Virtual Reference Adventure: Choose Your Own Experience

How do you train virtual reference providers to conduct excellent reference interviews?

> "The principles for the reference interview remain the same, no matter what the environment." (Catherine Sheldrick Ross et al, *Conducting the Reference Interview*, Neal-Schuman Publishers, 2002.)

Dr. Catherine Ross and her colleagues at the University of Western Ontario emphasize that the reference interview should be required, not just mentioned, in library policies. "Institutionalizing" the reference interview means that it is more likely that training is provided and that individual reference interview skills are evaluated.

Susan Barb of QuestionPoint 24/7 trains backup staff for the 24/7 cooperative. She reminds them that the reference interview:

- Clarifies the patron's information need.
- Identifies and delivers the desired sources of information.
- Confirms the relevancy of the information results.

Patrons may have unrealistic expectations for virtual reference service. The reference interview can also:

- Adjust the patron's expectations.
- Give the patron choices.
- Use the choice to meet adjusted expectations.

Here are the PowerPoint slides that Susan uses in her training.

The Virtual Reference Interview

"The reference interview is the key to quality reference service." Ohio Reference Excellence. http://www.olc.org/ore

Developed by Susan Barb for training QuestionPoint 24/7 backup staff

Goal of the Reference interview

☀ Clarify patron's information need.

   ✶ Improve the quality of the question.

☀ Identify and deliver desired sources.

☀ Confirm relevancy of information results.

Reference Interview in the Virtual World

- Similarities
  - Requires librarian to clarify patron need for information.
  - Requires experience and skill in searching sources.
  - Requires appropriate resources for patron's need.

Reference Interview in the Virtual World

- ☀ Differences
  - ☀ No visual or auditory cues; must confirm some information with a question.
  - ☀ Takes longer and requires more back-and-forth to cover.
  - ☀ Patron requires frequent communication from librarian due to lack of visual feedback.

Good Reference Interview Behaviors

I. Acts in a manner that encourages patrons to ask questions.

II. Presents a friendly and professional attitude.

III. Allows patron to finish asking a question before commenting.

IV. Clarifies patron's information needs before searching.

Good Reference Interview Behaviors I

★ Acts in a manner that encourages patrons to ask questions.

  ✸ Send a greeting immediately after connecting to a patron.
  ✸ If you are handling more than one patron, you may then send the "Patron Ahead" script from the scripts box.

Good Reference Interview Behaviors II

- Presents a friendly and professional attitude.
  - Use the patron's name when chatting with them.
  - Chat as you would speak to them at the desk.
  - Use emoticons and chat abbreviations sparingly.

Good Reference Interview Behaviors III

- Clarifies patron's information needs before searching.
  - Ask an open-ended question first to elicit more details.
    - " Can you give me more detail about what you need?"
  - Restate what you understand the question to be and verify with the patron.
    - "So what you are looking for is (fill in the blank), is that correct?"

Good Reference Interview Behaviors IV

- Allows patron to finish asking a question before commenting.
  - Do not begin interview with a why question (i.e., why do you need this information?)
    - Patron may feel he/she must justify the need.

Beginning the Process

- Ask a minimum of two questions to begin the interview.
  - Helps establish chat rhythm as well as identifying patron's need.
- Use the Reference Interview scripts to
  - Establish type of resource wanted.
  - Find appropriate level of material needed.
  - Ask what search strategies the patron has already used.

Scripted Chat

- Use the reference interview scripts to speed up the first part of the interview
  - Where have you looked so far?
  - Is this for a school project?
  - Can you give me more detail about what you need?
- Do not use it exclusively.
  - A totally scripted interview sound robotic.
  - Your own "voice" comes through and is more approachable.

Next steps

- If you don't understand the question, ask them to tell you more about it.
  - Where did the patron come across the topic?
  - What class is it for?
- Don't make assumptions about what they want.

Using the search to clarify the patron's question

* Find an online resource and send to patron.
* Verify that patron received the page sent.
* Ask if this meets the patron's information needs and if not, why not.

Meeting Patron Expectation

- ☀ Patrons often have unrealistic expectations.
- ☀ Use the reference interview to adjust expectations.
- ☀ Meet the adjusted expectations.
- ☀ Give the patron the power to choose.

Patrons Have Unrealistic Expectations

* ☀ It's fast.

* ☀ Everything is online for free.

* ☀ We can do everything for them.

* ☀ There is no one using the "library" but them.

Adjust Patron Expectations

- ✸ Tell patrons that searching may take a few minutes.
  - ✸ Tell them you are still searching often.
- ✸ Communicate briefly and often with a patron who is waiting "in line."
  - ✸ I am still helping another patron, but should be with you soon.
- ✸ Explain when you can't find or do something.

Meet Their Expectations

- Send a page as soon as possible.
  - Even if it isn't what they need, they know you are working and you may get some good feedback.
- Don't use negative words in responding to questions.
  - Won't, Can't, Don't
    - "We won't do your homework for you"

      A better way:
    - "Let me show you some great resources to help you."

Give the Patron Power

* Give the patron choices.
    * Choose to wait, get an email or come back (when the service is busy).
    * Choose to contact local library by phone or have you forward an email.
    * Choose a follow-up option, choose deadline.
* Verify choice with patron.

Summary

- Ask open-ended questions.
- Communicate frequently.
- Give time for response and "listen."
- Don't use negative language.
- Use scripted messages to speed things up.
- Check with patron that you are on the right track.