

Northern California Association of Law Librarians Newsletter

VIRTUAL REFERENCE

An Idea Who's Time Has Come

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Virtual reference. A few years ago, the very idea may have conjured up a mythical space age where disembodied automatons field research requests across massive divides of space and time. Or maybe I've read too much science fiction. The truth is, many of us conduct some form of virtual reference transaction every day. As law firm librarians offer remote support to attorneys and staff in satellite offices, court librarians field requests from judges and attorneys too busy to visit the library, and academic law librarians tackle questions sent from students sitting in classrooms, virtual reference is rising to the fore. In this article, I will provide an overview of virtual reference, and how researchers accomplish it at Greenberg Traurig.



At its most basic, virtual reference is the act of receiving, researching, and resolving a reference request without any face-to-face interaction between librarian and client. The query can be sent to the reference librarian in a variety of ways - via email, an online chat, a text message, even a bulletin board post on an intranet web page. This scenario has a number of advantages, the main one being that it no longer matters where patron and researcher are physically located. Laptops, Blackberries, smart phones, Wi-Fi and a host of Web 2.0 applications allow patrons to quickly get in touch with researchers regardless of where either person is at that moment. As an added bonus, researchers with virtual availability can provide their services to a wider audience, including clients who might never otherwise venture in to the library with a request.

On the other hand, administering virtual reference is not without its challenges. For patrons, submitting a reference request electronically can be a leap of faith. How do I know the person on the other end is qualified to help? Am I using the right terms to describe what I need? Is my request going to be given immediate attention and care, or will it go to the bottom of some queue, to be resolved at some unspecified time? Will someone even pick my request up?

While the reference librarian can assuage most of these concerns with a thorough introductory response to the initial query, other complexities remain. An effective reference interview, always of critical importance, becomes crucial in the virtual reference setting. Indeed, those of us who are accustomed to doing reference work at a reference desk may find virtual reference particularly tricky. A face-to-face reference interview includes any number of nonverbal cues to accompany what is actually said. A talented reference librarian can see a change in a patron's expression and quickly alter the line of questioning to head off potential frustration. Patron body language - crossed arms, foot tapping, finger drumming, etc. - often lets the librarian know how to proceed. In addition, vocal inflections, tone of voice, accents and word emphasis all serve to inform and aid in the successful navigation of a reference interview.

None of these extra cues is present in the virtual reference interview. A virtual interview is initiated and often navigated entirely via text. Sometimes, the initial request, sent in by the harried attorney or the overburdened student, consists of a short blurb, along the lines of "get me this..." Reference Interview 101 tells us that what hasn't been said (or written) can be just as important as what has. Once contact has been made, the librarian must begin to coax details and nuance from the patron in order to establish what is truly required. In the midst of doing this, the researcher must work to preserve the patron's confidence in his or her abilities, while asking just enough questions to ensure a successful resolution without causing undue exasperation.

A reference librarian in the virtual setting must remain unflappable as well. Just as we do not want our patrons to form any preconceived notions about our knowledge or abilities, we must make sure we do not make any snap judgments based on what little we know about them. A patron who responds with "I can't believe there's not more out there on this subject" could merely be expressing a sense of genuine surprise, rather than impugning the librarian's research skills. Without the tone of voice to go along with the words, we have no way of knowing, so there is little point in jumping to a conclusion. In the end, frequent and detailed communication between librarian and patron, coupled with an overabundance of politeness, deference, and attentiveness, are the essential soft skills that a knowledgeable researcher uses to succeed in the virtual reference setting.

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VIRTUAL COLLABORATION

One advantage to having a large geographically distributed team of librarians who are accustomed to working virtually is our ability to resolve large scale projects quickly and efficiently. For example, our team fields a large number of 50-state survey requests that would be impossible for an individual researcher to complete on a tight deadline. When such a request comes in, a workflow coordinator brings it to the attention of a special projects coordinator (SPC). The SPC then assembles a team of research volunteers to work on the project. Typically, an SPC will draft a detailed email, laying out the scope and parameters of what the patron needs, and assigning different components of the research to each volunteer. Time zones play a factor in the distribution of tasks, and more or less research can be assigned to researcher, depending on where they are and how much time is left in their workday. The SPC acts as the liaison between the patron and the research department, and performs quality control as needed. Whenever a component of the research needs clarification, researchers send an email to the team posing the question. Sometimes, a group chat is initiated where member discuss unforeseen problems and come up with solutions on the fly. Chat software keeps track of who is online at the moment, making it easier to establish these ad hoc conferences. By eliminating the need for in person conferences and strategy sessions, the SPC and the researchers can focus on resolving the issue at hand while leveraging the time differentials for maximum efficiency.

These are the abilities that more than fifteen researchers spread across thirteen offices in each of the four continental U.S. time zones bring to their jobs at Greenberg Traurig each day. Of the four AmLaw 100 firms where I have worked, GT is the first to have embraced a primarily virtual reference model for its research services. Indeed, while many of our researchers support a considerable number of walk-in patrons, all new hires are encouraged to submit request through our centralized system, and we strive to ensure that every patron gets the same level and quality of service from the researcher 1000 miles away, as they would from the researcher next door. The rationale is simple – researchers take vacations, they miss work due to illness, they go home at a normal time each night. But the need for research is constant – it doesn't just stop when the 'local' researcher is out of the office. Our patrons take comfort in the knowledge that someone within our network of professionals is going to be able to respond to their request. Our geographic distribution allows us to offer research services from 6 a.m. to 5 p.m. PST five days a week.

GT research requests are submitted to a common research email address. Once the patron clicks the 'send' button, the new request instantly appears on a centralized electronic bulletin board that each researcher monitors. Each researcher can see the new request, which we call an issue, and whoever is free claims the request and begins working on it. When this happens, the researcher's name gets attached to the request, so there is little danger of more than one researcher working on the same issue by mistake. Occasionally, when the department is particularly busy, an issue may sit for an undue amount of time, in which case the issue text goes from black to red. Workflow coordinators monitor research traffic and remind the team about issues that have not been claimed.

Research requests contain the text of the patron's email, along with a number of fields that our bulletin board prepopulates within the issue, most notably the name and location of the patron. The issue is timestamped as well, and new issues are added to the board sequentially. It is not uncommon for our team to handle one thousand or more issues a month. The researcher, in typing a response to the requestor, must also populate some additional fields – request type (e.g. legislative history, background check, SEC research, etc.), client matter number, and whether the request is normal, long-term or rush. Once a researcher has successfully resolved an issue, the researcher indicates which resources were used for the research in the "databases used" field. Each issue has a comments box and researchers are encouraged to include a description of the steps taken to answer the question. Since each issue is archived after it is closed, and because the bulletin board is searchable on any of the aforementioned fields, researchers can consult past issues for suggestions on how to resolve a current one.

All of this supplemental information is extremely useful to our department for statistical and reporting purposes, but our patrons just need answers to their questions. When a researcher responds to a request on the bulletin board, the requestor receives an email with the researcher's response, stripped of most of the "behind the scenes" data. The issue number is now part of the email subject line, which ensures that all subsequent communication between patron and researcher is attached to the request within the bulletin board system. When a patron responds to the researcher, the researcher receives an email, and the issue status field changes to "patron response." Researchers are responsible for manually updating the status of issues and when a 'patron response' has been sitting for too long, a workflow coordinator follows up with the researcher to ensure that the researcher has seen it. If the researcher has gone home prior to receiving the patron's response, the coordinator may ask another researcher to follow up.

While all of this might sound complicated, at the end of the day our bulletin board is just a tool for helping us conduct virtual reference by means of a sophisticated email interaction. The transparency behind each issue allows coordinators to direct the research and new researchers to pitch in as needed. In this and other ways, research at Greenberg Traurig is never done in a vacuum. The fact that the overwhelming majority of research requests are sent in to our bulletin board, coupled with the high marks that our department consistently earns in randomly generated user satisfaction surveys, assures us that our patrons are very comfortable with having their research requests handled virtually. It also demonstrates how capable our researchers are in the virtual environment.