

REINVENTING THE REFERENCE INTERVIEW FOR VIRTUAL AND CHAT BASED SERVICES

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Abstract: The reference interview has long stood as the signature pedagogical encounter of librarianship, a structured conversation through which librarians clarify ambiguous user needs and connect them with appropriate information resources. For decades, this interview was conceptualized and taught as a face-to-face interaction, one in which librarians could rely on visual cues, paralanguage, and the shared physical context of the reference desk. The rapid migration of reference services to virtual environments, particularly synchronous chat and text-based messaging, has fundamentally disrupted this model. Librarians now conduct reference interviews with users they cannot see, whose emotional states they cannot gauge through posture or facial expression, and whose information needs may be expressed in fragments, abbreviations, or ambiguous syntax. This article argues that the shift from physical to virtual reference requires not merely the adaptation of traditional interview techniques but a fundamental reinvention of the reference interview itself. Drawing on communication theory, discourse analysis of chat transcripts, and emerging best practices from academic and public library settings, the article proposes a new conceptual framework for virtual reference interviewing. This framework emphasizes explicit structuring of the interaction, strategic use of closed and open questions adapted to text medium, techniques for building rapport without visual or vocal channels, and methods for verifying understanding when backchannel cues are absent. The article concludes with a training agenda for librarians transitioning to chat based services and a research agenda for the continuing evolution of virtual reference pedagogy.

Keywords: virtual reference services, chat reference, reference interview, academic libraries, rapport building, digital communication

Introduction

Reference service has always been an act of translation. The user arrives with a question, often vaguely formulated, shaped by incomplete knowledge of how information systems organize the world. The librarian listens, probes, restates, and transforms the user's expressed need into a searchable query. The reference interview, refined over decades of practice and codified in library school curricula, provides the structure for this translation. Its core principles are deceptively simple. The librarian asks open questions to elicit the user's true information need. The librarian listens without interrupting. The librarian paraphrases and summarizes to confirm understanding. The librarian distinguishes between the user's stated question and their underlying need, recognizing that a user who asks for a book on dog breeds may actually need to identify a therapy dog for an anxious child. These principles remain as valid today as when Robert S. Taylor articulated them in the 1960s.

What has changed irrevocably is the medium through which the reference interview occurs. The physical reference desk, once the epicenter of library public services, has been supplemented

and in many institutions replaced by virtual reference channels. Email reference, with its asynchronous and reflective pace, posed manageable challenges to the traditional interview. But synchronous chat reference, now the dominant virtual reference mode in academic and many public libraries, has proven more disruptive. The chat reference transaction unfolds in real time, often with response time expectations measured in seconds. The librarian cannot see the user's face, cannot hear the hesitation in their voice, cannot notice the furrowed brow that signals confusion or the sigh that signals frustration. The user cannot see the librarian's reassuring nod, cannot interpret the pause as thoughtful deliberation rather than ignorance, cannot benefit from the shared spatial context of a reference desk surrounded by visible books and databases.

The central argument of this article is that effective virtual reference interviewing is not simply face to face interviewing performed with keystrokes. It is a distinct communicative genre with its own affordances and constraints. Librarians who succeed in chat based environments do not merely translate their in person techniques. They reinvent them. They develop new strategies for opening the interview, new questioning patterns adapted to the back and forth of instant messaging, new methods for showing attentiveness when they cannot nod, and new techniques for closing the transaction with clarity and warmth. This article synthesizes what is known about these reinvented practices and offers a framework for teaching them to both new and experienced reference librarians.

The Distinctive Affordances and Constraints of Chat Reference

To understand how the reference interview must be reinvented for chat services, one must first understand the communication environment in which chat reference operates. Five features distinguish chat from face to face and from other virtual modalities. The first feature is leanness. Chat is a lean communication channel, transmitting only typed text, typically without formatting such as bold or italics. It conveys no paralanguage, no facial expression, no eye gaze, no body orientation, no proxemic information about how close two people are standing. This leanness means that librarians lose access to the rich stream of backchannel cues they rely on in person, the nod that says continue, the tilt of the head that signals uncertainty, the shift in posture that indicates readiness to move on.

The second feature is asynchrony within synchrony. Chat is synchronous in that both parties are present and typing in real time, but turns are discrete and sequential. Unlike speech, where interruptions and overlaps are common and meaningful, chat requires that one party finish typing and send a message before the other responds. This creates a distinctive turn taking rhythm, one that can feel glacial when a librarian types a long open question or rushed when both parties type simultaneously and produce crossed messages. The delay between sending a message and receiving a response introduces ambiguity. Did the user not understand? Are they typing a long reply? Did they leave the session?

The third feature is persistence. Chat transcripts can be saved, reviewed, and analyzed. This persistence is a strength for quality assessment and training, but it also changes the social dynamics of the interaction. Librarians know that their words are being recorded. Some become more cautious, more formulaic, less willing to take conversational risks. Users may also behave differently when they know a transcript could be shared, though research on this effect is inconclusive.

The fourth feature is the absence of physical co presence. In a face to face reference interview, the librarian and user share a physical location. The librarian can gesture toward a database terminal, slide a book across the desk, or write a call number on a scrap of paper. In chat reference, all of this must be accomplished through typed descriptions and URLs. The librarian cannot assume that the user sees what they see. They must explicitly describe each step, each screen, each link to be clicked.

The fifth and most subtle feature is the expectation of brevity. Chat users, socialized by text messaging and instant messaging platforms, often write in abbreviated, ungrammatical, or telegraphic styles. They may send multiple short messages in rapid succession rather than one well formed paragraph. They may use acronyms or emoticons. Librarians, trained in standard written English, face a choice. They can match the user's informal style, potentially building rapport but risking unprofessionalism. Or they can maintain formal style, potentially seeming distant or unapproachable. Neither choice is clearly superior, and skilled virtual reference librarians learn to adapt flexibly.

These five features are neither wholly obstacles nor wholly opportunities. The leanness of chat, for example, eliminates the potential for visual bias. A librarian who might unconsciously respond differently to a user based on their appearance, their clothing, their perceived age or race or gender, loses access to those cues in chat. The anonymity of the medium can empower users who find in person reference intimidating. At the same time, the absence of visual cues makes it harder to detect confusion, frustration, or embarrassment, states that in person a librarian might notice and address before they escalate into user dissatisfaction or abandonment of the search.

Reinventing the Opening of the Reference Interview

The traditional face to face reference interview opens with a greeting and an initial question, often something like What can I help you find today? The librarian then listens to the user's initial statement, which may be vague or incomplete, and proceeds to probing questions. In chat reference, this opening sequence requires significant reinvention. The first challenge is establishing presence. In person, the librarian's physical availability is obvious. They sit at the reference desk, make eye contact, perhaps offer a smile. In chat, the user sees only a text box and perhaps an indicator that a librarian is typing. Librarians have learned to compensate with explicit opening scripts that go beyond simple greetings. A typical effective opening might read, Hello, this is Sarah at the library reference desk. I can help you find articles, books, or other information. I will stay with you until we find what you need. This opening does three things. It introduces the librarian by name, humanizing the interaction. It clarifies the scope of service, managing expectations. And it makes a commitment to persistence, reassuring the user that they will not be abruptly abandoned.

The second challenge of the opening is eliciting the user's initial information need without overwhelming them. In person, a librarian can ask an open question like Tell me about your project and wait patiently. In chat, the same open question may produce an extended monologue that scrolls off the screen or a paralyzing hesitation. Users may not know how much to type. They may worry that they are taking too long. Effective virtual reference librarians often break the initial elicitation into smaller pieces. They might ask, Can you tell me in one sentence what you are looking for? followed by, Great, now can you tell me what you have already tried? This

stepwise approach respects the chat medium's preference for brief, sequential turns while still gathering the information that a single open question would yield in person.

A third innovation in the virtual opening is the strategic use of the pre interview form. Many chat reference platforms allow libraries to present users with a short form before they are connected to a librarian, asking for name, affiliation, and initial question. These forms are sometimes criticized as impersonal, but they can serve an important accessibility function. A user with anxiety about typing or about explaining their need to a stranger can write their question in advance, without time pressure, and then paste it into the chat. The librarian who receives a detailed pre interview question can skip the basic clarification and move immediately to higher level reference work. The key is to ensure that the pre interview form does not become a barrier, that users who bypass it or fill it incompletely are still served fully.

Questioning Strategies for the Lean Medium

Once the reference interview is underway, the librarian's primary tool is the question. In face to face reference, the received wisdom favors open questions over closed questions. Open questions, such as *What kind of information do you need?* or *How will you use this source?*, elicit narrative responses and uncover the user's true need. Closed questions, such as *Do you need a book or an article?*, yield specific information but risk prematurely narrowing the search. In chat reference, the open closed distinction remains useful, but it must be supplemented by additional considerations. The first consideration is cognitive load. An open question posed in chat can impose a higher cognitive load than the same question spoken aloud. The user must compose a typed response that feels complete enough. They cannot gesture vaguely, cannot rely on the librarian to fill in gaps. Effective virtual librarians therefore sometimes temper open questions with scaffolding. Instead of asking *What is your research question?*, they might ask, *What is the main topic you are writing about?* and then, after receiving an answer, ask, *What argument do you want to make about that topic?* This sequences open questions across multiple turns, reducing the burden on any single response.

The second consideration is the strategic deployment of closed questions for pace control. In chat, closed questions serve a function beyond information gathering. They regulate the rhythm of the interaction. A librarian who has just sent a long explanation of database search syntax might follow with a closed question such as *Does that make sense?* This question requires only a yes or no response, giving the user a low effort way to signal comprehension or request clarification. Similarly, a librarian who senses that the user is becoming impatient might ask, *Do you want me to keep searching or would you like to try it yourself?* This closed question gives the user a clear, simple way to redirect the interaction.

A third innovation in virtual questioning is the explicit question about the user's emotional and cognitive state. In person, a librarian infers confusion from a furrowed brow or frustration from a sigh. In chat, these inferences are impossible. Effective virtual reference librarians therefore ask directly. They write, *I want to check in, are you following what I am suggesting so far?* or *I know chat can be confusing. Please tell me if anything I have written does not make sense.* These metacognitive questions would feel intrusive in a face to face interview, where the librarian can read the user's state without asking. In chat, they are essential. They replace inference with explicit confirmation.

Building Rapport Without Visual or Vocal Channels

Rapport, the sense of mutual trust and understanding that makes reference interactions satisfying for both librarian and user, has traditionally been built through nonverbal channels. A smile, a warm tone of voice, leaning forward attentively, these small behaviors signal that the librarian is engaged and cares about the user's success. In chat, all of these channels are absent. Rapport must be built through word choice, punctuation, timing, and what communication scholars call linguistic immediacy.

The most powerful rapport building tool in chat reference is the use of the user's name. A librarian who writes, Thank you for explaining that, James, signals that they see the user as an individual, not as a ticket number. This simple act of naming, which happens automatically in face to face interaction, requires deliberate effort in chat. Effective virtual reference librarians make it a habit to use the user's name at least twice during a transaction, once after learning it and once at closing.

A second rapport building strategy is the use of conversational fillers that approximate the function of backchannel nods. In person, a librarian says mm hmm or OK while the user is speaking, signaling continued attention without interrupting. In chat, the librarian cannot interrupt because turns are sequential, but they can send short acknowledgment messages such as OK, I see, or Got it. These messages should be sent while the user is typing, which is impossible because the librarian cannot see the user typing. Instead, the librarian learns to send acknowledgments after each meaningful user turn, before moving to the next question. The rhythm becomes user turn, librarian acknowledgment, librarian next question. This deliberate pausing feels unnatural to librarians trained in face to face efficiency, but it approximates in text the backchannel function of in person interaction.

A third and often overlooked rapport strategy is transparency about what the librarian is doing. In person, the user can see the librarian turning to a keyboard, opening a browser, or walking to the stacks. In chat, the librarian's actions are invisible unless described. A librarian who writes, I am now searching the education database for articles about kindergarten readiness, please give me one moment, transforms potential dead air into a moment of shared work. The user understands that the librarian is not ignoring them but is actively searching. This transparency builds trust and reduces the anxiety that can arise from silence in a chat environment.

Verification and Closing in the Absence of Visual Cues

The final stage of the reference interview, verifying that the user has received what they need and closing the interaction, poses particular challenges in chat reference. In person, a librarian can observe whether the user looks satisfied, whether they are writing down information, whether they are lingering as if they have another question. In chat, the librarian has only the user's typed responses. Users may type thank you and disconnect even when their underlying need is unmet, either because they are too hurried to continue or because they do not know how to articulate that they are still confused.

Effective virtual reference librarians therefore reinvent the verification stage through explicit, forced choice confirmation. Instead of asking Does this answer your question?, a question that invites a polite yes even when the answer is no, they might ask, On a scale of one to three, where one means you have exactly what you need and three means you need more help, how would you rate your current status? This quantitative forced choice is harder to answer with

reflexive politeness. It gives the librarian actionable information. A user who responds with a three has given permission to continue the interview without either party feeling that they are being difficult.

The closing of a chat reference transaction also requires reinvention. In person, a librarian might say, Feel free to come back if you think of anything else, accompanied by a warm smile and an open gesture. In chat, this closing must be explicit and unconditional. A strong closing script might read, I will keep this chat window open for another two minutes in case you realize you have a follow up question. If not, I hope this helps with your project. You are always welcome to start a new chat session. This closing manages expectations about the availability of the librarian, provides a specific waiting period, and leaves the door open for future contact without ambiguity.

Training Implications and the Future of Virtual Reference Pedagogy

The reinvention of the reference interview for chat based services has profound implications for how library schools and continuing education programs train reference librarians. Traditional reference training emphasizes behavioral techniques, open questions, paraphrasing, and the neutral question. These remain relevant, but they must be supplemented with medium specific competencies. Emerging virtual reference training programs now include transcript analysis exercises in which trainees identify moments where a different questioning strategy or a more explicit acknowledgment could have improved the interaction. They include simulated chat sessions in which trainees practice maintaining rapport with a user who types in incomplete sentences or who disappears mid transaction. They include discussions of when to break the open question rule, because in chat a well timed closed question can rescue a floundering interaction.

The future of virtual reference will likely see further integration of artificial intelligence, including chatbots that handle initial triage and automated response suggestions for human librarians. These technologies are not replacements for the reinvented reference interview but tools that can support it. A chatbot that collects the user's initial question and basic information can free the human librarian to focus on the higher order work of clarification, search strategy, and rapport building. Automated response suggestions, based on analysis of successful past transactions, can help novice librarians choose effective phrasing for common situations. The goal of these technologies should be to augment, not automate, the human work of the reference interview.

The core insight of this article is that the reference interview is not a fixed set of techniques but a communicative genre that adapts to its medium. The librarians who first developed the face to face reference interview could not have predicted chat reference, but they would recognize its goals. The reinvention of the interview for virtual environments honors their legacy by applying their principles of clarity, empathy, and rigorous user centered practice to a new set of affordances and constraints. Chat reference, done well, is not a degraded version of in person reference. It is a distinct and valuable form of professional practice, one that requires its own skills, its own strategies, and its own pride of craft.

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