

Virtual Reference Adventure: Choose Your Own Experience



Can you be a “secret patron” to explore the effectiveness of the chat reference transaction?

The Secret Patron activity is based on a "secret shopper" approach used in customer service training. The University of Maryland College of Information Studies did chat reference service [evaluation](#) using a secret patron approach (they called it "unobtrusive observer").

The goal of this activity is to explore chat reference from the user's perspective. We have observed that when librarians practice chat reference with each other, they are very polite and they ask questions in ways that make sense to themselves and to other librarians. Our patrons don't do this!

In the “Anytime, Anywhere Answers” training program, many learners said that the Secret Patron activity was the most valuable part of their training.

Here's how you can be a Secret Patron.

- ✓ First, create a scenario that reflects a real information need. (An example is included to inspire you.) **What are realistic patron behaviors?** Does a patron's initial question always reflect the real information need?
- ✓ Second, using this list, select several chat reference services to visit. (Be sure to go to the Web site of an individual library, not the Web site for the consortium.) **Don't ask your question at more than one library in a consortium because you may get the same librarian answering the question!**

[Members](#) of California's Ask Now consortium

AskColorado participating [libraries](#)

[Members](#) of InfoAnyTime (Connecticut)

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- ✓ Third, use the checklist developed for “Anytime, Anywhere Answers” to **evaluate your experience as a Secret Patron**.

- ✓ Fourth, record your overall impressions of the service you received. As a patron, did you discover anything new or unexpected? **What did you learn** that you want to remember when you are providing chat reference service?

CAUTION: If your work e-mail address reveals that you work for a library, you may want to use a personal e-mail address to receive a transcript of the Secret Patron transaction.



SECRET PATRON

Scenarios for Exploring Virtual Reference

You are

A college student taking a Native American Studies class. You are writing a paper on tribal-owned casinos and their social and economic impacts. You want to prove that casinos don't benefit individual Native Americans because the majority of employees are not tribal members.

Your approach to asking a question is

Short and to the point. You just want some statistics to complete your paper. You are an experienced chat user so you tend to give short, quick responses with minimal capitalization and punctuation.

You start with...

how many indians work at casinos?

Then you ask...

where can I find some good statistics on employment of native americans in tribal casinos...i need some figures for my paper.



VIRTUAL REFERENCE TRANSACTION CHECKLIST

Library visited: _____

Date/Time: _____

Scenario used: _____

SETTING THE TONE

- The librarian greeted me personally and used my name when appropriate.
- It was clear that he/she was interested in my query and ready to provide assistance.
- He/she thoughtfully integrated any scripted messages into the transaction.

GETTING THE QUESTION STRAIGHT

The librarian clarified my question using

- An open question
- A closed question
- Both open and closed questions
- Did not clarify my question

KEEPING ME INFORMED

- He/she asked me whether I wanted to see how to find the answer.
- The librarian's responses were clear, easy to read, and free of library jargon or personal opinion.
- The librarian kept me informed about his/her progress in finding an answer, providing a time estimate when needed.
- He/she let me know what he was doing, e.g., still looking, pushing a Web page, escorting, etc.
- The librarian provided help with any technical difficulties.

PROVIDING INFORMATION

- He/she identified authoritative information appropriate for my need and interest.
- The librarian gave me time to determine whether the information found actually answered my question to my satisfaction. Didn't rush me by pushing too much information.
- Cited the source of the information.
- Asked if I wanted to be shown more sources.
- Recognized if my question needed to be referred elsewhere or could be more effectively answered through e-mail.

FOLLOW-UP

- Asked if the information found answered my question to my satisfaction.
- Asked if I had any other questions.
- Encouraged me to use the service again.
- Thanked me.
- I was asked to evaluate my experience with the service. This evaluation was/was not an effective tool to express my opinion of the service. _____

- My other comments about the reference transaction are...
