

## A Checklist for Reference Interview Skills – adapted for eBook help

Remember to “*Stay Calm, Be Brave, Wait for the Signs*”

- *Dead Dog Café Comedy Hour, CBC Radio*

Be Approachable	<p>Make the patron feel welcome and comfortable with the transaction (even if you've never used Nook before).</p> <p><b>Stay Calm!</b></p>
Show Interest	<p>Demonstrate interest in patron's need (even if afraid of Vox) How do you like this eReader? How long have you had it?</p> <p><b>Be Brave!</b></p>
Manage Patron Expectations	<p>Be Honest! Tell patron that you've never used a Nook before! Explain that you'll learn together &amp; you'll refer them if you can't</p> <p>Just like with a reference question, don't feel that you have to know the answer, just know where to find it! <i>Unlike</i> some reference questions, there is a specific right answer.</p>
Listen	<p>Active listening skills - Encourage, confirm <i>What's the problem? Is there a problem? maybe they don't know where to start</i></p> <p><b>Wait for the Signs!</b></p>
Ask Questions! <i>Elicit more Signs</i>	<p>Ensure that the information need is understood. <i>Use open questions, clarifies understanding of question with patron. Have you tried to download library eBooks before? Have you seen the help articles and step-by-step videos?</i> <i>Have them walk you through the steps or process they followed.</i> <i>Don't have enough signs? – Elicit More Signs!</i> <i>The best signs are often in the patron's account – check it</i></p>
Resolve or Refer?	<p>Now you have enough information to determine if this is a technical problem that needs to be passed on, or if it's an information need that instructions can resolve</p> <p>Instructional issue: Patron is a beginner/missing a step/has steps in wrong order/lacks correct software/is trying to check out inappropriate format. <b>Be Brave!</b> First Tier staff can answer this!</p> <p>Technical issue: Error message that can't be resolved? Tried OverDrive Help? <b>Be Brave!</b> Know when to ask for help or refer the patron to Second Tier staff</p>
Inform	<p>Find and explain sources of information – OverDrive Help, your library's resources, google the problem...</p> <p><i>Show the patron, cite source to be used, walk through process if possible, checks if answer is understood, avoid jargon – Keep it as simple as you can!</i></p> <p>Extra options for those needing more help: formal classes, drop in labs or clinics, 1-1 sessions, troubleshooting phoneline or email address, second tier support</p>
Follow up	<p>Ensure patron satisfaction. <i>Encourages patron to return or follow up as needed, “Does this answer your question?” – offer options for further assistance, invite them to return.</i></p>

## Resource List – Top Notch Support for eBooks

### Technical Competencies:

Toby R. Greenwalt. (2012). Public Libraries Online. *Developing an E-Book Strategy*. Retrieved Feb 7, 2012, from [http://www.publiclibrariesonline.org/exclusives/internet\\_spotlight/developing-e-book-strategy-now-and-future](http://www.publiclibrariesonline.org/exclusives/internet_spotlight/developing-e-book-strategy-now-and-future)

### The support interview:

Rachel Singer Gordon. (2012). OCLC Web Junction. *The Support Interview*. Retrieved May 9, 2012, from [http://www.webjunction.org/content/webjunction/documents/wj/The\\_Support\\_Interview.htm](http://www.webjunction.org/content/webjunction/documents/wj/The_Support_Interview.htm)

Matt Weaver. (2011) Library Renewal Blog, *Ebooks and the Real Question*. Retrieved May 9, 2012, from <http://libraryrenewal.org/2011/10/22/ebooks-and-the-real-question/>

Matt Weaver. (2011) Library Renewal Blog, *Ebooks and the Real Question*. Retrieved May 9, 2012, from <http://libraryrenewal.org/2011/11/08/helping-staff-help-themselves-ereaders-and-training/>

### Building an in-library petting zoo:

OverDrive's test drive (list of recommended devices)

<http://www.overdrive.com/resources/testdrive/>

### Videos and online guides:

OverDrive video tutorials: <http://help.overdrive.com/going-mobile-videos>

### Selected Library eBook Guides:

Burnaby Public Library - <http://www.bpl.bc.ca/library-to-go>

North Vancouver City Library- <http://www.cnv.org/nvcl//server.aspx?c=3&i=45>

Richmond Public Library - <http://www.yourlibrary.ca/content.cfm?sid=16&lev1=237>

Vancouver Public Library - [http://guides.vpl.ca/ebooks\\_audiobooks](http://guides.vpl.ca/ebooks_audiobooks)