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WHAT DO YOU REALLY WANT TO KNOW?

When I received my MLS degree, lo these many years ago, it was a certification that I had successfully learned most aspects of being a librarian. I'd done cataloging; I'd designed an in-house database; I'd done ready reference and more in-depth research; I'd learned how to do online searching; I'd even taken courses in how to market a special library. Curiously, though, I never heard more than a passing mention of reference interviews – "Oh yeah, that's when the library client tells you what she wants and you find out when you need to get it to her."

The longer I've been an information professional, the more I realize that there's a lot going on during a reference interview than just getting the library client's name, address and description of the research question. While it seems straightforward, the reference interview actually entails a negotiation process and can often serve as a marketing tool for the library. And, of course, unless we really understand what our clients want, we can't provide them with professional research services.

As a side note, I am in the process of interviewing a number of expert business researchers for an upcoming book, Super Searchers Do Business (Plexus Publishing, Medford, NJ). Although the interviews focus on online search tips, several super searchers said that they consider a good reference interview to be one of the most important steps in online research!

To begin with, we need to figure out the general size and scope of the client's information need. Determining whether or not a research project is difficult or not, or requires extensive research or a reliance on ready-reference sources, depends on a number of variables, including

- The client's budget for the project
- The client's familiarity with the subject
- The client's requirements regarding sources (does he insist on market research reports? an Internet search?)
- The client's requirements regarding delivery of the final product
- The client's time frame
- Your ability to negotiate all of the above directly with the client
- Your expertise and familiarity with the subject
- Your choice of information sources
- Your work-load
- Library policies regarding service levels

Following are a few basic issues that arise (or should arise) during any reference interview. Some may seem self-evident, some may seem overly time-consuming. But the time you invest in the reference interview is time you *don't* spend later re-doing your work when you finally figure out what it was your client wanted.

*Keep as a mantra: The client has the best understanding of what information is needed; I have the best understanding of where the information is; my job is to bring these two understandings together. It's tempting, especially when swamped with work, to fit a client's question into a readily available information source rather than really listen to what the client is asking for.

*Determine the level and depth of information needed at the beginning of the interview. Does the client want "a few good articles" or a comprehensive study of the subject? Does the client expect an executive summary or just the data you found? Does the client want information from general-circulation newspapers? doctoral theses? peer-reviewed scientific journals? industry trade press articles?

*Be sure you understand the client's question. Even the most straightforward request may not turn out to be so simple once you've discussed it. I'm reminded of a super-searchers panel I moderated at a conference a couple of years ago. I gave each super searcher what I thought were very straightforward, one-dimensional questions. The answers they found explored entirely different aspects of the question – often going into angles I had never thought of. Even if both you and the client think the question is obvious, be sure to go into enough detail to determine that you really are on the same wavelength. It often helps to re-state your understanding of the request at the end of the reference interview, using words other than those the client used, to ensure that you both agree on the work to be done.

*Avoid premature diagnosis. This is related to the item above – the initial question may not be what the client really wants to know. I got a call once about "statistical software" and assumed the client meant packages such as SPSS. It turns out he was talking about relevance-ranking search software that uses statistical analysis of retrieved documents. (!)

*Remember that you're not an order-taker; this is a negotiation process. You *can* negotiate all the parameters of the request – when the information will be delivered, in what format, what the maximum budget will be, the depth and breadth of the research, and whether or not you talk with the client directly or with an intermediary.

*Ask the client what this information will be used for. This is a question that needs to be asked delicately, and the ability to even ask it depends on your relationship with the client. But understanding *why* the information is needed is often useful in determining what information to look for. Would technical journal articles be too abstract? Would statistical information be just what's needed? Are there internal sources that would be most appropriate?

* Be sure you nail down all the delivery options. Does the client want hard copy or electronic? Is email OK? Do they want a collection of hot links to Web sites? Can they accept and download attached binary files? What word-processing package do they have? Are they expecting photocopies of articles, annual reports, and so on or are they expecting downloaded material?

*One of the slogans of service-oriented business is "under-promise and over-deliver." In this context, it means managing your client's expectations as to the likelihood of your finding the ideal piece of information wanted, your ability to meet your client's deadline for delivery of the material, and the possibility of providing an executive summary or other massaging of the material.

Finally, following are a few questions that this former librarian has relied on to get at the question behind the question:

- What do you mean by _____?
- What do you already know about _____?
- If you were writing an article about this, what would the headline be?
- If I can't find exactly _____, what would be second-best?
- So in other words, what you'd like me to find is ______, right?

How you handle the reference interview sends a message to library clients. Do you project yourself as a peer or an order-taker? Do you sound self-assured or intimidated by the research project? Do you value your own time, resources and expertise in setting research priorities? Is your client aware of the variety of resources you have available, and of your familiarity with the subject matter?

By viewing the reference interview as an integral part of the research process, you can ensure better library services to your clients and the professional satisfaction of being able to truly meet your clients' information needs.

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