Assessing Chat Transcripts

Shannon Adams, Rebecca Graff, Melissa Johnson

Abstract:

Ask Us is the Southern Methodist University (SMU) Libraries chat reference service. Since Ask Us is most people's introduction to SMU Libraries, it's essential that the experience be positive. SMU Libraries' model includes an Ask Us team overseeing the virtual reference program. The three-person team consists of two instruction librarians and one access services librarian from across SMU Libraries. We assess chat transcripts regularly to ensure high-quality service. Using a form developed internally, the Ask Us team evaluates reference interactions for relationship building, the reference interview, and instruction.

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Ask Us is the Southern Methodist University (SMU) Libraries chat reference service. Since Ask Us is most people's introduction to SMU Libraries, it's essential that the experience be positive. SMU Libraries' model includes an Ask Us team overseeing the virtual reference program. The three-person team consists of two instruction librarians and one access services librarian from across SMU Libraries. We assess chat transcripts regularly to ensure high-quality service. Using a form developed internally, the Ask Us team evaluates reference interactions for relationship building, the reference interview, and instruction.

Keywords: Assessing Chat Transcripts, Virtual Reference Evaluation, Virtual Reference, Chat Reference Service, LibChat

INTRODUCTION

Southern Methodist University (SMU) is a nationally ranked private research university in Dallas, Texas. SMU Libraries consists of six libraries on the main campus and one in Taos, New Mexico, with the highly anticipated Rees-Jones Library of the American West set to open in 2027. Together, the libraries support SMU's academic mission by providing access to collections, expertise, and services that enhance learning and research.

One service that connects users to the breadth of SMU Libraries' resources is Ask Us, the Libraries' virtual reference program. As the main point of contact for many users, Ask Us plays an essential role in shaping initial impressions. Ensuring a positive, responsive, and informative experience is vital to the broader university's commitment to user-centered service. The Ask Us team, comprised of three members representing different areas of SMU Libraries, oversees the service. Members of the team include two instruction librarians and one access services librarian from across SMU Libraries. This structure ensures that users benefit from a wide range of expertise and that the service reflects the libraries' collaborative approach to research support and user engagement. To maintain consistent and high-quality service, the Ask Us team regularly assesses chat transcripts using an evaluation form developed internally. This assessment focuses on three key areas: relationship building, the reference interview, and instruction.

Relationship building is important to us, as we hope to continue interacting with the library user, rather than having a one-time encounter. This is also why we always refer to it as a reference interaction rather than a transaction. The reference interview is at the heart of any interaction, therefore we want to ensure that library staff gather the necessary information to understand and fully address each user's needs. Finally, we emphasize instruction, including identifying and using teachable moments, because the mission of academic libraries is to improve constituents' information literacy skills. Through these intentional practices, the Ask Us chat reference service exemplifies SMU Libraries' dedication to providing welcoming, knowledgeable, and effective support.

PROGRAM CONTEXT AND ASSESSMENT FRAMEWORK

SMU Libraries provides its virtual reference service through Springshare's LibChat platform, part of LibAnswers. This platform enables real-time, user-centered research support that extends the libraries' reach beyond the physical service desk. The reference program is staffed by five library graduate school interns who work alongside eight public services librarians from across SMU Libraries. Additional personnel assist as needed. Ask Us operates Sunday from 12–4 p.m., Monday through Thursday from 9 a.m.–7 p.m., and Friday from 9 a.m.–3 p.m. Most shifts are covered by an intern for two hours at a time, except during peak hours (11 a.m.–3 p.m. Monday through Thursday), when an intern is paired with a librarian due to higher traffic volume.

Given chat's prominence, SMU Libraries established a structured, ongoing transcript assessment program to ensure service quality, staff consistency, and user satisfaction. The framework is grounded in three areas: relationship building, the reference interview, and instruction, which collectively guide how we approach and evaluate every interaction.
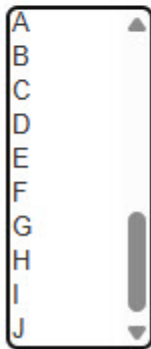
METHODS

The Ask Us team conducts monthly evaluations of chat transcripts to ensure timely feedback and continuous service improvement. The team selects transcripts from the previous month using selective sampling, focusing on the week with the most chats. One chat interaction per shift is chosen for review to represent the range of staff participation. Each transcript is reviewed collaboratively by the three-member Ask Us team using an internally developed Qualtrics form. The form includes four groups of questions corresponding to the evaluation figures: basic information, relationship-building behaviors, reference interview and accuracy, and instruction and follow-up actions.

Basic Information: Who staffed the shift? When did it occur? What was the user's initial question or topic? These questions provide context and allow the team to track trends across staff, shifts, and question types. (Figures 1–2)

Chat Shift

○ 9 - 11   ○ 3-5

○ 11-1   ○ 5-7

○ 1-3

Person

```
A
B
C
D
E
F
G
H
I
J
```

Figure 1. Evaluation Form: Basic Information Section.

Displays fields used to document shift details.

Transcript Link

[   ]

Date (yyyy-mm-dd)

[   ]

Initial Question

[   ]
[   ]
[   ]

Figure 2. Sample Evaluation Entry for Basic Information.
Illustrates how evaluators record context for each transcript.

Relationship-Building Behaviors: Did the chat begin with a greeting? Was the tone friendly, conversational, and professional? Did the staff member demonstrate a willingness to help and communicate clearly? Were updates provided during pauses? Were responses appropriately "chunked" into smaller messages? Was the interaction closed with an offer of further assistance or referral? These questions assess how well the staff foster rapport and maintained engagement throughout the chat. (Figure 3):

Built Relationship

	Yes	Sometimes	No	NA
Begins with Greeting	○	○	○	○
Friendly, conversational tone	○	○	○	○
Professional tone	○	○	○	○
Demonstrates willingness to help	○	○	○	○
Communicates clearly	○	○	○	○
Keeps person updated (acknowledges delays)	○	○	○	○
Chunks messages (breaks up text)	○	○	○	○
Closed interaction	○	○	○	○
Created ticket	○	○	○	○

Figure 3. Evaluation Criteria: Relationship-Building Behaviors.
Shows checklist items assessing greetings, tone, empathy, responsiveness, and conversational flow during the chat.

Reference Interview and Accuracy: Did the staff restate or clarify the user's question? Determine what the user already tried? Identify the user's affiliation or course context? Use open and closed questions strategically? Provide context for follow-up questions? Determine what types of sources were acceptable? Confirm whether the user's information need was met and shared correct, complete information? These questions evaluate adherence to RUSA behavioral guidelines and the effectiveness of the inquiry process. (Figure 4)

Reference Interview

	Were these Present in the Chat			
	Yes	Sometimes	No	NA
Restated the question or clarified the info need	○	○	○	○
Determines what they've tried	○	○	○	○
Determines affiliation	○	○	○	○
Determines course info	○	○	○	○
Uses open & closed questions strategically	○	○	○	○
Provides context for questions	○	○	○	○
Determines motivation for question	○	○	○	○
Determines what types of sources are needed	○	○	○	○
Confirms info need was met	○	○	○	○
Correct info shared	○	○	○	○

Figure 4. Evaluation Criteria: Reference Interview and Accuracy.
Outlines questions used to assess restating or clarifying the user's query, identifying prior searches, and confirming information accuracy.

Instruction and Follow-Up Actions: Did the staff identify teachable moments? Provide context for shared information? Demonstrate searches rather than simply giving results? Refer to FAQs, guides, or appropriate librarians? Include links to the library website or use canned messages appropriately? Finally, were follow-up actions identified—such as updating FAQs, revising guides, or initiating team communication? These questions assess the instructional quality and reflective learning outcomes of each interaction. (Figures 5 & 6)

Instruction

	Yes	Sometimes	No	NA
Uses teachable moment	○	○	○	○
Provides context for info shared	○	○	○	○
Shows the search, not just the results	○	○	○	○
Points to FAQ	○	○	○	○
Mentions guides	○	○	○	○
Mentions appropriate librarian or department	○	○	○	○
Links to website	○	○	○	○
Used canned messages	○	○	○	○

Figure 5. Evaluation Criteria: Instruction and Follow-Up Actions.
Highlights prompts about teachable moments, providing context, demonstrating searches, and using FAQs or guides.

Do we need to

- ☐ Update a research guide?
- ☐ Create an FAQ?
- ☐ Fix something on the website?
- ☐ Make an announcement in Teams?
- ☐ Add training?
- ☐ Follow-up with staff member
- ☐ Kahoot it!

Comments - If "Sometimes" is marked, clarify. Enter "example" if helpful with training.

[   ]

Figure 6. Example Summary of Evaluation Findings.
Summarizes outcomes from completed assessments, identifying recurring themes, staff strengths, and areas for further training.

Evaluations are completed by consensus to ensure inter-rater consistency. The team discusses recurring themes, identifies best practices, and highlights areas for staff coaching. Findings are summarized for internal reports and used to inform updates to training, FAQs, guides, and workflows.

FINDINGS AND DISCUSSION

Springshare's LibChat tools include a Quality of Service indicator to monitor user interactions in chats. For the 2025 fiscal year (June to May), SMU Libraries achieved a cumulative chat rating of 3.91 out of 4, demonstrating that the regular evaluation process contributes directly to the delivery of exceptional chat reference service.

The Ask Us team continues to strengthen the virtual reference experience at SMU Libraries by focusing on quality assurance, staff training, and proactive communication. The team's responsibilities include training employees on the LibAnswers and Ask Us chat platforms, overseeing queues, and reviewing the assessment instrument at least annually to ensure that evaluation mechanisms remain current and relevant.

Relationship Building

As with any service, building a connection or relationship is vital to ensure the person has a favorable experience and will continue to engage long-term. The team reviews the transcripts and asks the question, "Did the person build a relationship with the library user?" To do this, Ask Us responders are encouraged not only to provide an initial greeting but also to use the person's name and acknowledge their concern. We encourage library personnel to show empathy by offering expressions of regret or affirmation as part of the conversation. Relating to people on an affective level demonstrates that Ask Us chat operators are caring individuals, which makes people want to return to us. This lends itself to relationship building by creating a more pleasant dialogue between library staff and the person, leading to more effective information gathering. We want our staff to demonstrate a professional tone while also sounding conversational. Using emojis and exclamation marks (but not too many) also helps create a positive atmosphere.

We assess whether the library workers demonstrated a willingness to help because that's a powerful impression for the library user to have. It is important to clearly communicate what the chat operator understands to be the person's need and how they can help. Keeping library users updated and acknowledging delays ensures people are not waiting and wondering in silence for an extended period. We consider anything over two minutes too long for them to wait without hearing anything. The Ask Us team also evaluates whether the messages to the library user are sufficiently broken down, which we call "chunked," to ensure that people aren't waiting overly long for a response. It's better to send smaller bits of information for them to read in a timely manner than to make the person wait for us to finish an extended thought. The final part of the relationship-building evaluation involves checking whether the interaction was properly closed, meaning that we've asked if their question has been answered completely or if they have any other questions. Since this is about building a relationship, we strongly encourage making tickets for other library

staff to follow up and contribute to the interaction. For example, a subject librarian might have more suggestions to add, thus helping the person while furthering their inroads into a department.

Reference Interview

The reference interview is central to discovering the library user's information need. Many of the indicators we use for determining a good reference interview come from the Reference and User Services Association's "Guidelines for Behavioral Performance of Reference and Information Service Providers." These guidelines explain that the library worker "listens as the person fully states their information need and their interest in the topic, employs a system of open and closed questions to identify the person's information need and service priorities, and practices active listening techniques to clarify the informational objectives of the person's inquiry, restating the question and asking for confirmation to ensure an accurate interpretation."

It's crucial in a successful interaction to ascertain whether library workers really understand what the person wants, so restating the question or clarifying the information need is necessary (Sheldrick Ross et al., 2019). In other words, staff can't help people find what they want if they do not understand what that is. Library personnel ought to avoid duplicating their efforts needlessly; thus, library workers should determine what has already been tried. Some resources are available only to people currently affiliated with our institution, so that needs to be determined. We have discovered that learning the course information can help a lot with how chat operators respond to a question. It helps point library staff to the right subject guides and databases, as well as any available course guides. Similarly, it often demonstrates the context and motivation for queries, which are also useful pieces of information that help inform the reference interview. For example, regarding motivation, if an assignment is due later that day, then staff need to respond with quick and efficient suggestions for gathering information (interlibrary loan would be out of the question).

Sometimes library staff ask questions that seem unnecessary to the interaction, so evaluators like to ensure that context is given to the questions that staff ask. To help effectively, it's often necessary to know what types of sources are acceptable. For example, if a person needs peer-reviewed articles, then pointing them to a book is counterproductive. Before completing an interaction, we find it's vital to clarify whether the person's question was answered completely. If not, there's still work to do to assist them. Finally, we consider whether a query has been responded to with correct information. There are many aspects to this, since it's usually not just about providing answers but rather responses that may include teaching search strategies or showing how to use information resources.

Instruction

All librarians and interns who assist with chat reference understand that instruction is a key part of helping people and a core part of our mission to impact our institution's success. With this segment, the Ask Us team considers whether the staff member uses a teachable moment, provides context for the information shared, shows the search (not just the results), points to FAQs, mentions guides, mentions the appropriate librarian or department, links to our website, or uses canned messages.

We are constantly on the lookout for "teachable moments" during chats. We like to think of them as "show, don't just know" moments, which is why we want our staff to show the search and not just the results. We want our community to leave the chat feeling empowered to continue their search and to transfer those skills to future research opportunities. To help with this, it is integral to provide context with any information shared. Any given links should be friendly and descriptive, and during the chat interaction, we strive to show the search by explaining our actions. We want to demystify the research process and remove learning stumbling blocks as much as possible.

As part of our Ask Us system, SMU Libraries has developed a robust library of frequently asked questions, and the new website, which is both intuitive and streamlined, is a great point-of-need resource, so we train personnel to refer to these resources often. Library staff keep related research guides in mind so they can help people find relevant resources to get started or continue searching. Chat operators encourage people to meet with their dedicated subject librarian or relevant library workers to get targeted and expert one-on-one support. To take away the burden of initiating the contact, we train everyone to transfer the chat into a support ticket and assign it to the best point of contact. This way, the onus is on library staff to review and continue the conversation as needed.

As part of the built-in options with Ask Us, we've created canned messages that work similarly to FAQs but are developed based on frequent chat questions and common answers. Staff have the option to customize the preformatted language so it better reflects their own voice. Our canned messages cover greetings, closings, and popular follow-up questions, and more. These messages help keep the interaction flowing, encourage more back-and-forth, and provide a quick, friendly, and standard way to ask for or share more details.

CONTINUOUS IMPROVEMENT AND FOLLOW-UP ACTIONS

To ensure that we continuously improve our services, at the end of each chat evaluation, we decide whether more information needs to be shared. This can take the form of the Ask Us team choosing to update a research guide, create an FAQ, fix something on the website, make an announcement in Teams, add training, follow up with a staff member, or use Kahoot! for gamified review. By determining whether we need to post a quick announcement, initiate a personal follow-up, schedule a larger personnel training, add a new frequently asked question, or reach out to another library department to update online language on our website or a guide, we're keeping our pulse on the current trends in chat interactions and also making sure our information ecosystem remains robust.

We realize that in a virtual environment, it can be easy to feel siloed or wonder if you're making a difference, so throughout the semester, we share kudos with staff when the community provides positive feedback. We want Ask Us chat operators to feel valued and to understand that every interaction makes an impact. When negative feedback is provided, we assess it with a critical eye to determine if our part of the interaction could have been improved and follow up with the individual staff member if warranted.

To help with team building, once per semester, we hold meetings that provide a space for everyone involved with Ask Us to get together, ask questions, and share concerns or ideas. We also report monthly Ask Us stats to the library administration, as during the daily grind the big picture can sometimes get overlooked or forgotten. In the fall term, we've recently turned the meeting into a gamification opportunity using quiz software to remind everyone about best practices. Team members seem to appreciate the moment of levity and low-stakes competition as a way to welcome a new term.

CONCLUSION

The Ask Us virtual reference program continues to serve as a vital connection between users and the full range of SMU Libraries' resources. As the first point of contact for many students, faculty, and researchers, Ask Us plays an essential role in shaping users' initial impressions of the Libraries and reinforcing SMU's commitment to responsive, user-centered service.

The program is managed by a dedicated, cross-departmental team, ensuring that library users benefit from a broad base of expertise and a collaborative approach to research support and engagement. To uphold consistent quality, the team regularly reviews chat transcripts using an internally developed evaluation framework focused on three foundational areas: relationship building, the reference interview, and instruction. These elements collectively define the libraries' philosophy of virtual reference and inform ongoing training and service refinement.

We believe that approaching every interaction with relationship building, the reference interview, and instruction in mind, is a powerful combination that impacts the success of our institution and the people who make up our community. Every interaction is viewed as an opportunity to connect, to support learning, and to leave users better equipped than when they arrived. SMU Libraries recognizes the value of regular assessment to continually provide exceptional service and to build a strong foundation for chat reference. Through this commitment, SMU Libraries strengthens its foundation for virtual reference and reaches its goal of providing welcoming, knowledgeable, and transformative support.

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About the authors

Shannon Adams (sdadams@smu.edu) serves as the Director of Access and Resource Sharing Services at Southern Methodist University (SMU) Libraries, where she oversees initiatives that enhance user access, streamline resource sharing, and support an inclusive academic environment. She is also the author of a professional development book for youth librarians and educators, published by Bloomsbury Publishing. Before joining SMU, Shannon worked in public libraries as an Adult Engagement Administrator, where she coordinated adult learning programs, community partnerships, and service improvements informed by patron and staff engagement. Shannon earned her Bachelor of Social Work from Texas Woman's University in Denton, Texas, and later completed her Master of Science - Library Science at the University of North Texas. Throughout her career, Shannon has been guided by a commitment to equitable access, lifelong learning, and community connection—values that continue to shape her leadership within academic libraries today.

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