AskMN Best Practices

Carla Pfahl
Minitex Reference Outreach & Instruction
pfahl001@umn.edu

Merrie Davidson
Social Sciences Librarian
Charles J. Keffer Library
University of St. Thomas
merrie.davidson@stthomas.edu
Agenda

- The Reference Interview
- Perceptions
- Make it easy
- Attracting New Users
Recommendations for Best Practices

• Ask open questions
• Portray positive attitude
• Provide specific & accurate answers
• Clarify questions
• Take your time
• Pay attention to “close”
• Always be pleasant & polite
Best Practices While Chatting

• Greet the Patron/User
  o Greet the patron and use his/her name in the conversation if they provide it.
  o Identify yourself by name. You can use a false name, but use one. This helps establish rapport with the user.
  o Use scripts when appropriate – quicker
  o Check the patron information to find out patron’s institution and if they have entered an email address.

• Reference Interview/Conversation
  o Ask for clarification to ensure you understand what the patron needs.
  o Ask what other sources they have checked
  o Ask at what level the material is needed and how much is required
  o If question is more in depth, ask about patron's time and if follow up is okay.

• Resource Selection
  o Use a range of library resources available to the patron. Confirm which library resources the user can access.
  o Don’t overwhelm the user with too much at once. Ask if more is needed.
Best Practices While Chatting

• Provide professional level search assistance
  o Ask if the information is on track. Get clarification all the way through the session.
  o Remember to make contact frequently – “little and often” is the best motto! Tell the patron what you’re doing constantly.
  o Critically evaluate sources.
  o Cite the source for any information you give the user.
  o Answer the specific question.

• Concluding the session
  o Confirm that the patron has received all the necessary key data (email follow up is ok if it’s taking a while to compile – communication with patron about depth and time)
  o Thank the patron for using the chat service (use name of patron’s chat service – not yours)
Skills For Effective VR

• Be comfortable with your communication style

• Send several short messages in a row rather than typing a one single long response

• Keyboard proficiency and ability to type quickly

• Familiarity with multitasking in a multiple window environment
Two Views of What’s Effective in VR Experiences

**Users:**
- Convenience
- Comfort with service
- Accuracy
- Positive attitude
- Good communication skills
- Relationships with librarians

**Librarians:**
- Ability to leverage complex & specialized knowledge
- Positive attitudes, responses, & feedback
- VR tools & hybrid communication modes
- Relationships with users
Two Views of What’s Not Effective in VR Experiences

Users:
• Abrupt, dismissive answers
• Grumpy, ill-informed or uninterested librarians
• Poor wrap-up
• Limiting time of session
• Being sent to Google
• Failing or refusing to provide info

Librarians:
• Convoluted & confusing questions
• Rude, impatient &/or disappearing users
• Unrealistic expectations
• Unreceptive to suggestions
Make it easy

• Multiple options for access and levels of cooperative service
• Integrate library tools in popular sites
• Offer multiple service modes
• Offer help at time of need
  • Website
  • Catalog
  • E-Resources
QP’s Chatting Levels

• QP Cooperative, aka 24/7 Reference
  o Global queue – required for “AskMN” shifts

• AskMN – statewide queue
  o Required for “AskMN” shifts
  o Can monitor outside “AskMN” shifts just for own patrons

• Institution-level queue
  o Only see your patrons
  o Monitoring this queue is extra from “AskMN” shifts
QP’s Chatting Options

• **24/7 Chat form**
  - Available at these levels: Institution; AskMN (statewide); 24/7 Reference (Global)

• **Chat Qwidget**
  - Available at these levels: Institution; AskMN (statewide); 24/7 Reference (Global)? Maybe...

• **Text messaging**
  - Added service
  - Fee
  - Available at the Institution level
Recommendations to Attract Potential Users

• Introduce & demonstrate online alternatives during in-person reference sessions, library use instruction classes & library programs
• Create tutorial of “how to use” chat
Resources

• QP Wiki:

• Seeking Synchronicity:  
  http://www.oclc.org/reports/synchronicity/

• Libraries Interact Blog
  http://librariesinteract.info/2008/06/15/virtual-reference-training-chasing-the-sun/

• Library Success Wiki:  
  http://www.libsuccess.org/index.php?title=Online_Reference
Stay Connected

• QuestionPoint listserv:
  o http://questionpoint.org/community/listserv/questionpoint-l.html#subscribe

• QuestionPoint Blog:
  o http://questionpoint.blogs.com/

• QuestionPoint Wiki:
  o http://wiki.questionpoint.org/

• AskMN listserv:
  o Contact Carla, pfahl001@umn.edu
Continuing Ed

- Look for more AskMN-specific webinars coming soon
  - Administrator Refresher
  - Reports and Statistics
  - Librarian Refresher

- Upcoming webinars will be available on Minitex website
  - [http://minitex.umn.edu/Training/](http://minitex.umn.edu/Training/)

Questions?

Thank you!

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Tools and Tips for Chat Reference

Merrie Davidson
University of St. Thomas
Carla asked me to talk about tools
Virtual Librarian Issues & Concerns
(Fears and Anxieties)
Librarian Concerns

- Don’t see the patron; can’t check for understanding, attitude, emotional response
- Patrons want quick answers; don’t want to wait for response
- Chat not appropriate for in-depth reference/research questions
- Don’t know the policies, databases, mission of patron’s library
- Hard to teach, what we like to do
Politeness and Rapport
Research Shows

- Use online etiquette, politeness norms, humor, and informal language. Check for patron’s satisfaction.
- Make sure you understand the patron’s needs – use opened ended questions.
- Generally patrons want accurate answers that they can’t find themselves. Just check in with them about what you’re doing on your end.
- Use policy pages from target library. Make sure your own library has detailed policy page.
- Give specific answers, then give hints (teach) about how you found them.
Visit a Website with Chat

- Can you even find the chat box?
- Is the language used too formal and off-putting?
- Do they send you scripts about things you’re not even asking about?
- Do you give up?

04/09/2010 04:47:02PM Merrie Davidson: "okay"

04/09/2010 04:47:12PM Agent (Crystal Pn): "Total Equipment Protection combines all of the coverage of the Equipment Replacement Program and the Equipment Service and Repair Program in one complete package. For only $******** per month, you’ll have the most comprehensive coverage option. I highly recommend subscribing to the Total Equipment Protection plan to protect your investment. Would you like to add TEP to your new phone today?"
Specific Answers and Hints

• Gave student search string:
  • 3:27:38 PM me {Management Personnel} OR {Top Level Managers} AND Any Field:"employee attitudes" AND Any Field:"first-time" OR new NOT Any Field:"new jersey" OR "new york"

• Later I told him/her:
  • i used "and new managers" as part of the search
  3:28:11 PM me The not new york not new jersey is because the universities where the authors come from are included in the search
Why can we find stuff?

Patrons have access to same info and websites we have
What knowledge do we have that they don’t?
What other advantages do we have that they don’t?
Students are Panicked!

- They can no longer think clearly
- What is our job?
  - Help them relax as we do some of the work for them
  - Guide them to solutions, plans for their work
  - Help them schedule their work
We know how information is organized (at the library)

- Look at other websites (not libraries) that have a lot of information
- Use their chat reference and see what works and what doesn’t
- Libraries are trying to figure out which words will guide navigation
  - But patrons don’t know what’s there, so don’t know what words mean (subject guide, research guide, LibGuide, Path Finder)
Databases are fun! (for us)

• The end of our job is finding resources for patrons
  • It’s fun!

• The beginning of our patrons’ job is getting the resources from librarians and the library
  • There’s so much more to do 😞
How is research done?

• How are questions framed?
  • Student wanted a pro article on “IQ tests are culturally biased”

• How large or small are research questions?
  • Found research on IQ test biases when used with populations in Argentina, African Americans, Latinos in the US

• How is research written up?
  • Found fantastic article on IQ research with African American groups. Didn’t want it – not all cultures discussed
An Answer to Us, Not an Answer to them

• Requires deep analysis of the article or resource to get the answer
  • Articles on Psych Test includes reliability and validity, but must analyze tables and analysis of result
  • What are the numbers of people and financial involvement in sharing community?
    • Student found several articles giving examples and approximate numbers, stating that exact numbers not possible for various reasons
    • Wanted a number
Levels of Analysis of Different Sources

• Searches in LibGuides at level of topic sentence
  • Queen Elizabeth II ascension to the throne

• Searches in library catalogs at level of article title

• Searches on the website for topic of research

• Searches in MergentOnline for industrial psychology

• Summon and other federated searches attempt to solve
Librarians Share with Each Other!

- Policy Pages
  - GOLD!
  - Make sure yours are up-to-date
  - Beg your IT department to let us have a login to your databases (We’re still working on ours)

- QuestionPoint Wiki
  - http://wiki.questionpoint.org/w/page/13839446/FrontPage
RUSA MARS Best Websites

- Best Websites Combined

- **RS Best 2010**
  - About.Com.
  - Reviewed: MARS Best 2000

- **Ad*Access ([http://library.duke.edu/digitalcollections/adaccess](http://library.duke.edu/digitalcollections/adaccess))**
  - Duke University Libraries
  - Reviewed: MARS Best 2010

- **AdViews: A Digital Archive of Vintage Television Commercials, ([http://library.duke.edu/digitalcollections/adviews](http://library.duke.edu/digitalcollections/adviews))**
  - Duke University Libraries
  - Reviewed: MARS Best 2012

  - Africana.com Inc.
  - Reviewed: MARS Best 2001

  - Mountain Data Systems, LLC
  - Reviewed: MARS Best 200
How do we make these websites more helpful to us?