Hurry Up and Wait

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To cite this article: David S. Carter (2002) Hurry Up and Wait, The Reference Librarian, 38:79-80, 113-120, DOI: 10.1300/J120v38n79_08

To link to this article: http://dx.doi.org/10.1300/J120v38n79_08

Published online: 22 Oct 2008.

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Hurry Up and Wait: Observations and Tips About the Practice of Chat Reference

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SUMMARY. This article offers practical suggestions for doing chat reference, including setting up, using language, interviewing techniques, and composing responses. It contains comparisons to in-person, phone, and email reference techniques. [Article copies available for a fee from The Haworth Document Delivery Service: 1-800-HAWORTH. E-mail address: <docdelivery@haworthpress.com> Website: <http://www.HaworthPress.com> © 2002/2003 by The Haworth Press, Inc. All rights reserved.]


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[Haworth co-indexing entry note]: “Hurry Up and Wait: Observations and Tips About the Practice of Chat Reference.” Carter, David S. Co-published simultaneously in The Reference Librarian (The Haworth Information Press, an imprint of The Haworth Press, Inc.) No. 79/80, 2002/2003, pp. 113-120; and: Digital Reference Services (ed: Bill Katz) The Haworth Information Press, an imprint of The Haworth Press, Inc., 2002/2003, pp. 113-120. Single or multiple copies of this article are available for a fee from The Haworth Document Delivery Service [1-800-HAWORTH, 9:00 a.m. - 5:00 p.m. (EST). E-mail address: docdelivery@haworthpress.com].

We’ve been doing chat reference at the University of Michigan since September of 2002. I come to this chat reference service from a unique perspective: most of the planning for the service was done before I came to my current job, and my previous job was as the Director of the Internet Public Library (IPL), where we were influential pioneers in digital reference service, having mounted one of the first wide-scale email reference services (Lagace & McClennen 1998) as well as mounting an early experimental project in real-time digital reference (Shaw 1996).

It should be noted that the observations, opinions and suggestions in this article reflect my own experiences with the particular system and way of doing chat at the University of Michigan, and do not necessarily reflect the experiences or opinions of anyone else. In particular, as we use QuestionPoint (Quint 2002) as our chat reference system, your experience with some of the technical aspects of chat reference may differ depending on which system you are using at your institution.

**SETTING UP**

Ideally, your computer should have a display of 17" or more set at a resolution of at least 1024x768—you’ll want to be able to do several things at once and you’ll appreciate the screen real estate.

Browsers: I recommend using a Mozilla-based browser (Mozilla, Netscape 7 or later, Camino, etc.) mainly because of an important feature that Mozilla has: tabbed browsing. (The latest beta release of Safari, Apple’s browser for the Macintosh, also has a tabbed browsing feature.) By using tabs, you can have several Websites open at once, but only have to deal with one browser window. This greatly reduces the screen clutter when trying to respond to a question. You may find it helpful to use more than one browser, e.g., use Internet Explorer for the chat session and Mozilla to do your searching.

Turn up the volume on your computer loud enough so that you can hear the ‘beep’ when a new question arrives. If you’re at home or some other private place there will be a strong tendency to crank up your iTunes (or other music player) to entertain yourself, but be sure that it’s not so loud that you cannot hear the system beep.

Get comfortable. You’ll be spending a long stretch of time sitting in front of a computer. Be sure to stand up occasionally and stretch. If you’re going to have a shift longer than an hour, make sure there’s a
bathroom nearby (especially if you’re going to be drinking coffee or Mountain Dew in order to stay alert!).

**HURRY UP AND WAIT**

So, now you’re all set up and ready to take your first chat reference question. So you wait. And wait. And wait. Gee, weren’t the questions supposed to be pouring in?

I’ve spoken with many people who have done chat reference at different places and in different situations, and the experiences seem to fall into one of two extremes: either they have so many questions that they need multiple people to keep up with demand, or the questions come in dribs and drabs, where if they’re lucky they’ll get one or two questions per hour. My personal experience so far has been the latter.

Unless you know you’re going to be inundated with questions, you’ll want to be sure to have something else to do—you don’t want to be simply staring at the screen for an hour waiting for a question to arrive. The trick is to have it be something that doesn’t take too much concentration. So (as I’ve found) it can be rather difficult to write an academic paper while doing chat reference, but catching up on some professional reading can be fine. It helps if the task you choose can be broken up into small chunks, so that when you’re interrupted by a question you won’t find it hard to return to your task.

**LANGUAGE**

Language used in chat rooms is often delightfully informal—long and/or common words are abbreviated (e.g., gr8 = great), capitalization is often foregone, and complete strangers are addressed as bosom buddies. While many of our patrons may employ such standard chat conventions, we should avoid employing them ourselves. Without the artifice of a building around us, a position at a desk, the clothes we wear, etc., the only thing we have to present our authority are the words we use. Thus, it is imperative that we not come across as just another buddy, but rather as the official face of the institution (library) that we represent.

On the other hand, don’t sweat it out too much. If a misspelling or two creeps through, or your sentence structure isn’t perfect, no one is going to hold it against you. You don’t really have the luxury of time to
compose a perfect response—it is more important to get your response back to the patron.

GETTING TO KNOW YOUR PATRON

You don’t get to see (or hear) your patron when doing chat reference. In some ways this is beneficial: there are no opportunities for any prejudices or assumptions based on appearance to creep into the process. But by the same token you’ll be missing many of the helpful conceptual clues (age, demeanor, etc.) as well. All you’ll have to go on are the words the patron types.

After sending off the standard welcome greeting to a new patron, the first thing I do—while waiting for the patron to respond with his question—is to try to find out more about him. If he’s from the University, I can quickly look him up in the online directory to discover his status (student, staff, faculty) and department affiliation. Another thing that can be done is to Google the patron with his name and/or email. It may seem a bit like snooping, but it is all public information, and done in the spirit of being able to more directly address the patron’s needs.

DEALING WITH PAUSES

Pauses in conversations are natural, and reference interactions are no exception. Sometimes we need to think for a moment. Sometimes we need to look something up before continuing. In person, the patron can see a pensive look on our face, or that we have turned to the computer and are typing, or that we are walking across the room to grab a book. In chat reference, all the patron sees is a blinking cursor. If the pause goes on too long, she may start to wonder what is going on: perhaps we are looking for information, but maybe we have been disconnected, or we’re choking on a biscotti, or someone else has come along with a more interesting question!

(Strangely, this problem doesn’t seem to exist much with phone reference; I suspect that as a culture we are so used to being put on hold it doesn’t phase someone to hear “Hang on a minute—I’m going to look this up for you,” and then wait for five minutes until we continue the conversation.)

Thus, it’s a good idea to periodically remind the patron that you are still there: every couple of minutes, send a short message—“still looking
"..." seems to work well–to let her know that you remember that she is there and you are working on her problem.

We are just as likely to be faced with long pauses from the patron’s side as well. The pauses can be for many reasons–including the same bad case scenarios mentioned above–but most likely are due to one of two reasons:

First, the patron may be multitasking. This is quite likely for a patron who is comfortable with chat as a medium. She may be continuing to work on her paper, or searching in Google, or chatting with a friend–all the while asking a chat question to the librarian. Just because you are hanging on the patron’s every word doesn’t mean that she is doing likewise.

Second, the patron may be unfamiliar with using chat, and may be typing a long response himself. Think about how uncomfortable you were the first time you did chat reference, and then remember that in all likelihood this is your patron’s first time as well. He has not developed techniques for efficient chat reference that you have.

If the pause goes on too long you should probably send along a gentle prod (“Are you still there?”) but it can be quite common for a patron to take several minutes to compose a response to a question you have asked, and we need to take care so as not to appear too impatient or pushy.

THE ART OF PRODDING

Just as with other forms of reference, some patrons will be more forthcoming with their questions and information needs in chat reference than others. Many of the same reference interview techniques that you are used to using in in-person and phone reference can be applied in chat reference as well. However, recall that brevity is a virtue with chat, so take care to construct your question so that they are not too complex, and will elicit short, direct answers from the patron.

(I have yet to encounter this in a chat reference system, but I’d be interested in seeing how a pre-interview to chat reference would work–besides asking for name and email, get some demographic information, ask them for their question up-front, ask where they’ve already looked, etc.—much like a good email reference form does. I’ve also always thought that it would be interesting to employ a chat bot armed with a battery of reference interview questions before sending the patron on to a real librarian.)
You can also use questioning to another useful end, one that is unique to chat reference: stalling for time! While you’re trying to think of the best place to look, or are in the process of looking, instead of sending a ‘placeholder’ message (e.g., “still looking . . .”) you can give the patron a good Dervin and Dewdney (1986) neutral question to chew on (e.g., “How are you planning on using this information?”) This not only helps to keep the patron engaged and interested in the question at hand, it can also help to supply additional potentially useful information.

**STARTING THE SEARCH WITH INCOMPLETE INFORMATION**

The reference interview is a wonderful thing. Through it we learn better what patrons’ true needs are and how best to meet them.

In the traditional reference interview, a librarian interviews a patron with a series of questions until the librarian comes to an understanding of what the patron wants. Once the questioning is completed, the librarian then goes to work, helping the patron find what he needs. While there may be some follow-up questions based on information found during the course of the search, the bulk of the interview is supposed to be done before the work of providing an answer commences.

This should not be the case in chat reference. Once you get a nugget of information to go on, get to work. Continue with the reference interview, but while you are waiting for the patron to respond, start your searching. If you need to make assumptions, go ahead—yes, the patron’s further responses may show your initial assumptions to have been wrong, but all you’ve lost is the time you’ve spent searching, time that would have been lost anyway waiting for the patron to respond. But if your assumptions prove to have been correct, then you’re ahead of the game and can respond to the patron that much sooner.

**KEEPING YOUR RESPONSES SHORT**

It is tempting to want to give lengthy, complete responses to chat reference questions. This is especially true for those of us with experience in e-mail reference, where we have the time and inclination to give exhaustive responses that include not only answers, but also a bit of bibliographic instruction as we go.
Alas, we do not have this luxury in chat reference. It takes time to craft a careful, well-thought out response and type it in, time during which all the patron sees is a blinking cursor until we hit send.

Thus you’ll want to break up your responses into single sentences, and the simpler the better. Give the patron something to read while you’re composing the next part of your answer. I usually try to put (“more . . .”) at the end of each sentence I send to indicate to the patron that my response will be continuing in the next message.

**TO EVERY QUESTION ITS MEDIUM**

There is a strong tendency towards wanting to answer all questions that come in by chat as chat questions. It’s an understandable tendency—after all, when someone phones, we give them the answer over the phone; when they come in person, we give them the answer in person; when they email, we send back the answer via email.

Except sometimes we don’t. Sometimes when someone phones, we tell them that they need to come into the library for help. When someone comes in person, we sometimes take down their email address so that we can look for information and email it to them later that day.

In the same way, we need not always use chat to answer a question that comes in via chat. We may think that because a patron is using chat, it is her preferred way of asking us that question—but that need not be the case. More probably, it is the first method that she found for getting in contact with the library. Don’t be afraid to take note her email address, let her know that you’ll do some searching and then email what you find. You’re really not doing her any favors by keeping her waiting in the chat client while you spend 20 minutes tracking something down.

Similarly, if you’re thinking to yourself, “Gee, this would be much easier to handle over the phone than it is over chat,” why not ask if your patron is near a phone and call him up?

**WHERE CHAT SHINES: HELPING PATRONS WITH WEB-BASED RESOURCES**

Anyone who has ever done phone reference knows the frustrations involved with helping patrons remotely who are using Web-based resources. Reading a URL over the phone is a nightmare, and you find yourself saying things that no sane human should ever have to utter
(“Do you see down in the lower right hand corner of the page where it says ‘Patents & Standards’? Click there. Now find where it says . . .”). With chat reference, a librarian can just copy and paste a URL from the browser’s address bar into the chat message window, surround it with context, and send it. After the chat session is over, the user gets an email copy of the session, including all the URLs for easy reference in the future. Some chat systems even allow for co-browsing, wherein the librarian can take control of the patron’s browser to allow the patron to see what the librarian is doing and where he is going online.

CONCLUSION

Like phone and email reference before it, chat reference offers the opportunity to expand reference services to others in our user populations. Like most aspects of digital librarianship, it is “the same but different”–the same basic concepts are there, but the applications are different and novel. Different applications require new techniques; this brief article demonstrates some of the techniques that I have found helpful, techniques I hope that others will find useful to employ, expand on, and even disagree. As long as we continue to employ chat reference in serving our patrons’ needs, and share what we’ve learned, it will continue to grow as another useful component of the ever-growing reference toolbox.

REFERENCES