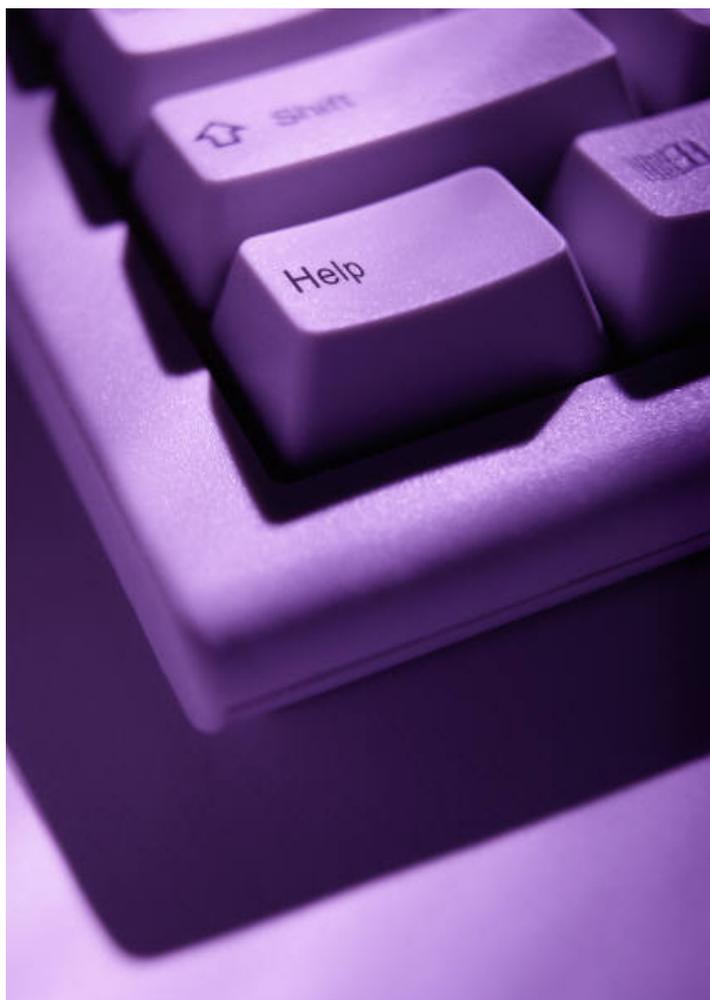


LiveHelp Project Manager's Toolkit



© 2008 Pro Bono Net

probono.net

Introduction

As with any new technology project, the implementation and maintenance of a LiveHelp project takes careful planning and preparation. Luckily for those interested in taking on this task, it has successfully been done before. This document is a collection of considerations and suggestions based heavily on the experiences of previous LiveHelp projects. It is meant to serve as guidance for anybody interested in implementing LiveHelp on any access to justice website, and as reference for those who are maintaining their LiveHelp projects. You can read it from beginning to end to get a comprehensive picture of the activities involved in the ramp up and maintenance of a project, or you can guide yourself through the document based on the sections you are most curious or concerned about.

This document contains discussion of various planning and implementation steps that will help you understand the reason for each step and how it can apply to your project. At the end of discussion sections there will be a link to the reference section of this document or a place on the Internet that can guide you through the process of carrying out that particular action step.

This toolkit was developed by Pro Bono Net with support from the Legal Services Corporation Technology Initiative Grant (TIG) program and the Montana Legal Services Association's Americorps*VISTA program.

For more information about LiveHelp or this toolkit, contact:

Liz Keith
LawHelp Program Manager, Pro Bono Net
221 Pine Street, 3rd Floor
San Francisco, CA 94104
Phone: 415-394-7142
Fax: 415-394-7140
Email: lkeith@probono.net

Table of Contents

LIVEHELP PROJECT MANAGER'S TOOLKIT	1
INTRODUCTION	2
TABLE OF CONTENTS	3
PLANNING FOR LIVEHELP	5
IS LIVEHELP A GOOD CHOICE FOR MY PROGRAM?	5
HOW WILL I USE LIVEHELP?.....	5
HOW DOES LIVEHELP WORK?.....	6
How many seats does my program need?	6
What other software should I consider to supplement LiveHelp?.....	6
What training do I need and where can I get it?.....	7
HOW WILL LIVEHELP BE STAFFED?	7
Who should be a project manager?	7
Who should serve as specialists?	7
DO I NEED TO ENGAGE IN MARKETING?	9
WHEN SHOULD I START THINKING ABOUT EVALUATING MY PROJECT?	9
IMPLEMENTING LIVEHELP	10
HOW DO I GET STARTED?.....	10
What factors should influence my LiveHelp policy decisions?.....	10
What do I need to do to prepare my organization for LiveHelp?	10
What do I need to do to prepare my website for LiveHelp?.....	10
HOW DO I OBTAIN/USE THE LIVEHELP SOFTWARE?	11
How do I download the LivePerson software?.....	11
How do I install the LivePerson software?.....	11
How do I get the LivePerson code on my website?	11
What do I need to know before I start creating accounts for specialists?.....	12
How do I use the “canned chat” feature to support my project?	12
How do I use the survey feature to support my project?	13
Should I use the Offline Survey feature?	17
HOW DO I TRAIN MY STAFF?	17
What should my staffing pattern look like?	18
Where do I look for potential specialists?	18
What support structures should I put in place for my specialists?.....	19
HOW DO I SPREAD THE WORD ABOUT MY NEW SERVICE?.....	20
HOW DO I PREPARE FOR EVALUATION?.....	21
How will I collect statistics from my project?.....	21
Considerations when choosing a survey:	21
Tips for creating your survey:.....	22
How will I use my chat transcripts?	22
MAINTAINING LIVEHELP	23
WHAT SHOULD I BE DOING TO GET THE MOST OUT OF LIVEHELP?.....	23
What do I do if users are asking for information that is not featured on my website?	23
How do I use LiveHelp to improve my website?	23
How can I be aware of improvements in the LivePerson Software?.....	24
HOW DO I MAINTAIN MY VOLUNTEER POOL?	24
What factors will determine my training schedule?	24
HOW DO I KEEP THE COMMUNITY INFORMED ABOUT LIVEHELP?	25
Internal Marketing	25
External Marketing	25
How do I evaluate my marketing efforts?	26
HOW DO I EVALUATE MY LIVEHELP PROJECT?	26

LIVEHELP RESOURCES	27
LIVEHELP MARKETING CONSIDERATIONS.....	27
Introduction.....	27
Population.....	27
Partners	28
Timing.....	29
Creative Solutions for Reaching Large Numbers of People in Your Area	30
SAMPLE LIVEHELP WORKPLAN.....	32
LIVEHELP TRAINING OUTLINE	34
Experimentation (Self-led, 1 hour).....	34
Project and Software Overview (Trainer-led, 1 hour).....	34
Content Overview (Self-led, time varies).....	35
Online Tutorials	35
Practice Chats (Supervised, less than 1 hour)	35

Planning for LiveHelp

Is LiveHelp a good choice for my program?

The original purpose of LiveHelp has been documented elsewhere in great detail; however it is worth taking a moment to consider the following:

- How can LiveHelp supplement my program?
- How is the mission of my program supported by the use of LiveHelp?
- How well will LiveHelp integrate with and support existing program services?
- Will LiveHelp naturally be met with enthusiasm by members of my program?
- Will this service provide assistance to enough individuals to justify the cost of implementation?
- Does my organization have the resources to manage this project on an ongoing basis?

The degree to which your program's mission is supported by LiveHelp will later determine the amount of support and funding you receive from your board and external stakeholders and the amount of time that staff members can justify devoting to this project. When at all possible, it is good to involve stakeholders who will be making these decisions early in the conceptualization of how LiveHelp will benefit your program.

How will I use LiveHelp?

The continued growth of Internet use across all demographics has led to millions of individuals turning to the Internet for help with their legal problems. Consequently, the Internet continues to present itself as a worthwhile portal for access to justice programs to reach out to previously underserved populations. LiveHelp can help users navigate your program's web-based information and can supplement your intake program. However, with the right people involved and the right approach, LiveHelp can also be a proactive tool that brings users directly to the online resources they need and helps you to constantly refine your own content to better respond to the needs of the community you serve.

Need More Ideas?

The Interim Replicability Report suggests and discusses ten innovative uses for LiveHelp to support access to justice initiatives.

You can access it at:

<http://www.probono.net/statewebsites/library/folder.154366-LiveHelp>

How does LiveHelp work?

LiveHelp has been implemented with LivePerson Pro software through a contract with Pro Bono Net. The LivePerson software is a flexible technology and can be deployed on any range of websites regardless of platform. It can be downloaded for free to as many computers as is necessary. The only cost for using LivePerson with your website will be the "seat" fee.

Quick facts about LivePerson "seats"

- Seats on the LivePerson software can be shared by anyone you wish, but only one person can be logged in to each seat at a time.
- One navigator can be assigned to take chats from as many websites as needed without taking up additional seats
- The seat fee for those using the national LiveHelp team account in 2007 was \$150 per seat per month which represents a nonprofit volume discount negotiated by Pro Bono Net.
- The number of seats that your program holds can be changed on a month-to-month basis if needed to account for expected fluctuations in chat volume and training schedules.
- The LivePerson admin console can be accessed through an Internet browser without occupying a seat, and from here most administrative functions can be carried out, including the capability to log specialists out of the software in order to open up a seat as necessary.

While the system requirements for the LivePerson software are not especially demanding, it may be worth checking the computers that you are expecting to use for LiveHelp and making sure that they can support the software. You can view the system requirements at:

<http://www.probono.net/link.cfm?10337>

How many seats does my program need?

New programs have traditionally started with two seats, with one for answering chats and another for tag-teaming in the case of high volume, performing administrative functions, and training. However, if your program is expecting low initial chat volume (as is generally experienced by starting programs in moderately populous states) it may be possible to begin with one seat if the browser-based admin console is utilized. In addition it may be possible to borrow an extra seat from another program on a temporary basis (if proper communication is in place).

What other software should I consider to supplement LiveHelp?

Instant Messaging

Another software option you might consider is an external chat (also known as instant messaging) client to support your LiveHelp project, as they have been found to be very helpful by other projects. If you already have a chat client connecting all of your potential specialists,

then that might be enough for you. If you will have specialists at remote locations or if you wish to be able to chat with specialists from other states, you may be able to use the LiveHelp chat server that Montana Legal Services developed for this purpose. Joining this server would require downloading Spark, a free chat client. The download file will be around 27 MB or around 14 MB if you don't need the Java update. Contact Pro Bono Net if you are interested in this option.

What training do I need and where can I get it?

While Pro Bono Net will train your program managers in using and administering LiveHelp, for sustainability purposes you will need someone on your staff who can train new specialists. While there are several resources available for reference in the SWEB library, this is a position that could consume a lot of time depending on your staffing patterns and the turnover in your specialist pool. For example, choosing to staff LiveHelp with Americorps members or law school students will likely necessitate a greater amount of time dedicated to training than the use of staff attorneys or paralegals.

How will LiveHelp be staffed?

Who should be a project manager?

One of the most crucial initial steps in developing LiveHelp for your program is getting the right people on board early in the conceptualization of the project, and this includes internal individuals who will be acting as trainers and project managers. The best person or people for these jobs may not be the people for whom these duties fit most naturally with their job description. Of more importance is whether or not these individuals understand the project and will pursue its goals with enthusiasm. If your LiveHelp management team feels like their duties have been forced upon them without their input or interest, then your project may never realize its potential.

It may be necessary to shift around the duties in your office so that the people who are the best candidates for these duties have the time to pursue them. It is preferable that somebody involved on the LiveHelp management team also be an administrator and content provider on your website, as this will facilitate the mutual growth that tends to occur around LiveHelp and the website in which it is embedded.

Who should serve as specialists?

It is beneficial to consider early-on what your staffing pattern should be and whether you have access to the number of volunteers necessary. Your staffing pattern also will need to be

somewhat flexible in order to adjust to your chat volume. If you have low volume, one or two people may be able to staff it for a day as they perform other duties. If there is high volume, LiveHelp might need to be staffed in one-hour shifts so specialists can perform other duties when their shifts are over

Here are some advantages and disadvantages of using various volunteer groups:

Type of Specialist	Advantages	Disadvantages
Permanent staff members	<ul style="list-style-type: none"> • Will result in less trainings per year • More aware of office services and policies • Easier to manage (more accessible and reliable) • Provides some staff members an opportunity to interface with the public that they would not otherwise have 	<ul style="list-style-type: none"> • They may be very busy and LiveHelp might add to an already full plate
Americorps*VISTA members	<ul style="list-style-type: none"> • Inexpensive option • Consistent with mission -puts them in touch with problems in community • Likely to be tech-savvy 	<ul style="list-style-type: none"> • One-year terms mean frequent trainings for somewhat short periods of service
Law school students	<ul style="list-style-type: none"> • Inexpensive or free option • Resume builder for law students • Can be done in conjunction with content development or studying • Likely to be tech-savvy • May be able to work during non-office hours 	<ul style="list-style-type: none"> • Must be supplemented during finals and breaks • Might be looking for more direct representation opportunities
Community volunteers	<ul style="list-style-type: none"> • Free option • Possibility for longer term of service meaning less trainings • Innovative avenue to participation by volunteers • Possibility of using remotely located volunteers if LiveHelp usage is sufficient 	<ul style="list-style-type: none"> • Not affiliated with organization - require the most training and management • Possibility of short terms of service meaning frequent trainings

Note: Some of the disadvantages listed can be cancelled out by drawing specialists from multiple groups. Americorps*VISTAS have trainings and community events to attend, law students have long breaks, and office staff will have holidays when the office is closed. Diversifying your specialist pool can help keep LiveHelp available through these periods.

Do I need to engage in marketing?

In order to encourage LiveHelp adoption by users it might be necessary to develop a marketing campaign for your site that highlights the new LiveHelp service. While there are quite a few resources available in the SWEB library to help with this activity, and there are several good marketing strategies that do not cost money, there needs to be someone in your office with the time and willingness to get the word out about your website and this feature.

When should I start thinking about evaluating my project?

You will get the most out of LiveHelp if you design your LiveHelp project from the beginning with your evaluation goals in mind. Begin by identifying to whom you will be held accountable and what you will need to demonstrate to them in order to maintain their support. For example, do you need to show that you are reaching a certain income level or a certain number of people? The answers to these types of questions will help structure both the delivery of your service and the type of data you will collect.

If you are applying for a TIG grant, there is a specific evaluation plan format you must follow. Regardless of who will provide the funding for this project, it is a good idea to create an evaluation plan, present it to your stakeholders, and let it guide your project. Your ability to successfully demonstrate that you have met your goals may be the difference between life and death for your project, so set yourself up for success early.

You can find freely available evaluation materials in the LiveHelp folder of the SWEB library.

Minnesota Legal Services Coalition and User Testing

Before going live, the Minnesota Legal Service Coalition engaged in user testing, soliciting feedback from potential users in order to shape the placement of the button, the presentation of the chat window and surveys, and the language of the canned messages. They found the process to be very useful and recommended that LiveHelp projects in the future include a line item in their budgets for user testing.

You can view the results of the Minnesota user testing at:

<http://www.probono.net/link.cfm?10338>

Implementing LiveHelp

How do I get started?

What factors should influence my LiveHelp policy decisions?

Your policies around LiveHelp will likely be shaped largely by the source of your funding and the mission of your program. The following are some questions, inspired by LSC requirements, the answers to which may help shape your policy around LiveHelp. If you are implementing LiveHelp on a court, law library, advocate portal or other website, your policy decisions will be shaped by your program's own goals and guiding documents.

- Could this service be considered offering assistance to income ineligible persons, undocumented persons, or the incarcerated?
- Is this service used by non-attorneys to provide legal advice?
- Could use of this service result in a conflict within your program?
- Are your specialists at the risk of providing information which is incorrect because it is from the wrong state, intended for the wrong area of law, based on anecdotal evidence, inaccurate, or contained on an inaccurate or for-profit website?
- For whom is it acceptable to take time from their normal duties to participate in this program?
- Will users be referred back and forth between this service and another service that your program offers?
- To what extent will specialists need to rely on external websites and sources, and what is the best way to determine which sites and sources are appropriate? How will you communicate this to your specialists?

What do I need to do to prepare my organization for LiveHelp?

As early as possible you should gather all concerned parties and develop a work plan for your LiveHelp project. Once this is completed you can divide the responsibilities within your program and prepare to launch the service.

You can find a sample implementation work plan in the “LiveHelp Resources” section below.

What do I need to do to prepare my website for LiveHelp?

Since this is a new feature to your website and many of your visitors will not have used a similar feature, it may be necessary to add a resource to your website explaining LiveHelp's features and purpose. You can do this with a single "What is LiveHelp?" page or with something more complex, like the “How to Use IowaLegalAid.org” video on the Iowa site made using Flash. This video explains the different features of their website, and includes a video of a LiveHelp chat so that users can see what it will look like before clicking the button.

It is also useful to continually add to the content of your site. Specialists will first look to your website for resources, so the more resources and links to useful sites that are housed on your site, the better. Once LiveHelp gets going, you will receive steady feedback on what the community is looking for on your website and, more specifically, what they are not finding. This feedback is a great tool for further developing your website.

How do I obtain/use the LiveHelp software?

How do I download the LivePerson software?

1. Go to <http://www.liveperson.com/download/downloadCt.asp>. (This is case sensitive.)
2. Save the file on your desktop.

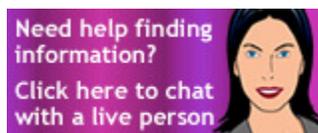
How do I install the LivePerson software?

1. Double-click the file that you saved on your desktop.
2. Follow the instructions that appear on the screen.
3. Enter the following information when appropriate:
 1. LivePerson account number
 2. Username
 3. Password
4. Delete the file that you saved on your desktop.

A helpful “Getting Started” guide appears the first time you start LivePerson. This guide provides links to additional training resources. If you want to access the “Getting Started” guide later, click “Getting Started and Training” on the “Help” menu.

How do I get the LivePerson code on my website?

Before the software can be used, you will need to integrate the LivePerson code onto your site. Please contact Pro Bono Net for assistance with obtaining and integrating this code. Pro Bono Net can provide you with the LiveHelp buttons in use in most states, or if you would like to design your own button you can work with Pro Bono Net to integrate that as well.



Traditional LiveHelp button

What do I need to know before I start creating accounts for specialists?

While everyone in your program will share the seats on your account, LiveHelp projects traditionally create a different “operator” account for each person that will use the software. You will be asked to submit a “nickname”, which is the name that will appear to users of LiveHelp when chatting. Traditionally, programs have used the specialist’s first name followed by their last initial. Every profile you create must be designated as an “Operator” or an “Administrator.” While the permissions for each category can be controlled with the Admin console, the following privileges are the default on the national LiveHelp account:

	Take chats	Use chat functions	View specialists' status	Change their own password	Modify canned text and surveys	Re-assign skills	View reports and transcripts	Create new users
Operators	x	x	x	x				
Admins	x	x	x	x	x	x	x	x

Notice: Administrators on the national LiveHelp account are able to modify canned chats and surveys for other states as well, so make sure your administrators are trustworthy.

How do I use the “canned chat” feature to support my project?

Developing canned chats helps to provide quick and consistent service, and also can help to keep your service in line with the policies you set at the conceptualization of your LiveHelp project. Canned chats also can be used to set the tone for what kind of language should be used in chats. There are four types of canned chats you will likely develop to support your program:

- **Pre-Chat disclaimer** - Any information that is absolutely necessary for your users to know before entering a chat can be placed in a pre-chat disclaimer in canned form that can be displayed and agreed to by the user before the chat begins. Possible items to include in a pre-chat disclaimer are: lack of attorney/client relationship, lack of guarantee of confidentiality, inability to provide legal advice, and policy regarding conflict. LiveHelp specialists have traditionally been instructed not to engage in conversation with users until the disclaimer has been agreed to.
- **Content chats** - It is a good idea to anticipate commonly asked questions and develop canned responses to address them. In these responses you can include as many links as you want, to your site or others. This is a good way to make sure users are being directed to the right place every time and to save your specialist the time of typing out the same responses over and over again. As time goes by, analysis of the questions that come in will help you determine which responses are worth putting in canned form.
- **Conversational chats** - These chats can be useful either to buy time for specialists that are searching for a resource and may not have time to type a proper message (ex: “Please wait while I locate the information you are looking for) or to carefully develop language for dealing with difficult situations which you do not want your specialists to have to use their own language to address (ex: when users repeatedly ask for legal advice, are in

immediate danger, or use disrespectful language). Some of your specialists may not be fully qualified to handle some issues that come up as representatives of your organization, so it is a good idea to anticipate these situations and carefully develop language for their use ahead of time.

- Post-chat disclaimers - These are useful not only for repeating concerns brought up in your pre-chat disclaimer in case your user was given the wrong impression during the chat, but also to provide contact information to the user to point them toward a specific service if they need further assistance. Information for local legal service providers and attorney referral services are popular choices, as is a link to the state code for further browsing.

It is recommended that projects have canned chats in each of those areas developed before going live, but canned chats can be added as your project matures and you learn more about what questions users have. You may find it useful to engage in user testing to shape the content and structure of your canned text to your target audience.

You can find a video tutorial on how to create and upload canned text at:

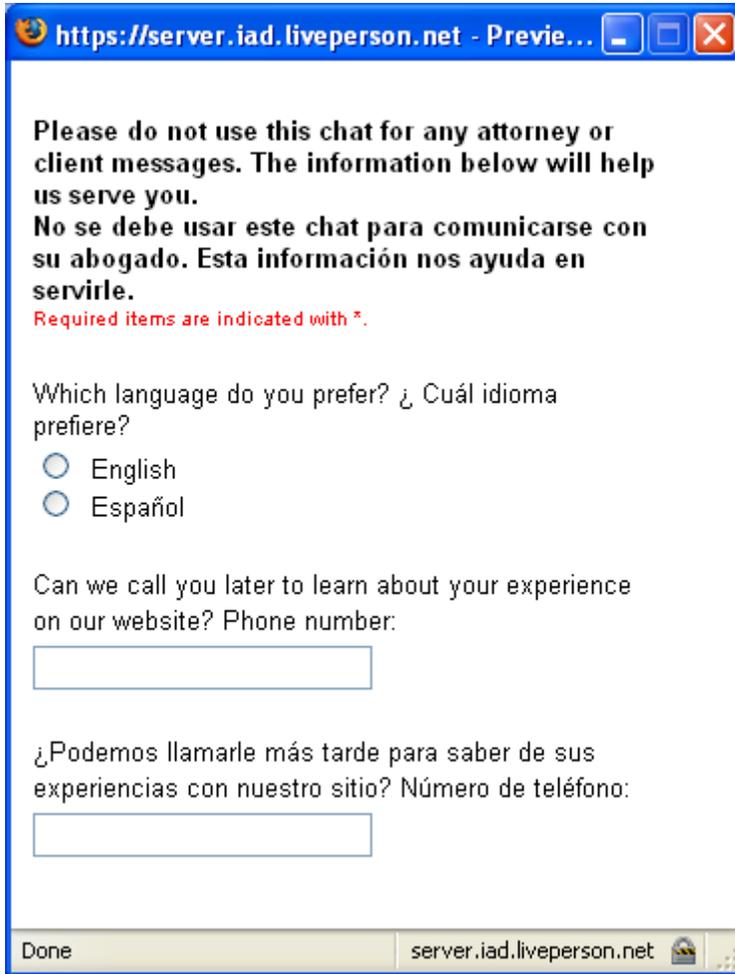
<http://www.probono.net/link.cfm?10339>

How do I use the survey feature to support my project?

Surveys are used to collect any information you want that you cannot get from LivePerson reports. There are four kinds of surveys that the LivePerson software supports. These surveys are separate from any survey built into your website template, and are a built-in component of the LivePerson software.

You can find a video tutorial on how to create and enable LiveHelp surveys at:

<http://www.probono.net/link.cfm?10340>



Please do not use this chat for any attorney or client messages. The information below will help us serve you.
No se debe usar este chat para comunicarse con su abogado. Esta información nos ayuda en servirle.
Required items are indicated with *.

Which language do you prefer? ¿ Cuál idioma prefiere?

English
 Español

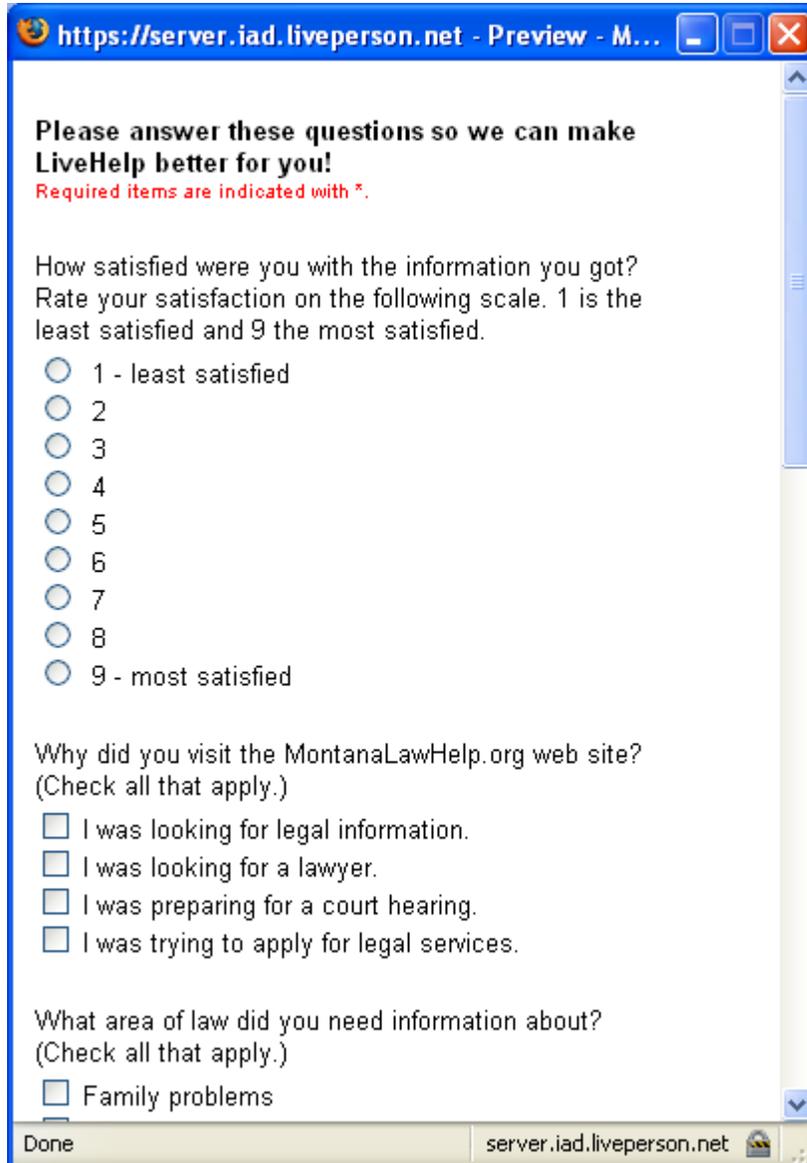
Can we call you later to learn about your experience on our website? Phone number:

¿Podemos llamarle más tarde para saber de sus experiencias con nuestro sitio? Número de teléfono:

Pre-chat survey - This survey is seen by users after they click the LiveHelp button but before they engage in chat. It is useful for information that could be helpful for the specialist to know beforehand and information that could help route users to the correct place, such as asking language preference if you support multiple languages.

You can view a full text sample pre-chat survey at:

<http://www.probono.net/link.cfm?10341>



https://server.iad.liveperson.net - Preview - M...

Please answer these questions so we can make LiveHelp better for you!
Required items are indicated with *.

How satisfied were you with the information you got?
Rate your satisfaction on the following scale. 1 is the least satisfied and 9 the most satisfied.

1 - least satisfied
 2
 3
 4
 5
 6
 7
 8
 9 - most satisfied

Why did you visit the MontanaLawHelp.org web site?
(Check all that apply.)

I was looking for legal information.
 I was looking for a lawyer.
 I was preparing for a court hearing.
 I was trying to apply for legal services.

What area of law did you need information about?
(Check all that apply.)

Family problems

Done server.iad.liveperson.net

Exit survey - This survey pops up in the user's window when the user clicks the "close" button after the chat has ended. This is the appropriate place to ask for demographic information and satisfaction levels of users.

You can view a full text sample exit survey at:

<http://www.probono.net/link.cfm?10342>

https://server.iad.liveperson.net - Preview - ...

Required items are indicated with *.

Were you able to answer this question with information on MontanaLawHelp.org?

Yes

No

If no, what information needs to be added?

Did you send the user to an external site?

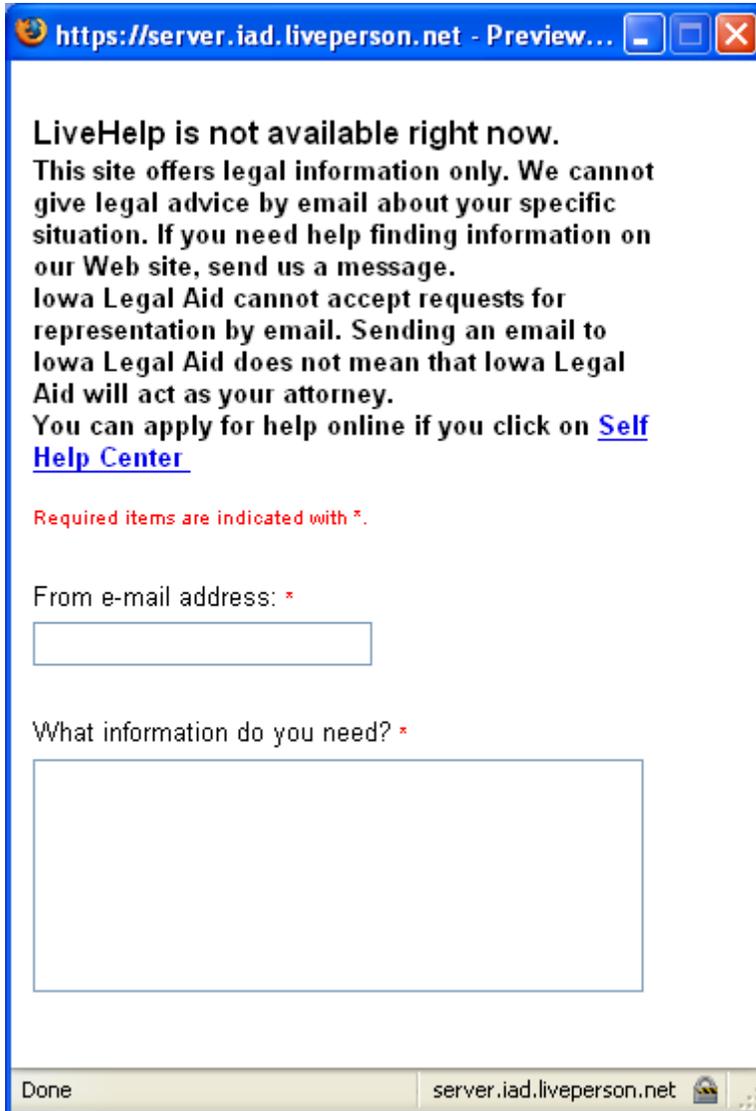
Yes

No

If yes, please provide the url:

Done server.iad.liveperson.net

Operator Survey - This survey is filled out by the specialist after the chat is completed. It is useful for collecting immediate observations from the specialist that could help improve the service (such as asking if any content needs to be added to the site).



Offline Survey - This survey, if enabled, is the message that appears to users when they click the LiveHelp button in its offline state. It can be configured to allow users to email their questions to a designated address.

Should I use the Offline Survey feature?

Historically, the offline survey feature has allowed LiveHelp projects to nearly double the amount of users they help with a relatively small extra time commitment. If you enable this feature, you will need to determine who will answer the emails and what protocol they should follow. Answering offline surveys is a good job for someone on your staff or at another organization who wants to help but cannot commit to a regular shift or someone who feels rushed or nervous when answering chats.

How do I train my staff?

LiveHelp volunteers generally require about five hours of training before they are ready to interact with users as specialists. Some of this time they should be accompanied by a trainer with LiveHelp experience -- whether one-on-one or in a group -- and some of the training can be done on their own time. Montana Legal Services has created a LiveHelp Navigator User Guide (posted in the LiveHelp folder of the SWEB library) which explains in detail everything a volunteer needs to become a specialist. Here is a list of the training steps discussed:

- Experimentation
- Project and Software Overview
- Content Overview
- Online Tutorials
- Practice Chats

A full description of each training activity from the trainer's perspective and supplementary resources can be found at: <http://www.probono.net/link.cfm?9674>

What should my staffing pattern look like?

There are several different options for staffing LiveHelp, depending on your resources and needs. Iowa has found that a very small number of specialists can staff an entire state if it is not too populous, but Montana chooses to spread their hours out among more specialists with fewer and shorter shifts.

Here are some advantages of either model:

	Advantages	Optimal for:
Large specialist pool	<ul style="list-style-type: none"> • Less time commitment from each specialist • Involves more staff members (increased understanding and buy-in from organization) 	<ul style="list-style-type: none"> • Higher-volume projects
Small specialist pool	<ul style="list-style-type: none"> • Easier to manage and monitor • More consistent service-delivery 	<ul style="list-style-type: none"> • Projects requiring more specialized expertise

It is a good idea to create a somewhat fixed weekly schedule of each specialist's shifts. You will want to decide early-on what your policy is on missing or trading shifts. It may be helpful to provide your specialists with a listserv to facilitate communication around shifts and other concerns that arise. Also, there has been success with interactive calendars, such as Google calendar. It is easy to set up and can be configured so that the schedule can be modified either by all specialists or only project managers who will alter the schedule based on email requests from specialists.

Where do I look for potential specialists?

Based on your staffing model and your chat volume, you may have to engage in a lot of recruiting to supply the necessary volunteer pool. If you are having trouble finding enough people, consider tapping into other populations. Here are some possibilities:

- Staff attorneys, Americorps attorneys, paralegals in your program
- Americorps*VISTA members
- Law school students
- Local librarians
- Information management students
- State bar (some attorneys that can't engage in full pro bono representation might be willing to staff LiveHelp from their desk)
- Retired persons

One possibility for recruiting staff members is to have a director in your program include it in their formal duties. This can help involve your office with the project and facilitate cooperation with other services you provide.

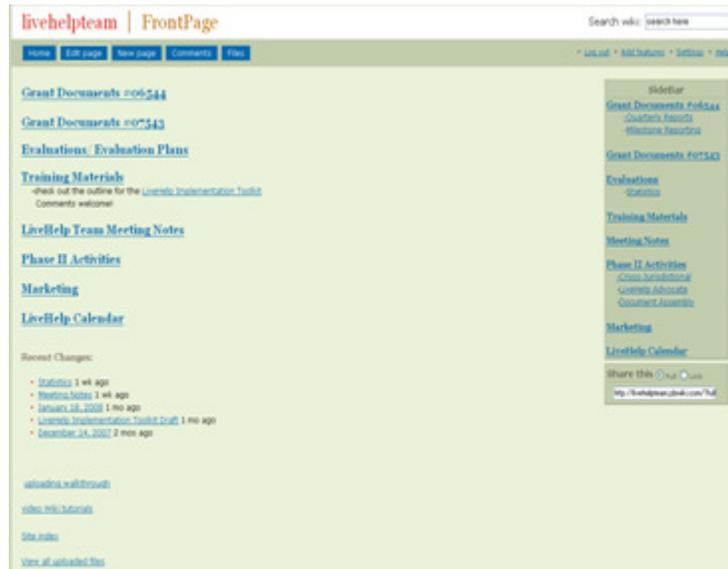
If you are using volunteers and your chat volume is low it might be worth thinking of ways to incorporate LiveHelp with other helpful activities. You could have them work on developing content or other resources for your office while they are available at their desk to take chats.

What support structures should I put in place for my specialists?

Regardless of your staffing model, it is a good idea to put a framework in place to facilitate cooperation and communication among specialists. This will help specialists to feel more involved in the project, create a sense of team unity, and allow feedback to improve your service. It is also important for specialists to communicate shift changes and ask for support. Consider the following devices:

- Hold monthly meetings (conference calls if necessary) where specialists can discuss interesting or challenging chats and be informed of content updates. To facilitate discussion, consider bringing in chat transcripts (names redacted) that exemplify a practice that you want to encourage or discourage
- Create a listserv (this can be done through the Pro Bono Net template) to connect all of the specialists. This can be used to facilitate the trading of shifts (if allowed), to pose questions to the group, to spread documents (such as updated approved website lists), or to send out a newsletter.
- Create an online or internal wiki. This can be used to post calendars and documents, to create message boards for interaction and communication, to facilitate collaboration on content and resource development, etc.

Hosted wiki suggestion: PBWiki



PB Wiki allows you to create a wiki within seconds that you can learn how to use within minutes. An unlimited number of users can create new pages, post content, and embed Google gadgets without ever seeing code. The basic package is free and comes with 10 MB of storage space and plenty of help resources and tutorials. You can find out more at www.pbwiki.com.

How do I spread the word about my new service?

In order to get your project off the ground it is a good idea to engage in some outreach efforts before you launch LiveHelp. Marketing campaigns can mention LiveHelp explicitly or simply advertise the site in which it is embedded, and they can be directed at the public or at organizations in your state that have access to your target population. There is a collection of development resources and sample materials available on the Statewide Website Support Library. At the very least, before you launch you should consider taking the following steps to raise awareness of your project and its purpose and capabilities:

- Inform everybody on your staff; perhaps offer a demonstration of the service, making sure they know in which situations it would be appropriate to refer clients to LiveHelp. Recommend that they mention the service in newsletters and email signatures.
- Put a mention or a link to the site embedded with LiveHelp on all affiliate sites run by your organization

- Alert other services in your state that are complimented by this service, letting them know in what situations it is appropriate to refer clients to your site (state bar, state library, etc.)
 - Alert social service agencies in your state
 - Make as many public libraries aware of the service as possible, giving demonstrations to staff if needed
-

How do I prepare for evaluation?

How will I collect statistics from my project?

While it may seem like evaluation is something to engage in well into your project, you need to take steps before your launch to set yourself up to collect the information you will need to evaluate your program when the time comes. While the information that LiveHelp collects will be useful for some purposes, you will probably need to collect extra user information through the LiveHelp survey feature.

You can view a video tutorial about generating and recording LivePerson usage reports at: <http://www.probono.net/link.cfm?10343>

Considerations when choosing a survey:

Pre-Chat Survey:

One distinguishing feature of the pre-chat survey is that you can make items mandatory, meaning that chats cannot start until the questions have been answered, so if there is any information that you absolutely must collect from each user you can collect it here. It is probably not a good idea to use this feature to collect demographic information, as at this point you have not yet provided a service to the user.

Exit Survey:

This survey appears after the chat is over and is a more appropriate place to ask about demographic information. After a service has been provided to the user they may be more likely to answer such questions. The LivePerson software offers several options for coding answers, including free response, check-all-that-apply buttons, and drop-down menus.

Tips for creating your survey:

Pre-Chat Survey:

- Ask questions that could be perceived as helping the specialist provide better service, such as asking language preference (if you support multiple languages) or to ask how they were referred to the site (so that you do not refer them back to where they came from).
- If you need information that you do not think you can get from the post-chat survey (or if you are worried that the post-chat survey will not provide a representative sample) you may choose to ask for a phone number and permission to call for follow-up questions in the pre-chat survey.
- While LivePerson calls this feature the “Pre-Chat Survey” it does not have to say the word “survey” anywhere on it, and it probably should not as it may confuse users.

Exit Survey:

- Make sure to ask questions and frame answers in such a way that the resulting information will be presentable and relevant to stakeholders.
- It is important that your survey not be too long, or users will refuse to fill it out or just fill in the first few questions and exit.
- If you have a large number of questions to ask, consider creating two different surveys and switching them in and out of use.
- You may want to inform users about the survey during the chat so that they will be more likely to fill it out afterward.
- The post-chat survey only pops up if users click the button that says "close". If users simply close the chat window using the "X" button they will not see the survey. It may be worth communicating this to the user in some way before or during the chat.

You can view a video tutorial on retrieving LivePerson survey data at:

<http://www.probono.net/link.cfm?10344>

How will I use my chat transcripts?

Another useful source of information for evaluations is anecdotal information taken from transcripts. In order to complement your statistics you may want to look over transcripts from your service and reproduce chats that were very helpful for the user or targeted toward the principles of your program for stakeholders, so that they can see qualitative as well as quantitative justification for your project.

Aside from evaluating your project in order to justify it to shareholders, you will also want to evaluate the performance of your specialists as well, especially at the beginning of the project. As you try to get your project off the ground, it is a good idea to review transcripts frequently to catch problems in the service delivery of your specialists early-on.

You can view a video tutorial on utilizing LivePerson chat transcripts at:
<http://www.probono.net/link.cfm?10345>

Maintaining LiveHelp

What should I be doing to get the most out of LiveHelp?

What do I do if users are asking for information that is not featured on my website?

You will find that a substantial portion of the questions you receive through LiveHelp cannot be answered by the content on your site. It is important to develop a policy for what should be done in these situations and to make this policy clear to your specialists. A good beginning policy is to instruct your specialists to avoid sites ending in “.com” and to only use websites that are affiliated with a government site (state law library, Attorney General’s website, etc.).

Other programs have found it useful to keep a list of approved external websites that are reliable and to distribute this list to their specialists. For this purpose, it is desirable to put a system in place to expand this list, whether by instructing specialists to email proposed sites to a website coordinator for approval, listing external URL’s they have used in specialist surveys, or allowing specialists to edit and distribute the list themselves through use of a listserv or a wiki. In addition to adding these websites to an approved website list, you should also consider posting links to these sites in the appropriate areas within your content.

Note: It may be a good idea to develop a canned chat for use with sending links to external sites explaining that your program is not responsible for the content on this page and cannot guarantee its accuracy.

You can find information on turning your approved website list into a “Favorites” or “Bookmarks” folder that can be imported into a specialist’s Internet browser in the “Project Manager” folder in the LiveHelp section of the SWEB library.

How do I use LiveHelp to improve my website?

Another result of users asking questions that cannot be answered by your current web content is that it gives you an opportunity to identify information that is being sought by your users that you are not currently providing. These instances will serve as an invaluable tool for improving the quality and scope of information provided on your website.

It is advisable to put a system into place to facilitate this content development. For example, you can put a question in your specialist survey asking the specialist if any information could be added to the site that would have made it easier to help the person with which they were chatting. Make sure someone is monitoring these surveys and adjusting web content accordingly. Additionally, you can encourage your specialists to seek out and draft information and resources and to bring them to the attention of your website coordinator. Engaging specialists in this way will speed up content development and make your volunteers feel more useful to the public and invested in the project.

How can I be aware of improvements in the LivePerson Software?

LivePerson is constantly adding new features to improve its capabilities for service. It is a good idea to try to keep informed about these new features so that you can be thinking of ways to utilize them for the benefit of your users. If you are not receiving the LivePerson newsletter, you can sign up for it at <http://www.probono.net/link.cfm?10346>. You can also use this form to edit your contact details and list yourself as an emergency contact so that you will receive status notification emails (such as in the rare moments when the service is down).

Keep in mind that you can adjust the number of seats on your account on a monthly basis. If you decide that you need another seat to handle your chat load or that you want to get rid of a seat that you are not using, contact Pro Bono Net so that they can make the adjustment for you.

How do I maintain my volunteer pool?

What factors will determine my training schedule?

Your staffing pattern will determine the timing and frequency of the trainings you hold throughout the year. You will save time by holding trainings at times when you can have several volunteers present at each session, but if you have volunteers that will only be able to serve as specialists temporarily (i.e. a VISTA serving a one-year term), then you will want to get them trained as soon as possible. Try to strike a balance between these two considerations.

You will have to fit the schedule of training sessions to your volunteer pool. If you are working with volunteers from outside of your program, they might be anxious to get past training and start serving the public with the time they are offering. It might be necessary to expedite the early training sessions a bit and shift the focus of their training toward practice chats so that they do not become frustrated.

MLSA and the VISTA Cycle

Montana Legal Services hosts an Americorps*VISTA program that enrolls a new group of VISTA volunteers for a one-year term every January and July. Since VISTA volunteers make up a significant portion of MLSA's navigator pool, MLSA has adjusted their training schedule so that they have two trainings a year, each about a month into the term of a group of VISTAs. During these trainings any new staff members that have been selected to serve as navigators are trained as well.

By adjusting to this natural cycle in their program, MLSA maintains a large navigator pool with a lot of turnover by holding only two trainings a year. This also ensures that many navigators will be trained at a time, allowing fellow trainees to practice chats together and support each other as beginners.

How do I keep the community informed about LiveHelp?

Internal Marketing

Marketing need not consist only of letting the public and organizations know that your service exists. You can also create awareness for LiveHelp by reporting its accomplishments. It is a good idea to keep your staff, stakeholders, funding-providers, and other decision-makers updated about the progress you have made. This keeps your program staff invested in your project and stimulates future interest and support.

External Marketing

Experience has shown that in less populous states, an initial outreach campaign is not enough to sustain adequate chat volume indefinitely. For best results it is advisable to always be thinking about new and useful ways to market your service. Do not be afraid to experiment in subsequent rounds of outreach, especially if you are using relatively cheap techniques such as mailings. With every round of outreach you could try to think of a new population to target or a new service to reach out to.

Also, try to think of milestones and occasions for which it could be appropriate to contact the press. You could try to get a new article written about your service every time you reach a new service milestone (100 acts of help through LiveHelp), partner with a new organization (the State Law Library links to you on their website), you tap into a new volunteer pool (a new law school class or term of VISTAS is trained), or you get new funding (a new grant for expanded services is approved).

How do I evaluate my marketing efforts?

In order to avoid wasting precious resources on inefficient marketing, it is important to evaluate your efforts. While your marketing campaign as a whole can be evaluated by fluctuations in website visits and chat volume (for a baseline look at previous statistics or contact a comparable state and ask if they will share their statistics), but for individual components of your overall campaign it may be more difficult to determine their efficacy. Here are some possible solutions:

- In a pre- or post-chat survey ask the users how they found out about your website or service. Note: While a higher percentage of questions will be answered in a pre-chat survey, asking too many questions up front may dissuade users from using your service at all.
- In a pre- or post-chat survey ask the users what county they live in and match county statistics to the marketing campaigns in their respective counties
- If you have sent promotional materials to other agencies, ask them how many materials were taken by the public
- If you trained other agencies to help users with the service or to direct users to the service, ask how many times this has happened since the training
- You can look for increases in users that are not referred from another website (people who found out your URL and typed it in directly). Outreach materials with your web address should cause this number to increase.

How do I evaluate my LiveHelp project?

In order to evaluate your LiveHelp service and its component parts it is important to keep track of current statistics. These statistics can be used to justify your program to stakeholders and fund-providers and also to direct your outreach and service delivery strategies. Keeping a workable collection of statistics provides a baseline against which you can compare current usage to measure the efficacy of outreach efforts and also to identify problems (such as a new pre-chat survey deterring users) so that they can be quickly remedied. LivePerson does not allow you to run reports on time periods longer than 31 days, so LiveHelp programs have traditionally tracked statistics in monthly intervals. Pro Bono Net has developed an Excel Model Spreadsheet for just that purpose.

You can use the spreadsheet to:

- Use the simple statistics you enter from LivePerson to automatically calculate and record averages, totals, and percentages
- Automatically feeds statistics into presentable graphs for quick visual comparisons, easy trend-spotting and widespread presentation

Other advantages include:

- It comes with a guide explaining where the statistic for each cell can be found and how every formula is calculated
- It is being used by other states, so use of this spreadsheet will allow multiple states to combine and compare data easily (this will be especially helpful in the early stages of your project when you do not have a wealth of your own data for comparison purposes).

You can find both the spreadsheet and resources explaining how to use it at:

<http://www.probono.net/link.cfm?9899>

LiveHelp Resources

LiveHelp Marketing Considerations

Introduction

Since LiveHelp cannot be utilized by individuals unless they have first found their way to the underlying website, a reasonable approach to marketing LiveHelp programs has been to increase marketing efforts for the host site in hopes that an increase in website visits will lead to an increase in LiveHelp use. For these purposes, there is a large collection of resources available at the Statewide Website Support Library. However, the inclusion of the LiveHelp service on your website creates a few additional opportunities and concerns that you may want to consider before creating a marketing plan for your LiveHelp program.

Population

Currently, most LiveHelp projects are targeted toward low to moderate income individuals who need legal information and support. While LiveHelp can be used by anyone from any population who wants legal information, it has been implemented onto Law Help websites to assist the subset of that population who, for one reason or another, can not or will not find the legal information they were looking for on their own. Individuals could land in this subgroup for a variety of reasons, but in order to reach this group it might be helpful to target the following populations:

- Individuals with language barriers (if you have the capacity to address their needs)
- Individuals that can read well enough to participate in a chat but not well enough to browse through content
- The computer illiterate
- Individuals that do not have the time to browse through content on their own (perhaps because they have time limitations at a public computer, etc.)

- The disabled

Partners

A good approach when trying to reach a population is to first connect with organizations that are already reaching the population effectively. This connection could be a full partnership or simply an interview asking them about an appropriate channel through which to present the program. Appropriate organizations will vary from state to state but a few of them are natural allies with LiveHelp partners:

Librarians

Librarians are committed to helping people find information and will appreciate LiveHelp as a tool to aid in that purpose. If librarians are made aware of this service, they can direct patrons to it when they feel it is appropriate. Also, people often come to the library with the purpose of finding the answer to a problem and the library is the primary provider of public Internet to people who do not have access to the Internet at home. For this reason, it might be a good idea to take direct measures to make library patrons aware of the service as well. Stickers with information about the service could be printed and sent to the library to be put on public monitors as Washington did with their Law Help site. Montana also experimented with providing informative mouse pads to libraries, though there is greater cost involved in this venture.

Tactics for reaching librarians and library patrons:

- Presentations and tables at library association meetings
- Brochure/flyer mailing
- Announcement to public and law library association listservs
- Article in library-related newsletter
- Stickers for computer terminals
- Promotional mouse pads

Courts and Attorneys

Courts and attorneys are approached by people with legal problems every day, many of whom they cannot help for one reason or another. If courts and attorneys are made aware of this service they can and will refer the clients who slip through the cracks to LiveHelp for another chance to have their problems addressed.

Tactics for reaching courts and attorneys:

- Presentations and tables at bar association meetings
- Brochure/flyer mailing to court clerks
- Cross-linking with court site
- Individual outreach to court administrators
- Articles in advocate newsletter

Schools

Newsletters through the schools and programs like Head Start could be a good way to connect with parents who might have financial troubles due to the strain of raising children or who might have family law problems that need resolution. Also, parents with legal problems that are not computer savvy may have their adolescent children use Law Help to try to find solutions to their family's legal problems. These adolescents may have a limited understanding of the adult world which would make it difficult to browse through the content, but might feel more comfortable using the chat feature than other populations. Furthermore, high schools, colleges, and law schools might be a good avenue to reach adolescents and young adults that are at risk for several legal problems (domestic violence, housing, consumer) and do not have the resources to resolve them.

Tactics for reaching schools and Head Start programs:

- Find contact information for your area's Head Start programs at:
<http://www.acf.hhs.gov/programs/hsb/hsweb/index.jsp#HS>
- Consider a mailing to counseling or library staff at local technical and community colleges
- Contact school board or civics departments as an idea to be incorporated into lesson plans
- Brochure/flyer mailing to law school clinics

Other Networks to Consider

- Senior Centers, Retirement Homes, organizations of either
- Cultural Centers, Indian reservation, ethnic churches, grocery stores, and radio stations (especially if you have the capacity to support the necessary language)
- Any state department building where people go for help (Office of Public Assistance, etc.)

Timing

Adding LiveHelp to your website may provide periodic milestones that you can use when marketing your website and/or LiveHelp. Consider a new marketing campaign to get out the word when you:

- First launch LiveHelp
- Obtain a new LiveHelp-related grant
- Train a new set of LiveHelp specialists
- Form a partnership with a new organization or create a new link to/from another website

If you use LiveHelp to help support another service that your organization provides, take advantage of that collaboration at significant times:

- Montana uses LiveHelp in conjunction with MontanaFreeFile.org and consequently has higher volume during tax season
- Iowa uses LiveHelp with its remote intake program which has its own milestones that can be capitalized on
- If there is a disaster or change of laws that you suspect might increase legal problems in your area, this could be a good time for a marketing push to help reach the population in need

Creative Solutions for Reaching Large Numbers of People in Your Area

There is no one solution that will effectively reach people in every area, but here are some examples of innovations that have successfully reached a large section of the target population:

- Montana created beverage coasters with legal questions on one side and answers and MontanaLawHelp.org information on the other side and distributed them to local bars.
- Iowa passes out paper hand fans featuring IowaLegalAid.org information at their state fair each year

Other places, organizations, and opportunities where you could try to share information about your LiveHelp program:

- Public transit
- Screen ads in movie theaters
- Newsletters
- Shelters
- Casinos
- Radio (don't forget stations in other languages that you can support)
- Bookmarks for libraries
- Places of worship
- Civics teachers
- Guidance counselors
- Local restaurants

- Departments stores- if not public than perhaps in the break rooms
- State Bar Meetings
- Registering your host web page with search engines
- Linking to and from other relevant sites
- Thrift stores
- Bowling Alleys
- Laundromats
- Grocery Stores

Sample LiveHelp Workplan

Month	Deployment Step	Who	Comments
1	LiveHelp demo and project planning	YOU and PBN	
1	Identify LiveHelp admins and navigators	YOU	
1	Determine budget and number of LivePerson seats	YOU	
1	Create new user accounts and skills in LivePerson	PBN	
1	Integrate and test LivePerson code on YOU dev site	PBN	Use existing or different icons?
1	New admins and navigators download LivePerson software	YOU	PBN will provide info
1	Training on LivePerson features and best practices for new admins and navigators	YOU and PBN	2 sessions: 1 navigator, 1 admin?
1	Begin Help content development (canned chats, surveys, LiveHelp FAQ and policies)	YOU	Models/samples available from MT and IA.
1	New navigators participate in online tutorials and practice chats	YOU and PBN	PBN will provide info
1	Navigators review sample transcripts	YOU	PBN will provide samples
2	Determine LiveHelp hours / shift scheduling	YOU	

2	Begin outreach to referral partners and stakeholders as necessary	YOU	
2	Begin developing LiveHelp marketing plan and materials.	YOU	Samples available from PBN, IA and MT.
3	Soft launch LiveHelp	YOU and PBN	PBN will integrate code as needed on live site.
3	Continue developing LiveHelp marketing plans and materials	YOU	
3	Identify quality external websites, develop and refine website content if necessary	YOU	Consult operator surveys for guidance
3	Review transcripts for quality control and address any problems	YOU	
3	Continue LiveHelp content development as needed (canned chats, surveys, LiveHelp FAQ and policies)	YOU	
3	Ongoing website navigator training / support as needed	YOU and PBN	
3	Finalize marketing plan and materials	YOU	
4	Hard launch on live sites	YOU and PBN	PBN will integrate code as needed on live site.
4	Begin full-scale marketing	YOU	
4	Begin collection of evaluation data using LiveHelp reporting tools	YOU and PBN	PBN will provide sample eval tools and training on reporting features.
4	Ongoing training / support as needed	YOU and PBN	

LiveHelp Training Outline

LiveHelp volunteers generally require about five hours of training before they are ready to go live as specialists. Some of this time they should be accompanied by a trainer with LiveHelp experience whether one-on-one or in a group and some of the training can be done on their own time. Montana Legal Services has created a LiveHelp Navigator User Guide which explains in detail everything a volunteer needs to become a navigator, but here is a basic outline of the training activities described in that document from a project manager's perspective:

Experimentation (Self-led, 1 hour)

The first step is self-guided. Ask the volunteers to experiment using the LiveHelp features on various websites. They should use the feature on the website they will be operating, but also encourage them to visit other websites that have the LiveHelp feature in order to experience LiveHelp from the perspective of the user. Montana Consumer Credit Counseling, (<http://www.cccsmt.org>), and the State of Montana website (<http://www.mt.gov>) are both possibilities, as are any of the websites listed on LivePerson's testimonial page (<http://www.liveperson.com/customers/testimonials.asp>), though some sites listed here may not have a button to initiate chats.

Trainees can also view a chat demonstration from Montana LiveHelp at:

<http://screencast.com/t/O9juGejU8v>

While volunteers are using the LiveHelp feature, ask them to pay attention to:

- how long it takes the website specialist to respond when they first request help;
- how long it takes the website specialist to answer their question;
- what tone and language the website specialist uses;
- what is done to make the chat easier for them; and
- what they like and dislike about the experience.

Ask the volunteers to contact you when they have a good feel for the experience and expectations of a LiveHelp user.

Project and Software Overview (Trainer-led, 1 hour)

The second component of website specialist training is an instructor-led session that lasts about an hour. This session should:

- introduce the LiveHelp Project;
- provide background information about your organization;
- identify important content on your LawHelp website as well as other significant legal information websites; and
- explain LivePerson's basic features.

The Powerpoint presentation that MLSA uses for this step can be found at the Statewide Website Support library at:

<http://www.probono.net/link.cfm?10347>

After this session, volunteers will need to install the LivePerson software on the computer they will be using for their navigator shifts. Detailed instructions can be found in the MLSA Navigator User Guide.

Content Overview (Self-led, time varies)

Instruct your volunteers to familiarize themselves with your LawHelp website between training sessions, pointing out a few resources from every category that they should read in full to be ready for commonly asked questions. Also have them skim any other websites they are likely to use for LiveHelp, such as the state law library website. Provide them with a few commonly asked questions that they can be mindful of as they look over available resources.

Online Tutorials

Volunteers can review their LiveHelp software training anytime using the online tutorials provided by LivePerson at <http://www.liveperson.com/training/elearning.asp>

.They can also view a video tutorial demonstrating how the Operator Console is used in LiveHelp access to justice projects at:

<http://screencast.com/t/QtFUOIJH6p>

Practice Chats (Supervised, less than 1 hour)

Before interacting with actual website users, it is a good idea for volunteers to engage in practice chats. The volunteer should log into the LivePerson software as a specialist and a colleague or trainer should initiate a chat on the LawHelp page that the volunteer is assigned to. If another navigator is serving for your LawHelp site, make sure to inform them that practice chats are taking place.

MLSA requires that their volunteers engage in at least two practice chats and respond to at least four different legal questions before they take any real chats. If you are not present for the practice chats, make sure to review the transcripts and provide constructive criticism to the volunteer. If you feel more practice chats are necessary before the volunteer goes live then arrange for them to take place-sometimes it takes time for volunteers to learn to resist the habit to offer advice and to become familiar with the available resources.