



VIRTUAL REFERENCE TRANSACTION CHECKLIST

Library visited: _____

Date/Time: _____

Scenario used: _____

SETTING THE TONE

- The librarian greeted me personally and used my name when appropriate.
- It was clear that he/she was interested in my query and ready to provide assistance.
- He/she thoughtfully integrated any scripted messages into the transaction.

GETTING THE QUESTION STRAIGHT

The librarian clarified my question using

- An open question
- A closed question
- Both open and closed questions
- Did not clarify my question

KEEPING ME INFORMED

- He/she asked me whether I wanted to see how to find the answer.
- The librarian's responses were clear, easy to read, and free of library jargon or personal opinion.
- The librarian kept me informed about his/her progress in finding an answer, providing a time estimate when needed.
- He/she let me know what he was doing, e.g., still looking, pushing a Web page, escorting, etc.
- The librarian provided help with any technical difficulties.

PROVIDING INFORMATION

- He/she identified authoritative information appropriate for my need and interest.
- The librarian gave me time to determine whether the information found actually answered my question to my satisfaction. Didn't rush me by pushing too much information.
- Cited the source of the information.
- Asked if I wanted to be shown more sources.
- Recognized if my question needed to be referred elsewhere or could be more effectively answered through e-mail.

FOLLOW-UP

- Asked if the information found answered my question to my satisfaction.

- Asked if I had any other questions.

- Encouraged me to use the service again.

- Thanked me.

- I was asked to evaluate my experience with the service. This evaluation was/was not an effective tool to express my opinion of the service. _____

My other comments about the reference transaction are...
