

# Contents

<b>List of Figures</b>	<b>vii</b>
<b>Quick Locator of Exercises and Checklists</b>	<b>ix</b>
<b>Foreword by Clifford Lynch</b>	<b>xiii</b>
<b>Preface</b>	<b>xvii</b>
Clicks and Mortar	xvii
How to Use This Book	xviii
About Terminology	xix
Digital or Virtual?	xix
Patron, Customer, or . . . ?	xx
One More Thought	xx
Your Comments Are Welcome	xx
<b>Acknowledgments</b>	<b>xxi</b>
<b>Part 1: Making the Decision to Go Virtual</b>	<b>1</b>
<hr/>	
<b>CHAPTER ONE:</b>	
<b>Discover the Benefits and Confront the Problems of Virtual Reference</b>	<b>3</b>
Three Reasons to Offer a Virtual Reference Service Now	3
Reason 1. You want to close the growing gap between users and the library	3
Reason 2. You can't afford to wait for the perfect technology	4
Reason 3. You want to continue providing the best service possible	7
Six Approaches to Carving Out a Niche for the New Service	9
Approach 1. Make room for new work	10
Approach 2. Redefine "professional" work	12
Approach 3. Create new work	13
Approach 4. Redesign space	13
Approach 5. Provide the necessary underpinnings	14
Approach 6. Give the new service time to succeed	15
Dispelling Doubts	15
Contrary evidence says don't go virtual	15
<i>"I'm eager to go virtual, but how to convince the others?"</i>	19
References	19

---

<b>CHAPTER TWO:</b>	
<b>Get Yourself in the Virtual Frame of Mind</b>	<b>21</b>
Spend Time Appreciating Your Work	21
Axiom 1. Your job is not to answer questions	21
Axiom 2. There will always be a need for a human consultant to satisfy the needs of the information seeker	23
Remind Yourself: To Want Convenience Is Human	24
Face the Realities of Reference Desk Work	25
Learn to Welcome Change	26
Think Like Your Clients Think	29
You're not so different from your demanding clients	29
Take a new look at old ideas	32
Invent New Vocabulary	32
Keep Up with Progress	33
New Internet resources and current developments	33
Current literature	34
Developments to track	34
Keeping up	38
References	40
<b>CHAPTER THREE:</b>	
<b>Shop Wisely for Software</b>	<b>41</b>
Keep a Flexible Attitude	41
Solicit Others' Opinions	42
Library-based Issues	42
Software-based Functions and Features	45
Vendor Support	50
References	50
<b>Part 2: Moving to the Virtual Reference Desk</b>	<b>51</b>
<b>CHAPTER FOUR:</b>	
<b>Transfer What You Know to What You Do</b>	<b>53</b>
Preventing the Einstellung Effect	53
Basic Chat Etiquette	54
Skills You Need When You Can't See or Hear the Client	55
Skill 1. Get comfortable in cyberspace	55

Skill 2. Perform a simple transaction efficiently	61
Skill 3. Let your fingers do the talking and listening	61
Skill 4. Answer the question the client hopes you heard	64
Skill 5. Search in quality resources	66
Skill 6. Evaluate retrievals	68
Skill 7. Teach while you chat	68
Skill 8. Control the length of a transaction	69
Skill 9. Practice fixing what can go wrong	71
Skill 10. Save your work to use again	72
Skill 11. Put it all together	72
Skill 12. Become overwhelmed	75
<b>CHAPTER FIVE:</b>	
<b>Update Your Library's Policies</b>	<b>77</b>
Eligibility	78
Confidentiality	78
Use of Licensed Databases to Answer Questions	80
How You Will Identify Yourself to the Client	81
Delivery of Material to the Client	82
Average Length of Transaction	84
Client Satisfaction	85
Inappropriate Client Behavior	85
Questionable Questions	86
Limit of Transactions per Client	87
Follow-Up	88
<b>CHAPTER SIX:</b>	
<b>Make Your Virtual Reference Desk a Comfortable Place</b>	<b>91</b>
Develop Homepage Features That Encourage Access	91
Top ten basic principles of Web homepage design	92
Library homepages that work	95
Exercises in evaluating library homepages	95
Plan the Look and Feel of Your Virtual Reference Service	108
Decisions to make when planning your Web site	108
Listen to the Evaluations of Your Users	119
Post-transaction evaluation form	119
Usability studies	119
Meetings with your users	120

---

**Part 3: Building a Lively Service** **123**

---

<b>CHAPTER SEVEN:</b>	
<b>Market and Publicize the Service in Old and New Ways</b>	<b>125</b>
Promotion Strategy 1: Create Awareness	127
Promotion Strategy 2: Segment the Market	132
Promotion Strategy 3: Ask Users How They Heard About Your Service	133
Promotion Strategy 4: Keep Up with the Changing Needs in the Community	133
Reference	136

<b>CHAPTER EIGHT:</b>	
<b>Let the Service Sell Itself</b>	<b>137</b>
Guidelines for Designing a High-Volume Service	138
Usability Is in the Eye of the Beholder	145
Here's to Your Success!	146

---

**Appendices: Virtual Reference Support Materials** **147**

---

<b>1 Causes of Questions at the Reference Desk: A Survey</b>	<b>149</b>
<b>2 Neutral Questioning: Why It Works, What It Looks Like, and How to Modify It for the Virtual Environment</b>	<b>157</b>
<b>3 Virtual Reference Desk Service Policies, Scripted Messages, and Tales from the Trenches</b>	<b>161</b>
<b>4 Chat Communication Tips</b>	<b>173</b>
<b>5 Training for Change: Beyond the Virtual Reference Desk</b>	<b>177</b>
<b>Index</b>	<b>191</b>
<b>About the Author</b>	<b>199</b>

# List of Figures

Figure 1-1	The genres of reference service in time and space	9
Figure 1-2	Characteristics of types of reference service	9
Figure 2-1	Relationship of question asked to answer wanted	23
Figure 3-1	Example of a worksheet for evaluating software and elements to include	45
Figure 4-1	Primary horizontal bars on a Netscape browser	57
Figure 4-2	Primary horizontal bars on an Internet Explorer browser	57
Figure 6-1	Example of enabling retrieval of desired results directly from the homepage of the Yale University Library ( <a href="http://www.library.yale.edu">www.library.yale.edu</a> )	93
Figure 6-2	Homepage of the University of Nevada Las Vegas Libraries showing mouse-over pop-up links to subcategories of a main link ( <a href="http://www.library.unlv.edu">www.library.unlv.edu</a> )	94
Figure 6-3	Homepage of the University of Nevada Las Vegas Libraries ( <a href="http://www.library.unlv.edu">www.library.unlv.edu</a> )	95
Figure 6-4a	Homepage of the Charlotte & Mecklenburg County Library ( <a href="http://www.plcmc.lib.nc.us">www.plcmc.lib.nc.us</a> )	96
Figure 6-4b	Charlotte & Mecklenburg County Library: same homepage showing rotating centerpieces. The center space is also used for mouse-over definitions of links.	96
Figure 7-1	Example of an article about the service written from the client's standpoint	130
Figure 7-2	Example of publicizing the service by showing how to use it	131
Figure 8-1	Helsinki City Library's Information Gas Station chat service ( <a href="http://igs.kirjastot.fi/index3.html">http://igs.kirjastot.fi/index3.html</a> )	139
Figure 8-2a	Homepage of the Toronto Public Library ( <a href="http://www.tpl.toronto.on.ca">www.tpl.toronto.on.ca</a> )	140
Figure 8-2b	Same homepage as in Figure 8-2a, with the lower left link highlighted (and which, when clicked, will generate an overlaid screen)	140
Figure 8-3a	Homepage of the University of Wisconsin-Madison Libraries ( <a href="http://www.library.wisc.edu">www.library.wisc.edu</a> )	142
Figure 8-3b	Main page of a subsection of the University of Wisconsin-Madison Libraries' site	142
Figure 8-3c	Main page of a different subsection of the University of Wisconsin-Madison Libraries' site	143
Figure 8-3d	Main page of a different subsection of the University of Wisconsin-Madison Libraries' site	143

Figure A5-1	Examples of training events in each of four growth tracks	182
Figure A5-2	Who needs to do what, and when, to support a particular training activity	184
Figure A5-3	How people learn	183
Figure A5-4	Sample categories of a training plan	187
Figure A5-5	Snippets from a sample training plan	187
Figure A5-6	Categories to consider when planning the interview of applicants	188
Figure A5-7	Snippets from an interview-for-hiring plan	188

# Quick Locator of Exercises and Checklists

Exercise 2-1	Your awareness-of-ambiguity score	27
Exercise 2-2	Challenge long-held beliefs	32
Exercise 3-1	Checklists of library-based issues to think through	43
Exercise 3-2	Checklists of software-based functions and features	46
Exercise 3-3	Checklists of vendor support	50
Exercise 4-1	Know your browser's basic features	56
Exercise 4-2	Be able to go beyond basics	58
Exercise 4-3	Know your software's bells and whistles	59
Exercise 4-4	Understand the information landscape on the Internet	60
Exercise 4-5	Greet the client, conduct a simple dialogue, push a page, and end the transaction	61
Exercise 4-6	Feel the effect of silence	62
Exercise 4-7	Fill the client's dead time	62
Exercise 4-8	Avoid embedding negative emotions in your message	63
Exercise 4-9	Control your negative reaction to the client's message	64
Exercise 4-10	Omit the neutral question	65
Exercise 4-11	Use NQ to get at the real question	66
Exercise 4-12	Asking neutral questions that start with openers	67
Exercise 4-13	Avoid Google, remember print	69
Exercise 4-14	Know how to evaluate retrievals	69
Exercise 4-15	Practice evaluating retrievals	70
Exercise 4-16	Tell client what to do next time	70
Exercise 4-17	Observe each other conducting a search	70
Exercise 4-18	Describe your virtual surroundings	71
Exercise 4-19	Limit your transactions to ten minutes	72
Exercise 4-20	Recover from a client-initiated disconnect	73
Exercise 4-21	Practice recovering from other surprise interruptions	73
Exercise 4-22	Perform post-transaction duties	74
Exercise 4-23	Perform multiple tasks simultaneously	74
Exercise 4-24	Become overwhelmed	75
Exercise 5-1	Draft a virtual reference service policy for your library regarding eligibility	78
Exercise 5-2	Draft a virtual reference service policy for your library regarding confidentiality	80

Exercise 5-3	Draft a virtual reference service policy for your library regarding use of licensed databases	81
Exercise 5-4	Draft a virtual reference service policy for your library regarding how you will identify yourself to the client	82
Exercise 5-5	Draft a virtual reference service policy for your library regarding delivery of material to the client	83
Exercise 5-6	Draft a virtual reference service policy for your library regarding average length of transaction	84
Exercise 5-7	Draft a virtual reference service policy for your library regarding client satisfaction	85
Exercise 5-8	Draft a virtual reference service policy for your library regarding inappropriate client behavior	86
Exercise 5-9	Draft a virtual reference service policy for your library regarding questionable questions	87
Exercise 5-10	Draft a virtual reference service policy for your library regarding limit of transactions per client	88
Exercise 5-11	Draft a virtual reference service policy for your library regarding follow-up	89
Exercise 6-1	Evaluate the homepage of the University of California, Berkeley, Library	98
Exercise 6-2	Evaluate the homepage of Hawaii State Public Library System	99
Exercise 6-3	Evaluate the homepage of the networked academic libraries in the Illinois Alliance Library System	100
Exercise 6-4	Evaluate the homepage of the Cambridge University Library	101
Exercise 6-5	Evaluate the homepage of the New Haven Free Public Library	102
Exercise 6-6	Evaluate the homepage of the Iowa City Public Library	103
Exercise 6-7	Evaluate the homepage of Santa Monica Public Library	104
Exercise 6-8	Evaluate the homepage of the Princeton University Library	105
Exercise 6-9	Evaluate the homepage of the Yale University Library	106
Exercise 6-10	Evaluate the homepage of Vassar College Libraries	107
Exercise 6-11	Routes to the virtual reference service	109
Exercise 6-12	Representation on collaborating member libraries' homepages	110
Exercise 6-13	First impressions	111
Exercise 6-14	Who is eligible to use the service?	112
Exercise 6-15	Clients' expectations	113
Exercise 6-16	Your expertise	114
Exercise 6-17	Related services	115
Exercise 6-18	"Wait, please" screen	116
Exercise 6-19	Client satisfaction	117
Exercise 6-20	"Staff only" screens	118
Exercise 6-21	Observe users as they use your Web site	119
Exercise 6-22	Observe users as they use your Web site on your terms	120
Exercise 6-23	Analyze transaction logs	121



Exercise 7-1	Conduct a survey	134
Exercise 8-1	Get personal	144
Exercise A1-1	Determine the causes of questions	149