

# R U There? How to Reach a Virtual Audience Through Affordable Marketing Strategies

Laura Taddeo

**ABSTRACT.** Virtual reference is a vital service component of many libraries. Whether serving college students or the general public, a real-time reference service demands highly trained staff and quality resources. What can administrators do to make sure their users make the most of this cutting-edge service? The University at Buffalo (UB) was one of the first universities to establish a virtual reference service. Known as *Instant Librarian*, the chat room thrives as a major public service without placing a drain on staff or budget. This article discusses the marketing strategies UB applies to chat reference, including advertising, use of icons, and user surveys for assessment.

**KEYWORDS.** Chat reference, digital reference, marketing strategies, promotions, publicity, virtual reference

## *INTRODUCTION*

“Lack of traffic is the kiss of death for virtual reference services” (Coffman 2003, 75). While this statement may seem like a cliché or even a melodramatic warning, it should serve as the main motivation

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behind a library developing a strong marketing campaign. Like any public service, virtual reference revolves around the needs of a library's clientele and requires devoted staff participation, special software, training, and funds. Without a sound marketing plan patrons will not get the most out of a service and an institution risks wasting both time and money. The University at Buffalo (UB) was one of the first Association of Research Libraries (ARL) institutions to implement a virtual reference service in 2001. In 2002, a SPEC survey was sent to 124 ARL member libraries. Sixty-six libraries responded to the survey and only about half the respondents reported that they offered chat reference. All but two of these (including UB) services had been in operation less than two years (Ronan and Turner 2002, 9). Its real-time chat service called *Instant Librarian* has expanded UB librarians' reference encounters beyond the traditional face-to-face, phone, and e-mail queries. Six years later, *Instant Librarian* is at its strongest and continues to receive positive feedback from its user community. Much of this success stems from a well-trained staff and excellent library resources used to answer the online questions received. However, a strong marketing plan plays a vital role in *Instant Librarian's* prominent status at UB's libraries.

### ***HAVE A PLAN***

According to Judy Adams-Volpe, UB's Director of University Libraries Communication & Development, marketing creates an ongoing connection between a library or organization and the population groups served. The libraries can communicate with, report to, and receive feedback from active and potential users (Adams 2004, 1). It is also cost-effective to implement a solid marketing plan. Software purchases are not the only potential cost involved in running a virtual reference service. Devoting several hours a week to chat reference represents a significant commitment from each librarian who contributes to the service. In addition, graduate library students, who often help staff the virtual service, want to be paid in lieu of receiving course credit, placing financial demands on a library budget.

Prior to creating promotional flyers or advertising on the local college radio station, begin with some research about how to develop a sound marketing plan. There is a tremendous amount of literature published on marketing all sorts of library services; however, only a small portion is directly related to virtual reference. Steve Coffman's *Going Live, Starting and Running a Virtual Reference Service* (2003) is a perfect starting point,

providing both practical and theoretical advice on setting up a service, along with a section on sound marketing strategies. After you've read Coffman's introduction to the virtual environment, read Luke Vilelle's *Marketing Virtual Reference: What Academic Libraries Have Done* (2005). Vilelle reviews promotional efforts by academic libraries described in recent literature, and includes snapshots of current effective marketing practices. The publication *Blueprint for your Library Marketing Plan: A Guide to Help You Survive and Thrive* (Fisher and Pride 2006) contains effective worksheets for organizing and planning a marketing strategy. *Guidelines for Implementing and Maintaining Virtual Reference Services* developed by the Machine-Assisted Reference Section Digital Reference Guidelines Ad Hoc Committee, Reference and User Services Association (2004) also outlines the recommended standards for marketing a service. Endorsed by the American Library Association, these guidelines could be used in any documentation that an administrator might need to justify costs required to support a virtual reference marketing campaign. Providing support documentation demonstrates that your plan is well researched and based on actual data, rather than just your hunch that marketing will help a service thrive and be in demand.

Keep in mind that it's important to allow staff some time to become comfortable with a new service before beginning an aggressive marketing campaign. While UB has a Director of University Libraries Communication & Development, there is no official "written" plan for marketing *Instant Librarian*. Instead, the Director works closely with *Instant Librarian's* Coordinator, and together they develop successful strategies based on users' needs and expectations. These techniques will be discussed in detail throughout this article.

Knowing the clientele that your institution serves is crucial to selecting the right forms of publicity. According to Coffman,

user groups or segments that you identify will differ from library to library. But there are two important segments that all libraries have in common: The group of patrons who are already using your library services either through your website or inside your building; and everyone else . . . i.e., those people who are not currently using your services and probably have never visited your building or website" (2003, 77).

In other words, what are the best ways to reach an undergraduate vs. a member of the outside community? An advertisement in the college

newspaper probably won't reach a community user, but will definitely reach a large student population.

## ***INSTANT LIBRARIAN AT UB***

### ***Background***

Before delving into the details of UB's marketing strategies, a bit of background about how the virtual reference service operates is appropriate. It's important to understand the day-to-day details about the targeted service, its overall purpose, and audience level. *Instant Librarian* began as a pilot project in 2000 and became an established public service at the UB in the following year. While not open 24/7, the service complements the traditional reference desk's hours and stays open 57 hours a week during the fall and spring semesters. The service is staffed by 26 librarians and 3 library school graduate students (hereafter called either "librarians" or "staffers"). Each librarian, on a volunteer basis, generally only works the chat room about two hours a week. A graduate student may work up to eight hours a week and is either paid or receives course credit. Staffers can work from their office or home. *Instant Librarian's* manager "hires and trains the staffers, coordinates the schedules, troubleshoots software problems, creates promotional materials, and utilizes the *Instant Librarian* listserv to make policy announcements and answer questions" (Taddeo and Hackenberg 2006, 69).

Until early 2007, AOL Instant Messenger software was used as the chat room interface because it is free to use, platform-independent, and user-friendly. It's considered the most popular chat software used in America (Shiu and Lenhart 2004, iii), making it very familiar to college level students. However, Meebo is now the preferred interface choice for chat reference at UB. With Meebo patrons can use *Instant Librarian* without downloading special software and are not required to take time to create a unique username.

According to Coffman and Arret, who are avid followers of the development of virtual reference, the typical chat question takes 10–15 minutes to answer (2004, 52). On average, an *Instant Librarian* staffer may receive up to three queries per hour, each of which can result in interactions lasting 15–30 minutes. This data is collected twice a year during Reference Statistics Sampling Weeks in which librarians are asked to keep track of all reference questions (e-mail, phone, in-person, etc.). The coordinator also has students log questions for

two weeks each semester so she has a sampling of common questions. The nature of the question and the time spent answering each query is logged and analyzed. Chat staffers have access to websites that readily assist in responding to typical ready reference questions and to guides for chat abbreviations used by patrons that can sometimes create miscommunication during an online exchange. The service is not restricted to UB-affiliated patrons so questions come from a diverse population.

Some issues that arise during a virtual reference desk exchange include the need for librarians to adapt to lack of verbal cues, body language, and gestures that they are accustomed to at the traditional face-to-face reference desk. Training the staffers on techniques to interpret and answer questions and establishing a set schedule keep the service running smoothly. According to Ronan, one of the biggest challenges of real-time reference is learning to communicate effectively with remote users and translating the interpersonal skills used at the physical reference desk into the virtual environment. (2003, 43). In her article on the online reference interview, Ronan addresses how to overcome these obstacles. Based on the RUSA Guidelines for Behavioral Performance of Reference and Information Services Professionals, she provides behavioral guidelines for chat librarians and explains how librarians can effectively teach searching skills to online patrons (43–46). Taking it a step further, Radford analyzed hundreds of virtual reference transcripts, revealing that they require similar tactics used during face-to-face library encounters: “These include techniques for rapport building, compensation for lack of nonverbal cues, strategies for relationship development, evidence of deference and respect, face-saving tactics, greeting and closing rituals” (2006, 1046). The chat reference coordinator at UB addresses many of these factors while training the *Instant Librarian* staffers. Making *Instant Librarian* a permanent and vital part of the University’s public service menu entails not only maintaining a qualified and confident staff, but also establishing an ongoing marketing and assessment plan. A service “is guaranteed to flop unless you pay sufficient attention to marketing” (Coffman 2003, 73). For an in-depth look at a successful marketing campaign, take a look at Brenda Bailey-Hainer’s report on AskColorado, “a statewide 24/7 virtual reference service provided by Colorado librarians” (2004, 12). While the Colorado service does not solely serve an academic community, the campaign efforts could be applied to a university setting. Their marketing strategies proved so effective they intend to double their usage by the public and receive more state funding (15). Many of their techniques are implemented at UB and are discussed below.

## ***Marketing Strategies***

“The Chartered Institute of Marketing offers the following definition of marketing: “Marketing is the management process responsible for identifying, anticipating and satisfying customer requirements profitably” (2005, 2). With that in mind, marketing a library service such as chat reference involves implementing sound promotional techniques and public relations activities that fall within your budget. There are many marketing strategies that a library can incorporate without spending a lot of money. Among these are a striking logo, Web presence, newspaper ads, press releases, news articles, media interviews, flyers, word of mouth, signage, library publications, programs/special events, and user surveys.

### ***Branding a Logo***

One of the first steps UB took was to create an effective name and logo for their real-time reference service. Initially, the service was called Instant Message. However, such a generic name didn't imply that it was a library service and confused patrons. The chat coordinator e-mailed the staffers' listserv for name suggestions and then polled library staff on the top three. *Instant Librarian* received the most votes for clarity and uniqueness. In addition, we attached a graphical icon to the name creating a logo unique to UB. While hiring a graphic artist might seem to be the best way to get a professional look, it is also a costly way to spend what little money a library has to devote to one service. Libraries often have talented staff that are skilled in either design or possess degrees in graphic art. Seek help within your organization first before considering paying for a consultant or professional designer. Since staff will already have projects and regular assigned duties, give them plenty of time to work on the design, thus facilitating a well thought out and creative end product. Details about the icon's size and color are crucial factors. Some organizations will have Web guidelines they need to follow or specific colors they need to use to guarantee consistency throughout their websites.

UB initially used the AOL Instant Message icon as their logo. Once the service became more established, it was felt that a more distinct icon was needed. The coordinator asked the Educational Technology Center (ETC), which is staffed with librarians and instructional design specialists who serve all of UB faculty, to help design a new logo. Dropping the AOL brand and changing the colors to match the overall look of the Library website were important factors in the new design. The icon that was eventually chosen was developed by ETC Instructional Design Specialist Thomas Slomka and Rose Orcutt, Special Projects Librarian (Figure 1).

FIGURE 1.



It was tailored to appeal to students—the majority of *Instant Librarians'* users. While there have been no statistics gathered on the likeability of the icon, the service has definitely attracted more users since the logo change.

### *Web Presence*

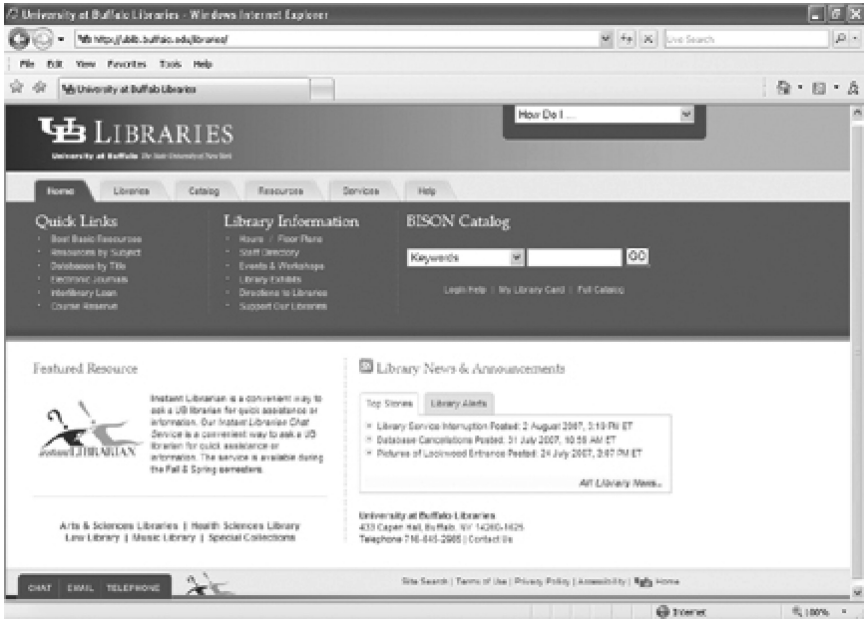
Once the logo is deemed eye catching and memorable, place it where it will get a wide audience—the most obvious being the library's homepage. While it may seem like the most appropriate place for the icon, linking from a library's homepage could be a complicated process. There may be strict guidelines or protocol to follow before a new service can be advertised. This often depends on the size and structure of an organization. For instance, a small, specialized library may have one person in charge of the website. The virtual reference coordinator may just have to walk one office door over and ask for something to be placed on the website no questions asked. However, a larger institution, such as a university or public library, may have a Web team that follows strict guidelines about what goes on the homepage and when. There may be many departments who want to have their resources placed on the homepage. Thus, the coordinator or marketing director must advocate for the importance of retaining a permanent or semipermanent logo positioned on the site.

Obviously, the person or committee in charge of the marketing needs to be familiar with the Web protocol of their organization. At UB, the *Instant Librarian* Coordinator and Director of University Libraries Communication & Development have a good relationship with the Web team. They also have garnered the support of the administration for a prominent placement of the logo on the Libraries' homepage (Figure 2).

It is also featured on the "Databases by Title" page—a sector of the website in which students link to online databases (Figure 3).

Having an ad on this page seems to be quite effective. As students begin researching their topics they are immediately reminded of the chat

FIGURE 2.



reference service. *Instant Librarian* staffers often report that visitors' questions are about searching strategies for specific databases.

### *Newspaper Advertisements*

Newspaper advertisements are easy ways to reach your clientele. They usually cost money so choosing the right paper, the appropriate time of year, and placement within the newspaper is essential. Currently, UB advertises in the *Spectrum*, the campus student newspaper, about three times each semester (Figure 4).

Ads are placed during busier times of the semester and week. Running an ad on a Friday, for instance, is not effective since many students don't have classes on Fridays and take off for a long weekend. In addition, an ad is not run right before spring break. If possible, try to request placement of an ad at the top right or center of a page. Always try to avoid burying an ad at the bottom or risk it being overshadowed by other advertisements. The design of the ads should be refreshed and revised periodically. UB alternates the day of week and time of semester the ads appear.



FIGURE 3.

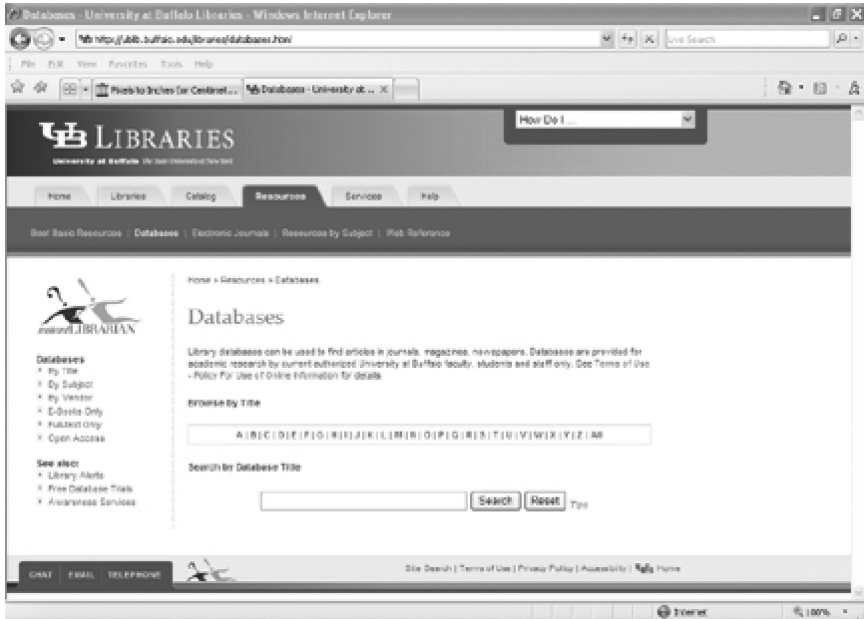


FIGURE 4.

**Info Chat ...**

**Instant Librarian is online:**

11am-10pm Monday-Thursday  
 11am - 3pm Friday  
 1pm-10pm Sunday

**Instant Librarian** is a convenient way to ask a UB librarian for quick assistance or information

<http://ublib.buffalo.edu/libraries/help/refchat.html>

### *Press Releases*

A press release is an effective method of announcing a new service. “A press release should answer the questions Who? What? Where? When? And How? It should be organized like a pyramid, with the most important information at the top” (Fisher and Pride 2006, 70). This information includes the name of the person in charge of the service along with an e-mail address or phone number. The headline should be memorable and the text should include quotes or statistics and a graphic, if possible. For instance, insert comments from students complimenting the usefulness of the service or list the hours of operation. Usually, a library can send press releases to professional publications without getting permission from their internal news bureau, if they have one. However, if a release is going out internally or externally to general newspapers or other publications, such as to a university’s campus paper or community newspaper, it might need some form of administrative approval. Again, whoever is in charge of publicity needs to be aware of the organization’s rules and regulations regarding such matters. The editor of UB’s University News Services wrote an article about *Instant Librarian* for the Campus newspaper, the *Reporter*, and then sent out a press release to various publications. Before the article was released, the Coordinator reviewed it to make sure the chat service was accurately profiled. *Instant Librarian* received significant local and national attention following this piece.

### *Newspaper Articles*

Depending on the audience targeted, a brief article in your local newspaper or school newspaper can provide some short-term publicity. *Business First*, western New York’s leading business paper, ran an article with the headline “UB Library Aid Just an Instant Message Away” that sparked significant interest in *Instant Librarian* (Drury 2002). Articles should be to the point, highlighting anything unique about the service, such as 24/7 access, if available. Screen shots of transcripts are not typically used to avoid patron privacy issues. Whether in the form of a press release or article, make sure that the service is staffed properly and staffers are ready to answer questions about the service. The goal is to make positive first impressions and to create repeat users. The *Instant Librarian* Coordinator of the service always sends a thank you letter to the writer of the article after the story runs. This helps establish a good relationship with the press, which in turn could lead to future favors, such as gaining a better spot in page layout for future advertisements or a discount on repeated ads.

## *Radio*

In the age of the Internet, the radio is often not thought of as a way to reach today's students. However, it is still a powerful tool to reach not only college students but also members of a local community. Coffman points out that one-time features on a radio show, like running a single ad, do not have lasting effect. He encourages organizations to get a "regular gig" on a radio show (2003, 88). While a great idea, it's not the most feasible solution for the average library. UB was fortunate to be featured on their local National Public Radio (NPR) radio affiliate, WBFO. The NPR reporter contacted the *Instant Librarian* Coordinator after reading about the service in the school newspaper; hence, the advantage of a newspaper article. A caveat about a radio interview: the interviewee may not be given time to prepare canned answers. Luckily, the *Instant Librarian* Coordinator was given a day to prepare for the interview. Some basic advice for the interviewee:

- always speak with energy and enthusiasm;
- have some canned responses to frequently asked questions about the service in case called on for an interview at the last minute;
- don't sound like you're reading a script;
- be professional and confident and back up your points with data, such as statistics about users' satisfaction or library hours;
- try to replace a negative question with a positive answer or spin. For instance, if the interviewer asks why a service isn't open 24 hours a day, the coordinator could point out that the service is open in the evening after 9 p.m. when the traditional reference desk is closed;
- lastly, know if you need to get permission or the "go-ahead" from your organization before agreeing to an interview.

Having a one-time interview on a radio show may not lead to a regular gig, but it will give a library free publicity. If a university or college has its own campus radio station, it also might be worthwhile to pay for advertising during busy air times.

## *In House Promotions*

### *FLYERS and Table Tents*

One of the easiest and least expensive ways to advertise a service is the promotional flyer. A flyer should be very simple and not crowded with text, avoiding library jargon. UB's flyers were printed on colored paper and cut into four squares per page. The initial flyer had no description of the service, just the name of the service with hours and Web address. A catchy heading was used (Figure 5).

FIGURE 5.



A subsequent flyer captured the *Instant Librarian* logo with a brief sentence about the service, the Web address, and the hours open (Figure 6).

The coordinator or other library staff can create flyers quickly. Before making a large amount of copies, always ask at least two people to proof the flyers for grammatical or spelling errors and possible mistakes in the Web address. Solicit comments from a sample of the target audience about the overall look of the flyer. Flyers can be distributed at reference desks, public computer areas or labs, or library instruction workshops. The *Instant Librarian* flyers are relatively small and are handed out at reference and circulation desks without being a burden to staffers or users. The reverse side is often used for jotting down library call numbers or titles. The patron then walks away with the information they were looking for and a reminder about a unique library service. Librarians also place flyers in student and faculty mailboxes or in informational library packets, such as library orientation folders or materials that are provided to transfer students. They are distributed on study tables and placed on bulletin boards throughout the library and campus facilities, such as dormitories and student unions. In addition to the flyer format, table tents are effective tools to reach a large population. They should contain the same information as the flyers and be placed on tables in study rooms, cafes, and other high traffic areas around

FIGURE 6.

**NEED HELP?**

**Instant Librarian** is online:  
 11am-10pm Monday-Thursday  
 11am - 3pm Friday  
 1pm-10pm Sunday

**Instant Librarian** is a convenient way to ask a UB  
 librarian for quick assistance or information

<http://ublib.buffalo.edu/libraries/help/refchat.html>



*instant***LIBRARIAN**  
 UB Libraries

your library or campus. Remember, however, if you decide to place them on tables in your campus cafeterias, you might need to get approval from the manager of the Dining and Catering Services. *Instant Librarian's* most recent mode of publicity includes colorful table tents strategically placed throughout the libraries' study and computer areas. Lastly, promotional materials should be saved in a computer file that is backed periodically up so material can be easily revised and reprinted. As Kratzert notes, because of the transitory nature of the student population, an online reference service needs to be continually marketed (2001, 80). Promotional materials should not become stale or overused and must always address the interest of your current audience.

### *Word of Mouth*

Simply talking about a service to people will help spread the word and bring customers to the product. UB's information literacy librarians often announce the service during library workshops for undergraduates and graduate students. They remind students that they can use *Instant Librarian* to ask follow-up questions about their research process, especially during the evening when reference librarians are often not around to answer questions in person. Professors and teaching assistants are also asked to

place the Web address or icon on their syllabi, in a section labeled “research assistance” or “research resources.”

### *Signage*

While it may seem like the average patron doesn’t pay too much attention to signs, it is still useful to place them in areas with significant activity. After the reference desk closes in the evening, UB librarians place a sign on the desk that reminds patrons to use *Instant Librarian* until 10 p.m. for additional assistance. Remember, signs need to be in large print, visible from a distance, and accompanied by the logo of the service and Web address. They should be placed in high-traffic areas, such as by elevators, bulletin boards, library cafes, or near restrooms.

### *Annual Reports*

In order to create support for marketing activities from an institution’s administration, there needs to be documentation about the usefulness and productivity of a service. For example, include a section about the virtual reference service in the library’s annual report. Give statistics about patron usage and satisfaction, along with the logo, highlighting the cutting-edge aspect of the service. Chat reference fits well in the UB Libraries’ “progress report” within sections highlighting advancements in technology and public services. In fact, many top administrators rely on this report to keep abreast of library developments at UB.

### *Online Workbooks*

Many colleges and universities have a Library Skills Workbook that their undergraduates must complete in order to graduate. Designing one or two questions in the workbook around the virtual reference service is advisable. Thus, students are either introduced to the service or reminded that real-time help is available. For instance, UB’s Workbook question is as simple as it can get:

How can you get reference assistance from UB librarians?

- a. By visiting or calling the reference desk at any of the libraries
- b. Via e-mail or via *Instant Librarian* in the fall and spring semesters
- c. By using the EndNote link for in-depth research
- d. a and b

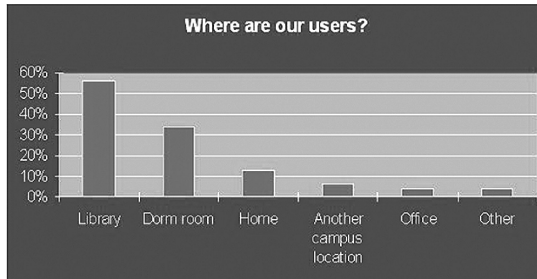
### *Brown Bag Lunches*

Remember that publicity should not just be confined to library patrons. At UB, reference librarians were initially required to work the virtual reference desk an hour or so a week. This was eventually changed to a volunteer basis due to some resentment among the staff. Some librarians reported that they felt an increase in stress due to the fast nature of the service. Others felt that devoting an hour or so of their time to this service was not part of their initial job duties and that they wanted some kind of credit or compensation for the added responsibility. Those uncomfortable working in a virtual setting felt it was a poor substitute for face-to-face reference, not a complement. In response to some of the staff reluctance, “brown bag lunches” were initiated. During the lunches, librarians talked about the ease of learning the software or the success of the online sessions. This helped recruit new volunteers and relieved some skepticism or fears a few staffers had regarding the service. These informal meetings are also good venues for brainstorming about new marketing ideas or discussing problems that arise during chat sessions.

### *User Surveys*

How are user surveys related to marketing? Simply put, the information collected from a survey provides a snapshot of users and their satisfaction with the product and serves as an assessment tool. User feedback can dictate where to focus publicity—e.g., school newspapers, library website, or a college radio station. If the statistics collected reveal that the majority of users are accessing the service from their dorm room, then advertising in the college newspaper or website would carry more weight than a press release in a library publication or an interview on a local radio station. The survey itself does not have to be very complicated. *Instant Librarian* runs a very brief survey during a two-week period each semester using a JavaScript pop-up window, so the survey is submitted on a volunteer basis. Survey questions that users are asked include their major, their preference for help (i.e., chat reference, in-person help), where they access the service, their status (undergraduate, graduate, public), why they use *Instant Librarian*, and what they like best about the service. The results from the *Instant Librarian* surveys conducted in 2002–2005 show that the majority of users are affiliated with UB (87%) and are aged 18–22 years (55%). Users’ majors are (in descending order of frequency) social sciences (33%), other (26%), sciences (17%), humanities (10%), and undecided (5%) (see Figure 7).

FIGURE 7.



#### User Stats

- 87% UB affiliated
- 55% aged 18-22
- 34 % Graduate Students

Thus, the Library continues to concentrate publicity around the website and campus newspaper. Both of these modes cost little and provide good exposure.

### ***FUTURE***

Students today expect to have resources at their fingertips 24/7. While *Instant Librarian* is not open around the clock, it certainly complements the traditional reference desk that closes at 9 p.m. Publicizing the advantages of virtual reference will attract more users. Out of all of the suggestions discussed above, having a prominent presence on the UB Libraries' website has had the most impact. Today's students will more likely surf the website for help than read a flyer. Plus, the Web icon provides instant connection to the service. Adding the *Instant Librarian* icon to additional Web pages within the UB Libraries' site is a future goal. Just recently, a link to the chat service has been placed within some of the online reference sources. If students are in need of assistance while searching any of the Eureka databases such as the Avery Index (a popular architecture index), they can simply click on the "Ask a Librarian" link to connect them to UB's *Instant Librarian*. Giveaways such as magnets or pencils with the service logo and URL on them are other potential modes of publicity. Since this costs money, there needs to be support from the



library's administration. Currently, a group of librarians are considering incorporating a bibliographic instruction component in the virtual reference service. Brief video tutorials that explain how to use the public access catalog or demonstrate simple database searching are being designed and could eventually be connected through *Instant Librarian*. Consequently, the chat room becomes a marketing tool for other library resources. Regarding the user surveys, the Coordinator continues to add questions that reveal more details about users' needs and expectations. Transcript analyses might also be a future assessment tool. In their article about marketing, manpower, and measurement of virtual reference, Dennison, Sanders, and Sims note that transcript reviews should "include evaluation of appropriateness of responses, use of standard scripts, accuracy of answers, completeness of answers, use of resources, referrals and appropriateness of referrals" (2005, 27). Ultimately, a formal assessment of the marketing strategies themselves would be an ideal way to document the impact of each mode. This would, of course, require administrative support and staff time.

The above suggestions are certainly not the only options a library should consider when marketing a virtual reference service. Whatever the type of service, an organization should aim for quality and user satisfaction. The *Instant Librarian* staff is highly skilled in database searching and navigating the Web, and most librarians have specialized subject expertise. A combination of excellent service and successful marketing strategies will make any virtual reference service a fundamental component in an institution's public services arena.

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