AskUsNow! Provider Behavior's Checklist: Anatomy of a Chat Session

This guide will help you relate the Face-to-Face behaviors of the reference desk to the behaviors of the virtual one. Above all, remember that you're not a robot pushing out information as fast as you can; you are a skilled librarian who will maintain their professionalism while both helping the customer get what they need and building a relationship with the customer. You have the opportunity to set the pace and tone of the conversation; make it an enjoyable interaction for both you and the customer.

Behavior	Face-to-Face Communication Strategies	Virtual Communication Strategies	Examples
Approachability	- establish eye contact - friendly greeting - remain visible - offer help proactively	- customers are picked up promptly - librarian sends scripted welcome message and personal greeting using the name of the customer while identifying themselves - friendly "speaking" style – being friendly from the get-go sets the tone	"Welcome to Maryland AskUsNow! I'm reading over your question and will be with you in a moment…" "Hi Donna! I'm Rachel, a librarian with AskUsNow! Let me see what we can find you."
Interest	- appear unhurried - nod in response - maintain eye contact	- keep responses short; use ellipses (…) to break up longer sentences, or at the end of the sentence. - give feedback & response to every comment and question and action by the customer - need to communicate more often since customers can't see your body language. Keep them updated on what you're doing - keep them engaged - use empathetic responses, encouraging comments	Customer says, "I'm sorry this is so complicated." Librarian says, "that's okay, this is what we're here for! Let's see what we can find!" "That's a great question! Let's see what we can find!" Customer says, "I'm sorry, I don't type well." Librarian says, "That's okay! I can't speel!"
Listening & Inquiring: Getting the facts	- rephrase the question - clarify terminology - use open-ended questions	- use the Info Tab to gather information (check name, email, library, question) & confirm if need be - engage in clarifying reference conversation to verify you and the customer understand what is needed - use paraphrasing to let the customer know you understand what they are requesting - verify how much time the customer has, how much information the customer needs and in what format - verify anything you're unsure about	Customer writes, "need top 10 colleges in state by attendance." Librarian writes "So you're looking for colleges in Maryland with the highest enrollment, is that right?" "I want to make sure I understand what you're looking for so I can send you the correct information. Can you tell me a little more about what you needed to know about Pam Shriver?" "Did you want to know if this was available at the Harford County Public Library?"

Finding and Giving Info	- find out what customer has already tried so you don't duplicate efforts - develop appropriate search strategy - shows and explains sources to customer - appropriate resources are used to answer questions - customer can see you typing / looking / searching	- let the customer know what you're doing throughout the interaction; let them in on your search strategy - maintain ongoing and frequent dialog with the customer; keep the conversation/interaction going while you search - set up expectations on if the answer is out there in the form they want it in and the timeframe you think you can find it in - explain resources to the customer. Why did you choose it? Let them know that a page is coming before you send it - Explain what you're doing every step of the way - Verify that they've received what you've sent them and that they're ready for more - give customers a choice of learning by doing or learning by watching - always cite sources	"I'm taking a look at a database called MEDLINEplus. I should have something for you in just a minute." "Oh that's a great question! I'm not exactly sure it's available in the format you want, but give me about 3 minutes and I'll start looking." "I think I've found a good starting point for what you need. Let me know when I can send it to you […] did you receive the page/link? Okay, take a look at it and let me know when I can send you another one." "Does this look useful to you?" or "I'm not familiar with this topic myself, but does this make sense to you?" "I'm going to send you a page from the Library of Congress that I think will answer your question. [page sent] If you look about halfway down the page it says that [answer]"
Follow-up	- librarian sees nodding heads and confirms verbally that the customer is happy - librarian has customer write down their email address or phone number when follow-up will be needed - encourage the customer to return if more help is needed - refer customer to other resources if appropriate	- check in periodically to make sure the customer is with you, engaged, and is getting what they need/want - be willing to change modes; just because the customer came to you through chat, doesn't mean the final interaction has to be through chat using whatever mode is appropriate, effective, and timesaving for the customer - verify customer doesn't need any further information and has no other questions (don't assume "thank you" is a closing) - offer follow-up when needed. Verify email and timeframe needed - question is completed even if the customer has disconnected or logged off	"Are we finding what you've been looking for?" or "Does it seem like we're on the right track?" "It looks like we've been disconnected but to answer your question, the page I'm about to send you states that the Berlin Wall was opened on November 9, 1989."
Closing	- librarian says "goodbye, come again" to his/her happy customer	- personal goodbye and closing script sent - a resolution code is set for every chat	"Bye Sally! Thank you for using Maryland AskUsNow!"

BEST PRACTICES FOR 24/7 REFERENCE COOPERATIVE SESSIONS

1. Picking up Patron

- Check to see if the patron has an asterisk (*) preceding the name; if so, wait at least 1 minute before picking up, to give the local librarian a chance to pick up.
- Keep hold times as short as possible. Patrons should be picked up within 3 minutes.

2. Greet the Patron

- Send a personal greeting, identifying yourself and indicating your willingness to help. Identify the name of the library or group you are affiliated with, in order to set expectations with the patron.

Examples:

"Hello, my name is Mark, and I'm a reference librarian at xxx University. Your library and my library are part of a nationwide cooperative that staffs this chat service. I'm looking at your question right now."

OR

"Hi! Your call has been picked up by a librarian at the xxx service in [name of state]. Your library and my library are part of a nationwide group that provide backup for each other's service. I'm reading over your question and will be with you in just a moment."

3. Reference Interview/Resource Selection

- Conduct an adequate reference interview to understand the question and the patron's information need. Be sure to clarify patron's question before beginning the search.
- Choose resources at the appropriate level for the patron's research. In general, databases are preferable to Google or other general web sources when assisting students with research projects.
- Use the library policy page to find information using home library's resources (including OPAC, databases, and guides).
- Evaluate resources for authority, objectivity, and currency; share with patron.
- Answer questions accurately.

4. Provide professional level search assistance

- Provide context and instruction to the patron, rather than just sharing resources or merely sending web pages. Provide enough guidance so that patron can recreate the search if needed (include the name of links, which one patron should click on, as well as the "click path"). Merely providing links to resources often will not suffice – some URLs are dynamic, such as library catalog search results, and the links that appear in session transcripts may become dead links.
- Recommend appropriate search terms and subject headings, in the context of a recommended search statement using Boolean operators. Provide examples of query constructions using basic and advanced Boolean operators.

NOT:
Patron: Need help finding books on the history of black businessmen in New York City.
Librarian: You should search the catalog with keywords like black, businesspeople, entrepreneurs, New York, african americans, history

RECOMMENDED:
Patron: Need help finding books on the history of black businessmen in New York City.
Librarian: You should search the catalog by typing in things like this (exactly as I have them)...
Librarian: african americans and business* and new york
Librarian: or using that last one, replace business* with the word entrepreneur*

- Help patron evaluate the sources for relevancy to topic
- Ask for feedback on resources sent

5. Interpersonal skills

- Create a welcoming atmosphere
- Chat frequently, so patron doesn't have long lags without chat from librarian (no more than 3 minutes should elapse without the librarian sending a message to each patron who is in session, even if it is a simple "I'm still working on your question", or even "Still searching…")
- Show interest in the patron's question through chat tone and choice of words
- Use positive phrasing ("We can…" instead of "We don't/can't/won't…")
- Use scripts appropriately, as needed
- Paste small excerpts of information; avoid pasting long blocks of text in the chat.
- If patron has trouble viewing a web page that you send in chat, try escorting the patron to that page
- Send chats to correct patrons when serving multiple patrons.

6. Concluding the session

- Before closing, ask the patron if their question has been answered ("Does this completely answer your question?") or if they need additional information.
- If the request cannot be adequately answered during the session, code the session for Follow Up (see Resolution Codes, below)
- Before coding for follow up, verify the patron's email address and deadline. It may take several days for the patron to get an answer back from the library.
- If the patron indicates that they need no additional information, send the appropriate Goodbye script provided by the patron's library. If no Goodbye script is available, thank them for using the service and encourage them to return if they have more questions.

Resolution Codes: It is important to use a resolution code to end the session. If no resolution code is selected, then the session is assigned the default code of Answered. Use the codes as follows:

- ***Answered:*** no additional information is needed by patron.
- ***Follow Up by Patron Library***: In most cases, use this code anytime Follow Up is needed.
- ***Follow Up by Me:*** Only use this code if you (the chatting librarian) have information at hand which will thoroughly answer the question. When you use this code, you are responsible for the follow up. Be sure and either send the follow up through QuestionPoint, or add a note that follow up has been done.
- ***Lost Call:*** If the patron never responds and does not have an email address. Do not use Lost Call if the patron left an email address; instead, use Follow Up by Patron Library.

Beyond the Behaviors:
Tips for Successful Virtual Reference Sessions

Common Librarian Mistakes

1. Question Never Clarified - Customer's question never clarified by librarian through use of open-ended questions nor verified with a closed question. Customer sent irrelevant information on first librarian attempt.

2. Reliance on only Search Engines - The librarian rushes to jump into a weak superficial search, sending the customer the first thing that turns up. A higher quality resource could have been found with a more thoughtful search.

3. Librarian in a Rush - The librarian lets the 15-20 minute recommended time frame for a session effect the quality of service.

4. Librarian doesn't Keep the Customer Informed - There is little or no communication from the librarian during the session. The customer doesn't know what is going on. This increases the likelihood that the customer will choose to disconnect if they don't understand what is happening.

All of these mistakes lead to transactions of poor quality.

The Right Way

1. Many times librarians of virtual reference services feel like they have to send a site immediately. This perspective will almost always lead to a high stress level. The good news is that it doesn't have to be this intense. The reference interview helps the process in that it both allows us to clarify the question being asked and gives us time to think. While we're chatting with the customer, we can begin thinking about resources and directions for our search. This is not e-mail and we don't need to work with only the initial question typed in by the customer at login. We want to take advantage of the opportunity to communicate with the customer just as we would in-person or on the phone.

2. Google often does not provide the best answer. In fact, in many cases the customer has already done their own basic search of a search engine.

3. Time is a guideline to help us, not placed as a restriction upon us. Don't let the 15-20 minute recommended time frame affect your service quality. Remember that every transaction is different. Some might take longer due to the nature of the question. The real key is quality. Referral to e-mail is a good option.

4. Maintain communication and keep the customer informed. Write your chat as you would speak at the public service desk. This will help you to maintain a professional demeanor, and also keep you relaxed so that the reference interview is not perceived of as an interrogation. Remember to keep in mind the customer's perspective throughout the transaction. Without the visual and auditory cues inherent in-person or on the telephone, we leave the customer in the dark if we don't say anything.

<u>More tips for success</u>

1. Use the Maryland AskUsNow! Behaviors checklist.

2. Keep in mind the customer's perspective throughout the session.

3. Break long pieces of text into chunks. If you have a lengthy concept to relate, then type an ellipse of three periods (...) after part of your text and hit Send. Then, begin the next part with another ellipse and continue your typed text. This lets the customer know you have more to share, and keeps them from experiencing long periods of time without a new message while you type.

4. Set a positive tone
   a. Personalize the session by doing such things as using the customer's name in chat: "Susan, that's an interesting question…"
   b. Show the customer that you're both interested in helping and encourage them: "That's a really good question, but we should be able to find something about that."
   c. Use the inclusive we: "…let's see what we can find on that topic." This makes the customer part of the process, rather than just a recipient. It also alerts them that you may need some information from them as you begin your reference interview. This will help relieve any possible tension of the reference interview seeming like an interrogation, as you are both come to a better understanding of the information need.

5. Perform a reference interview using question negotiation
   a. Ask probing open-ended questions to clarify the question. This is done through neutral questioning that can't be answered with a 'yes' or 'no': "There are a few places I'm thinking of where we might find this. Can you describe more specifically what you're hoping to find?"
   b. Verify with a closed question that can be answered with yes or no: "Okay, if I find you a list of all Maryland governors and their time in office, will that be what you're looking for?"
   c. Ask a follow-up question at the end to confirm that the customer received what they were looking for: "Is this all of the information you were looking for? Can I help you with anything else?"

6. Don't penalize the customer for choosing this method of library service. Always keep in mind what we are able to do, rather than dwelling on real or perceived limitations of the live chat format. Send the customer in the right direction: "Unfortunately I won't be able to get into your library card account here, but if you call 410-887-6124 you'll be able to speak with someone at your library's circulation department who can answer that for you."

7. Have the customer leave with more than they had when they entered the service, even if at a minimum it is a referral into the QRC follow-up service or the phone number of their local library. Overall, give the customer a good experience with virtual reference and Maryland Libraries that will encourage the use of both again.

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Maryland AskUsNow!
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RECOMMENDATIONS FOR FACILITATING INTERPERSONAL COMMUNICATION IN VIRTUAL REFERENCE ENCOUNTERS

General Notes

- Always remember that your interpersonal skills and experience are transferable to the chat environment.
- There is a general misunderstanding that interpersonal niceties are not important in chat or virtual settings. Interpersonal dimensions are present and vitally important in virtual communication.
- The large majority of time spent in virtual interactions is spent in the searching process, not in interpersonal exchanges.
- Type short sentences and hit send frequently at appropriate places to maintain "word contact." If you are going to be searching for a while, continue to send short reassurances (e.g., searching…) so the users know you have not disconnected.

Greeting

- Give a personal greeting after the script (can be a quick "Hi!")
- Use the person's first name in your response, younger users especially like a personal approach. This softens the anonymous environment and may head off problems.
- When reading user's initial question, look for any self-disclosure or indications that the user is seeking reassurance (Can you help me?) and provide an appropriate response.
- When initial question looks complex, immediately let the user know that you think this may take some time and ask if they have the time to wait while you search. Users sometimes expect instant answers, like when they search Google, but often they are multitasking and may not mind waiting.
- If you can see that the user is from a geographically remote place, you may want to make a comment on this right away (e.g., How's the weather in Florida? It's snowing here in Maryland). This gently alerts the user that a question about local information may have to be referred.

Strategies for Building Rapport

- As appropriate, be willing to self-disclose, to provide information about yourself, to use "I" statements. This can mean:
    - Offering personal opinion/advice/value judgment (e.g., I think that you will have more success if you do X; or I have used this strategy before and it works!)
    - Admitting lack of knowledge (e.g., I don't know what you mean, could you be more specific? I have not heard of this term before, can you tell me what it means?)
    - Ask for confirmation as needed (e.g., Is this what you mean?)
- Acknowledge user self-disclosure (e.g., I'm sorry you're not feeling well and are unable to travel to your library, let me see how I can help. Then, at the closing, "feel better soon!")
    - Be empathetic when users self-disclose difficulty or frustration. (e.g., It is frustrating when our technology doesn't work!)
- Include user in search process (e.g., Let's try this; We'll look here first; Would it be ok if we…)
- Indicate your approval as appropriate (e.g., That's great! or Good for you!)
- Offer reassurance when users indicate that they are tentative, or unsure of how to proceed. Realize that they can be fearful of your disapproval (if, for example, they have poor computer skills).
    - Use encouraging remarks, praise, and enthusiastic remarks as appropriate.
    - Humor also can be reassuring, as can the use of self-deprecating remarks (I'm not the world's best speller either!)
- Mirror the level of formality/informality of the user
    - If they use informal language, feel free to be less formal (as appropriate).
- Be deferential and respectful of all users.
    - Use polite expressions as appropriate (e.g., please, thanks, you're welcome, etc.).
    - Apologize as appropriate (e.g., use sorry, unfortunately, or oops).

Compensation for Lack of Nonverbal Cues

- Mirror the user's style. If they use shortcuts, acronyms, abbreviations, and emoticons (smileys), feel free to do so also (as appropriate).
- You may see more "chat speak" in younger users, respond in kind if you are comfortable doing so.
- If you are not comfortable using emoticons, you can spell out nonverbal behaviors or use interjections (e.g., hmmm, oh, ha ha, grin).
- Use repeated punctuation for emphasis (e.g., !!!, or ??).

- Use ellipsis to indicate more to come (e.g., still searching…)
- Be careful when using ALL CAPS, this may seem like a reprimand or like shouting (e.g., Don't EVER …).

Closing
- Always give a personal closing (can be a quick "bye!")
- In the closing, as in the greeting, be sure to respond to self-disclosure, enthusiasm, or polite expressions. (e.g., if the user says: "This is a great service!" Don't just send them the scripted closing, give an appropriate response like "Glad you think so, thanks!")
- Avoid premature closing, make sure you have answered users question(s) completely. Ask if they need anything else before closing.
- Look for subtle cues that the user wants more help. (e.g., "Well, thanks for your help" is one example, the "well" hedge may indicate that they are settling for what you have provided, but really want more.)

Relational Barriers to be Avoided
- Avoid robotic answers.
- Avoid sending an inappropriate script (e.g., a welcome script half-way through).
- Don't ignore user self-disclosure or use of humor. If the user makes a joke (even if it is lame!) respond with a ;-) or ha! or <grin>.
- Avoid failing to offer reassurance when the user seeks it.
- Don't ignore parts of questions or additional questions.
  - When dealing with a several part question let the user know that you will take the questions in order.
  - If busy, indicate that you will start with question one, and may have to answer the others by e-mail.
- Avoid being condescending or disconfirming.
- Avoid negative closure
  - Premature Closing – make sure that you have answered all questions.
  - Abrupt ending – let user know you are going to close.
  - Disclaimer – don't indicate that question is unanswerable or problematic before checking, many things previously unavailable may now be accessible. Provide a good referral if you are unable to answer question.
  - Never ignore cues that user wants more help, even if it means asking them to wait while you help others.

Checklist for Encounters with Rude/Impatient Users
- Remember you have skills and experience in dealing with rude/impatient people in face-to-face encounters – these skills can be just as effective in virtual encounters.
- Don't "mirror" rude behavior; this only provokes further rudeness.
- Be polite and professional at all times.
- Resist the urge to reprimand or admonish users for rude behavior or FLAMING, again this only provokes more rude behavior.
- Avoid jargon or language that will create a barrier or send the message that you are blindly following the rulebook.
- Apologize to the user as appropriate, this does not mean that you are accepting blame.
  - An apology can diffuse potentially rude behavior on line.
  - E.g., I'm sorry that you had to wait so long; our service is very busy today.
  - E.g., I'm sorry that I can't help with your request this time, please visit your local library for that information.
- When users are impatient (Hurry, hurry!), let them know realistically how long you think that the search for the information they need will take. If you think it will take more than a minute or so, let them know. Present alternatives and let them decide.
  - E.g., I know you are in a hurry, but this will take about 4 to 5 minutes. Can you wait?
  - If they can't wait, apologize (e.g., I'm sorry I can't answer your question quickly, but I can e-mail that answer to you within 2-3 days).
- If the user complains about library service or another chat librarian, thank them for bringing their concern to your attention and promise to follow-up. Regard a complaint as a gift, as a way to improve service.
- Don't be condescending to a person with a "simple question." Sometimes parents are helping their children with homework and you may insult them. Treat all users with equal courtesy and respect.
- Realize that the rude users are in the minority, but understand that you will encounter one now and then.
- Don't take rude behaviors personally, sometimes users are stressed by deadlines and other life problems and their rudeness and impatience usually has nothing to do with you or your service.

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