Making Alma Work for You

Optimize Service at the Colorado School of Mines

Laura Guy | Colorado School of Mines
John Larson | Ex Libris
Agenda

1. Why Expert Services?
2. Overview of Services
3. CSM Optimize Service
Why Expert Services?

• Implementation factors
  • Many activities in parallel necessitate triage
  • Implementation model rapidly provisions environment

• Change management factors
  • System change is stressful
  • Incremental workflow shifts make overall change manageable

• Institutional culture factors
  • Shift to culture of ongoing improvement takes time
  • Goal is to build institutional capacity for change
## Implementation factors

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Change management factors

• Change triggers resistance and uncertainty
  • Necessary precondition of engagement
  • Should be accounted for in planning

• Dramatic changes can disrupt service
  • Focus on patron service may deprioritize more extreme change

• Incremental improvements allow for smoother, less stressful transition
Cultural factors

• Implementation as a milestone
  • A new system is a piece of overall library strategy
  • Go-live is not an end-point

• Cultivating a culture of incremental improvement
  • Perfection is a poor goal (and a moving target)
  • Instead, prioritize adaptation and focus on needs

• Concrete plan for post-implementation reassessment
  • Helps reset thinking
  • Reduces stress during implementation
  • Accounts for changes in system
Expert Services Initiative

1. Supports workflow changes
   - Provides outside perspective on workflows
   - System support underpins larger cultural changes

2. Optimizes product use
   - Allows deploying new end-user services
   - Supports advanced product functions

3. Extends value of existing systems
   - Realizes existing system investment
   - Extends staff expertise

4. Fills in gaps in local expertise
   - Reduces background knowledge required for detailed configuration
Expert Services

Optimize
Identify new ways to streamline your use of Ex Libris systems. A consultant will perform an onsite analysis of current workflows in one functional area, make recommendations, configure the system, and train staff.

Extend
Set up new system functionality. A consultant will configure the system and train staff in new workflows and administration.

Analyze
Write custom reports in Alma Analytics. A consultant will understand the questions to answer, then deliver reports and visualizations.
Optimize @ Colorado School of Mines

• Scope crossed departmental workflows
  • Focus on item lifecycles across library groups
  • Streamlined workflows and reduced handoffs

• Nov: Onsite analysis
  • Interviews with IT, technical and patron services staff
  • Identified knowledge gaps, alternate configuration options

• Dec-Jan: Recommendations, configuration and training
  • Recommendations focused on consolidation and simplified workflows
  • Training delivered for both workflows and configuration

• Feb: Overall summary and project conclusion
Alma Optimization @ Mines
Enter John Larson!
The Situation

• Contentiousness between sections and dissatisfaction with some aspects of Alma
• We self-identified a few major problems and a lot of minor issues (John would identify more problems during discussions with staff)
• The Director wanted us to optimize workflows and processes as part of a “redeployment”
• Needed to revisit some migration decisions
• We all knew things could be “better”
The Scope

• Focus on Technical Services and Fulfillment
• 3-Day Analysis Session*
• Recommendations and Work Plan Report
• 2-Day Configuration and Training Session
• Final Summary Report
The Organization

• Getting the “Band Back Together”
  • Alma Implementation PM and Team Leads used to organize, lead and ensure staff participation
• Director’s strong emphasis on importance
• Clear identification of responsibilities
• John was known to us already and very well-liked (this is incredibly important for buy-in)
• All staff were included and involved
Analysis Session

• November 17-19, 2015
• Divided by functional areas
• All staff were invited and encouraged to come with questions or issues that they wanted addressed. No topic was off-limits.
• Day 1: Technical Services (including ACQ)
• Day 2: Systems & Fulfillment
• Day 3: Fulfillment
Work Plan

Prepared by John Larson
Created 2015-12-4
Revised 2016-01-27

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Assign Responsibilities

• Streamlining acquisitions via data loading; implement shelf-ready: Steve and Heather
• Consolidate work orders and eliminate transit: Lisa N.
• Streamline reserves processing: Patricia
• Correct circulation desk printing errors: Laura
• Define workflows for archival materials processing: Steve
• Manage missing items using “search” work order: Patricia and Michelle
• Enhance and streamline e-resources workflows: Heather and Lisa N.
• Offer digitization and office delivery services: Laura and Patricia
Training & Configuration Session

- January 6-7, 2016*
- Divided by functional area aside from general all-staff session at the beginning
- Day 1: General Session; Tech Services
- Day 2: Patron Services; Wrap-up
Post-Training Progress Report

Alma Action Items Update
January 23, 2016

1) Craig (and others?) need to clean out the items in the in-process queue so we can retire the Catalog Work Order Type and move to the new simplified work order model that eliminates in transit and will make everyone's lives easier.

Lisa Nickum: Please work with the appropriate parties and set a deadline for getting this done. Ensure that all relevant staff have the roles and scopes they need. Ensure all relevant staff understand the new work order workflows and the "Currently at" changes.

Laura: Cataloging Work Order Type is deleted; queues cleaned out accordingly. We are still seeing some items going into “In Transit.” Why?

LisaN: I have made changes to all affected staff so that they are “Currently at” Main Desk. I have also changed their roles and scopes so that they are scoped to the Main Desk and they can get to and see Technical Services and Preservation as needed. We will be adding a couple of statuses to make sure that everyone can identify their work orders. Still need to do some training, but a lot of it is done.
Final Summary Report

Optimize: Overall Summary

Prepared by John Larson
Updated February 15, 2015

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The Results

- Implement YBP Shelf Ready
- Fix Work Orders; Eliminate In Transit; Simplify “Desks” down to one
- Resolve Course Reserves Issues
- Resolve Alma Printing Problems
- Workflows for Missing Items, Archival Materials
- Streamline E-Resource workflows
- Implement new patron services
Final Thoughts

• Incredibly successful & a lot accomplished
• Improvements made were significant
• Important to be inclusive of all staff
• The miracle of John Larson
• A model and momentum for future efforts
• It was, after all, perfect timing
• Do this again in a couple of years?
THANK YOU
john.larson@exlibrisgroup.com