Virtual Reference Best Practices

Tamara Ottum
Answerland Coordinator
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Ideally, help one person at a time

• Focus on the patron you’re chatting with, not the chat queue
• If you do want to help multiple patrons, inform them that this is what you are doing
• It sometimes helps to give one resources so they can browse while waiting

I am helping another patron right now. It may be several minutes until I can help you. You can choose to wait, to receive an answer later via email, or try the chat service again later.
Take your time and read carefully

• Don’t rush through the interaction
• It’s important to read the question and patron responses carefully – it’s easy to miss info

Patron: Hello, I have an urgent question about In-text citations for MLA. [...] 

Librarian: APA in-text citation style = author's last name and year: (Field, 2005).
Hello Jane! I'm Larry the Librarian and I'll be helping you today.

What an interesting topic - let me see what I can find!

Establish a personal connection

- Greet patron by name (if supplied) and give your name
- Show interest in patron’s question through choice of words
- Utilize a cheerful, welcoming tone throughout
- Use scripts minimally
Indicate your willingness to help

• "We can..." instead of "We can't / won't..."
• If patron’s question indicates that they believe they have contacted a local library, briefly explain that the service is staffed by librarians from all over Oregon and assure the patron you can help them.

As a volunteer I don't have access to info about your fines, but if you would like to provide your email address and library card number, I could have someone email you about that. Does that sound good?
Perform a good reference interview

• Use active listening by restating the question

• Clarify patron’s questions before searching for info.

• Try to strike a balance between asking questions, giving patron time to respond, and looking for info

So you’re exploring a career in photography? What have you discovered so far?
Patron: i need some info on the blackfeet indians paintings

Librarian: Can you tell me a little more about your question? Are you looking for specific paintings created by Blackfeet Indians?

Patron: i want to know if they painted why they painted

Librarian: Is this for school research?

Patron: yes it is

Librarian: Can you tell me about the assignment?

Patron: i have to write a paper on the blackfeet's painting's if they painted and why they painted

Librarian: Let me take a look and see what I can find. This may take a few minutes. In the meantime, can you tell me if you have looked at any resources so far on your question?
Don’t be afraid to ask for time

• Most of the time, chat users are not in a hurry; they are using the service because it is convenient, not because it is fast

Librarian: Do you have a few minutes to wait while I search?
Patron: sure do

Librarian: Great! Let me see if I can find [the resource]
Patron: brilliant
Explain your process

- Strive for a combination of instruction and ‘giving answers’
- Responses should include an explanation of the search process or strategy for finding the information

I’m going to start by exploring the Center for Disease control website. If you’d like to look along with me, it’s cdc.gov.

I did a quick search for the words [blood pressure pregnancy] and got some good results: <URL>. The very first result in that list is a pretty helpful one.
Use authoritative resources, and use them ethically

• Choose ones at the appropriate level for the patron's research

• Try to use the patron's "home" library first

• If patron’s library doesn’t have the needed resources, use statewide resources
Keep the patron informed

- Try not to let long lags without chat from librarian elapse (no more than 3 minutes). Otherwise, they don’t know if you’re there or not.

I’m still working on your question.

Still searching...
Provide context

- Provide enough guidance so that patron can recreate the search if needed.
- URL after URL isn’t always very helpful.
- When texting, remember that not everyone has a smartphone so don’t answer with just URL.

One good way to find health related resources is to limit the list of databases to health related ones. If you click on the drop-down arrow next to the box that says "all subjects" on the list of databases page, you can choose the topic of "health science" and it will limit to the databases that cover that topic.
Legal, medical, and statistical information should not be interpreted

• Use available scripts to make this clear to the patron

• Remember that even pointing a patron to specific legal form is considered “giving advice”

I cannot give you legal advice, including selecting or interpreting legal materials, but I can make suggestions about research tools to use.
Move the question, not the patron

• Ask for email to follow-up if question requires more detailed searching

• Sometimes making a quick phone call to a library works well.

I am not able to find anything at the moment. Would it be ok for us to do further looking and contact you by email?

I just talked to your library, and it does appear the catalog is down.
Move the question, not the patron

- Give the patron options - don’t just tell them to call or go to the library. That defeats the purpose of using VR in the first place.

The circulation department can best answer that question. I can alert them to contact you by email, or I can give you their phone number and you can call them directly. Which would you prefer?
If referring, get the follow-up info you’d want to have

- If this was your patron, what info would you need to answer the question?
- Remember, if the other library has to go to patron and get more info, it’s not really a good use of anyone’s time.

Examples:
  - Renewal question: get patron name, contact info, title of book, library card #
  - eBook download error: get patron name, contact info, device, platform, error message
Offer more help

- Ask if their question has been answered or if need more info
- Ask if they have any other questions
- Thank them for using service and encourage to return if have more questions

Is there anything else I can help you with today?

Thank you for using Answerland. Please come on back if we can help again!