The Chat Reference Interview: Practicalities and Advice

Tammy Bobrowsky, Lynne Beck & Malaika Grant

To cite this article: Tammy Bobrowsky, Lynne Beck & Malaika Grant (2005) The Chat Reference Interview: Practicalities and Advice, The Reference Librarian, 43:89-90, 179-191, DOI: 10.1300/J120v43n89_12

To link to this article: http://dx.doi.org/10.1300/J120v43n89_12

Published online: 12 Oct 2008.

Submit your article to this journal

Article views: 340

View related articles

Citing articles: 2

Full Terms & Conditions of access and use can be found at
http://www.tandfonline.com/action/journalInformation?journalCode=wref20
SUMMARY. The popularity of chat reference services is evident, as seen from participation by libraries of all types and sizes. Librarians have long been taught and honed skills to assist the patron in face-to-face reference interviews, but this new medium has forced librarians to rethink those skills. The article discusses the practicalities of conducting a reference interview through chat, as opposed to face-to-face or in-person reference. Actual chat transcripts and surveys from the chat reference librarians at the University of Minnesota-Twin Cities
Libraries are used to illustrate the relationship and tension between instruction and reference in the chat interview. Also included are training suggestions, ways to compensate for the lack of visual cues, and advice from veteran chat reference librarians.

KEYWORDS. Chat reference interview, chat reference services, reference interview

As more and more libraries are signing on for chat reference, it has become clear that this medium has provided libraries with both an exciting new service and the challenge of acclimating staff to its nuances. Aside from training librarians to use the software, chat reference forces librarians to rethink traditional face-to-face reference interviews which have, through the years, provided librarians with keen insight into patron behavior and idiosyncrasies. Chat reference interviews are redefining those traditions and practices. The authors will not discuss the technicalities of creating or implementing chat reference services, but rather, provide practicalities and advice for conducting the reference interview through the chat medium.

TRAIN AND PRACTICE, THEN PRACTICE SOME MORE

Establishing a training program will be beneficial to both new and experienced chat reference librarians. Training encourages the library to develop procedures and best practices that will help sustain the quality of the chat reference service.

Learning how to use the chat software is vital to the success of a chat service and will help to ease qualms that beginning chat reference librarians may have. Being comfortable with the technology and learning how to use the many features or shortcuts that most chat software programs provide (quick links, templates, co-browsing, voice-over IP, etc.) allows the chat reference librarian to concentrate on the reference interview and the patron’s question.

There is great pressure felt by an inexperienced chat librarian despite skills they may have in other reference mediums. A survey sent to librarians who provide chat at the University of Minnesota-Twin Cities
revealed that a majority of them initially had many doubts and frustrations about the service. Much of their angst stemmed from the technology of the software, which many allayed by practicing chat sessions with other chat reference librarians or by themselves.

Speed was another concern identified by chat reference librarians in the survey. Many stated they felt pressured to get a response back to the patron quickly. Disconnections, lag time between sent responses, and the librarian’s own expectations were among the top reasons for this pressure. The new chat reference librarians felt that they were taking too long to respond, but in most instances getting what the patron needed was more important than the time it took.

*Ask Us!:* I am sorry that this took so long.

*Patron:* No this was great. I spent two whole evenings looking for this information and you found it just like that. This is better than Google!!!

Chat reference training should involve more than software training. Reference interview basics can be applied to chat and should be discussed. Also, protocol should be established: How should users be addressed? What if the patron disconnects before the information gets to them? What if the librarian cannot answer the question? Having a troubleshooting guide or policies and procedures documentation can help new chat reference librarians through any problems that arise.

Regular discussion groups or meetings to discuss chat experiences can also be a helpful way for chat reference librarians to learn from each other. Chat reference librarians often discover that they have similar fears and experiences. Knowing that other librarians are experiencing the same trepidations can help an inexperienced chat reference librarian deal with the pressures of this new medium.

**TRANSCRIPTS: THE DOUBLE-EDGED SWORD**

Many chat software programs offer transcripts of chat transactions for both patrons and chat reference librarians to view. These transcripts make it possible for patrons to have something to refer to for information and links visited during the transaction. They also have the potential to be an excellent training tool for chat reference librarians, both new and experienced. A good chat transcript can teach a chat reference
librarian how to conduct a chat reference interview or provide a good process to follow to find an answer. Transcripts are also great tools, to the discomfiture of many a librarian, to teach what not to do in a chat transaction. Many libraries have realized the value of these transcripts. For example, the University of New Brunswick Libraries applied various models of assessment to analyze their transcripts. This provided them insight into how their patrons perceived and used the chat service (Smyth 2003).

Chat transcripts are not without shortcomings. Imagine having every reference desk interview recorded and made available to the scrutiny of other chat reference librarians. When a chat transcript is made available to others for study, so is every typo, grammatical and contextual error. It can be unnerving to try to help a patron, knowing that others will be able to read the transcript, as well as very uncomfortable to recognize errors in one’s own transcript.

*Patron:* Thanks for the help!

*Ask Us!:* You’re welcome. Thanks for lokking us up!

In commonsensical terms, attempts to type accurately while communicating via chat is important, lest the patron is given the idea that librarians are incompetent! One librarian in the survey commented that chat is comfortable for her because she is at ease with the written word and composing at her keyboard. Others have mentioned concerns with typing accuracy and speed when they feel rushed to get an answer to the patron.

*Ask Us!:* Do you see Search Electronic Journal Titles?

*Patron:* yes

*Ask Us!:* Type in the word comuter

*Ask Us!:* I mean computer.

Correcting every error is a personal preference, but should not get in the way of answering the patron’s question in a timely manner. This particular librarian felt it necessary to correct the mistake, but was this necessary? Would the patron know that the librarian meant “computer” despite the correction?
LEARN TO BE SHORT-WINDED

Reference librarians have been well trained to conduct a thorough reference interview in order to understand a question and make sure it is answered completely. At the end of the interaction, the librarian might ask, “Did this fully answer your question?” The desire to answer questions thoroughly, as well as accurately, is a positive phenomenon for both in-person and chat reference. However, in chat reference the desire to be thorough is mitigated by the quick-paced nature of the transaction.

In chat reference, the communication between patron and librarian happens at a swift pace. It takes more focus and effort to type the answers than to speak them. There is a feeling of urgency typing an answer to a patron who is waiting for a response. The librarian cannot see the patron, thus, cannot know what is being done on the other end.

For many chat reference librarians this makes communicating via chat very difficult. They may feel that they are not able to answer questions as thoroughly as they would like. However, efficiency is a must for chat reference librarians. The ability to answer a question thoroughly without being too wordy is a valuable skill to learn and practice. There are tools that any library can utilize to assist chat reference librarians in being more efficient during chat transactions.

FAQ (Frequently Asked Questions) database

*Patron:* I have to record a group play scene for a class this summer—but none of us have a video camera. Is it possible to rent out a video camera for usage? Are there digital cameras available?

*Ask Us!:* Let me take you to an FAQ on this . . .

*Ask Us!:* [Item sent–Univ. of Minnesota Libraries FAQ database record]

*Ask Us!:* Here is the information you need. Unfortunately, the Libraries do not rent these items. But here is a list of places that do.

*Patron:* Thanks for the info. Cool service here!

The chat reference librarians at the University of Minnesota-Twin Cities utilize a Frequently Asked Question (FAQ) database that con-
contains answers to many of their most commonly asked questions. The database has proven very useful for answering many questions posed via chat. Copying and pasting information from the FAQ database into the chat window allows chat reference librarians to give complete, thorough answers without having to retype the information each time. Of course, this is most useful for common questions, not for in-depth reference questions.

Scripts

Some chat software allows the capability of saving “scripts,” or pre-typed messages. These are very useful time savers. A scripted greeting that reads, “Hello ______. Thank you for your question, which I am taking a look at right now . . . ,” for example, provides the librarian with a few moments to read through and ponder the question and while at the same time reassures the patron that the librarian is working on their question.

COMPENSATE FOR LACK OF VISUAL CUES

Chat reference lacks the essential human interaction that makes face-to-face reference a complex and wonderful phenomenon. A successful chat transaction depends on the librarian’s ability to compensate for those missing visual cues. Strategies to implement include:

- Ask strategic questions to clarify patron’s needs.
- Use ellipses ( . . . ) to indicate a continuing sentence.
- Avoid sarcasm; it doesn’t translate well to the written word.
- Avoid using all capital letters (also considered SHOUTING).
- Avoid using emoticons or use only in response to a patron’s use of them.

Despite the lack of physical presence, the chat reference librarian can, in a sense, adapt traditional face-to-face reference interview skills to the chat transactions. The following patron appears at ease with the in’s and out’s of communicating via chat which allowed the chat reference librarian to write in a matching casual manner:

Ask Us!: . . . Do you want to do the same search that you did before and show me what pdf you were working with? As you click, my browser will follow along.
Patron: system’s slow :-(

Ask Us!: I know. That’s OK.

Patron: r u able to c that pdf file?

Patron: select text ’n copy to word document

Ask Us!: Yep, I can see it. What I’m wondering is whether different browsers deal with text selection differently. I’m not able to do it now with IE, but I can check it out with Netscape if you don’t mind waiting . . .

{ . . . }

Ask Us!: OK, just watch your browser window and I’ll go to the page.

Patron: ok . . . thanx! i’ll try that ’n c what happens.

By picking up on these “virtual cues,” the librarian was able to communicate at a comfortable level for both her and the patron, and successfully navigate through a particularly complex session.

Acronyms and shorthand are commonly used in online communication. The chat reference librarian may assist cyber-savvy patrons experienced in using acronyms that are unclear to the chat reference librarian, such as TIA for “thanks in advance” or BRB for “be right back.” A number of online glossaries provide lists of such acronyms and their meanings; reviewing these definitions may be useful to the new chat reference librarian.

However, chat reference librarians should try to avoid using such terms when answering questions, regardless of their expertise with the Internet. Even though chat sessions can be rushed, it is best to use complete words and avoid acronyms. Acronyms may hinder communication rather than making it more effective. Remember that communication is essential, whether online, on the phone, or face-to-face. Tone and voice should be considerate. A study by Liu and Ginther (2001) offers further interesting insight into how people perceive and are perceived through computer-mediated communications.
Patron: I need help!!! My research question is: Does the curriculum of inner-city high school put their students at a disadvantage to standardized test such as the ACT. I cannot find any articles about this. Can you please help me?

Ask Us!: That is a good, challenging research topic! There are education indexes I could suggest. Even more important is how to design search strategies.

Patron: Please!! That would be great.

Ask Us!: OK, lets start from the Library Home page.

Ask Us!: Then we select “Indexes” under Articles and More.

Ask Us!: Now we can select Education to look at those indexes. Education Abstracts, Education Full Text, and ERIC are all article indexes that would work well for your topic.

Patron: Oh, I see–I was looking at general indexes. This will work better.

Ask Us!: When you enter your search, try to keep your search terms to minimum, but with your major concepts.

Ask Us!: So “ACT scores” is one big concept and a good search term. “inner-city” would be another.

Patron: Oh! Maybe was not being specific enough . . .

In many reference interactions, especially in academic libraries, there is tension between the patron’s request for the librarian to give them an answer and the librarian’s desire to teach the patron the skills to help them answer their own questions. This same tension also affects chat transactions. There is a strong desire to provide a speedy response to the patron, but it conflicts with the desire to be instructive with the answers provided, to make sure that patrons understand how the answer was found, and that they learn something in the process. There is, indeed, a “symbiotic” relationship between providing reference and providing in-
struction to patrons through this medium (Johnston 2003). Through training and experience, the chat reference librarian will learn to balance the two.

Sometimes it is appropriate to give a patron a quick, one-line answer to certain types of queries, such as factual questions or questions about library services. However, most librarians would agree that when a patron says, “I need two articles for my paper on . . . ,” the patron should be shown how to access and search an appropriate article index, rather than simply being handed two articles. Successful chat reference services will strive to maintain standards in providing answers while helping patrons become more self-sufficient library users.

It is important to be instructive with answers to chat reference questions, but it is not an easy feat. A thorough explanation of all of the steps in a research process will require a great deal of typing and time. Often patrons don’t realize that their question is complicated and requires multiple steps, so they may become impatient with the librarian’s attempts at instruction. However, there are some techniques for providing instruction during chat reference without overwhelming or losing the patron.

**Break Complicated Processes into Steps**

When an answer to a reference question is complicated, it is best to simplify the process into stages, rather than overwhelming the patron with too much information at once. This is an excellent strategy for keeping the patron online; if it is taking too long to type out a wordy paragraph of instruction, the patron may get impatient or think they have been disconnected and log off. It is better to break the instruction into simple steps as much as possible, and send the steps one at a time. Do not write in lengthy paragraphs when information can be summarized in a few sentences.

**Refer to Outside Sources**

There are several good research guides and interactive tutorials available online. If a patron needs a great deal of assistance with an aspect of their question, it is useful to refer the patron to other online assistance. For example, if a patron asks how to find articles on a topic but has no experience using an article index, it would be helpful to refer the patron to a guide on using article indexes as well as helping them use a particular index to find the articles they need right away.
Be Polite, But Relaxed

Most people tend to be more formal when writing than when speaking, writing in complete sentences and using proper grammar. However, chat is less formal than other forms of written communication. The need for a certain degree of formality combined with the need to communicate quickly is difficult to balance. To be an effective chat reference librarian, it is important to be less formal than usual because there simply is not time to completely proofread each response for perfection every time. By the same token, it is important to be respectful, polite and not overly casual with one’s responses. This is a difficult balance to achieve, but becomes easier with practice.

KNOW WHEN TO SAY NO

As mentioned earlier, an online chat environment is not necessarily the best platform for deep, intellectual thought, and definitely not for some types of reference questions. Some patrons are better served if their questions are asked and answered in person.

For example, the University of Minnesota-Twin Cities, like other large research institutions, is made up of several subject-specific libraries. If the librarian on the chat shift feels a question could best be answered by the subject specialists or otherwise, they are encouraged to refer the patron to the appropriate service point or librarian. This is one of the great advantages to using chat reference. Chat offers the luxury of obtaining essential information from the patron to make a meaningful referral, should the chat reference librarian not be able to answer the question.

Patron: I am trying to cite a direct quote from a journal article, but if the journal article has it cited from a different source, how do i cite it in the text of my paper?

Ask Us!: Xxxx, I’m going to pull up on this screen how to cite statistics. Take a look at this page while I see if we have the statistic you need . . .

Patron: ok
Ask Us!: Xxxx, I wasn’t able to pull up any stats for National Safety Council for 1993.

{ . . . }

Ask Us!: I think I may need to refer you to the wonderful librarians in the Government Publications Library . . .

It is important to establish referral protocol and the scope of the chat service beforehand to help maintain quality levels. This, however, creates another issue. The U of M Libraries has approximately 30 librarians, from several different subject areas and departments actively engaging in chat shifts. The quality of the service provided to the patron may vary, depending on who is on duty, and what type of question is asked. For instance, had the question above been asked of a government publications librarian, they may have been able to fully answer the patron’s question. What implications will this have on returning user’s expectations? Quality control is an issue that should be explored further, as it pertains to chat reference services.

**DON’T TAKE IT PERSONALLY**

Ask Us!: Have you tried connecting to the Daily’s website? It looks like they have a search feature, but I’m not sure if it’s possible to search back issues

Ask Us!: The URL is www.daily.umn.edu

Patron: ok thanks

Ask Us!: If you want to go ahead and enter the URL, we can search it together.

Ask Us!: Xxxx, are you still there?

Server and software issues are often the cause of problematic chat transactions, but there are many other complications to consider. Did the patron get tired of waiting? Are they multi-tasking and searching in a separate browser window? Did they hurry off to class or work?
The very nature of chat is dynamic and mysterious. The patron is unseen and often times anonymous. Behavior that would be construed inappropriate at the reference desk is acceptable online. Imagine being in the middle of a complicated explanation with a patron, only to have them walk away abruptly. It sounds absurd and rude, but this happens frequently in the online environment. Providing reference in person has given librarians the luxury of gratification, appreciation and instant feedback from patrons. Many chat reference librarians surveyed for this article mentioned they first took problems like this to heart, feeling genuinely helpless and at fault for losing the patron.

The chat medium certainly lends itself to instability, but the chat reference librarian needs to realize that if a patron disconnects from the service, it is not necessarily their fault. Ultimately, there is no sure-fire way to understand why a patron fails to respond or why they log out of a chat transaction prematurely; chat reference librarians should not take it as a personal failure.

Eventually, as chat services evolve and grow, more assessment and evaluation will be performed. In the future, chat reference librarians will be able to get a better sense of chat behavior on the patron side. Fortunately, some chat services allow for transactions of the session to be e-mailed to the patron if they choose. If a chat transaction goes awry, it is oftentimes possible to make information available to the patron.

**Patron:** I’m looking for a periodical called “Lecture Notes in Computer Science” (LNCS), but I can’t find it in the electronic journals web site. Is it in the U’s system or where might I get it?

**Ask Us!:** Hi. Thanks for your question, which I am taking a look at right now. I’ll send something your way in just a moment.

[Patron has disconnected]

**Ask Us!:** I see that you’ve disconnected but this is sent to your email address. I believe that most books in the series are in Walter library . . .

**WORDS OF ADVICE FROM THE VETERANS**

The chat reference service at the University of Minnesota-Twin Cities Libraries has been up and running full-speed since early 2001. The
survey conducted at the University of Minnesota-Twin Cities Libraries elicited advice for new chat reference librarians that ranged from theoretical to practical:

- The panic fades after you’ve done it a few times.
- Try to realize right away that you don’t have to hurry so much; most chatters seem to be used to waiting.
- Users of the service are generally patient and extremely appreciative of the help.
- Practice, practice, practice–get the mechanics of it down so you’re free to concentrate on the intellectual parts.
- Don’t do anything prior to chat that will key you up–you need to be calm in order to “think on your feet.”

REFERENCES