



Transcript Evaluation

Approachability

- 👤 Picked up the call and responded to the patron promptly
- 👤 Opened with a welcome or encouraging greeting

Interest

- 👤 Expressed interest in the question and the patron's information need
- 👤 Demonstrated an understanding of the question being asked (e.g. by restating it, referring to specific details)

Listening & Inquiring

- 👤 Clarified the question if necessary
- 👤 Conducted a reference interview by requesting any additional information required to successfully answer the question

Searching & Instruction

- 👤 Asked questions to better understand where the patron was in their search process and what strategies they may have already tried
- 👤 Informed the patron how and where they found any sources (e.g. shared links)
- 👤 Explained the search strategy to the patron
- 👤 Explained any library jargon (e.g. peer review, database)
- 👤 Checked in with the patron to make sure they were following along
- 👤 Worked with the patron to evaluate search results, to narrow or broaden the search, and to identify other sources when necessary
- 👤 Handled a question from another institution well
- 👤 Took the question as far as possible before referring the patron to their library

Follow-up & Closing

- 👤 Responded to the question fully
- 👤 Checked that the patron was satisfied with the answer
- 👤 Offered more information or an appropriate referral if required
- 👤 Closed with an appropriate statement, inviting the patron to return

Tone

- 👤 Used scripts, chat lingo, emoticons appropriately
- 👤 Maintained a friendly, approachable, helpful tone throughout

If any of the criteria above were not met, is there an obvious explanation?