case study from Surrey <https://4a6525ee-84c8-4290-beb9-d57139d799b1.filesusr.com/ugd/b65572_2854a8f19220494b85efe74070330099.pdf>  We have used Valentine - love or break up letters on service aspects. Had a great one breaking up with our printers! (Anglia Ruskin) |
| **Q.** | **I'm interested in knowing how you manage feedback across multiple channels and methods across your library service. Do you collate feedback together? How do you pass feedback between teams/functions? Does someone have responsibility for monitoring themes across all forms of feedback?** |
| **A.** | We create a quarterly report that collates feedback from different sources, summarises the ratings and pulls out quotes. (Royal College of Nursing). |
| **Q.** | **I'd love to know about how you implemented the Lib ticket feedback.** |
| **A.** | Here is the guidance for adding satisfaction survey to your libtickets - <https://ask.springshare.com/libanswers/faq/2830> |
| **Q.** | **What incentives, if any, do you use to encourage students to fill in surveys/give feedback? Is it just used for surveys? When we were in the building we could give out sweets etc. and can use prize draws on and off campus.** |
| **A.** | We have a lot of £10 amazon vouchers which can be used for getting people to participate in surveys |
| **Q.** | **How do you collect feedback about registration or induction?** |
| **A.** | We don't do any wider feedback exercises on inductions but would get feedback on individual sessions delivered. I work in the customer services department and learning and teaching get feedback somewhat separately so we need to come together to get the wider picture |