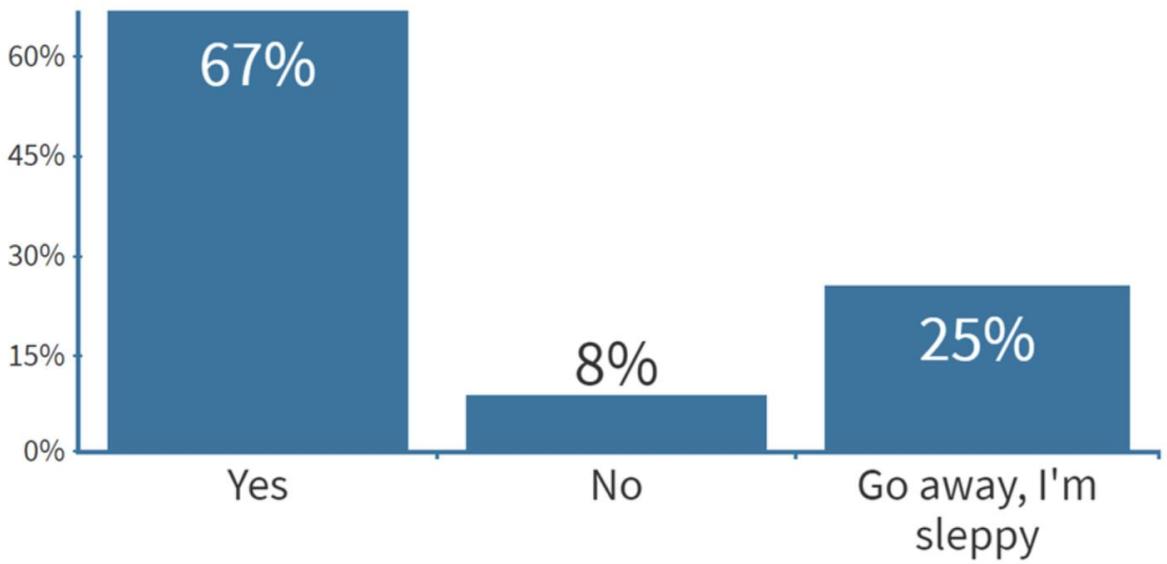

Customer Priority Management: Reference Triage

— Cody Fullerton & Joshua Herter —
Library Dudes

Do you know what the term "Reference Triage" means?



When poll is active, respond at PollEv.com/reftriage285 Text REFTRIAGE285 to 37607 once to join



Reference Triage

Two Forms

1. In-Person Triage
2. VR Triage

Soft Skills



Not this kind of triage.

Reference Triage

Definition:

The assignment and routing of a question to a reference or subject expert “answerer.”*

*Pomerantz, J. (2004) Factors Influencing Digital Reference Triage: A Think-Aloud Study. *The Library Quarterly*, 74(3), 235-264.

In-Person Triage

“In any case, combined desks with multiple functions require flexibility and collegiality on the part of all staff.”

(Bopp & Smith, 2011)

Unlike VR, in-person reference triage is best discussed in terms of the issues that can influence any given environment. A system like ours - a shared system with many satellite branches and moving parts - needs an approach to triage which allows for our individual units' patron needs, yet works consistently with other divisions to create a seamless user experience. We all work in different environments, and need a set of standards that is can be bent to the needs of each environment. In terms of literature, very few ever write about triage as its own topic, but consider it as one component of patron service as a whole. Therefore, in order to unpack the concept, we've looked at library customer service assessment literature as a larger body, and broken down the factors influencing successful in-person triage into the following categories:

- Unit Service Standards
- Library Geography & Topography
- Communication Channels
- Institutional & Unit Culture

In-Person Triage - Library Geography

Physical factors:

Layout

Signage

Service Points



Layout:

- How far patrons must travel between service points

- Locked doors; open areas

- Sight lines

- Waiting area topography

Signage

- Good signage manages traffic; poor signage makes it worse

- Balance

Service points

- How many - too many = confusion

- Function (do people do 'work' as well?)

In-Person Triage - Communication Channels



[Flora Christie Commons](#)

Internal Channels

External Channels

Feedback & Flexibility

Internal

- Regularity & consistency

- Dependable messages regarding policy, changes, events.

External

- Explicit communication (Long, 2012 example re: stamping)

- Explain policies: don't dictate them

Feedback & Flexibility

- Does the system allow for staff feedback?

- Not just feedback, but change? Can staff influence triage policy changes?

- Do rules allow for staff to make "common sense" judgements?

In-Person Triage - Service Policies

The Good and the Bad, and
the Librarians:

The Good

The Bad

The Librarians [& tiered
service]



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UM currently working toward unified service standards

Good

Consistency breeds confidence for patrons: expectation, anticipation of process

Consistency breeds confidence for staff: "tried & true"; (Long, 2012 example student workers on weekends)

Customer service has a tendency to diminish over time: standards alleviate this.

Bad

Trapped inside the box

Walls to hide behind: policy dictations sound like an excuse, not a reason

Triage models are great until they break: again, staff need room for 'common sense judgements': 'once size does not fit all'

The Librarians

Tiered service: it's what we do

Librarians who aren't available: "A benefit of tiered reference is that staff is not wasted on routine directional questions. The problem with this method is that many users simply accept the information provided at the first level of service and do not follow through with the referral."

In-Person Triage - Institutional Culture



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Staff Relationships

Staff Knowledge

Relationships

Librarians and rules (Lund, 2012). In-depth reference is a recursive process, but circulation and basic library functions require strict workflows

Academic staff vs. Non-academic staff: we're all on the same team, here.

Specialties and territorial disputes: Availability vs. Ownership

Room for mistakes: allow for experimentation

Knowledge

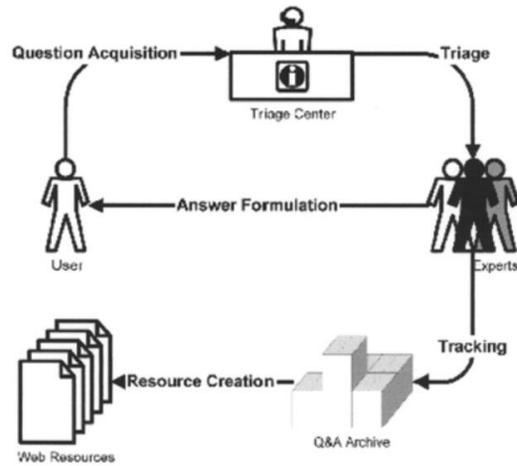
We all have varying degrees of understanding, specialization; lateral triage

Quality triage requires more cross-training and empathy: at least knowing what you don't know

Increased understanding of people, places, and services beyond the unit

EXAMPLE: If a patron needs IT help, an understanding of how IST functions can help triage assistance in that area

Virtual Reference Triage



Pomerantz, J., Nicholson, S., & Lankes, R. D. (2003). Digital Reference Triage: Factors Influencing Question Routing and Assignment. *Library Quarterly*, 73(2), 103.

We will come back to this image later

VR Triage

VR = Interconnected

Virtual reference is inherently about being instantly connected to others.

VR Triage - Literature Search

- Most literature is ~10-13 years old
- Still relevant
- Major points
 1. Triage is essential to VR
 2. Human decisions trump Automated decisions for referrals
 3. Ultimate goal is automated (eg. Help Hub)

10-13 years old:

This is because VR began at this time and much research was being done on the “new aspect” of reference service.

Still Relevant:

VR hasn't changed too much since its introduction.

We've become more familiar with chat software, we use it everyday: eg. text message

One of my friends (Steve) sends me texts asking me: “what book is this...” and gives me some details

Major Points:

Triage is essential to VR

Depending who is online, you are going to get questions that are outside your scope of knowledge and possibly outside the scope of your collection.

Human > Automated

No comprehensive list of library employees skills exist (best we have is LibGuides)

Someone might know that another person knows about a particular topic, but they aren't specifically in charge of that topic. (Classics and History)

Automated is the goal

The literature states that automated processes take up the least time, but can only make decisions as good as the info it has access to.

VR Triage - Literature Search

Three Important Factors:

1. Specific to the Question (eg. Subject)
2. Specific to the Answer (eg. Answerer Expertise)
3. Specific to Reference Service (Scope of Collection)*

*Pomerantz, J., Nicholson, S., & Lankes, R. D. (2003). Digital Reference Triage: Factors Influencing Question Routing and Assignment. *Library Quarterly*, 73(2), 103.

3 Factors:

These factors were picked out as the most important things to consider when you are presented with a triage worthy question

Specific to the Question

Eg. If someone asks a question about researching Fuzzy Systems, you'll have to make sure you know the discipline that falls under

Specific to the Answer

What type of answer are they looking for?

Is it simple, maybe you don't have to triage.

Or is it complicated, in which case you'll contact the expert.

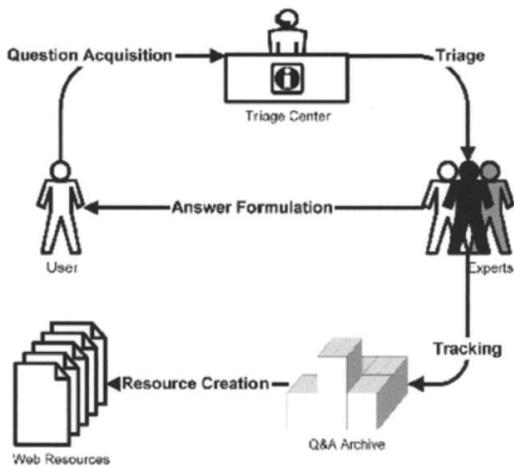
Specific to Reference Service

Is this question outside the scope of our collection?

Manitoba or Canadian genealogy questions might better be answered by Manitoba or Canadian Archives

Questions about graduation would be better answered by the Registrar's Office

VR Triage - Steps



1. Question Asked by Patron
2. Triage (refer to "Expert")
3. Expert answers question
 - a. Track Common Questions
 - b. Create Online Resources

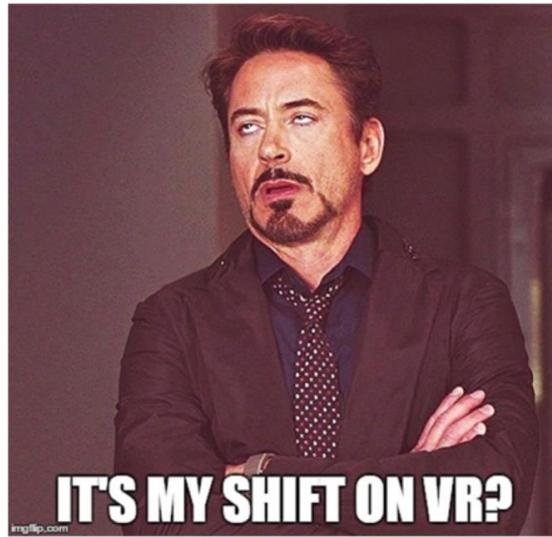
Basic representation of Triage service

The literature puts little emphasis on Q&A archive, but they are important

Help Hub is a type of resource creation on a large scale.

Also, there are LibGuides and information sheets.

Obstacles



Do you think it would fair to say that **SOME** people don't like going on VR?
Do you think it would fair to say that **MOST** people don't like going on VR?

Why?

VR Obstacles

VR = Necessity

Meet students where they live

Change in mentality is needed

VR is necessary

In the modern academic library, VR is a standard. Everyone has it and we need it to “keep up” with other institutions.

It’s not going anywhere

Meet Students where they live

Students live online

Let’s be fair, so do we, at least at work

Change in mentality is needed

No more “I don’t want to go on VR.”

It should be seen as the same as working the desk or meeting with students for reference help.

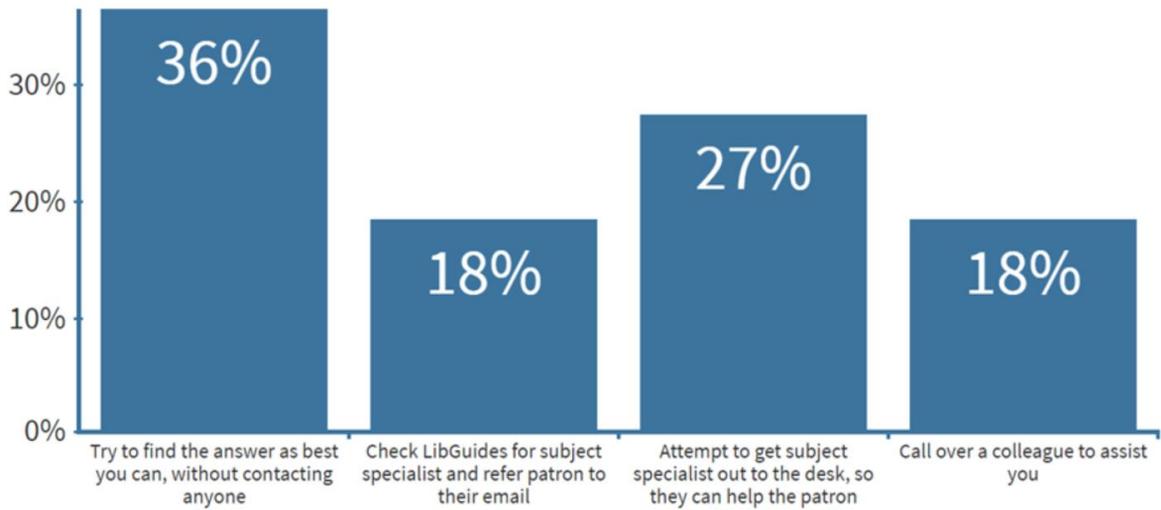
It’s just another form of reference

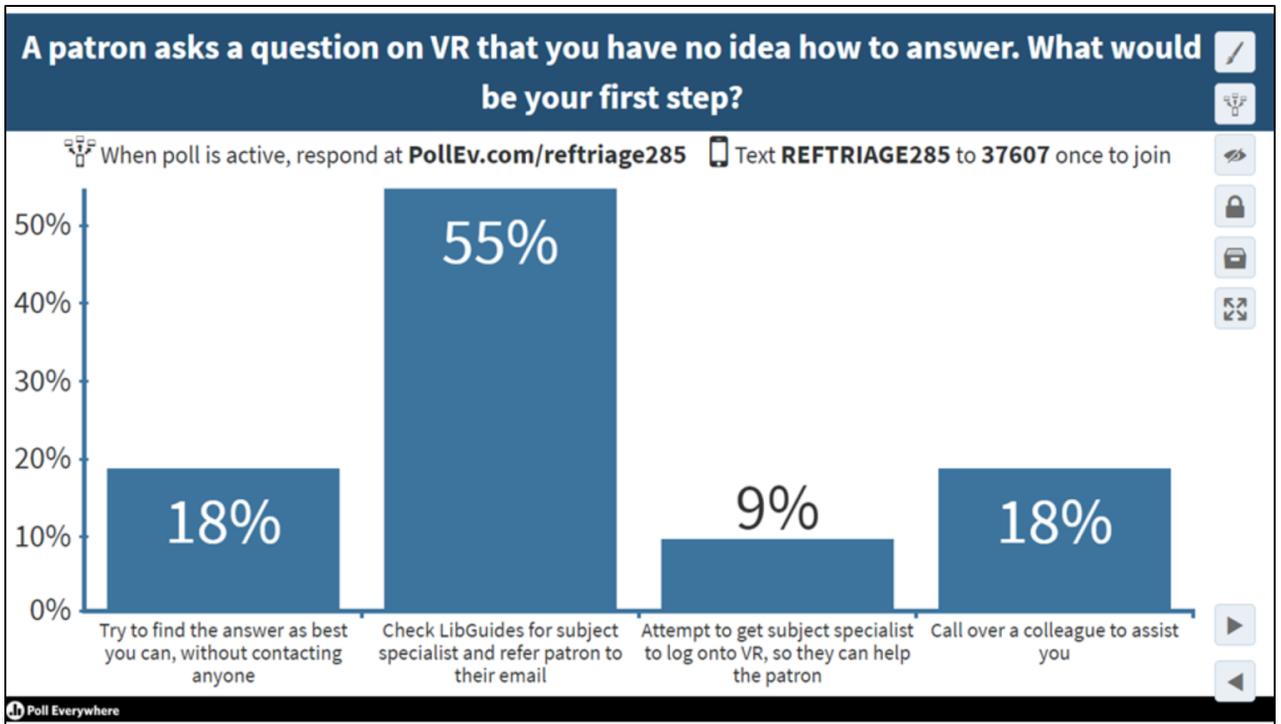
This is the ideal situation

A patron asks a question at the desk that you have no idea how to answer. What would be your first step?

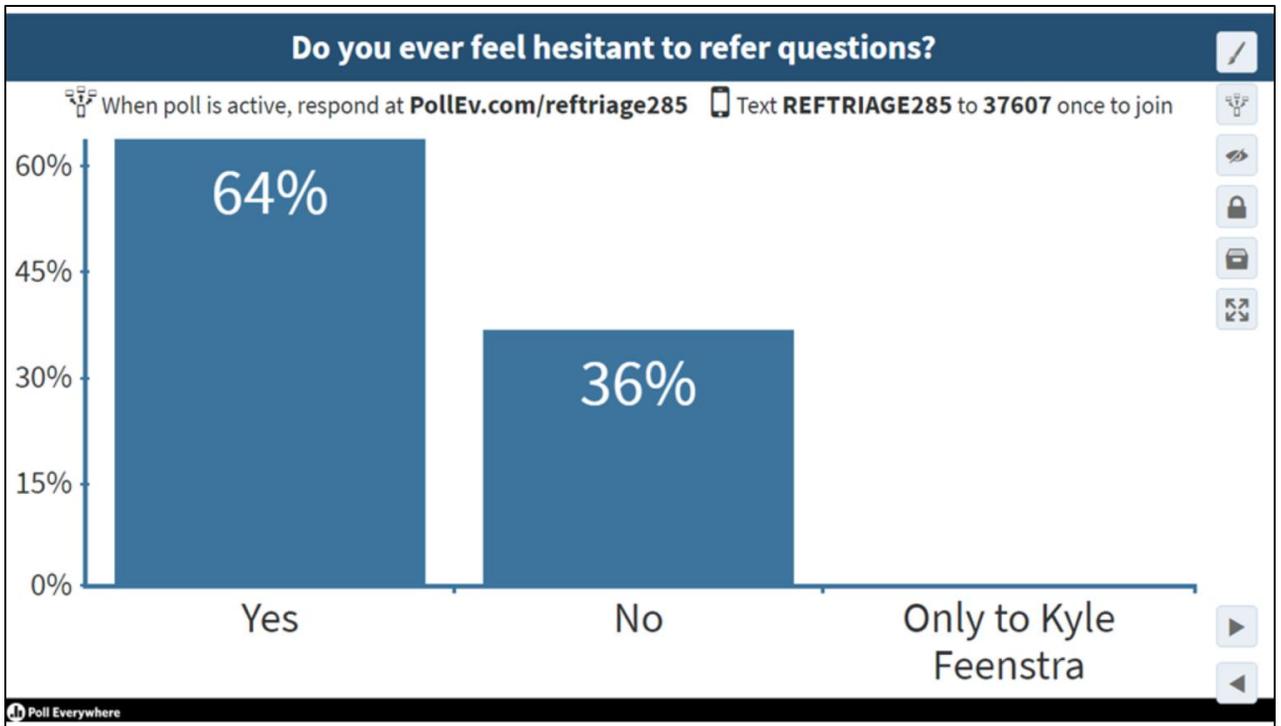


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Third poll. Notice how answers changed from in person to VR. The “ideal situation” is to have the subject specialist log on to VR, but only 9% of responses said they would do that. The Triager was hesitant to ask someone else to log on to VR.



As you can see, most people have felt hesitant to refer a question. Why is that? Are they afraid or just don't realize they can?

Soft Skills

"...lack of specificity allows each individual to hear what they want to hear." (Abdul, 2016)

"Language was invented to keep people from knowing what we are thinking." (Anderson, 2009)



The double-edge sword of communication: balance between honesty and courtesy.

Specificity: Works both ways. We speak in general terms when we're not interested in dealing with the situation, or when we need to be polite.

We speak in explicit terms when we are interested or when conveying information is a priority. Second floor example.

Language: Personal Example

Soft Skills - Interpersonal Tips

Maintain Approachability

Anticipate Obstacles [not **assume needs**]

Offer Alternatives

Empathize



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Approachability

In-Person: Smiling, looking up, making sure to not look completely engrossed in your computer screen; face in the direction from which people approach: being the first one to speak; acknowledge people waiting in line: EXAMPLE: In a few of the studies we looked at, wait times were **not** an issue for patrons - only courtesy. Patrons can recognize when staff are effectively dealing with a heavy load, and are only upset when they feel they've been ignored or staff aren't making an effort. Asking waiting patrons for their needs allows you to take their needs into consideration BEFORE you get into trouble.

Online: Respond quickly, even if you're tied up with other conversations. A simple, "Hi there, I will be right with you," may be enough.

If you don't know, say so, but stay confident that you can help find the answer. Two reasons 1) It establishes you are a human being, and 2) It shows that you're willing to go beyond for the customer.

Stay aware of your nonverbal cues - remember, language masks what we are really thinking. An obvious juxtaposition will send the wrong signals.

Anticipate needs

Do not assume you know what a need is: establish what it is, and then anticipate the obstacles that will occur.

Always ask about the patron's timeline - this will help you decide if a "quick and dirty" answer will suffice, or if you need to call an expert right

away.

Ask about the patron's experience level - are they an undergrad, graduate student, medical student, faculty?

Provide explanations of other units' differences, policies, so that the user is not surprised; EXAMPLE ILL

Provide explanations for jargon; EXAMPLE LCC: provide map (or link online) and explain the general area of a call number location, if you can't walk them there yourself

Online, provide links, email addresses, and contact phone numbers - give the patron options, and explain when the best time to call is, how to handle the operator, etc...anything that

Follow-through on commitments (both online and in-person)

Offer alternatives

Provide a positive transition context: "I'm going to call Cody because he worked in this field and will be able to help you more quickly than I can," instead of a negative one, "You need to talk to a librarian, I cannot help you."

Make a lateral referral right away if you think it might be necessary.

Try WPL, or UW, or Red River - even if you aren't able to find what you're looking for, you're demonstrating a willingness to extend your effort.

Offer to follow-up with them later, or offer to personally arrange the referral yourself; FOLLOW-THROUGH ON COMMITMENTS

Empathy

We have a diverse clientele with a variety of needs: we have inexperienced undergraduates, students with language barriers, and veteran researchers who are skeptical of change: each of these patron bases have unique needs.

Deal with the problem, not the patron: "Your catalogue sucks and never works." Most patrons don't have time to hate library workers, and you have no idea what their situation really entails.

Empathy is strategic: by putting yourself in someone else's shoes, you can better anticipate their needs and barriers that may come along the way

Questions?

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