Chat Best Practices

The following best practices are compiled from the articles and books listed in the bibliography.

Conducting a Reference Interview

- The most effective chat sessions adopt/adapt face-to-face reference best practices; indeed, researchers have noted that that most of the techniques of successful chat sessions are similar to behaviors in effective face-to-face exchanges.
- Although it may appear unnecessary, it is important to conduct a proper reference interview. Research reveals that 40% of users ask questions that don’t express their real information needs. Conducting a reference interview has been shown to boost accuracy response rates (which generally hover between 50 to 60 percent) and increase the likelihood that the user will continue to use the service.
- Paraphrase the initial question and clarify/refine by asking questions.
- Paraphrasing the question (“So, you are looking for x, did I get that right?”) encourages the user to confirm, adjust, qualify, or explain further.
- Asking clarifying/refining questions (“Is there some particular aspect of x that you are interested in?” or “If you could tell me more about what you would like to discover about x, I could help you zero in on the best sources”) will help you discern the real information need. Gather as much information as necessary and explain why you need it so that the patron does not feel his/her privacy is being violated.
- Find out what a user already knows but do so in a face-saving way (“Have you had a chance to look in the catalogue yet?” rather than “Did you look in the catalogue?”) No one wants to appear foolish or ignorant.
- Admit lack of knowledge (“I am not sure what you mean by x – could you explain a bit more?”)
- Do not assume that users know all the procedures and processes of the library (“I wonder, are you familiar with how our new catalogue works?”)

“Listening” to the User and Demonstrating Interest

- Virtual users have no visual clues to indicate that you are actively listening. Demonstrate that they have your full attention by using rejoinders such as “uh-huh, “I see,” “okay,” “go on,” “anything else?” “hmm . . .”
- Use punctuation marks to communicate. End punctuation (single or repeated) can indicate emphasis (“!!!” or “??”); ellipsis indicates more is coming (“Go to database x . . .”).
- Keep users updated on your progress and assure them that you are still working on their question (“Still searching. . .”).
- RUSA guidelines state that “librarians who demonstrate a high level of interest in the inquiries of patrons will generate a higher level of satisfaction among users.” Personally embrace each question and adopt the mindset: “your problem is my problem.”
Letting patrons know you are interested (“That’s a fascinating topic!”) establishes a good rapport with them.

ENGAGING/INVOLVING THE USER

- The best chat sessions bring the patron into the process and aim for user independence. As in face-to-face reference, guide patrons rather than do everything for them. See, for example, the following excerpt from a successful chat session:

  “L: [Librarian suggests multidisciplinary databases to search and asks] Are you familiar with either one of these?
  S: I’ve looked a little in both but couldn’t find much. I had trouble coming up with keywords.
  L: OK, that I can help you with. What kind of keywords were you trying, what results were you getting, and what were you hoping to get?
  S: Reality television – reviews . . . reality and television or film . . . again reviews.
  L: Let’s try something – can you open up a new browser window and go into Database X on your PC and we can try a search and talk through what is found.
  L: Go ahead and plug in this search and let me know when you get the results screen and we can talk about what comes up.” (excerpt from Devlin, Curry & Stratton)

- Engage the user in in performing one online task while you do another (“I’ll search LexisNexis while you search Factiva”)
- Have the user brainstorm with you about possible keywords; build search strategies together
- “Thinking aloud” by typing things like “um . . .” “hmmm . . .” “let’s think about how to start” encourages participation and models the process of searching

CONVEYING A POSITIVE, APPROACHABLE, AND EMPATHETIC ATTITUDE

- Research has shown that user satisfaction is highest when we develop a good rapport with our patrons
- Being upbeat and enthusiastic (“That’s great!”) establishes a friendly tone and helps build confidence in our users; avoid giving negative responses emphasizing what can’t be done
- Be persistent. Researchers have found that those most successful demonstrate persistence (“Okay, let’s not get discouraged. There are other places we can check”)
- Offering reassurance that the question is a valid one encourages hesitant users (“That’s a good question. . .”)
- Always be courteous, encouraging, and respectful of users (“Thanks for the clarification. That helps a lot”)  
- Use the “golden rule.” Consider how you would like to be treated
- Put the patron at ease by conveying a friendly, conversational tone
- Look at everything from the user’s perspective (“Gee, this database is slow. Sorry it’s taking so long!”). Always be empathetic, especially with user frustrations
STRIKING THE RIGHT BALANCE WITH TONE AND LANGUAGE

- Although our users often use chat shortcuts and ignore rules of capitalization, spelling, and grammar (“hi u their?”), we should not.
- At the same time, we don’t want to sound formal and stilted. Formality increases social distance.
- The best chat sessions adopt a professional but casual and conversational tone, focusing on the conventions of spoken rather than written language (“Oops! Sorry, I’m not the best speller!”).
- Using emoticons such as :) or :( can convey a friendly/approachable tone. They can also express in writing what body language, intonation, and visual cues convey in face-to-face interactions.

BEING AS DESCRIPTIVE AS POSSIBLE BUT BREAKING UP LONG CHUNKS OF TEXT

- Engage users by describing the steps of the process but do not overwhelm them with large chunks of text.
- Break it up by including only one or two sentences in each chunk of instructions. End each section with “...” so the user knows more is coming.

FIXING MISTAKES

- Use an asterisk before a word to indicate a previous typo (“*occurrence”).

DEALING WITH TIME PRESSURES

- The internet has shaped user expectations of speed and immediacy of response. In addition, some of our patrons face deadline pressures and may have unrealistic expectations of response times. Tell users how long they might have to wait and ask them if they have time to do so. Giving them the option of a response via email can work with complex questions.
- If more than one user appears, it is best to let the second one know as soon as possible that you are helping someone else. Ask the patron if he/she has time to wait.

REFERRING WHEN NECESSARY

- Don’t hesitate to refer a question to someone with expertise in an area but let the expert know that a user will be contacting them.

USING OPENING RITUALS

- Responding as soon as possible starts the session on a positive note.
- Beginning with a short friendly greeting (“Hi! How can I help you today?” or “Welcome to our chat service! What can I do for you?”) begins the important process of rapport building.

USING CLOSING RITUALS
• Make sure the user’s information needs are satisfied ("Did this completely answer your question?" “Do you have enough to get started?” “Does this seem like what you need”)
• Always provide a follow-up option ("If the articles don’t appear useful, please come back and we’ll try again")
• Invite the person to return again to use the service
• End on a cheerful note (“Good luck with your assignment!” or “Happy researching!”)

HANDING-OFF EFFECTIVELY
• Wait for the next person to enter the chat session. The person who takes over should do so five minutes early so that the first person does not start a lengthy new chat
• If the succeeding person does not appear on time, wait (if at all possible) in case this person is delayed. Contact the person if the delay persists. Report repeat offenders to the scheduler

REFERENCES


RUSA. “Guidelines for Behavioral Performance of Reference and Information Service Providers – Revision (Draft) – 08-08-2011.” http://connect.ala.org/node/153494


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