

10-30-2009

Online Reference Question Protocol

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Recommended Citation

Hillyer, Nora, "Online Reference Question Protocol" (2009). *Criss Library Faculty Proceedings & Presentations*. 13.
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Nebraska Library Association Annual Conference
Online Reference Protocol
Nora Hillyer
October 29 & 30, 2009

- Virtual or online reference includes email, chat, IM and texting.
- Students in college now were 3 years old when the Internet started to take off so the Internet is second nature to them like the television, microwave or phone is to baby boomers or Generation X.
- Internet based library services has become a necessity.
 - Among college-aged individuals, IM is the preferred method of communication.
 - More users are demanding Internet services to fit library research into their schedules.
- Academic libraries are showing more growth in IM services for virtual reference than chat services.
 - From a librarian perspective, chat software is clunky and cumbersome.
 - More librarians, especially younger librarians, prefer IM over chat.
- A 2004 AOL study shows that 90% of the teens that use the Internet also use IM.
- A Pew Internet and American Life Project survey found that 42% of all online users IM.
- Due to the proliferation of unlimited texting plans, the average teen sends 2,272 texts per month or 80 per day.
- IM or chat is not going to replace other forms of communicating with patrons but libraries will be reaching a new group of users by using IM or chat while keeping their reference service relevant.

There are concerns with online reference:

- 1) How do you staff the online reference desk and the physical reference desk?
- 2) How can you teach students research skills remotely?
- 3) How do you know you are answering the patrons question(s) when you are not receiving visual/aural cues?
- 4) How do you handle rude/impatient online users?
- 5) How can we use online reference to its fullest potential with a population that is comfortable communicating online?

Ideas to use online reference to its fullest potential:

- 1) Use your reference skills.
- 2) Introduce human elements into the online conversation.
- 3) Give your user personal space with your texts.
- 4) Adopt the language of communication for the online environment.

- 5) Deal with rude/impatient online users.

The Human Element Online:

- 1) Patrons who are fearful of approaching a live librarian at the desk may prefer using online reference.
 - a. An online librarian is more approachable.
 - b. The patron can feel anonymous
 - c. The librarian or user is not able to form judgments about race, age or gender.
- 2) Any interpersonal skills, experience or niceties are transferable to the online experience.
- 3) Adding warmth to the conversation adds to the human element
 - a. Offer reassurance when users indicate they are fearful of your disapproval
 - b. Use encouraging remarks, praise as appropriate
 - c. Mirror the level of formality/informality of the user
 - d. Be deferential and respectful of all users
 - e. Acknowledge user's self-disclosure (I'm sorry you are not feeling well)
 - f. Be empathetic when users self-disclose difficulty of frustration (It is frustrating trying to find the location of journals)
- 4) Add humor
 - a. Humor can be reassuring as can the use of self-deprecating remarks (I'm the world's worst speller)
- 5) Increase Interactivity
 - a. Break down complex processes into workable steps
 - b. Differentiate search terms in brackets or double quotes
 - c. Include the user in the search process (Let's try this)

Personal Space

- 1) Provide warnings before pushing a page, disconnecting them or redirecting to another librarian
- 2) Ask directly if all of their questions have been answered
- 3) Send messages every couple of minutes or sooner
- 4) Patrons are patient as long as they are kept in the loop
- 5) Type short sentences and hit send frequently
- 6) If you are busy searching, continue to send short messages

Language of Communication for the Online Environment

- 1) Compensate for the lack of visual cues by:
 - a. Using repeated punctuation for emphasis
 - b. Use ellipses to indicate more to come
 - c. Spell out nonverbal behaviors (ha ha, oh, hmmm) rather than using emoticons
 - d. Try to avoid ALL CAPS
 - i. It may seem like a reprimand or like shouting

- 2) A study of chat conversations done by Jack M. Maness determined the formality of chat conversations and correlated formality with patron satisfaction.
 - a. IM conversations then to be more spoken, informal genre
 - b. The study looked at
 - i. The use of emoticons, abbreviations and acronyms
 - ii. The style (refers to the formality of the language)
 - iii. Genre refers to the general characteristics of the spoken versus the written word
 - c. Librarians rated NOT helpful:
 - i. Used very formal language
 - ii. Used scripts
 1. Often a response to inappropriate behavior
 - d. Librarians rated helpful
 - i. Used less scripts
 - ii. Used ellipses
 - iii. Continually kept the patron informed of what was going on
 - iv. Kept the conversation less formal
 1. Relaxed the rules of formal grammar and language
 2. Used more contractions
 3. Mirrored the language style of the student
- 3) Barriers to communication – thing to avoid
 - a. Sarcasm
 - b. ALL CAPS ALL THE TIME
 - c. Emoticons
 - d. Acronyms
 - e. Impatience
 - f. Ignoring humor
 - g. Jargon
 - h. Mirrors rude behavior

Handling Rude/Impatient Online Users

- 1) Use the same face-to-face skills when dealing with problem patrons
- 2) Be polite and professional at all times
- 3) Avoid jargon
- 4) Look at complaints about service or another librarian as an opportunity to improve service
- 5) Rude users are in the minority
 - a. Don't take it personally

More to Consider

- 1) Establish a training program
 - a. Develop procedures and best practices
 - b. Be comfortable with the technology
- 2) Learn by doing
- 3) Talk with other staff members

- a. Conduct regular discussion groups about chat experiences
- 4) Review other online transcripts
 - a. Sometimes these can teach you what NOT to do

Words of Advice from Veterans

- 1) Panic fades with experience
- 2) You don't have to hurry
 - a. Users of the service are generally patient and appreciative of the help
 - b. Users maybe multi-tasking waiting for an answer
- 3) You need to be calm to think on your feet
- 4) Practice, practice, practice

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