Reference Chat: Filling a Space in a Beautiful Way

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To cite this article: Dave Harmeyer (2016) Reference Chat: Filling a Space in a Beautiful Way, The Reference Librarian, 57:3, 254-263, DOI: 10.1080/02763877.2016.1129248

To link to this article: http://dx.doi.org/10.1080/02763877.2016.1129248

Published online: 25 Feb 2016.
It was nearing 3:00 on a Friday afternoon at Brett College in Southern California. I was secluded in my office catching up on a few e-mails from book publishers, mostly e-books, of course. It was about time for monitoring my 2 hours of online chat reference when I received a call on my smart phone. The screen read Unknown Caller. But I knew who it was.

“Hi,” said a young girl's voice.
“Who is this?” I asked in an annoyed tone.
“It’s Diane.” The girl responded.
“Oh, Diane! What a coincidence. I have a 12-year-old daughter named Diane.”
The young voice fluctuated, “Da-a-a-d!”
I responded, “Oh, that’s right … you ARE my daughter. So, what can I do for you?”
“I’m starving!” was the response.
“I’ll be home in 2 hours. Get a can of soup from the pantry. That’ll hold you over ‘til dinner.”
“I don’t know how to open cans.”
“These have no-brainer pull tabs.”
“Oh, got it,” she said confidently.
“Anything else?” I asked.
“No, I’m good now.”
“Great, good bye, love you.”

I ran my fingers through my hair as I hung up the phone and began to focus on the 2-hour task ahead.

Chat reference is rewarding and exhausting. Two hours is about all I can take. I’m an enthusiastic chat librarian for three reasons: (a) the vendor who provides the service expects me to answer chats in an efficient, professional manner; (b) every chat patron deserves a respectful, accurate, and timely experience; and (c) I love it.

After clicking on my browser’s bookmark for Chat Reference, authenticating with my username and password and selecting three chat queues to monitor, I was in the system—live. The chat screen, for me, has become a kind of artist’s canvas; each query eventually forms an answer to be brushed out into meaningful mental images. Most results end in satisfying ways, some even a tour de force, with the answer complete and accurate, and the patron grateful. But a few are dreadful ramblings, plops of paint with canvas showing through. Two goals of chat reference are to discover how to practice forming the masterpieces and learn from the plops.

Ding! The soft, quiet tone announces a waiting patron. I see that there are some 17 librarians monitoring calls along with me, from states such as Washington, Michigan, and Hawaii. It is a competition of sorts; which one of us will get the next person? When I mouse over the incoming request, before accepting the query, a pop-up box reveals the patron’s question. Some chat customers provide adequate information, such as the complete citation for a source they need in full text. The information is helpful—well, most of the time. But chat librarians will sometimes read too hastily, maybe with the thought that someone quicker might snatch up the easy questions or, if they are more of a thrill-seeker, the challenging ones. If you click on a patron who was just picked up by some other librarian, you get the abrupt message: “Sorry, either the patron logged off or another librarian is answering the patron,” and feel a small sense of loss in a silly game of cat and mouse.

However, in the late Friday afternoon, this patron’s first expression is neither revealing nor helpful. He or she simply typed, “Hi.”

The pop-up box gives attentive librarians a little more to go on; there is the name of institution hosting the chat service and the patron’s e-mail address, but, in this case, no patron name. The answer all 17 of us want to know is “Is this question worth picking up?” Both the e-mail address and the institution confirm its origin, United Kingdom academic library, but nothing else.

Here’s when the tension kicks in. The system lets those of us monitoring know the number of seconds the patron has been waiting for a pickup. It is interesting to note that entire dissertations have been devoted to the average wait time of call centers, of which chat reference is related. According to
research, the industry goal is 25 seconds and yet the reported actual wait time is 41 seconds for 80% of all calls.¹

The seconds are ticking ... 5 ... 10 ... 15. No one picked up this patron, so I did. The wait time, given to me by the system, showed 18 seconds. Because the patron did not include a name, I would not begin my first response with a friendly “Hi so-in-so.” However, before I could send my canned greeting (“Hi, I’m reading your question”), the following message came across the screen:

“Bit of a random question this time on a Friday night—I’m a staff member and need to print something. Am I able to walk in, top up my smart card with credit, and print something?”

In my head I heard a slight British accent as I read the question. It was not a reference question per se, but a policy question. Some chat librarians will disagree with me, but if I have enough information to answer a policy question, I certainly will. Those chat colleagues who prefer only reference questions (maybe because it is a waste of one’s time or professional expertise) will simply not pick up nonreference ones or if they mistakenly do, quickly provide a mere phone number for a library worker to answer at a later time.

Moving on ... I assumed my UK staff patron had read the initial automated message: “Brett College Librarian Dave” has joined the session, and he or she therefore knew I was not a librarian from their campus, so I responded:

“Let me check. I have access to your library’s policies.”

I clicked on the “Policy” link maintained by the librarians at that library. Reading the labeled categories, I eventually came to “Printing.” I copied what was relevant and typed:

“Here’s what I found out: Printing and photocopying credit is handled through the IT department. To add credit to your account ...” and followed the exact quote with the URL location of the page about printing.

I also discovered a small caveat that might disturb the person if not mentioned—I read in the policy that it took 30 min to show new credits in their system. So I added, “Hmm, looks like it will take 30 min for your new amount to be updated on your card. Hope that’s not an issue.”

As I typed or pasted a few more printing tips from the policy, I saw the patron’s green icon had turned to red. We were disconnected. Bummer. When the patron-disconnect happens, it makes me feel a little like my efforts were fruitless or the patron did not care for my answer. There is no way to know, that is, unless they fill out an optional short survey that pops up on their end after exiting the service. Any completed surveys immediately show up in my e-mail inbox and are, for the most part, positive and encouraging.

There is also a way to extend the conversation. Once I log off, the system sends a copy of the transcript to the patron’s e-mail address. Before I do that, and the patron included an e-mail address, I can add more information knowing that when I eventually log out, the patron still gets, in theory, a more accurate and complete answer. If a customer chose not to include an
e-mail address, as in this example, the system still provides the exiting patron one last chance to do so. The system prompts the user to enter an e-mail address to receive a copy of the session’s transcript. So, in this case, I will never know for sure if my attempt at “filling a space in a beautiful way” made its way back to the patron. But I always hope it does.

My sense of hopeful unknowing, though, never lasts long. There’s always the next transaction. Within minutes I was engaged in the second of three reference transactions for my day’s shift.

Ding! … Ding! … Ding! … I quickly moved my cursor over the next arrival’s credentials. This time the patron includes a name, e-mail address, and question. Additional information informs me that this is Jeremy, a student at a nearby private university whose librarians also monitor our queue to answer our students’ when we’re not online in chat. In a couple of seconds I learned all this and clicked the name before any of my 17 colleagues did. Next I see:

“Hi! I am doing my senior thesis on intact families versus divorced families and substance abuse. I am having a hard time finding recent articles.”

I responded, “Hi, Jeremy, my name is Dave, and I’m a librarian helping your librarians when they’re unavailable. I’m reading your question …”

My first thought was to find out where Jeremy had already looked and to get his search terms. I hoped to recreate his efforts and then go from what was familiar—on to new unfamiliar territory. This is a teaching technique I call going from the known to the unknown and is attributed to a book written in 1886 by John Milton Gregory, the first president of University of Illinois at Urbana-Champaign.3

I continued, “OK, where have you looked so far? Have you tried Academic Search Premier?”

When asking an open-ended question, as I did here, I try to add a short, clarifying example, Academic Search Premier. Doing this not only moves the conversation along, but also creates fewer ambiguities between librarian and patron. Some reference librarians would consider this a closed question only. But it’s actually both, first an open question and then a closed one, which together, I think, gives a friendlier tone and a sense of being less pushy.

Anyway … continuing, Jeremy typed, “I have tried Academic Search Premier, PsycINFO, and Psyc Articles.”

The affirmation of Jeremy having used the one database plus these two others demonstrates he’s probably experienced in searching as well as in choosing more discipline-specific databases. Doing so provides better search results than what might be found in general databases, of which Academic Search Premier is one.

I asked, “Hmm, ok. What did you use as a search string? Such as families AND divorce?
I ask another open-ended question but this time with the, maybe, unfamiliar term search string. I then try to define the unfamiliar with a simple example: families AND divorce. I intentionally typed and in uppercase to highlight the standard practice of using the Boolean AND between search terms. I decided not to explain the Boolean AND details to him in this example, but I might later if I thought it would help the overall process.

He types again, “I have tried family structure, intact families, divorce, substance use, and substance abuse.”

With these terms, I’ve by now gathered enough facts to begin working toward useful resources. While Jeremy and I are dialoging, I apply a simple technique to track the details up to now and throughout the rest of the transaction. I opened a blank Microsoft Word document and copy his exact terms into what might be considered a staging area, if you will, for notes. Here I can do a number of useful things such as check spelling (spell-check is not part of the chat system, and I’m too creative a speller), quickly look up synonyms, and rearrange terms and synonyms before trying them out as searches for better results.

During lengthy and complicated transactions, I find it helpful to use the staging area method and/or open another browser screen to experiment with different databases and search strings. But—and this is important—care must be taken with wait time; that is to say, the time between a chat librarian’s last response and their next one. Research has found that in chat reference the librarian has a higher statistical confidence of getting a correct answer if time gaps between responses are between 1.5 and 2.5 minutes. This also helps toward more satisfied patrons who don’t wonder if you’ve left them.4

Going back to Jeremy’s transaction, I sense that he’s growing eager to see some kind of results on his topic. The fact that I know where he’s been and his search terms helps me move us into new terrain.

“OK. Let’s go to PsycINFO together. Bring up another browser window so we can keep chatting in the current one,” I directed.

“Okay.”

“In the first box type family, in the second box type divorce, in the third “substance abuse” with quotations around these two words.”

“Okay… give me a minute.”

“No problem …” I respond, making a mental note: I need to slow down a little.

“Okay… I’m in … do I need to change anything in the drop down menu?”

“Not right now,” I cautioned. “Let’s cast the largest net possible first, then narrow.”

After about two minutes I continued, “So, how many did you get?”

“Well, they can only be five years old… so I went ahead and condensed it from 2009. I got 50.”

“Great, give me a moment and I’ll do the same.”

The student texted, “Why the quotation marks?”
“Good question. Putting quotation marks around two or more words changes your search from single words to a phrase. When searched this way the results will be more relevant and there will be fewer items to look at. This is because your search is bringing up only those records that use the two words together as a single term versus finding each word separately in a document and giving you a lot of false hits.”

From here on, it was a typical reference interview. We worked through how to narrow results by scholarly/peer-reviewed articles, how to change the sorting arrangement from relevance to date newest, and how to locate the American Psychological Association (APA) citation format for each record. In the end, I sensed Jeremy had grasped the search techniques and was well on his way to adequate resources for his senior thesis.

I logged out of Jeremy’s session and clicked “Set Transaction: Answered” with my own sense of satisfaction, filling a space in a beautiful way.

I took a few moments’ break and called my daughter…

“Hi sweetie. What’s for dinner?”

“What?” she asked.

“Oh, aren’t you making dinner tonight?”

“What are you talking about, Dad? I warmed up one can of chicken and rice soup for me.”

“Soup sounds good to me. See if that’s OK with your sister; she’s probably in the back room with her headphones on.

“But dad, I don’t know …”

I interrupted her, “Now what was that? Look, there’s about six more cans of that soup in the pantry. Get out the big storage bowl, open the lids, dump, and put it all in the microwave for 10 minutes. Done!”

“Sure Dad, I can do that. Oh, I just thought of something. I have an art assignment due tomorrow. How about I make tonight’s meal my project?”

“Well I don’t know, what do you mean?”

“We’re supposed to take something at home and make art out of it. I’ll do that with dinner and add some potato chips and marshmallows and stuff like that as side dishes.”

“Hmm, sounds interesting. I guess so. Just don’t overdo it, Chef Diane.”

“No, it will be perfectly fun! See ya,” and she hung up.

So, artistic efforts would be attempted by father and daughter, mine virtual, hers edible.

During the conversation with Diane, I noticed a couple of chat patrons were picked up by other librarians. At the sound of the ding, I chose the next person without reading the question; not advised, of course, and certainly risky. Then I watched my screen morph into these words: “language and literacy development: what educators need to know” is what I read; not even
a complete sentence. The seemingly disconnected set of terms reminded me that, occasionally, chat librarians need to play the role of crossword puzzle takers, intuitively filling in missing pieces and doing a bit of detective work and outright mindreading. I could have asked a clarifying question, and that would have been fine and professionally expected. But where’s the art of the reference transaction in that? And then I had an idea.

“Is this a title of an article you are trying to find?” I quickly went to Google Scholar, copied and pasted her or his original words into its search box and up came a record with that title. I clicked on Google Scholar’s “Cite” feature for that record and copied the APA citation style for the entry. I continued, “I believe this is the full citation of the article (in APA format): Stewart, N. (2011). Language and literacy development: What educators need to know. Early Years, 31(3), 301–302.”

“I am trying to find that book.”

Well, I was close! But I was curious why the record didn’t show it was a book. I figured it out and followed with, “OK, yes a book. What I found was a book review of the book. Sorry. Checking sources for the book. One moment.”

Next I went to the patron’s library website and checked for holdings of the title. Three minutes later I responded,

“Sorry for the wait. Found a copy. However, it is not at your college but at another school that is part of a statewide sharing service. Checking for other sources of the title. Parts of it may be online. Just a moment.”

“OK, thank you.”

When students need a book in this way, it’s often a textbook for a class. They sometimes will say they ordered it, but it hasn’t come in the mail. And yet they still have reading assignments due. Google Books can be a helpful source on the fly. Large numbers of titles allow a preview of multiple pages.

I continue, “Yes, some of the full text of this book is available for free from Google Books. The URL is … Will the digital version meet your needs or do you want to do an interlibrary loan and get the print version?”

The student texted back, “The digital is fine as long as I am able to print.”

I answer, “Printing is only what you see on your screen. So one screen at a time, I’m afraid. Copyright compliance comes into play.”

“Oh I understand. But I was looking to see if the digital was the full version.”

I checked my online sources. The title had two editions, but both were not yet cataloged as e-books. So I answered, “Sorry, it does not appear that the title is in electronic form.” And I just had to find out, “Is this a textbook?”

“Yes it is.”

I smiled. I summarized what options we had found plus something else, “OK, so you can get the print via interlibrary loan in a couple of days from another library, view some of the content immediately in Google Books, or if
you haven’t yet purchased it, I suggest you try AddAll.com (where I purchase all my print books).”

“OK, thank you so much for your help … and personal suggestions.”

“That’s all I have for now,” I responded.

The student ended with, “Ok thank you.”

I clicked and sent the canned goodbye response supplied by the student’s librarians: “If you need further assistance, please feel free to contact us again. Thank you for using our service. Goodbye!”

Then I set the resolution as “Answered,” logged out of the chat system, and took a deep breath. Done!

I called Diane to see how dinner was going.

“Hello, is this Diane’s Burgers?”

“What? Who is this?”

“Oh, I must have a wrong number. What’s your name?”

“I’m not supposed to tell strang … Dad! Is that you?!”

“Well, that depends?”

“Depends on what?”

“.…. if you’re my daughter. OK, yes, it’s me, good old D-A-D. And to prove it, your favorite color is pink every month of the year except December when it’s grassy green. How’s the art project coming along?

“Art project? Oh, you mean dinner. Well, I decided to forget the soup idea. Instead I’ve put four packages of rice in the microwave, mixed them together with three cans of chicken pieces, put out four plates, four bowls, spoons, forks, and knives on napkins. I then took some of our guinea pigs’ lettuce and tore up pieces in a big bowl, dumped in a can of drained black olives, added some chopped up miniature carrots and crumpled up a bag of potato chips. Yum!”

“Ah . . ., yes, yum. Don’t forget drinks and some salad dressing. I’ll be home in 20 minutes.”

“OK, Dad. I’ll let Mom and sissy know. And I put some of our backyard flowers in a vase.”

“Very cool, kid. See you in a few.”

I pressed the “Off” icon on my phone and gathered my things. As I walked out the door I couldn’t help but think how we were both filling space in our own beautiful ways.

The following is a list of 18 things you may have discovered from this reference transaction:
Reference transactions can be perceived as more art than rote tasks
Your full professional attention is needed when conducting a chat reference
Every patron deserves a respectful, accurate, and timely experience
Two goals of chat reference: to practice creating masterpieces and to improve from mistakes
When initial questions are incomplete or incorrect, improvement happens in question negotiation
Because chat systems show a patron’s wait time, it is best to pick up within 25 seconds, which is the national industry goal of call-centers
Answer policy questions in the same full, respectful manner as reference questions
It is quicker and more accurate to copy and paste a policy answer; and follow such statements by their URL location
If a patron for whatever reason logs off and an e-mail address is included, the reference transaction can continue because the full transcript is sent after the librarian logs off
Take patrons from where they’ve been searching (the known) to potentially better sources (the unknown) versus jumping into something that’s unfamiliar
When asking an open-ended question, add a short, explicit example to clarify what you mean
Keep the tone of your chat responses friendly and obliging
Discover early on patrons’ searching expertise so you can acknowledge their proficiency, help them build trust in you, and introduce important but unfamiliar terms sooner, such as search string
Keep some notes about the transaction in a separate Word document window (staging area) to organize thoughts, perform spell checks, find synonyms, and add ideas
If helpful, open another browser window and experiment with other databases and search terms while maintaining the transaction
Research shows that you will get a more accurate answer if your posting times are kept within 1.5 and 2.5 minutes
Co-browse with the patron in the same search source (database) by instructing the patron to open another browser window (to maintain the chat screen) and continue in the second screen with your step-by-step instructions
When co-browsing, acknowledge whether the patron has kept up or has received a different set of search results
Notes

3. This *known/unknown* sequence is attributed to John Milton Gregory, the first president of University of Illinois at Urbana-Champaign, as the fourth of seven principles found in his *Seven Laws of Teaching* (1886).

Acknowledgment

The author expresses gratitude for the copy editorial expertise of Janice Baskin, MA, MS, Director, Graduate Publications, Azusa Pacific University.

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