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## INTRODUCTION

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Research shows that patrons use IM and SMS as a regular means of communication with friends, family, and colleagues. In order to meet them at the point of need and interact with them via the methods they prefer, libraries must offer IM and SMS as part of their reference services options.

### ▶ **WHAT IS IM/SMS/TEXT MESSAGE REFERENCE?**

Before you can begin to provide these new services, you must first understand the terminology. Instant messaging (IM), or chat reference, is a form of real-time direct text-based communication between two or more people using computers or other devices, along with shared clients or software. The user's message is conveyed over a network, such as the Internet. Short Message Service (SMS) is the text communication service component of phone, web, or mobile communication systems, using standardized communications protocols that allow the exchange of short text messages between fixed line or mobile phone devices. In this book we often use "SMS" and "text messaging" as synonyms and are strictly focused on messages that are derived from cell phones.

### ▶ **HOW DOES IT DIFFER FROM VIRTUAL REFERENCE?**

Virtual reference encompasses all reference that takes place in the virtual realm, including e-mail, IM, and text messaging/SMS. In other

words, it includes patron reference services that do not occur in person or on the phone. Think of “virtual reference” as an umbrella term and “IM” and “text messaging/SMS” as specific services under the umbrella. In this book we are specifically addressing the IM and SMS forms of virtual reference services. E-mail is an important service to offer patrons and should be included in a robust virtual reference service but will not be discussed in this book.

## ▶ WHO USES IM AND SMS?

The past few years have seen a tremendous spike in the usage of text messaging/SMS. Text messaging is accessible to most cell phone users; as long as the cell phone user has a plan that enables text messaging/SMS, most cell phones are capable of handling this form of communication. Another reason for the surge in text messaging or SMS is the availability and increased usage of devices such as iPhones, Blackberries, and Androids, which make text messaging easier. In 2010, iPhone sales were estimated to be \$37 million and will increase in 2011 to an estimated value of \$48 million (“iPhone Sales by Year, 2010–2015,” *Market Share Reporter*, 2011, Online Edition; Gale, 2010, reproduced in Business and Company Resource Center).

Some groups, such as teenagers, have adopted text messaging more quickly than other groups. A survey by the Pew Research Center’s Internet & American Life Project in 2009 (<http://www.pewinternet.org/Reports/2010/Teens-and-Mobile-Phones.aspx>) reported that 54 percent of teenagers surveyed text daily. Sending text messages to their peers is their preferred method of communication over calling, e-mailing, and face-to-face communication; when talking to their parents, teenagers choose the phone. In addition to the popularity of text messages for teens, another Pew Research survey in 2011 (<http://www.pewinternet.org/Infographics/2011/Generations-and-cell-phones.aspx>) found that 72 percent of all cell phone owners surveyed rated text messaging as one of the most frequently used features on their phones.

Instant messaging takes place on the Internet and can be a quick way to communicate with others who are also online. A survey done by Forrester Research found that 33 percent of Americans over 18 use instant messaging at least once a month (“Understanding the Changing Needs of the US Online Consumer, 2010,” by Jacqueline Anderson, 2010; <http://www.forrester.com/>). Clearly instant messaging is a popular mode of communication and affords users a quick way to receive answers to their questions.

## ► WHY CREATE IM AND SMS SERVICES?

Clearly there is widespread adoption of instant messaging and text messaging/SMS among a variety of potential library users. As more and more users of different ages utilize these communication tools, it is imperative that libraries also make use of them. For some groups, such as teenagers, text messaging/SMS is one of the primary ways that they interact with their peers.

Furthermore, libraries need to provide services similar to those used on sites across the Internet, as users will look for these options. For example, while a library provides services different from a retail store, patrons are habituated to IM help on retail sites and this habit will be carried to other sites as well. Users are also familiar with using IM to get quick answers at work or to quickly connect with a friend to ask a question. In order to stay relevant, libraries should meet patrons at their point of need by using the tools that their patrons use on a regular basis, namely, IM and SMS.

## ► IMPLEMENTING AN IM/SMS SERVICE

The book will walk you through the steps of implementing an IM and SMS reference service. It is critical that you think through the implementation so that you build a popular and well-used service. This will take more time and effort than just publicizing an IM handle or text message number to patrons, but it will be worthwhile in the end, as more patrons will use the service and will get the best answers possible.

You can choose to offer either an IM reference service or an SMS reference service, or you can implement both technologies and monitor them through one system at the same time. If you are interested in offering your patrons both an IM and SMS solution, we advocate for choosing one system that integrates both technologies. This will streamline your services and most likely make it easier on the librarians monitoring incoming questions by having to monitor only a single system. There are distinct advantages to each method, and after deliberation you may find, for either financial or patron-driven reasons, that you need or want to offer only one type of service.

In this book, because we advocate for a combined IM and SMS system, we often blur the line between the systems. This is most often the case when talking about a system (such as LibraryH3lp) that integrates both types of services. Much of our text actually addresses both services, and you can apply many of our suggestions to either

service if you do decide to go with one over the other. However, it is also important to remember that patrons will utilize IM and SMS services very differently. While library staff may see the back end of the service one way, patrons choose to interact with the library via IM or SMS for different reasons, the main reason being most often a matter of convenience.