

Live Chat Training: Part One

The System

System functions (Web Client)

- Set your status
- Identify your contacts, who is online and allow you to talk to them
- Personalising the chat settings
- Block chats
- Transfer chats
- Send or receive files (they will appear as if from Amazon)
- Email a transcript of a chat to the student
- Tag the chat for follow up
- Canned answers

Users can also email themselves a copy of the transcript and send or receive files.

Handling chats – what’s different?

Greeting a chat user

It is good practice to identify yourself. For example, start a chat with

'Hi, I'm Peter. I'm reading your question now . . .'

or

'Hello, I'm Peter. How can I help you today?'

General instant messaging tips:

- Never type in capital letters - it appears as shouting.
- If you have found the users name out (for example, in response to you introducing yourself in your greeting), use it (unfortunately, our system won't ask them to record their name as standard input before arriving in the queue).
- Avoid yes and no responses.
- Ask at least one question to establish with the patron that this is a two-way communication.

For example:

- Is there something specific about ___ that you would like to know?
- What kind of information on ___ are you looking for?
- Can you give me an example?

- Break up answers if the response is longer. By breaking it into chunks of one or two sentences you avoid long pauses and gives the user the chance to read your responses as you are writing them.
- If you need to check something let the user know you are doing this. Phrases like 'Bear with me . . . ' and 'One moment . . . '

Closing the session:

- It's good practice to always ask the user if the question has been answered and if any additional information is needed.
- If you need to follow up the chat later or are referring on to another librarian, make sure you have the person's correct email address and deadline for when they need a response by.
- It isn't uncommon for chat users to just 'disappear' once they have what they need.

Referring on chats and handling more than one user

- Change your settings to help you manage the number of chats you receive.
- Make use of the conference room facility to ask for help.

Do's and Don'ts of Chat

Do

Introduce yourself and say goodbye

Break information down into short chunks

Send URLs on separate lines so they are easily identifiable.

Keep users informed as to what you are doing - avoid long pauses in the conversation

Don't

Use BLOCK CAPITALS, it makes you appear to be shouting

Make assumptions about the person on chat.

Provide information or articles without explaining how a user can locate them for themselves in the future

Be afraid to tell a user if you need to refer them to someone else or get back to them at a later time.

Sometimes

Use smileys, emoticons and casual language. Take your cue from the person on chat.

Practicalities of Chat (For information)

Can Your Computer Play Sounds?

The visual prompt that a new message has been posted is only visible if you have the web chat interface displayed on your desktop – so if you're going to be monitoring the chat service it is essential that you have speakers connected to your computer and switched on.

- If you have no speakers attached to your computer (either external speakers, or ones built into your monitor) you may need to use headphones.
- If you have speakers, please check that they work and play sounds

Some people prefer to wear headphones, especially in a shared office if you think the ping notification will disturb other users. You can also change the type of alert you get in settings

Which Browser?

We recommend the Google Chrome browser because we know the staff chat client works best in it. It also works well with Firefox.

Although we've used Internet Explorer for some elements of the training we don't really recommend using it for live chat as some people experience problems with notifications.

Desktop Notifications

Desktop notifications will flag incoming messages as a pop up message on your computer. It allows you to have chat minimised and see when chats come in- even if you have the volume turned off.

Notifications only work in Chrome and Firefox. At the moment you need to turn on notifications every time you log on to the system by going into settings and checking the relevant box.



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