

Referral Strategies: A Learning Object for Chat Operators

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Abstract

Live chat services are now a commonplace communication channel in many libraries. This learning object is geared towards the academic library setting in particular and focuses on building two distinct skills among chat operators. First, recognizing when to refer and, second, strategies for making successful referrals. Utilizing the web-based platform Genially, this training resource is designed as an interactive presentation template that can be customized to suit local needs. The learning object includes four example chat scenarios, a review quiz, a collaborative bulletin board, and further readings. It is expected that chat operators will have varying degrees of familiarity with general reference work and aims to create a shared foundation of core referral skills on chat. This resource is envisioned as one part of what should be a broader training program, as opposed to a stand-alone resource.

Keywords: chat, referrals, referring, strategies, training, reference

This [teaching resource](#) is designed for onboarding new chat operators at academic libraries and focuses on building two distinct skills: 1) recognizing when to refer, and 2) developing strategies for making successful referrals. It uses the Genially platform to create an interactive presentation template that can be customized to suit local needs (select “Reuse this Genially” from the link). Example chat scenarios, a review quiz, a collaborative bulletin board, and further resources are all included. The resource is based on the understanding that team members will have varying degrees of familiarity with general reference work, and it is aimed at creating a shared foundation of core referral skills on chat. This resource is envisioned as one part of what should be a broader training program, as opposed to a stand-alone resource.

Guiding Scholarship

A mixture of educational theories was considered in the design. Behavioural learning theory, measurable outcomes, immediate evaluative feedback, clear right/wrong answers, repetition of scenarios, and chunking content into smaller sections were key factors (Kay & Kibble, 2016). Behavioural elements are balanced with constructivist underpinnings in multiple ways. In particular, the collaborative bulletin board draws from constructivist learning theory by incorporating multiple perspectives and no 'one right way' to approach a reference question. It acknowledges learners' existing knowledge, allowing for connections between content and past experiences (Watson, 2001), and changes the learner's role from recipient of knowledge to constructor (Films Media Group, 2010). Additionally, the resource begins with question-based scenarios, acting as authentic real-world problems with no single approach to solution (Kay & Kibble, 2016).

The learning object also incorporates cognitivism through an additive approach. Problem scenarios are presented upfront and learners can find their own personal meaning in them as they actively explore (McGilly, 1994). In the chat examples, a framework of concepts is provided followed by presenting learners with new scenarios to think through in the assessment quiz (Nguyen, 2020). The collaborative bulletin board further provides an opportunity for discussion and knowledge sharing, acting as a reflective knowledge check that allows thought processes to be explained.

Additional considerations in the creation of this learning object included provision of choice and humanist elements. Self-determination theory is based on autonomy, competence, and relatedness (Wehmeyer & Zhao, 2020). The learning object is built on a sense of agency since learners can choose which chat scenarios to explore, in what order, and they can add to content themselves if they wish through the bulletin board. Humanism also factored into the design as there was a conscious effort to recognize the human feelings of uncertainty and other affective experiences of being a chat operator (Arghode et al., 2017).

Notes and Suggestions

To make the most of this open, modifiable learning resource, a few notes and suggestions may prove helpful. In general, it is strongly recommended to customize the

resource as much as possible to individual contexts. Everything from the chat scenario examples to the assessment quiz and further resource links can be edited as needed. Image ideas are listed in square brackets where it may be helpful to have institution-specific visuals. Be sure to always add an image caption and explain any critical information in the text content. Genially also has a tutorial guide on how to make accessible designs (Genially, 2023). A collaborative bulletin board is included for learners to share their own strategies. Currently, this section links to a generic Google Jamboard webpage so that anyone can create their own and update the link accordingly. Regarding the review quiz, there is an option to upgrade to a paid premium account which would allow for statistical analysis of results if that is of interest. Finally, it is worth noting that designs can be shared, allowing multiple staff to edit a design.

References

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