Type of Contribution: POSTER

Using Data to Manage Proactive Chat Reference

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# Introduction

Proactive chat, a popup widget inviting users to access chat reference services at the point of need, has the potential to reach new groups of patrons. Patrons may hesitate to initiate chat reference services because they do not know about them or do not understand the service. Proactive chat may help bridge this knowledge gap by reaching out to the patron1. This may have important implications for equity in access to expert research services. This project seeks to understand some of the management and engagement variables associated with proactive chat in order to implement this service sustainably and demonstrate impact.

**Theoretical framework & Research questions**

This study analyzes ten months of proactive chat data from a large institution using quantitative methods. There are many variables in implementing proactive chat that can alter the impact the service has on users and staff. Several studies show that implementing proactive chat increases chat volume and complexity including Zhang & Mayer2, Kemp, Ellis, and Maloney3, Rich and Lux4, and Epstein5. The impact of the timing of the proactive chat pop-up window on this increase is not well understood. This study seeks to confirm the findings in the literature that proactive chat, even at a more modest pop-up trigger time, increases volume and complexity. This study also investigates the impact of trigger time on the volume and complexity of chats.

**Methodology & Research**

The authors examined daily chats and complexity rankings using the READ Scale6 from the proactive experimental period compared with corresponding data from the previous year to understand the changes to volume and complexity. To understand the relationship between trigger time and chat volume and complexity, they conducted correlations for the trigger time periods with the daily proactive chat and READ Scale numbers.

**Results & Discussion**

The authors found a 76.6% overall increase in chat volume and a statistically significant increase in complexity after implementing proactive chat. Trigger time was negatively correlated with chat volume; as the time to launch the proactive chat pop-up box increased, the volume of proactive chat decreased. The authors also found that as trigger time increased, questions became more complex. These findings could help libraries institute proactive chat services more sustainably and manage the level of staffing with greater nuance. Proactive chat has enormous potential to reach new users and deliver research assistance at the point of need. These findings may help libraries implement this service more sustainably.

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