

OCLC Research
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Seeking Synchronicity: Revelations & Recommendations for Virtual Reference



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Seeking Synchronicity: Evaluating Virtual Reference Services from User, Non-User, & Librarian Perspectives



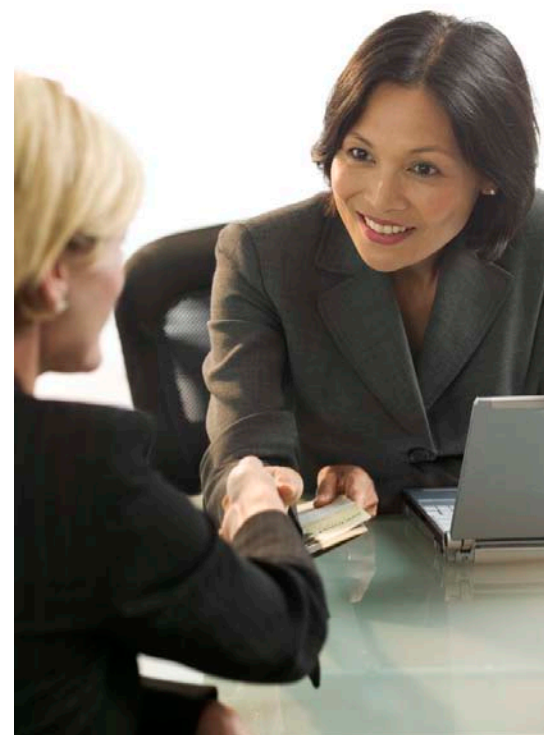
- Funded by IMLS, OCLC, & Rutgers University
- Four phases:
 - Focus group interviews
 - Analysis of 850 QuestionPoint live chat transcripts
 - Online surveys
 - 137 VRS Users
 - 173 VRS Librarians
 - 134 VRS Non-users
 - Telephone interviews
 - 76 VRS Users
 - 100 VRS Librarians
 - 107 VRS Non-users



Why Not Virtual Reference?

What we learned from non-users:

- Preference for FtF service
- Do not know it exists
- Unknown or unfamiliar format



Lack of Knowledge that VR Exists VR Non-users Online Survey

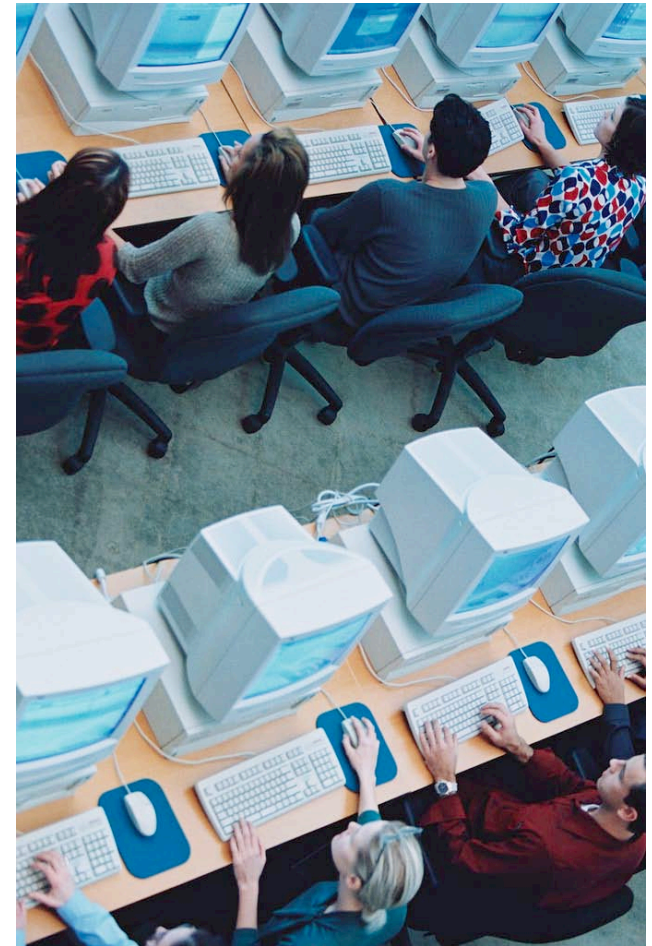
“I’ve never used this type of service and never knew it was available—that’s probably why I never tried it.”

(Millennial)



Top Recommendation Attracting Potential Users

Introduce & demonstrate online alternatives during in-person reference sessions, library use instruction classes & library programs.



Two Views of What's Effective: Positive Factors in VR Experiences

Users:

- Convenience
- Comfort with service
- Accuracy



Librarians:

- Ability to leverage complex & specialized knowledge
- Positive attitudes, responses, & feedback
- VR tools & hybrid communication modes

Two Views of What's Not Effective: Negative Factors in VR Experiences

Users:

- Abrupt, dismissive answers
- Grumpy, ill-informed or uninterested librarians
- Poor wrap-up



Librarians:

- Convoluted & confusing questions
- Rude, impatient &/or disappearing users
- Unrealistic expectations

Comfort With VR: Focus Group Interview

“I was on the site at 2 or 3 in the morning and it felt personalized. I don’t know, I felt like I was the only person the other person had to talk to and they took the time out.” (User)



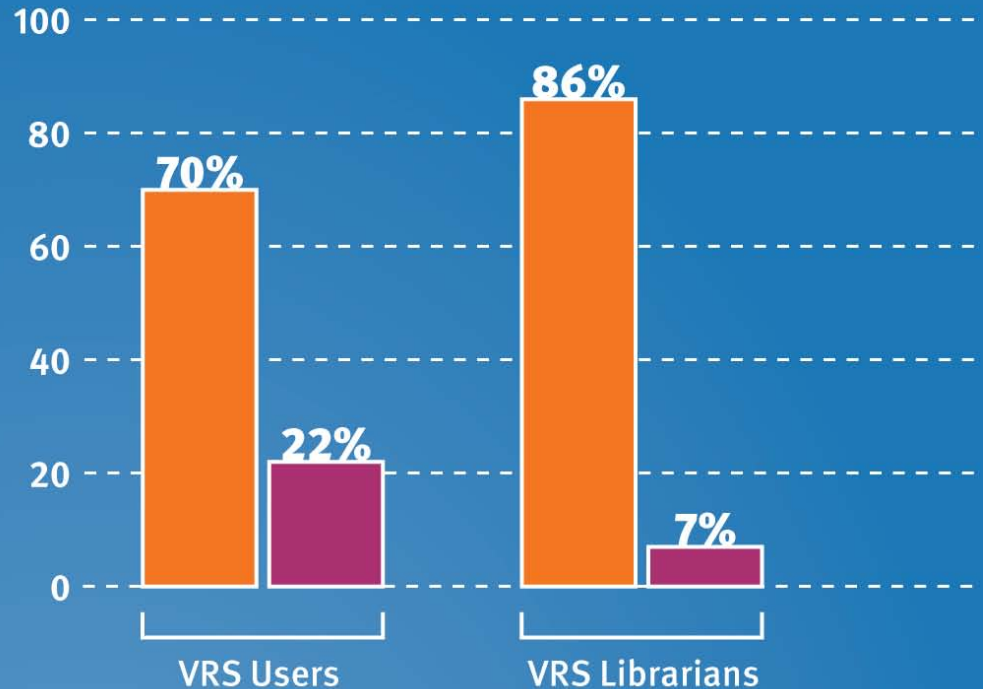
Mode for Developing Best Relationship: VR Users & Librarians

“I Can Develop the Best Relationship
with a Librarian/User In”
Online Survey

137 VRS USERS

175 VRS LIBRARIANS

 FtF
 Chat

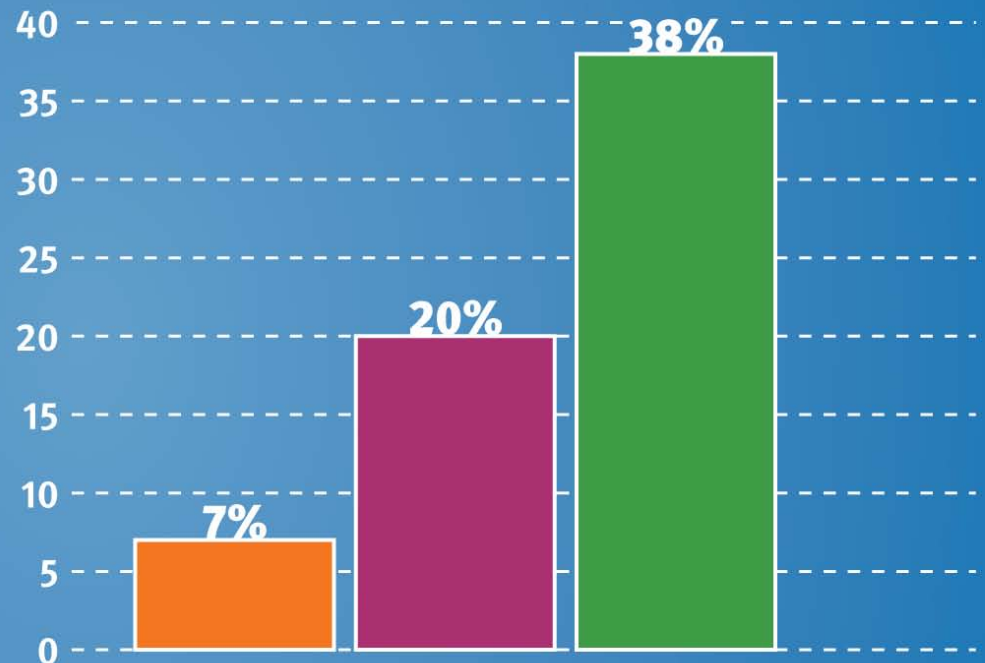


Making Personal Connections: VR Librarians

Opportunity to Make Personal
Connections with Users in Live Chat
Online Survey

175 VRS LIBRARIANS

- Excellent 13 = 7%
- Very Good 35 = 20%
- Good 67 = 38%



Talkin' bout Generational Differences: Positive Perceptions of VR

Baby Boomers & Millennials:

- Appreciate quick, on-target responses
- Value those “who know their stuff”
- Convenience
- Appreciate personable & friendly exchanges
- Would recommend to others



Positive Perceptions of VR: Millennials

- Immediacy
- 24/7 late-night & weekend availability
- Convenience
- Co-browsing
- Personalized interfaces
- Would recommend VR
- Less intimidating than FtF reference



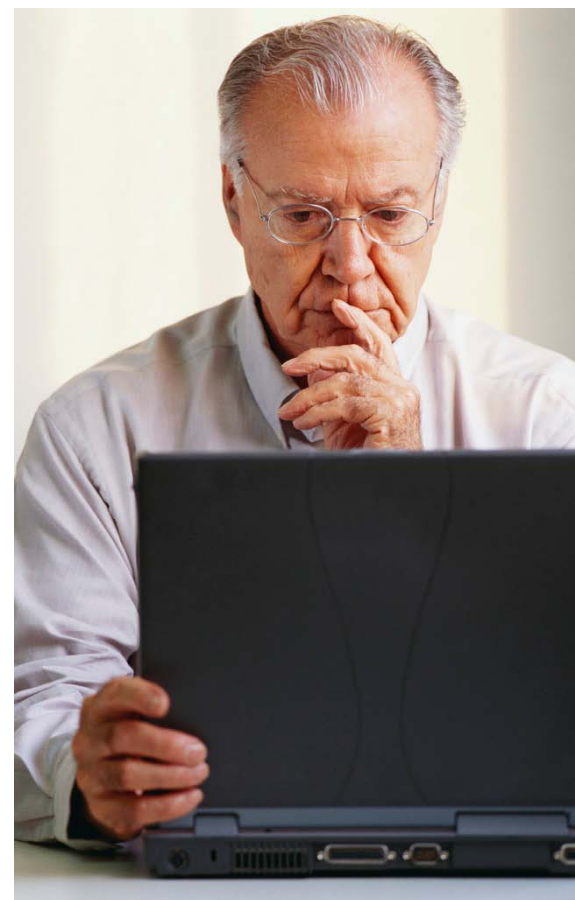
Why Millennials May Not Use VR

- Fear technology complicated
- Fear of annoying, overwhelming, or pestering
- Trust their own abilities
- Believe they don't need assistance
- Don't know it's available!



Why Older Adults May Not Use VR

- Preference for FtF & personal relationships
- Comfort with library & find it convenient
- Lack experience with other reference methods
- Lack of computer skills & slow typing speed
- Don't know it's available!



Intergenerational Recommendations

- Promote VR by marketing & word-of-mouth
- Reassure teens that questions are welcome
- Involve users in VR development
- Encourage users to enter library phone numbers in cell phones for quick reference help



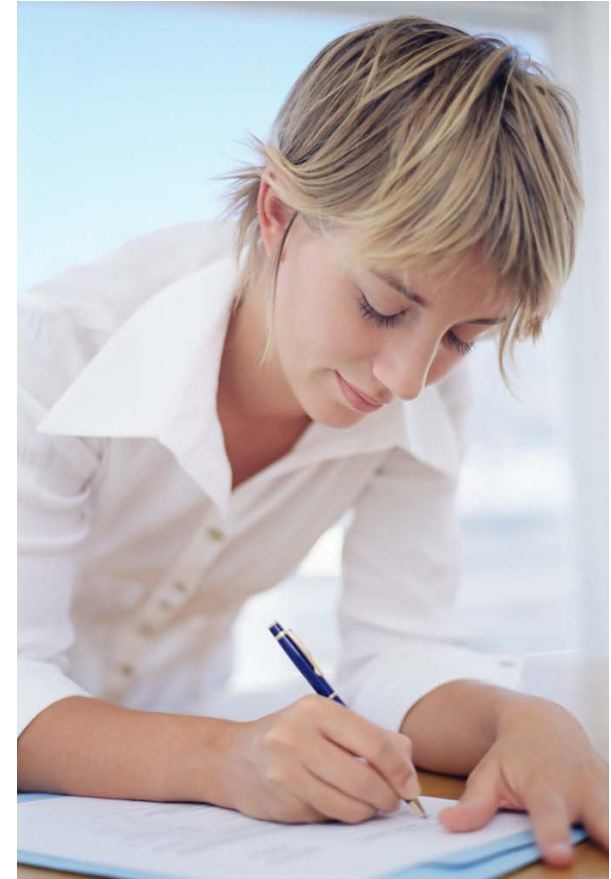
Critical Incident Technique (CIT)

- Flanagan (1954)
- Qualitative technique
- Focuses on **most memorable** event/experience
- Allows categories or themes to **emerge** rather than be **imposed**



Critical Incident Technique (CIT) VR Users' & Librarians' Questions

- Remember 1 specific *successful* VRS interaction
- Remember 1 specific *unsuccessful* VRS interaction
- Describe each interaction
- Identify factors that made interactions successful or unsuccessful



What's Effective: VR Users Value

- Knowledge and accuracy of answers/information
- Positive attitude
- Communication skills



What's Effective: VR Librarians Value

Relationships with VR Users Who:

- Approach with willingness to explain needs openly
- Are agreeable to receiving help
- Demonstrate ordinary politeness & common courtesy (e.g., use please & thank you)
- Admit lack of knowledge



What's Effective: VR Users Value

Relationships with VR Librarians Who:

- Offer opinions/advice
- Explain search strategy
- Are less formal (e.g., use chat speak)
- Encourage users during reference encounter
- Use personal greetings
- Let users know when search will take time
- Warn users before signing off/disconnecting



What's Not Effective: VR Librarians Speak

Users who are:

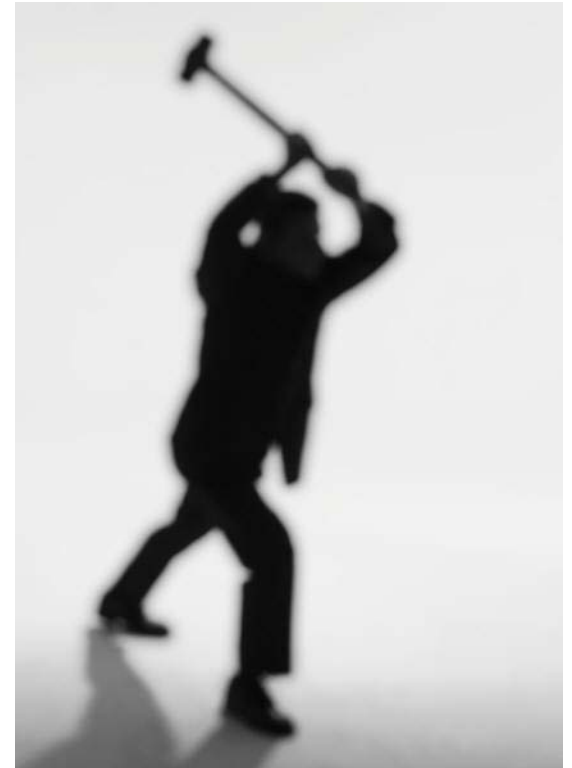
- Impatient
- Rude or insulting
- Unreceptive to suggestions



What's Not Effective: VR Users Speak

Unsuccessful VR experiences entailed:

- Abrupt session ending
- Limiting time of session
- Sending users to Google
- Reprimanding user
- Failing or refusing to provide information



Recommendations from CIT Findings

- Positive attitude crucial
- Provide specific & accurate answers
- Take your time
- Pay attention to “close”
- Always be pleasant & polite



What's Effective: Importance of Query Clarification

- Found to boost accuracy
- Use variety of clarifying questions
- Expect clarifying questions from users
- Use follow-up questions to verify needs are met



What's Not Effective

- Using “closed” questions in online interactions
- Not clarifying reference questions



Convenience Factor Important

- Ease of the Web
- Online full-text journal articles
- 24x7 availability
- Search engines



Barriers to Convenience

- Difficulty of library systems
- Print articles
- Limited hours, distance to library



Recommendations to Boost Convenience

- Deliver resources 24/7
- Integrate library tools in popular sites
- Provide links & reminders
- Make interfaces more like web browsers
- Accommodate different & personalized discovery & access preferences
- Offer multiple service modes
- Provide opportunities for collaboration



New! Longitudinal Comparison Question Types & Accuracy



Live Chat Transcripts 2004-2006 (QP1)

- 8/2004 to 10/2006
- Total QuestionPoint & 24/7 = 651,687
- 850 randomly selected (550 QP & 300 24/7)

Live Chat & Qwidget Transcripts 2010 (QP2 & QW)

- 6/2010 to 12/2010
- Total QP2 & QW = 296,797
- 560 randomly selected (350 QP2 & 210 QW)

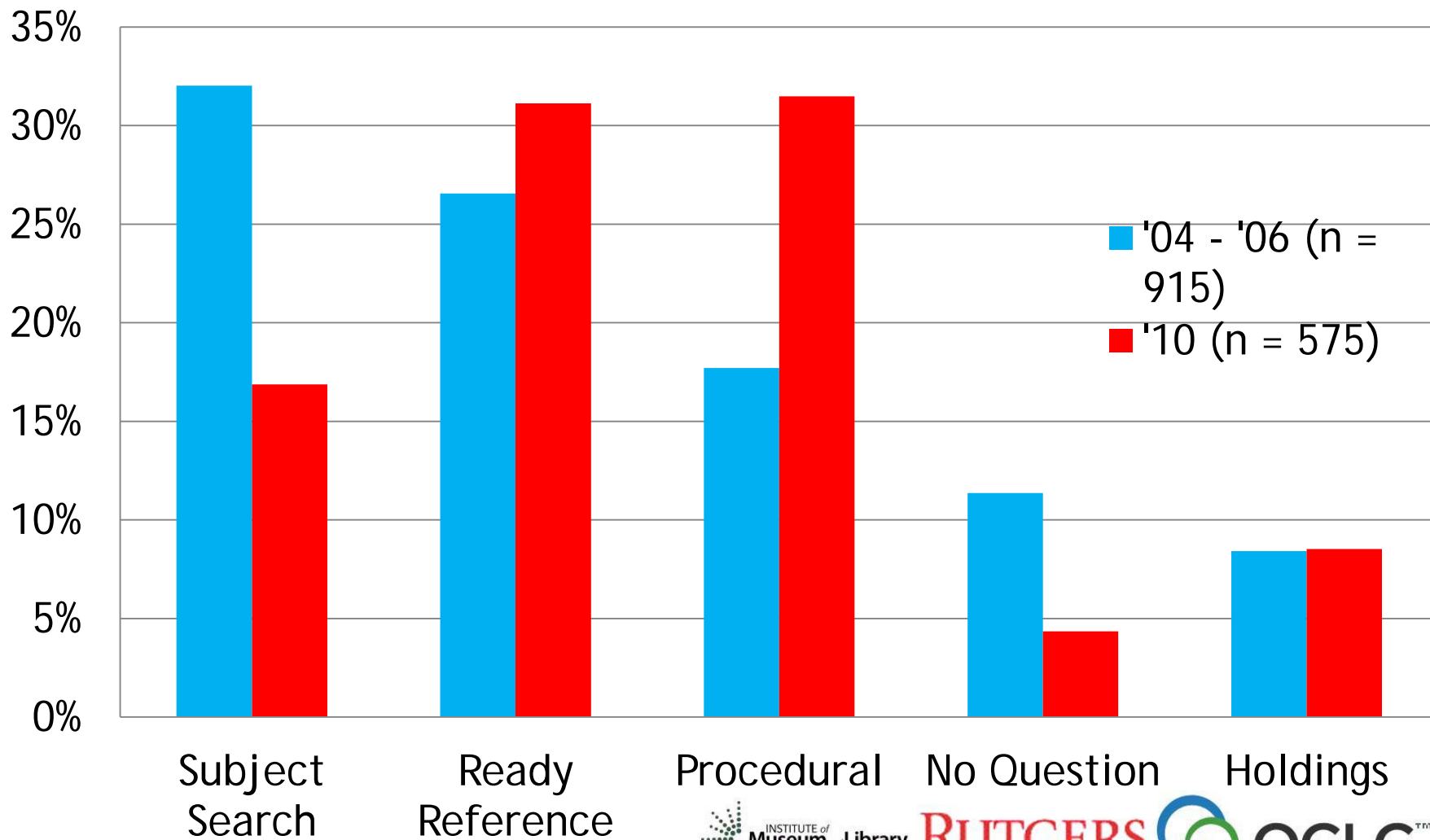


Types of VR Questions

- Subject Search
- Ready Reference
- Procedural
- No Question
- Holdings
- Research
- Inappropriate
- Directional
- Reader's Advisory



Query Type: 2004-2006 vs. 2010



Ready Reference Defined

“These are the typical ready-reference or data queries that require only a single, usually uncomplicated, straightforward answer...Who? What? When? Why? Where?” (Arnold & Kaske, 2005).

- Who was Bentonville, NC named after?
(QP1 - 147)
- How do i cite a political talk show in
MLA format? (QP2 - 013)
- who won the world cup game between
south africa and france? (QW - 024)



Accuracy in VR Ready Reference?

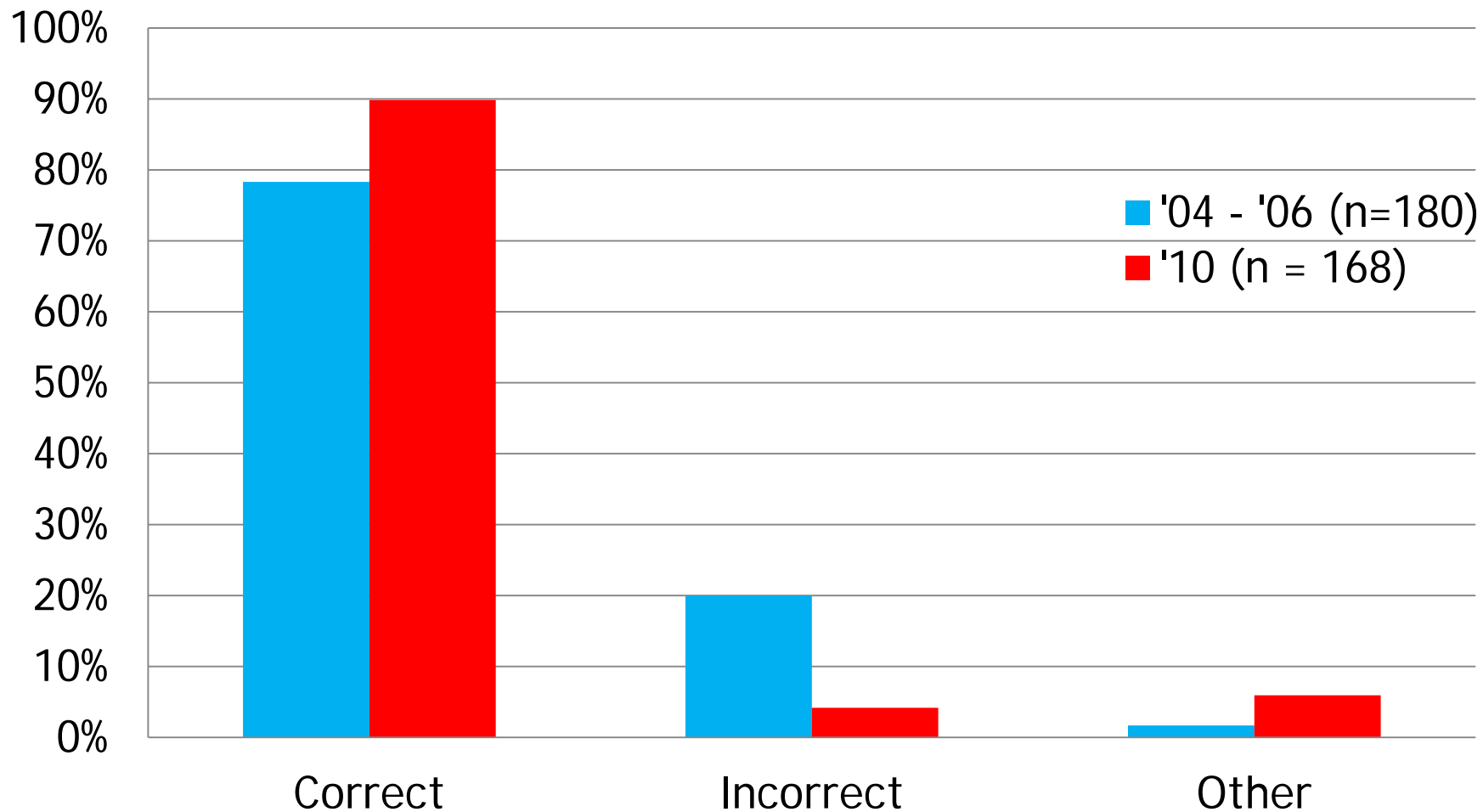
- How accurate are VR librarians/staff in answering ready reference questions?

- Do we see the 55% rule in effect?

(Hernon & McClure, 1987)



Accuracy: 2004-2006 vs. 2010



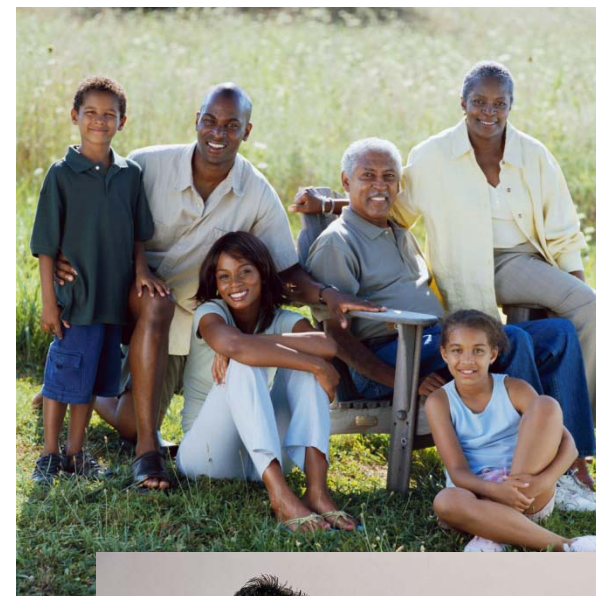
A Simple Way to Increase Accuracy

- For 2004 -2006, accuracy would rise from **78% to 90%** if VR librarians only...
 - Answered **specific question** asked!
- Seeking Synchronicity urged VRS librarians
 - Before pushing** a general info page **make sure** it has **specific & exact** answer to user's question!
- 2010 sample included far fewer with this error accuracy **90%** (perhaps b/c of recommendation?)



Conclusions

- It's all about the relationships
- Death of ready reference exaggerated
- To boost accuracy
 - Clarify question
 - Answer specific question
- Convenience is the hook
- Generational differences come into play
- Marketing matters



Future Research Directions

Cyber Synergy: Seeking Sustainability through Collaboration between Virtual Reference and Social Q & A Sites

- \$250,000.00 grant funded by IMLS, OCLC, and Rutgers University
- Co-PIs
 - Marie L. Radford, Rutgers University
 - Lynn Silipigni Connaway, OCLC
 - Chirag Shah, Rutgers University



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QUESTIONS?

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