

What if we just made it Simple?

Workflow Redesign Ideas for ILL

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1. Introduction to workflow analysis- what is it and why
2. Inputs- help on where to start and what needs attention
3. The redesign- defining the scope of the work redesign
4. The outcome - assessing the efficacy or impact of the changes
5. Review and questions

SESSION OVERVIEW

This is a process, not an event.

Workflow redesign is the process of:

1. reviewing existing policies, procedures and protocols to identify areas for improvement or simplification,
2. Defining, detailing and implementing those changes, and
3. assessing the changes effectiveness making adjustments as needed.

WHAT IS WORKFLOW REDESIGN?

- ✓ Because things change
- ✓ New tools are developed
- ✓ Priorities change
- ✓ New opportunities present themselves
- ✓ Improve services
- ✓ Better meet our customers' needs



<https://twitter.com/oldschoolads/status/686959411294810113>

WHY DO WORKFLOW REDESIGN?

WHERE TO START



http://www.ajbubb.com/wp-content/uploads/2013/03/don__t_panic_and_carry_a_towel_by_ashique47-d3fu8qd.jpg

I have no idea where to start. This project is too big. I feel overwhelmed.

We have many sources for statistics and data about requests.
Use your data-

Sources

OCLC

Local system

RAILS

ILDS

ILLiad

Etc.

Data Points

of Requests

of Patrons

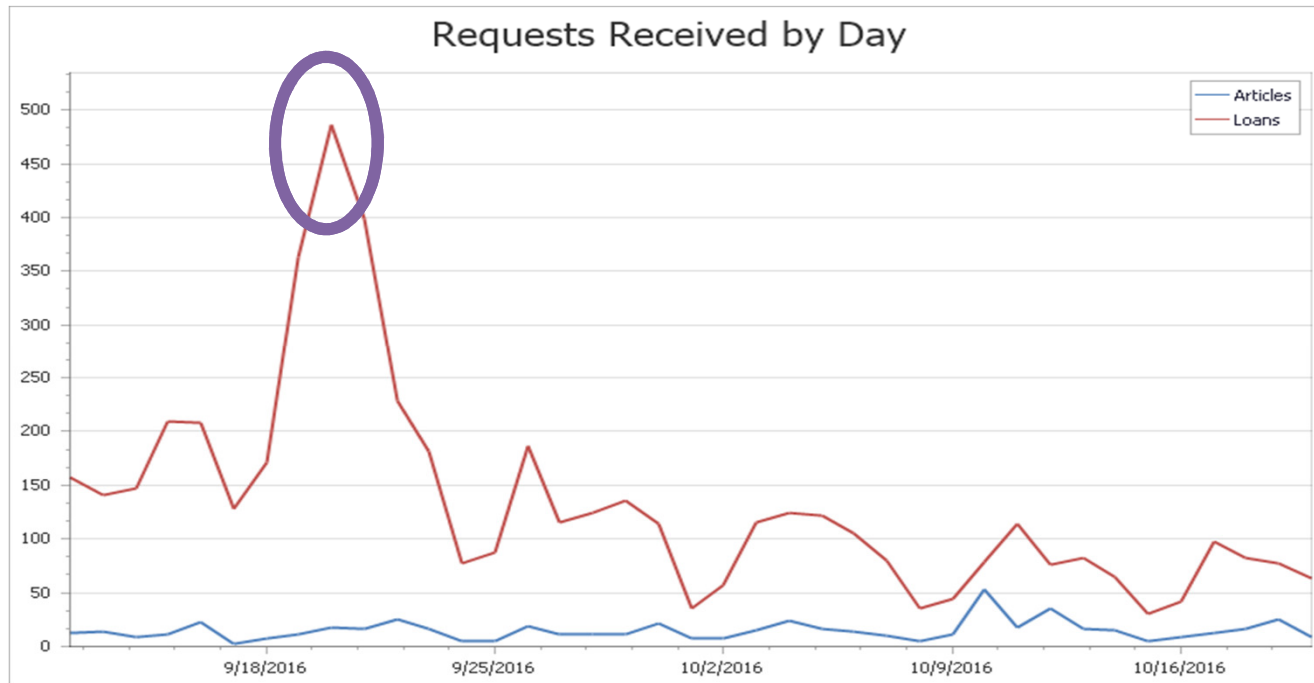
Turn-around-time

Who we lend to

Who we borrow from

Etc.

**STATISTICS AND DATA. WHAT DO
THOSE NUMBERS TELL YOU?**



**SOMETIMES ITS RIGHT IN FRONT OF
MY FACE**

Patron asks “How do I.....?”

How often do you get questions? Do you have to explain something to everyone, or just on occasion?

Morris and the OpenURL change

Fixing one problem caused much a larger one effecting both patrons and staff

Remember: We understand work stuff we do every day. Patrons don't library every day so we need to figure out if: a) they are unclear on the process, i.e., how to do something or b) the system is overly complicated and hard to use. *A is instruction. B is workflow analysis.*

**USER FEEDBACK. WHAT WORKS WELL?
WHAT CAUSES THEM FRICTION?**

We do the work, day to day. We know what our pain point are. Ask your staff (or yourself)

For my staff, a big one is Scores and CDs of classical music.

Just which one of the 696 sound recordings or 198 scores of Beethoven's 9th listed in WorldCat do you want?



**STAFF EXPERIENCE. WHAT DO THEY
KNOW? HOW CAN THIS HELP YOU?**

WORK REDESIGN

In that most perfect of all perfect worlds, it would
do THIS...

**HOW TO DESCRIBE THE PLACE YOU
WANT TO BE**

Who does what?

Staff,
Patrons,
Systems

How do they do it?

Manual staff processing,
Automated process,
Magical nuclear powered unicorns

Why do they do it?

They need information or a resource.

It is a service we provide/part of their job.

Because we have always done it that way due to a (minor) problem in 1974

**USER STORIES INFORM BOTH THE STAFF
AND THE PRODUCTS WE USE**

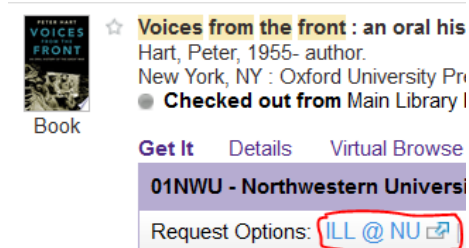
I (USER TYPE) WANT (THING) SO I
CAN (OUTCOME)

USER STORIES 101

A patron wants to read a book that
my library owns, but our copy is
checked out.

I (user type) want (thing) so I can
(outcome)

1) A patron needs a book but our locally-owned copy is checked out. The patron clicks on an ILL link in the catalog that auto-populates a request form which the patron submits.



Then...

2) The staff double check the catalog to see if the book is available locally and then place an ILL request for the patron.

DESCRIBE THE CURRENT SITUATION

Current Situation:

2) The staff ~~double check~~ the catalog to see if the book is available locally and then place a request for the patron.



<http://www.convertoffline.com/wp-content/uploads/2009/02/rated-stupid.jpg>

Desired Situation: Nobody reviews the request, it is sent out automatically

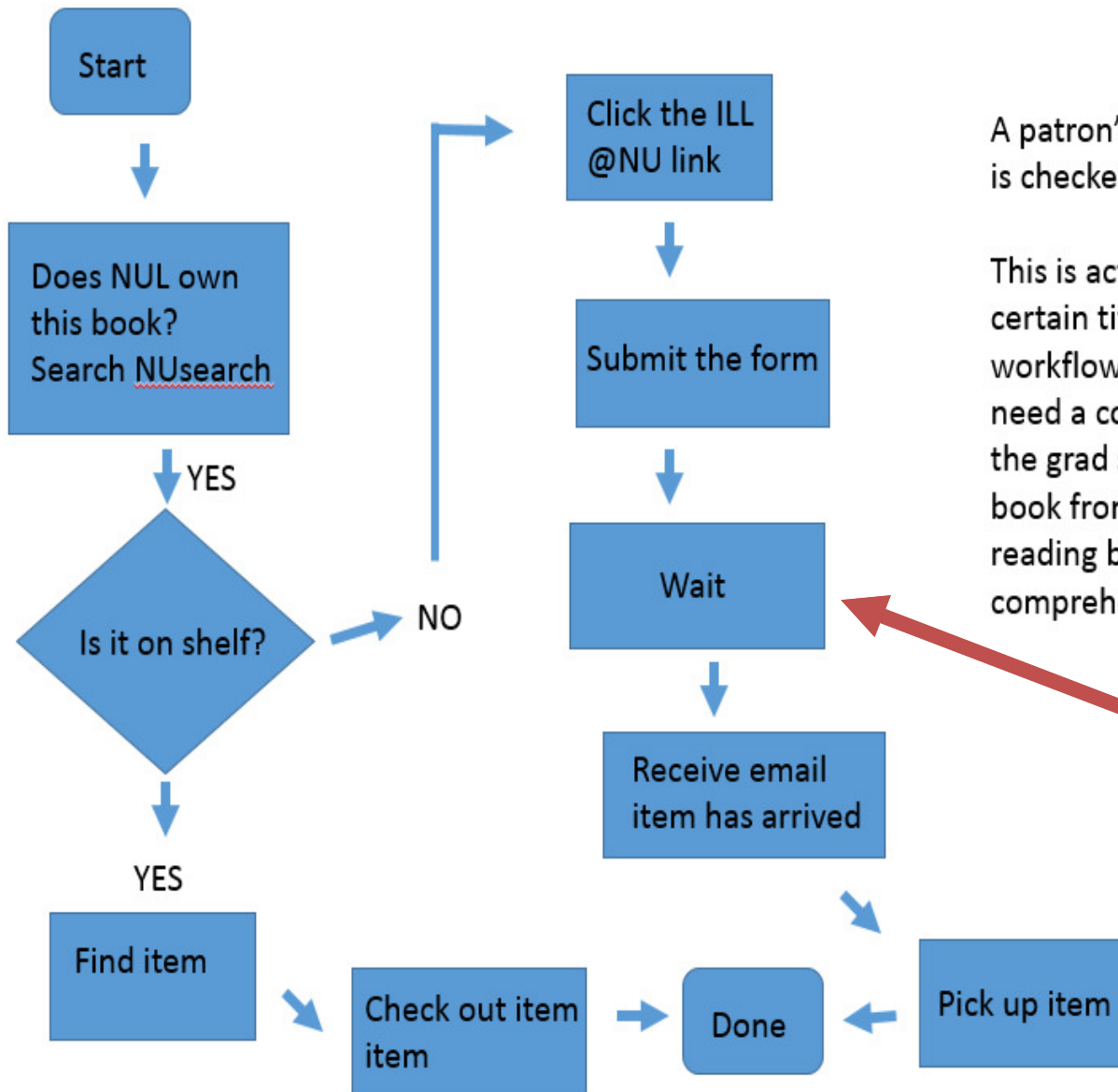
DEFINE THE **DESIRED** OUTCOME



Shoeblog.com

<http://www.blog.thesietch.org/wp-content/uploads/2010/12/Nature-abhors-a-vacuum.jpg>

**DEFINE AND DESCRIBE IN DETAIL HOW
THE DESIRED STATE WILL WORK**



A patron's workflow to borrow a copy of a book that is checked out from Northwestern University's library.

This is actually a very common workflow because certain titles are very popular at certain points. This workflow makes it easier for undergraduates who need a copy of a text from the canon. It also helps all the grad students who need a copy of that same book from the same reading list that everyone is reading because they are all preparing for their comprehensive exams.

Behind the scenes automation sends the request out automatically without staff intervention

You are customers too! Making your job easier is important in providing better service.

Work Redesign can be super simple too. We put the ILDS routing info on our ILLiad slips so we don't have to look them up each time.

This item is being returned to:

ICY

AUGUSTANA COLLEGE
TREDWAY LIBRARY - ILL
639 38th Street
Rock Island, Illinois 61201
United States

ILDS AUG

ILLiad TN: 872988

872988

DEFINE ALL THE CUSTOMERS' NEEDS

If a tree falls in the forest, and ... you didn't send Lending overdue emails,

- ❖ You stop sending lending overdue notices to the borrowing library...
- ❖ Who are already sending their patron overdue notices, so (more effective) effort is already in place to get your book back...
- ❖ We might have more time to do work instead of deleting emails. Do we have ANY data to show those lending emails get books back any faster?



LETS ONLY DO THE WORK WE NEED TO DO

We extended our standard lending loan period by 4 weeks to avoid processing renewal requests.

How much does it cost to process an invoice? Cut a check?

Please don't conditional something to let me know you can't loan it. Just say no. It's less work for both of us.

A DVD is not an exotic format. Books get wet and mold, plastic just needs to dry. Send it!

LETS ONLY DO THE WORK WE NEED TO II

ASSESSMENT



Scholarly Kitchen Retweeted



Tim Vines @TimHVines · 3h

Anecdotes, bad personal experiences, quotes from long retired EICs, and overall bad feelings don't equate to evidence.



**ASSESS THE CHANGE. DID IT FIX
WHAT YOU WANTED IT TO?**

Again-Use your stats.

Is it faster?

Is it worth it?

Are there fewer errors?

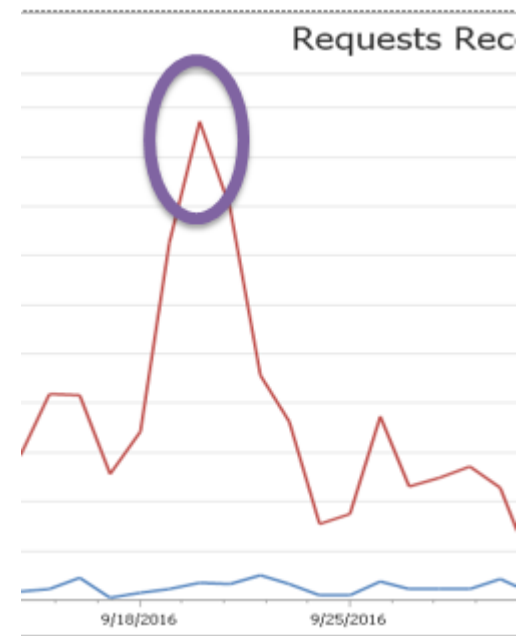
PROVE IT. HOW CAN YOU TELL?

IS IT FASTER?

Remember this?

Around that crazy peak, new automation sent out 60, 64, 50 and 31 requests per day that staff would previously had to process.

Thus they could spend their time processing physically received items for patrons.



NO STAFF PROCESSING IS OBVIOUSLY FASTER THAN ANY STAFF PROCESSING

IS IT WORTH IT?

Old stuff is hard to borrow, but students need it.

Last year we had 466 requests for pre-1923 materials.

- ✓ 218 items were physically sent to us. (staff time, money, supplies)
- ✓ 120 were canceled because the owning library said no. (staff time, ☹️)
- ✓ 128 were available online. (staff time)

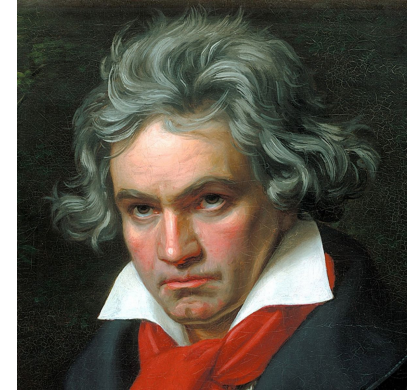
27% of those items were found free online. **It is worth the effort!**

**IS IT WORTH THE EXTRA EFFORT? CHECKING
FOR DIGITAL COPIES OF **PRE-1923**
MATERIALS?**

ARE THERE **FEWER** ERRORS?

Roll over Beethoven?

We knew the patrons were finding those scores and CDs in Worldcat. What we didn't have was enough detail to know which one.



We edited our request form so it included the **OCLC#** thus staff can use that to order the **right** thing fast.

**WHAT INFORMATION DOES THE STAFF
HAVE NOW THAT THEY DIDN'T BEFORE?**

Getting to Yes instead of Canceling:

Improved support of our users (article delivery)

We are the experts or the last chance (checking the actual physical volume of that obscure title)

Doing more (scanning Master's Thesis)

Ultimately Providing Better Customer Service

**WHAT DO THE STAFF HAVE TIME TO DO
NOW THAT THEY DIDN'T BEFORE?**

FINAL THOUGHTS

“It is almost impossible to find ILL at the Library website. Seems to take real detective work.”

- A single cranky faculty member

“Since July 19, 2016, thousands of patrons seem to have been able to place ILL requests on the new website just fine without any help from the staff”

- Kurt’s cranky response

Once is **not** a trend

* Avoid **False Positives** and always evaluate your sources.

Workflow Redesign is for the 99%, the routine, the common, the easy...

- Books with ISBN numbers
- Journal Articles with full citations and/or DOIs
- Things where there is only one version

Unique or challenging requests are just that, **unique**. Thus, their workflow is not generalizable...

- We will likely never have to order another 1850's newspaper article from Honduras and have it filled as an emailed cellphone picture
- It is unlikely the Australian Government will ever burn another one of our books

WHAT HAS THE BIGGEST IMPACT FOR
YOUR **USERS** (PLURAL)?

In the end, it's all about...

Making it **easy** for your (tuition paying, part of their job doing, tax paying) **patrons**.

Questions?

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