askON CALL:

*a pilot, adding voice to chat*

Jan Dawson, Ask Ontario
VR Librarian and Project Coordinator
Ontario Libraries’ Virtual Reference Service
...askON 39 public partner libraries

- Asphodel Norwood
- Barrie
- Belleville
- Brampton
- Cambridge
- Cornwall
- Dryden
- Fort Erie
- Georgina Township
- Greater Sudbury
- Hamilton
- Innisfil
- Hearst
- Kenora & Keewatin
- Kingston Frontenac
- Kitchener
- Lambton County
- London
- Middlesex Cnty
- Moonbeam
- North Bay
- Oakville
- Oshawa
- Pickering
- Powassan & District
- Prince Edward County
- St. Catharines
- Six Nations
- Stormont Dundas & Glengarry
- Temiskaming Shores
- Terrace Bay
- Thunder Bay
- Vaughan
- Val Rita Harty
- Waterloo
- Windsor
- Welland
...askON 21 academic partner libraries

- Algonquin
- Cambrian
- Centennial
- Conestoga
- Confederation
- Fanshawe
- George Brown
- Georgian
- Humber
- Mohawk
- Niagara
- Seneca
- Sheridan
- St. Clair
- Lakehead
- Ryerson
- University of Guelph
- University of Guelph-Humber
- University of Toronto
  - St. George Campus
  - Mississauga
  - Scarborough
- University of Windsor
- York
askON CALL pilot project goals: why VoIP?
askON CALL pilot project goals: why VoIP?

★ Challenge with VR: no face to face means no nonverbal cues, etc. which aid in satisfying a successful reference interview.

★ Adding voice is a step closer to face to face reference whereby verbal cues are received.

★ VoIP has been touted the future of VR as an evolution to the “laborious and time-consuming” chat. (Coffman, 2003).

★ Speculation that a combination of VoIP and chat may enhance certain askON interactions.
askON CALL pilot project goals: what we wanted to know

• Did adding voice to the askON CALL chat help to clarify and focus the reference interview?

• Did adding voice to the askON CALL chat make the VR communication more efficient?

• Did adding voice to the askON CALL chat improve askON staff’s overall ability to help the visitor?

• Did adding voice to the askON CALL chat aid in askON staff’s ability to demonstrate searching with the visitor?
LivePerson’s Talk-by-PC capability:

• Initial research led us to believe we could set it up as a “call me” button beside our click-to-chat button.

• Not available on LivePerson’s UK server yet, where our account lives.

• Testing on the US server concluded functionality was not satisfactory.
askON CALL VoIP client selection

Skype Hits 521 Million Users And $185 Million In Quarterly Revenue

by Erick Schonfeld on Oct 21, 2009 36 Comments 267 retweet 20 Share Buzz it

askON CALL VoIP client selection

Skype!

• blessed by Oprah

• most popular VoIP vehicle to date

• works on Windows, Mac, and Linux
askON CALL participation

29 askON staff participants:

• 10 public sector (to deliver up to 12 hours of service)
• 10 college sector (to deliver up to 14 hours of service)
• 9 university sector (to deliver up to 17 hours of service)

Total askON CALL opportunities: 43 hours/week
askON CALL public schedule

9 askON CALL staff placed in 12 potential askON CALL opportunities in public sector
**askON CALL college schedule**

10 askON CALL staff placed in 14 potential askON CALL opportunities in college sector

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*sen will work 3 random shifts plus 6-7 Thurs*
**askON CALL university schedule**

9 askON CALL staff placed in 17 potential askON CALL opportunities in university sector

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14 + 3

*rye will work 3 random hours a week*
askON CALL participant training & protocol

*Video was not piloted*

1. Sign out of existing Skype profile.

2. Click on “Don’t have a Skype Name?”
askON CALL training & protocol

3. Create your Skype name as “askON_[your first name]”. 
when to turn a chat into Skype

- The visitor requests to communicate by voice
- Typing becomes too cumbersome for an explanation
- Disability inhibits typing ability
- When the service isn’t busy
- You want to!
turning a chat into Skype: invite and qualify

• Invite visitor to talk:

Canned message: “askON is conducting a pilot project to add voice to our chats. Would you like to try it? Do you have Skype?”
turning a chat into Skype

• If visitor says they don’t have Skype:
  Canned message: “OK, we won’t be able to use voice this time, but you can always come back after you’ve downloaded it (www.skype.com).”

• If visitor says yes they do have Skype:
  Canned message: “Have you used Skype before and do you have a headset or microphone and speakers?”
  Canned message: “Are you in an environment where your talking won’t disturb anyone?”
turning a chat into Skype

• If visitor says they haven’t used Skype before, or they don’t have a headset or mic and speakers:

Canned message: “For now then, we’ll just continue to chat.”

*Training tip*: at this point, you need to return to the conversation and reestablish the reference interview.
turning a chat into Skype

• If at any point in the askON CALL, there is technical difficulty:

  Canned message: “I’m sorry, this doesn’t seem to be working out for us right now. Let’s go back to chat.”

*Training tip*: you are in the driver’s seat. Don’t let the askON CALL component get into the way of the information need.
turning a chat into Skype: chat and call

• If visitor says yes, ask them to keep the existing chat window open and add you as a contact: ie. “askON_jan”

***never ask for the visitor’s Skype name***

Canned message: “Please keep this chat window open and visible at all times so I can send you links and you can request a transcript at the end of our session.”

Canned message: “Open your Skype. Under contacts tab, click “add a contact”. Search for askON_[your first name] under “add a Skype contact”. Click on the correct name and click “add contact”. Click OK to send the verification message. I’ll wait while you do this.”
turning a chat into Skype:
removal of names

• After the Skype portion of the reference interaction is completed, both you and the visitor need to remove names from Skype and return to the chat:

Canned message: “Now that we’re done with Skype, I will remove your contact name from my contacts list and I ask that you please remove my name as well.”
askON CALL protocol:
push exit survey

• Closing the reference interaction:

  Canned message: “Thank you for participating in our askON CALL pilot project. We look forward to hearing your feedback. Please complete the exit survey and check the box which asks if you’ve used Skype today.”
askON CALL protocol: fill out operator survey

• Fill out the operator survey:

Mac view:
Repeat Skype visitors

If the visitor contacts the askON staff member in Skype (outside the askON service), even for a legitimate reference need, and you are NOT on shift, please refer them back to the askON service or their library.

A way to ensure this doesn’t happen is to only be logged in ask askON_[your first name] when you are on your askON shift.
Repeat Skype visitors

If the visitor contacts the askON staff member in the future for a legitimate reference need, and you ARE on an askON shift, you still need to refer them to the askON service.

The reference transaction always has to START and END in the askON service to maximize potential of a valuable transcript.
If the visitor continues to contact the askON staff member for inappropriate reasons, there is an option to block the visitor, which means that they can no longer communicate or see the askON staff member when they sign in.
Summary checklist

1. invite and qualify
2. chat and call
3. push exit survey
4. complete operator survey
5. remove visitor from Skype
6. repeat as much as possible!!!
askON CALL pilot timeline

askON collected data until April 4, 2010.

• Public sector:
  • 18 weeks from November 30, 2009 to April 4, 2010

• Academic (college and uni) sectors:
  • 14 weeks from November 30, 2009 to December 11, 2009 & January 11, 2010 to April 4, 2010
askON CALL data collection: Road blocks

1. askON CALL staff were forgetting to fill out the askON CALL operator survey.

2. askON CALL visitors weren’t filling out the exit survey.

3. NONaskON CALL staff were filling out the askON CALL operator survey even though they didn’t know what it was!
askON CALL data collection

Solution

In order to ensure usable, accurate, and exhaustive data an alternative way to gather data was implemented which involved a keyword search for “skype” in all transcripts.
askON CALL findings

askON CALL initiations by sector

- College: 23%
- Public: 60%
- Uni: 17%

Total initiations = 90
askON CALL findings

askON CALL interaction types

- ignored/incomplete chat
- school/work computer; skype blocked
- don't know what skype is
- not installed/no interest in installing
- tried to set up and failed
- declined, no reason
- don't have technical reqs

55%
askON CALL findings

askON CALL interaction types

- 13% school/work computer; skype blocked
- don't know what skype is
- not installed/no interest in installing
- tried to set up and failed
- declined, no reason
- don't have technical reqs
askON CALL findings

askON CALL interaction types

- 11% ignored/incomplete chat
- school/work computer; skype blocked
- don't know what skype is
- not installed/no interest in installing
- tried to set up and failed
- declined, no reason
- don't have technical reqs
askON CALL findings

askON CALL interaction types

- ignored/incomplete chat
- school/work computer; skype blocked
- don't know what skype is
- not installed/no interest in installing
- tried to set up and failed
- declined, no reason
- don't have technical reqs

10%
askON CALL findings

askON CALL interaction types

- ignored/incomplete chat
- school/work computer; skype blocked
- don't know what skype is
- not installed/no interest in installing
- tried to set up and failed
- declined, no reason
- don't have technical reqs
askON CALL findings

askON CALL interaction types

- ignored/incomplete chat
- school/work computer; skype blocked
- don't know what skype is
- not installed/no interest in installing
- tried to set up and failed
- declined, no reason
- don't have technical reqs
askON CALL findings

askON CALL interaction types

- Ignored/incomplete chat
- School/work computer; Skype blocked
- Don't know what Skype is
- Not installed/no interest in installing
- Tried to set up and failed
- Declined, no reason
- Don't have technical reqs

1%
askON CALL findings

types of college askON CALL initiations

- ignored/incomplete chat: 24%
- school/work computer; skype blocked: 14%
- don't know what skype is: 14%
- not installed/no interest in installing: 14%
- tried to set up and failed: 14%
- declined, no reason: 14%
- don't have technical reqs: 38%
askON CALL findings

askON CALL public initiations

- 52%
- 13%
- 11%

- ignored/incomplete chat
- school/work computer; skype blocked
- don't know what skype is
- not installed/no interest in installing
- tried to set up and failed
- declined, no reason
- don't have technical reqs
askON CALL findings

askON CALL university initiations

- ignored/incomplete chat: 6.6%
- school/work computer; skype blocked: 6.6%
- don't know what skype is: 6.6%
- not installed/no interest in installing: 6.6%
- tried to set up and failed: 6.6%
- declined, no reason: 80%
- don't have technical reqs: 80%
askON CALL findings

askON CALL interactions

Total initiations = 90

- successful calls
- unsuccessful calls

3%
askON CALL findings: successful call

“Selena”, a K-8 student, asked: “When the earth has come to an end what are some theories from Canadian scientists?”

(a reference interview was conducted)

askON staff: Before i start searching ... askON is conducting a pilot project to add voice to our chats. Would you like to try it? Do you have Skype?

selena: yes

(qualification and set up ensues)

selena: i have just added u
askON CALL findings: successful call

continued...

(Skype interaction ensues. Useful resources are shared)

askON staff: Nature Canada
askON staff: Ontario Ministry of the Environment - Kids Zone
askON staff: Environment Canada

finishing up:

selena: yes i have already deleted ur name from my contact list
askON staff: thank you! i will do the same now!
askON CALL findings: successful call

“I think that askON CALL improved the interaction because before logging into Skype, I found it difficult to understand exactly what kind of information the visitor was looking for...

...Once we started talking it was much easier to understand what KIND of information she wanted...

...The visitor was also better able to explain the scope of her assignment. Also, she asked me two related questions once the initial question was answered...

...I was also able to talk to her about searching for information (and the pitfalls of using wikipedia) WHILE I was searching for information – which I do not do in LivePerson because typing and searching simultaneously would be difficult and distracting...”
askON CALL findings: participant and nonparticipant surveys

We wanted to learn more about our staff’s perspective so we polled both participants and nonparticipants:

- Participants are individuals who participated in the askON CALL pilot

79% response rate
askON CALL findings: participant survey

Did you have any successful askON CALL interactions? (successful is defined as chatting in LP, then talking in Skype)

3%
askON CALL findings: participant survey

If no, what was the reason in most of the circumstances?

- Visitor did not meet technical qualifications
- Visitor was not in an appropriate environment for sound
- Visitor didn’t want to
- Visitor didn’t have time to
- I didn’t feel as though the question was appropriate for Skype
- Other
askON CALL findings: participant survey

“Most of the questions during my shift come from schools which do not have Skype on their computers, so I didn't ask when they were from a school.”

“The shifts were often too busy and more than one call would be juggled.”

“There were only a few opportunities to do so - most questions that I received in the college queue were brief questions, when I had multiple calls, and when I was not able to speak (throat issues!)”

“i didn't initiate any calls”
askON CALL findings: participant survey

• “1. My shift is usually very busy, often deals with 2, 3, 4 users at the same time so didn't have time to initiate the chat on many occasions;
2. There are a few occasions when I do happen to just deal with one patron, that patron is usually in a lab at school, so can't really install Skype onto the machine”

• “I didn't initiate any calls”
askON CALL findings: participant survey

Did you ever feel too shy to try?

- Yes: 25.0%
- No: 75.0%
askON CALL findings: participant survey

Why do you think there weren’t many successful askON CALL interactions?

- Too cumbersome switching from LP to Skype
- Visitor didn’t meet technical requirements
- Other
- Environment didn’t allow sound
askON CALL findings: participant survey

“While many people said they didn't have Skype many...preferred chat as the method of communication. That way it seems less personal and more anonymous.”

“askon is too popular :)

“Visitors weren't interested...either didn't have skype, couldn't be bothered downloading it, or were in the library where they couldn't chat.”

“None of my customers had Skype”
“Usually students are not allowed to download any software on public computers without administrative privileges”
More visitors would have participated in the askON CALL project if it were set up in the same LivePerson platform as opposed to asking them to switch to Skype.
askON CALL findings: participant survey

I like the idea of the immediacy of using Skype for chat reference.

- Strongly agree: 1
- Agree: 10
- Neutral: 7
- Disagree: 2
- Strongly disagree: 0
askON CALL findings: participant survey

I like the idea of the pause (the moment to think) that chat brings to Virtual Reference that it is not as available in Skype.
askON CALL findings: participant survey

I like the concept of adding voice to virtual reference.

- Strongly agree: 3
- Agree: 12
- Neutral: 5
- Disagree: 1
- Strongly disagree: 0
askON CALL findings: participant survey

“While I believe the voice option would be fantastic for accessibility reasons, it is too cumbersome for general inquiries”

“I think if a request is complicated Skype or voice would be a good way to clarify it. Most of my requests were very specific needing a short answer which really didn't benefit from Skype.”

“...I'm very partial to email reference. And AskON is good for the text-based instruction and directions that can benefit the student.”
askON CALL findings: nonparticipant surveys

We wanted to learn more about our staff’s perspective so we polled both participants and nonparticipants:

• Nonparticipants are representative staff from institutions who did not participate.

91% response rate*
askON CALL findings: nonparticipant survey

I was unable to participate in the askON CALL pilot because (check all that apply):

- My institution has a policy to not participate in pilot projects
- I was too busy
- My work environment did not have headsets—or mic/speakers
- My work environment does not allow Skype to be installed on our staff
- My institution was too busy
- My work environment is not conducive to talking—io. The sound disrupt...
I use Skype to speak to friends and family in my personal life.

- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly disagree
askON CALL findings: nonparticipant survey

I like the idea of the immediacy of using Skype for chat reference.

- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly disagree

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askON CALL pilot limitations

• Multiple step process between two different clients: LivePerson and Skype. The visitor’s and staff’s expectation would be to stay in the same platform.

• Limited participation from both askON staff and visitors due to environmental constraints such as soundscape or blocked access to Skype.

• Limited participation from both askON staff and visitors due to technical requirements such as access to headset/mic & speakers.
askON CALL pilot limitations

• No promotion due to irregular service hours.

• Service traffic is too high. Juggling multiple chats with voice is not possible.

• Skype was not installed on any partner library’s public terminal computers.
askON CALL lessons learned

• Staff participant demographics were an initial surprise:
  
  • New interns were hesitant of the immediacy of the voice component. Traditional chat gives welcomed pause. “I am barely comfortable speaking to my family on Skype!”
  
  • More experienced generations welcomed it with open arms because of their comfort with phone reference.
askON CALL lessons learned

• In addition to the technology, VoIP requires an environment where both staff and visitors can talk.

• Public initiations were significantly higher. Surprise because technology is assumed to be more pervasive in academic sector.

• Was it too soon for this? Is VoIP not as universal as we’d hoped?

• People like the concept of adding voice to VR, but agree it is for only certain types on questions.
askON CALL lessons learned

• Even if we got the functionality with LivePerson platform, several issues would have remained:
  • Service too busy
  • Portion of staff too shy
  • Technical requirements on both staff and visitor sides
  • Soundscape restrictions on both staff and visitor sides
askON CALL conclusions

• Did adding voice to the askON CALL chat help to clarify and focus the reference interview?

• Did adding voice to the askON CALL chat make the VR communication more efficient?

• Did adding voice to the askON CALL chat improve askON staff’s overall ability to help the visitor?

• Did adding voice to the askON CALL chat aid in askON staff’s ability to demonstrate searching with the visitor?
Does not exist at present

“voice to text” translation services such as Dragon Dictation pair with VoIP services (stationary and/or mobile!) to provide valuable, hyperlinked transcripts for our visitors to take away from the askON VR interaction.

I used my voice and Dragon Dictation to do this!
**future directions in VR VoIP?**

face to face video!

**Exists now:**
- the librarian can choose to have an avatar represent them or a live video feed.

**Does not exist in Skype at present:**
- the librarian is empowered by having the control to accept video chat and within seconds, have the option to shut the visitor’s video feed down to avoid instances of inappropriate behaviour.
future directions with askON

Work with LivePerson to try to make Talk-by-PC functionality work for askON on the UK server

✓ askON CALL button beside click-to-chat button
✓ recording capabilities
✓ video capabilities
✓ technology to transcribe valuable/enriched voice to text transcripts
Questions/Comments?

Contact jdawson@knowledgeontario.ca
Blog: www.jandawson.net
Twitter: www.twitter.com/nunanishi
works consulted


works consulted


works consulted

Schonfeld, E. “Skype Hits 521 Million Users and $185 Million in Quarterly Revenue”, *TechCrunch*.  
