



BALTIMORE COUNTY
PUBLIC LIBRARY

Creating Virtual Customer Connections

Tom Malley | Cynthia Dennis | Alex Houff



Connected

LibApps, Forms and Widgets

Presented by Tom Malley

What is LibApps?

- A suite of online services by Springshare, LLC
- Library-focused cloud services (SaaS):
 - LibGuides
 - LibCal
 - LibAnswers & LibChat
 - LibWizard
 - And more
- We use LibAnswers & LibChat for virtual customer service.

What is LibAnswers?

- A ticketing system for customer interactions
- Customers ask questions, library staff provides answers (and more!)
- Asynchronous (not "live"), but usually quick response time

Benefits:

- Interactive forms
- Queues
- Statistics reporting

Your Question/Comment

Question

More Detail/Explanation

☐ Receive an email confirmation of your submission.

Your Info

Email Address *

Name *

Library Card Number (For account questions include your card number)

This question is about *

Select One

Id	Status	Queue	Question	Last Message From	Owner	Last Updated ↓
<input type="checkbox"/> 5967766	New	Downloadables	Is there any way I can search the library catalogue for play away books exclusively? I used to find my selections by visiting that section when	Patron	---	Oct 01 2020, 09:00am
			Asked via System User Agent Chrome version 85.0.4183.127 on Android			
<input type="checkbox"/> 5967643	New	Circulation	How can get my temporary card number I requested?	Patron	---	Oct 01 2020, 08:40am
			Asked via System This question is about Library Account Select your branch library Essex User Agent Chrome version 85.0.4183.101 on Android			
<input type="checkbox"/> 5967305	New	Default	Brainfuse will not let me log in	Patron	---	Oct 01 2020, 06:50am
			Asked via System Library Card Number (For account questions include your card number) This question is about Databases Select your branch library Rosedale User Agent Chrome version 85.0.4183.121 on Windows			

Using LibAnswers at BCPL

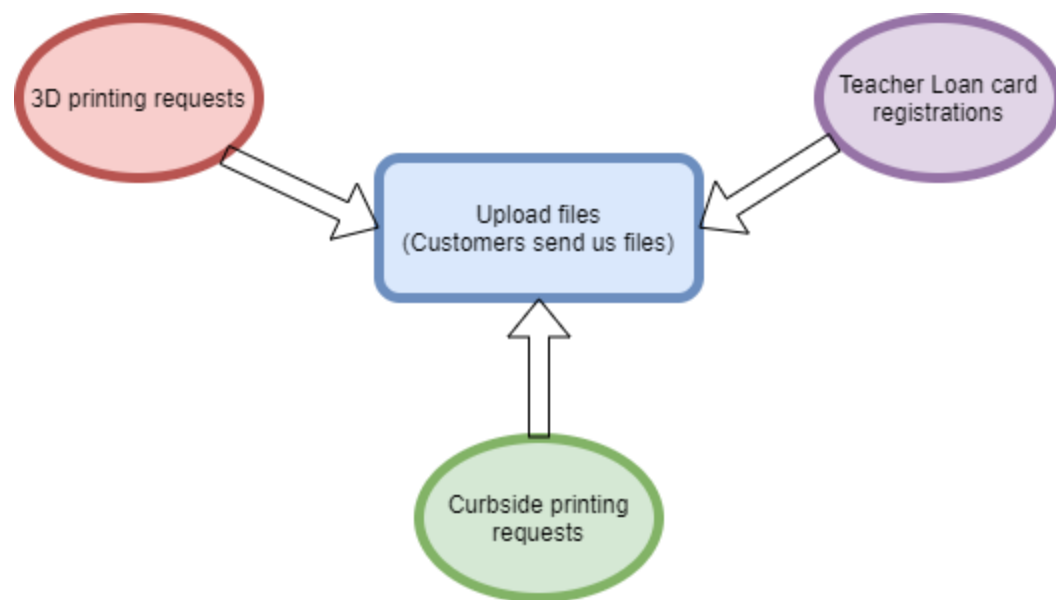
- 2011 – Started using LibAnswers in Virtual Services Department
- 2017 – Expanded to branch staff
- 2018 – Redesigned website and launched 3D printing service
- 2020 – LibChat, Virtual My Librarian, Teacher Loan card, Curbside printing



LibAnswers tickets, 2011-present (monthly)



New ways to use LibAnswers



- File upload is the key
- First, 3D printing files from customers
- Then, Teacher Loan card registrations (documentation of teaching status)
- Then, Curbside printing



3D Printing form

Your Info

Name *

Email Address *

Phone Number *

Library Card Number *

Upload Your Design

Upload a .stl or .obj file for printing. Max file size 20 MB.

Click to choose files or Drag them here.
Maximum file size: 20.0 MB

Source of the file *

Select your pickup branch. *

Select the material and color of your object *

Please choose a print quality option *

Brief description of your object *

- Customers upload their 3D object files
- Choose options for color, material, quality

QID: 5754273 Status: Closed

Asked by: [Redacted] (User History)

00:00:00

Mask Strap

Test test test

Asked By: [Redacted]

User submitted files:

- Surgical_Mask_Strap_Remix.stl

Note from [Redacted] Sep 02 2022

[Status changed to Closed.]

Questioner Information

Asked by [Redacted] (User History)

Phone Number [Redacted]

Library Card Number [Redacted]

Source of the file
Thingiverse

Select your pickup branch.
Towson

Select the material and color of your object
Red PLA plastic

Please choose a print quality option
High Quality (most expensive)

User Agent
Chrome version 84.0.4147.135 on Windows

IP Address [Redacted]

Asked via
System

Create a Reply Post an Internal Comment Close



Teacher Loan Card form

- Card has special privileges for educators
- Expires every August
- Need to show documentation of active status
- Was previously done in person, on paper

Baltimore County Public Library Teacher Registration

Teacher Loan Cards have a nine-week loan period and may be used to borrow DVDs, kits and other collection materials.

Questions marked with * are required

Is this a renewal or a new registration? *

☐ Renewal

☐ New registration

If renewal, existing Teacher Loan Card number (if known)

and renewal valid person is required

Would you like to receive a message via text message?

☐ Yes

☐ No

School name *

Upload a copy of your verification of teaching status (see [our website](#) for acceptable documents).

Click to choose files or Drag them here.
Maximum file size: 20.0 MB

Clear files

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Fields marked with * are required.

Southwest Academy

Asked By: Thomas Testing

User submitted files:

- Thinking-of-getting-a-cat.png

Note from System (Aug 03 2020, 04:55pm):

Original Queue Question Form Information:

Is this a renewal or a new registration?

Renewal

If renewal, existing Teacher Loan Card number (if known)

21183030000 teacher loan

Existing personal library card number (if known)

21183030000 personal

Home street address, city, state, and ZIP

320 York Road Towson, MD 21204

Home phone number

410887home

Cell phone number

410887cell

Cell phone service company (if you want text message notifications)

Verizon

Notification preference

Email



Curbside printing form

Printing for Curbside Pickup

Use this form to send a document, picture, or website to your local Baltimore County Public Library branch for printing. Printed pages can be picked up from the library using our Curbside Pickup service.

Temporarily, we are not charging for the first 20 pages of prints, per person per day.

Your name *

Your email address *

Your phone number

To print a document

Name of document *

Upload your file for printing. For best results, please upload .docx documents, .pdf documents, or .jpg pictures. You can upload multiple documents. The total file size limit is 20MB.

Click to choose files or Drag them here
Maximum file size: 20.0 MB

To print web pages (like forms, articles or recipes)

Paste the web address(es) here. Separate web addresses with a comma ",".

Additional information or instructions

Printing options

Black and White or Color prints? *

How many copies of each page? *

Where would you like to pick up your prints? *

☐ Receive an email confirmation of your request.

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Fields marked with * are required.

Send

- Customers upload their file and/or type in web page address
- Choose options for number of copies, color/b+w, and pickup branch
- Routed to pick-up branch

cat photo
google.com

Asked By: Thomas Testing

User submitted files:

- Thinking-of-getting-a-cat.png

Note from System (Aug 11 2020, 02:11pm):

Original Queue Question Form Information:

Your library card number
211830

Black and White or Color prints?
Color

How many copies of each page?
10

Where would you like to pick up your prints?
Other



System Status Widget (future)

Current status of library branches and apps

Arbutus Branch	Curbside	Catonsville Branch	Curbside	Cockeysville Branch	Curbside	Essex Branch	Curbside
Heredord Branch	Curbside	Lansdowne Branch	Curbside	Loch Raven Branch	Curbside	North Point Branch	Curbside
Owings Mills Branch	Curbside	Parkville-Carney Branch	Curbside	Perry Hall Branch	Curbside	Pikesville Branch	Curbside
Randallstown Branch	Curbside	Reisterstown Branch	Closed	Rosedale Branch	Curbside	Sollers Point Branch	Curbside
Towson Branch	Curbside	White Marsh Branch	Curbside	Woodlawn Branch	Curbside		
Cloud Library	Normal	OverDrive	Normal	RBDigital emagazines	Normal		

- Show status of each branch and digital service
- Embedded into website
- Easily updatable
- Connected to LibAnswers
- Drill-down for more details

Old software, new tricks

Some tips for using your existing software in new ways:

- Learn everything you can about your software platforms
- Determine internal and external needs and match with available resources
- Try to exceed expectations for response time, availability, and thoroughness
- Use your webforms to engage and educate
 - Language is warm, welcoming, and clear



Connected

LibApps, Forms and Widgets

Q&A



Connected

LibChat

Presented by Cynthia Dennis

Goals and Challenges


Find	Provide	Plan and launch	Train	Schedule	Expand
Find more ways for customers to connect with the library.	Provide more and meaningful telework opportunities for staff.	Plan and launch a chat service, giving BCPL customers real time access to library staff.	Train staff remotely.	Maybe self-serve chat shift sign up?	Expand chat hours as staff are trained.






Testing – Button Pop-Out Widget

Contact Us

Chat with a librarian

 Email Baltimore County Public Library

 Downloadables Support for BCPL Customers 

 Text BCPL at 4109410418

Chat - Google Chrome

v2.libanswers.com/chati.php?hash=3eb82869cc059b2b...

Baltimore County Public Library - Live Chat

Your Name

Email address

Library card number **recommended not required*

How can we help you?

Start Chat



Testing LibChat Interface – Staff View

Operator: Cynthia
Dennis

Status: Offline Internal **Online**

Set Away ☐

Chats Internal Tickets

Settings

Patron Chats **All (1) / New (1) / Mine (0)**

Testy Test **Claim Chat** 11:34 am
⌚ 01:57

Status Messages and Alerts

10:37 - Screensharing & Webinars module is enabled for screensharing and multi-attendee webinar functionality (in FAQ at <https://ask.springshare.com/libanswers/faq/1876>).

10:37 - Don't forget to sign off of LibChat at the end of y



Chat Button – During and After Hours

Chat With a Librarian

You can now speak directly with Library staff, with

- Monday through Thursday, 9 a.m. to 9 p.m.
- Friday and Saturday, 9 a.m. to 5 p.m.
- Sunday, 1 p.m. to 5 p.m.

Chat with a librarian

Chat With a Librarian

You can now speak directly with Library staff, with our new chat feature during the following hours:

- Monday through Thursday, 9 a.m. to 9 p.m.
- Friday and Saturday, 9 a.m. to 6 p.m.
- Sunday, 1 p.m. to 5 p.m.

Offline: Ask a question via email

Preparing for Training

- Create training document and video
- Create a training department and training widget
- Wrote and entered canned chat messages
- Doodle Poll to schedule training dates and times
- Scheduled Zoom meetings
- Create LibAnswers accounts for each chat provider.
- Sent trainees training document and video ahead of training



Training Sessions



Trainees reviewed **training document and video ahead of training**



Used Zoom for live training sessions



2-3 trainers and 3-5 trainees per session



Session Agenda

Brief Introduction
LibChat Demonstration:
25-30 minutes
Practice, trainees claim a
practice chat: 25-
40 minutes
Q & A and wrap up: 10-
15 minutes



**Total session time:
1 to 1.5 hours**

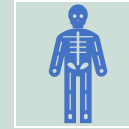


**Total of 55 chat
providers trained**

Scheduling Staff to Monitor Chat



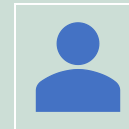
2 staff scheduled on each shift



Began with limited hours



Planned to expand chat hours as we trained more staff



Self-sign up using MS Teams channel and Excel



Teams channel for chat providers to communicate, swap or post shifts in need of coverage, post announcements, issues or questions



Current shifts are 2 hours each, Mon-Thur. 9 am to 9 pm, Friday and Saturday 9 am to 5 pm, Sunday 1 to 5 pm



Sample Schedule Sign Up Sheet

	4-Oct	5-Oct	6-Oct	7-Oct	8-Oct	9-Oct	10-Oct	
9 - 11 am	NO CHAT							9 - 11 am
9 - 11 am	NO CHAT							9 - 11 am
11 - 1 pm	NO CHAT							11 - 1 pm
11 - 1 pm	NO CHAT							11 - 1 pm
1 - 3 pm								1 - 3 pm
1 - 3 pm								1 - 3 pm
3 - 5 pm								3 - 5 pm
3 - 5 pm								3 - 5 pm
5 - 7 pm	NO CHAT					NO CHAT	NO CHAT	5 - 7 pm
5 - 7 pm	NO CHAT					NO CHAT	NO CHAT	5 - 7 pm
7 - 9 pm	NO CHAT					NO CHAT	NO CHAT	7 - 9 pm
7 - 9 pm	NO CHAT					NO CHAT	NO CHAT	7 - 9 pm

Going Live



Advertised chat hours
on website and in
email newsletters



Launched on April 27,
2020



Had approx. 20 staff
trained at launch



Limited hours in
beginning, 8 hours the
first week



Expanded hours,
currently providing 68
hours per week

Ongoing Maintenance and Statistics



Missed chats



Chats turned into tickets



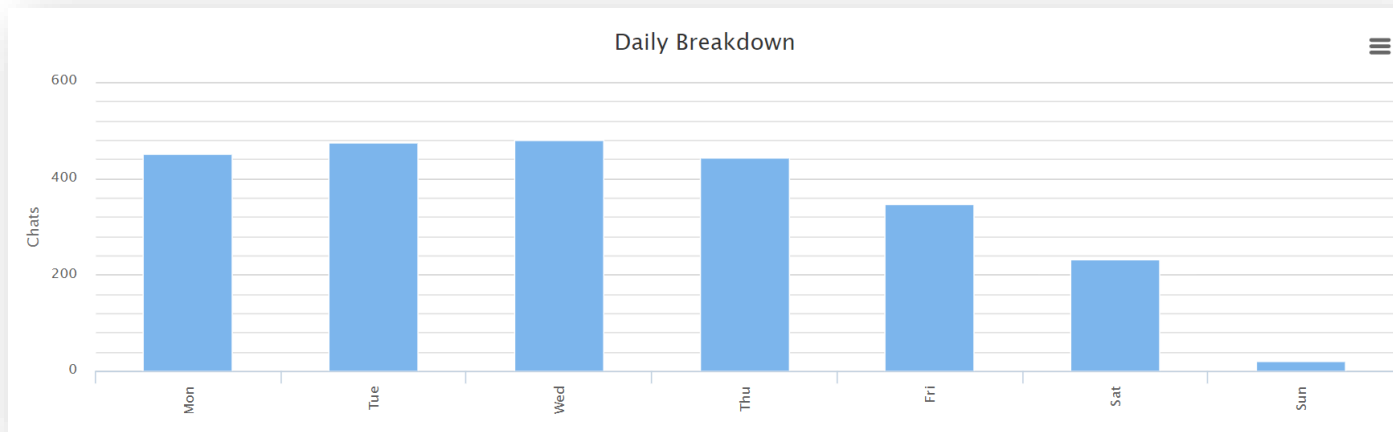
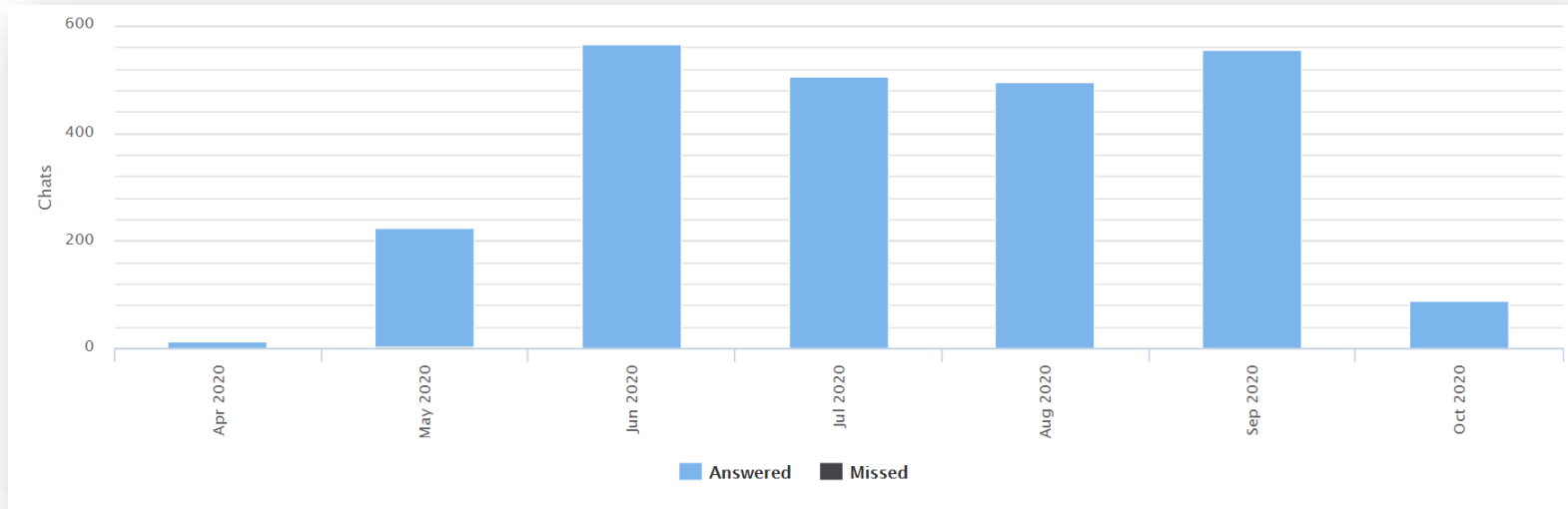
Scheduling sign-up sheets



STATS

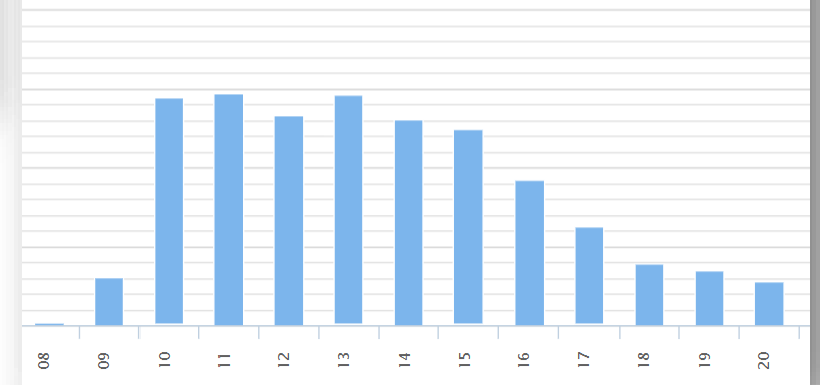


Statistics – Monthly, Daily, Hourly



08	09	10	11	12	13	14	15	16	17	18	19	20
4	61	288	294	266	292	261	247	184	125	79	70	55
0	0	1	0	0	1	0	1	0	1	0	0	0
4	61	289	294	266	293	261	248	184	126	79	70	55

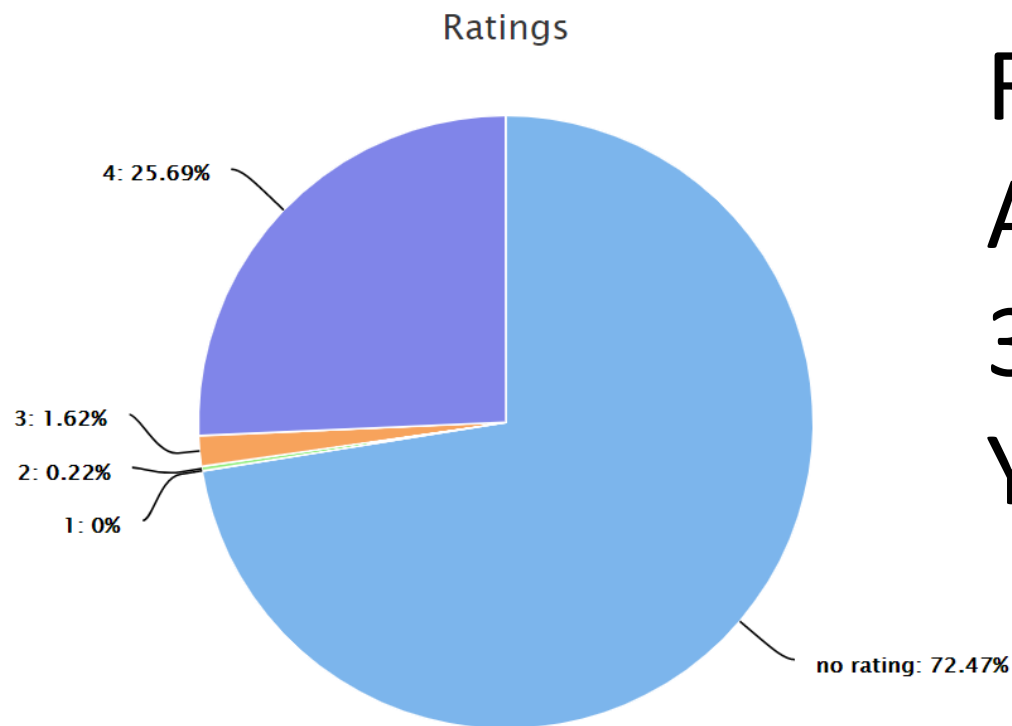
Hourly Breakdown





Chat Ratings - 1 to 4

1 (Bad)	2 (So-so)	3 (Good)	4 (Excellent)	Rating Average
0	5	37	588	3.93



Rating
Average
3.93%
Yay!



Great
Feedback
Happy
Customers



Connected

LibChat

Q&A



Connected

Virtual My Librarian

Presented by Alex Houff

Goals

- Create a scalable service to provide customers with a one-on-one connection to a librarian.
- Transition the existing branch-based model to a centralized model leveraging familiar and system-owned technology.
- Train staff working from home to use LibChat and its Zoom integration to provide the service.



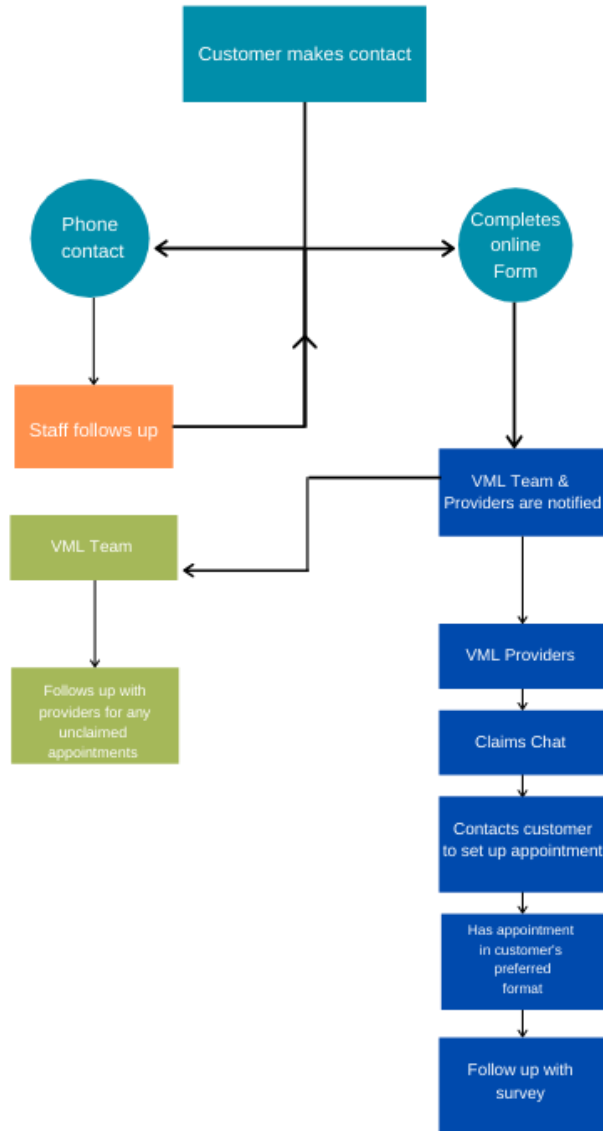
Needs Assessment

- What is needed
 - Customer Contact
 - Data collection
 - Notification to providers
 - Ticket claim
 - Confirm appointment
 - Conduct appointment
 - Feedback/Measurement
- How it's handled
 - Form on website/branch phone
 - SharePoint List
 - Event-triggered email
 - SharePoint Calendar
 - Phone call or email
 - LibChat/Zoom or phone
 - Survey

Systems Used

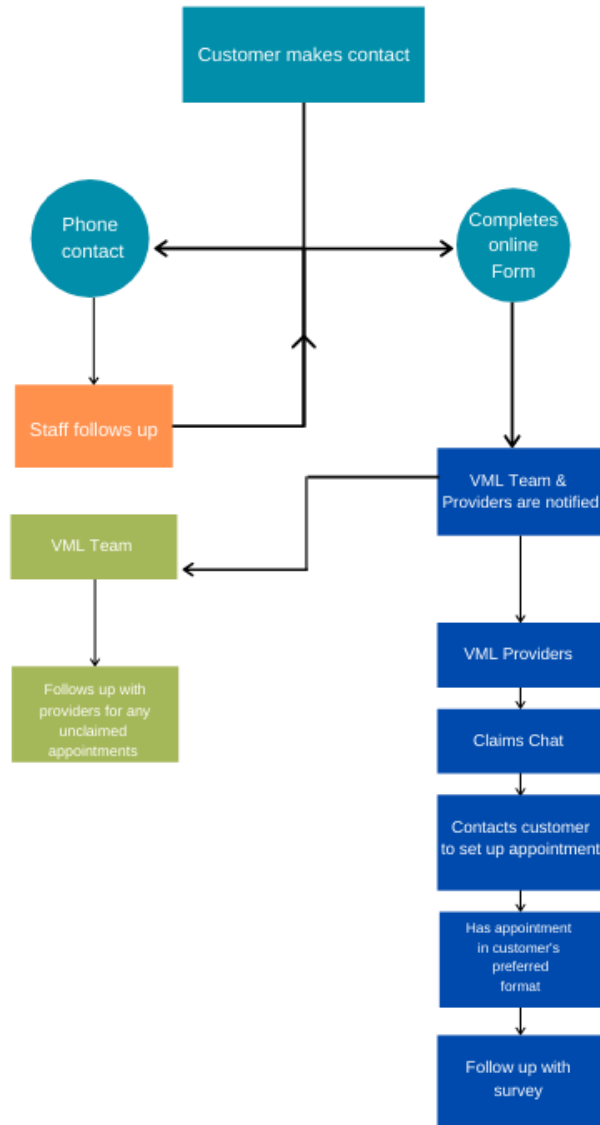
- Virtual My Librarian (VML) uses several systems already in place at BCPL:
 - Microsoft Forms – customer requests
 - Microsoft SharePoint – captures request data as “tickets”
 - Microsoft PowerAutomate – sends notifications to VML providers
 - Microsoft Teams – facilitates provider communication and document/information sharing
 - Springshare LibChat – begins video appointments
 - Zoom – conducting video appointments
 - SurveyMonkey – follow-up satisfaction survey

Flow of Service



- Customer reaches out via public form on website.
- Form entry triggers email to VML providers.
- VML providers review the resulting ticket and claim the appointment.
- For video appointments, staff send link to custom chat widget.

Flow of Service



- Customer enters chat via widget.
- Provider begins screensharing using Zoom integration with LibChat.
- Appointment occurs via Zoom.
- Provider ends Zoom session and sends follow up chat/email.



Form Flow/Calendar

English (United States) ▼

Sign Up For a Virtual My Librarian Appointment

Book a free 60-minute Virtual My Librarian appointment to work with a librarian by phone or video chat. We're ready to help set up email accounts, conduct job searches, write resumes, and more. Please select a date at least 2 days in the future. Same-day appointments are not available.

* Required

1. Customer name *

2. Preferred contact method *

☐ Email

☐ Phone

3. Preferred appointment method *

For video visits, we use Zoom as our service platform.



Master List of All Appointments Unclaimed Appointments Claimed Appointments Completed Appointments EDIT LINKS

Virtual MyLibrarian intake form

October 2020

27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Today is Thursday, October 1, 2020

Thursday, October 1, 2020

THURSDAY

7 AM	Vanessa (Alexandra Houff)
8	Fred
9	Key
10	
11	
12 PM	
1	
2	

Home

Conversations

Documents

Notebook

Pages

Virtual MyLibrarian intake form

Unclaimed Appointment View

Claimed Appointments

Completed Appointments

Virtual MyLibrarian sign up

Site contents

Recent

Recycle Bin

Customer Name

Provider Name

View in calendar for providers to claim

Form on BCPL.info – available in multiple languages



Claim Form

O365-Virtu... > Virtual My... > Vanessa

Customer Name *

Vanessa

Date and time of message *

9/27/2020

9:35 PM

Desired Appointment Time

☐ Morning (9-12)

☐ Early Afternoon (12-3)

☐ Late Afternoon (3-6)

☒ Flexible

Appointment Status

Select an option

Customer Phone Number

443-

Please enter either a phone number or an email

Appointment Details

☐ Basic computer skills

☐ Email

☐ Job search or online applications

☐ Writing or formatting a resume

☐ Mobile Device/Tablet Setup

☐ Apps for mobile devices

☐ Research assistance

☐ Downloading e-books, audiobooks or e-magazines

☐ Microsoft Office

☐ Operating System (Windows 7/10, MacOS, Chrome OS)

☐ Social networking (Facebook, LinkedIn)

☐ Other

What is the desired appointment subject?

Actual Appointment Date/Time

Enter a date

12:00 AM

Customer email

@msn.com

If "Other" please provide additional details:

Enter value here

Return Contact Type *

☐ Phone

☒ Email

Customer Question

Interested in Retirement Information re Health Plans, Tricare, and checklist. And KNApp

Appointment type preferred

☒ Phone call

☐ Video meeting

Desired appointment date *

10/5/2020

Claimed By

Alexandra Houff

Enter a name or email address

Notes

Emailed customer 9/28; no response as of 10/1. ~AMH

Any additional information

Claimed?

☒ Yes

Has this been claimed?

Save

Cancel

Staff provider claims

Provider enters notes about appointment as needed



Starting VML Appointment - LibChat

- Staff provider logs into LibChat
- Customer is provided link to MyLibrarian Widget in appointment confirmation email
- Staff provider waits for customer to enter via widget
- Staff provider claims chat and begins appointment

Virtual My Librarian appointments

Your librarian has not logged in yet. We will be with you shortly.

Thank you for your patience!

Provider not logged in yet



Welcome to your virtual My Librarian appointment!

Name

Appointment Time

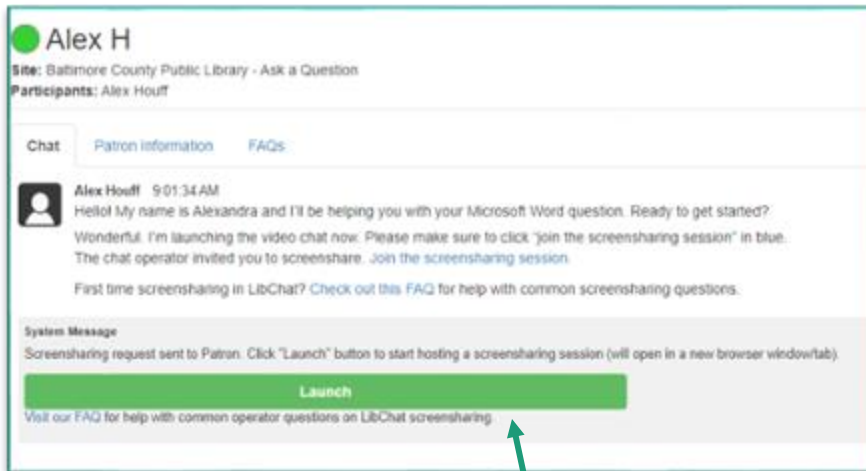
Start Chat

Provider logged in



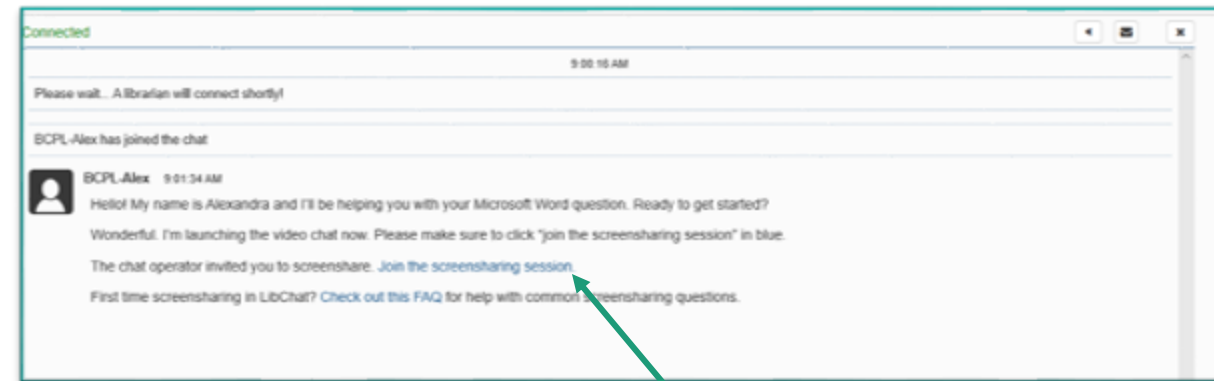
Provider—Customer Views

- Provider View



What a provider sees when they “start screensharing”

- Customer View



What a customer sees when they are invited to screenshare

Lessons Learned

- Train staff on LibChat widgets and what causes them to be active/inactive.
- Staff who are in both the General Chat department and the MyLibrarian department should turn off monitoring for the General Chat when expecting a MyLibrarian appointment.
- Remind staff that any chatting in Zoom is separate from chats in LibChat.
- Remind staff that there is a likelihood that customers will not return to the LibChat chat window and follow up survey link will need to be sent via email as well.



Wrap up and Q&A



Contact Us With Any Questions

- Tom Malley
tmalley@bcpl.net
- Cynthia Dennis
cjdennis@bcpl.net
- Alex Houff
ahouff@bcpl.net