

Additional Q&A from 'Essential tips for answering patron questions' on July 20

Question: Where can I find instructions on how to transfer a question?

Statewide Coordinator, Maryland AskUsNow! Paul Chasen

I have two suggestions:

1. [QuestionPoint video](#)
2. Ask Us 24/7 [training manual](#) (pages 23-25)

Question: Can these tips be used for helping customers on the telephone as well? Are there any tips for helping customers on the telephone?

Online Customer Service Manager & QP Administrator, Hennepin County Library, Erin Callahan

My tips apply to any work with patrons.

Statewide Coordinator, Maryland AskUsNow! Paul Chasen

I think the tips can be applied by phone. While not specific to telephone reference, I suggest reviewing pages 1-2 in the AskUsNow! [Behaviors Binder](#). The rest of the binder includes helpful communication tips, especially from Dr. Radford, that can also be applied to telephone reference.

Question: Could you say more about how you use notes?

Online Customer Service Manager & QP Administrator, Hennepin County Library, Erin Callahan

I mentioned notes. I was referring to librarian notes, which are only seen by staff and are great for sharing anything that might help the next staff person fielding the question. You can add them in chat or after if you set resolution as follow up by patron library if your institution is fielding the question. The question shows up in the unassigned list. (It's commonly used by HCL staff with our local patrons.)

Statewide Coordinator, Maryland AskUsNow! Paul Chasen

I use librarian's notes to 1) indicate if a customer is going to yellow or red (i.e., possibly disconnect) on chat, 2) address broken URLs, 3) add context to the chat experience, or 4) overall explain why something needs to be addressed that needs to be seen by the library's local QuestionPoint administrator. Depending on what happens in chat, I may contact the local QuestionPoint administrator by email (or phone), too.

I use patron's notes in the hopes that a customer will still see more help from the chat or the notes will be seen in their chat transcript. I tend to use patron's notes when the customer is anonymous in the hopes that they add in an email address after closing chat. I prefer to do "follow-up by me" instead of patron's notes to assure that the customer gets more help from me by email.

Question: Should we use emojis in our chat messages?

Online Customer Service Manager & QP Administrator, Hennepin County Library, Erin Callahan

I use emoticons often. I use at least one in any chat interaction. I use an emoji in email replies. Sometimes it's obvious that it's not appropriate for the question or the patron. Most times it can't hurt to smile.

Statewide Coordinator, Maryland AskUsNow! Paul Chasen

If the customer uses them, then we can make the judgment call to use them in return. We need to consider the tone that the customer is having on chat. Is the customer being sarcastic with the emojis? Or thankful

with the emojis? Will abbreviations still help with engaging the customer in chat?