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Online Reference Question Protocol

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Online Reference Protocol
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- Virtual or online reference includes email, chat, IM and texting.
- Students in college now were 3 years old when the Internet started to take off so the Internet is second nature to them like the television, microwave or phone is to baby boomers or Generation X.
- Internet based library services has become a necessity.
  - Among college-aged individuals, IM is the preferred method of communication.
  - More users are demanding Internet services to fit library research into their schedules.
- Academic libraries are showing more growth in IM services for virtual reference than chat services.
  - From a librarian perspective, chat software is clunky and cumbersome.
  - More librarians, especially younger librarians, prefer IM over chat.

- A 2004 AOL study shows that 90% of the teens that use the Internet also use IM.
- A Pew Internet and American Life Project survey found that 42% of all online users IM.
- Due to the proliferation of unlimited texting plans, the average teen sends 2,272 texts per month or 80 per day.

- IM or chat is not going to replace other forms of communicating with patrons but libraries will be reaching a new group of users by using IM or chat while keeping their reference service relevant.

There are concerns with online reference:
1) How do you staff the online reference desk and the physical reference desk?
2) How can you teach students research skills remotely?
3) How do you know you are answering the patrons question(s) when you are not receiving visual/aural cues?
4) How do you handle rude/impatient online users?
5) How can we use online reference to its fullest potential with a population that is comfortable communicating online?

Ideas to use online reference to its fullest potential:
1) Use your reference skills.
2) Introduce human elements into the online conversation.
3) Give your user personal space with your texts.
4) Adopt the language of communication for the online environment.

5) Deal with rude/impatient online users.

The Human Element Online:
1) Patrons who are fearful of approaching a live librarian at the desk may prefer using online reference.
   a. An online librarian is more approachable.
   b. The patron can feel anonymous
   c. The librarian or user is not able to form judgments about race, age or gender.
2) Any interpersonal skills, experience or niceties are transferable to the online experience.
3) Adding warmth to the conversation adds to the human element
   a. Offer reassurance when users indicate they are fearful of your disapproval
   b. Use encouraging remarks, praise as appropriate
   c. Mirror the level of formality/informality of the user
   d. Be deferential and respectful of all users
   e. Acknowledge user's self-disclosure (I'm sorry you are not feeling well)
   f. Be empathetic when users self-disclose difficulty of frustration (It is frustrating trying to find the location of journals)
4) Add humor
   a. Humor can be reassuring as can the use of self-deprecating remarks (I'm the world's worst speller)
5) Increase Interactivity
   a. Break down complex processes into workable steps
   b. Differentiate search terms in brackets or double quotes
   c. Include the user in the search process (Let's try this)

Personal Space
1) Provide warnings before pushing a page, disconnecting them or redirecting to another librarian
2) Ask directly if all of their questions have been answered
3) Send messages every couple of minutes or sooner
4) Patrons are patient as long as they are kept in the loop
5) Type short sentences and hit send frequently
6) If you are busy searching, continue to send short messages

Language of Communication for the Online Environment
1) Compensate for the lack of visual cues by:
   a. Using repeated punctuation for emphasis
   b. Use ellipses to indicate more to come
   c. Spell out nonverbal behaviors (ha ha, oh, hmmm) rather than using emoticons
   d. Try to avoid ALL CAPS
      i. It may seem like a reprimand or like shouting

2) A study of chat conversations done by Jack M. Maness determined the formality of chat conversations and correlated formality with patron satisfaction.
   a. IM conversations then to be more spoken, informal genre
   b. The study looked at
      i. The use of emoticons, abbreviations and acronyms
      ii. The style (refers to the formality of the language)
      iii. Genre refers to the general characteristics of the spoken versus the written word
   c. Librarians rated NOT helpful:
      i. Used very formal language
      ii. Used scripts
         1. Often a response to inappropriate behavior
   d. Librarians rated helpful
      i. Used less scripts
      ii. Used ellipses
      iii. Continually kept the patron informed of what was going on
      iv. Kept the conversation less formal
         1. Relaxed the rules of formal grammar and language
         2. Used more contractions
         3. Mirrored the language style of the student
3) Barriers to communication – thing to avoid
   a. Sarcasm
   b. ALL CAPS ALL THE TIME
   c. Emoticons
   d. Acronyms
   e. Impatience
   f. Ignoring humor
   g. Jargon
   h. Mirrors rude behavior

Handling Rude/Impatient Online Users
1) Use the same face-to-face skills when dealing with problem patrons
2) Be polite and professional at all times
3) Avoid jargon
4) Look at complaints about service or another librarian as an opportunity to improve service
5) Rude users are in the minority
   a. Don't take it personally

More to Consider
1) Establish a training program
   a. Develop procedures and best practices
   b. Be comfortable with the technology
2) Learn by doing
3) Talk with other staff members

   a. Conduct regular discussion groups about chat experiences
 4) Review other online transcripts
   a. Sometimes these can teach you what NOT to do

Words of Advice from Veterans
 1) Panic fades with experience
 2) You don't have to hurry
   a. Users of the service are generally patient and appreciative of the help
   b. Users maybe multi-tasking waiting for an answer
 3) You need to be calm to think on your feet
 4) Practice, practice, practice

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