

# Ex Libris Customer Journey- Continuous Improvement

IGeLU 2022

Shelley Hostetler and Hilary Newman



# Agenda

## Customer Journey:

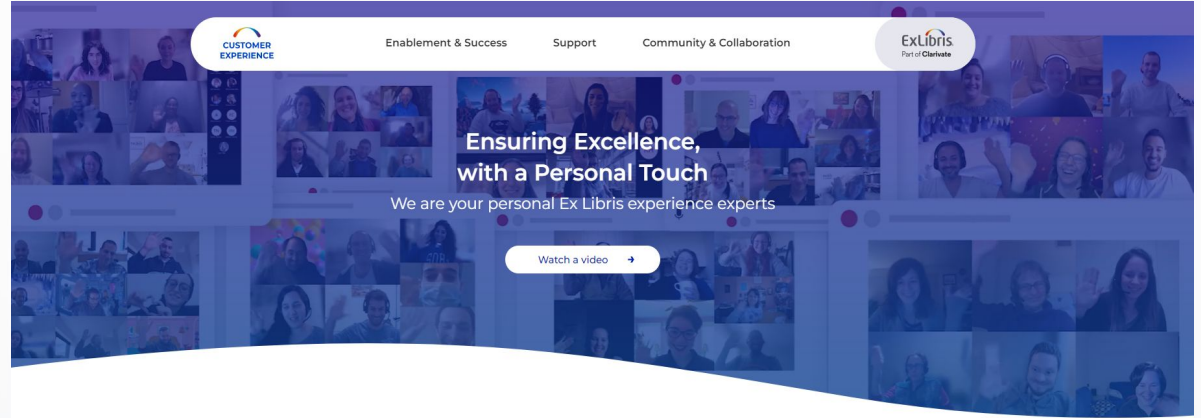
What was done?

What's next?

## Q&A



# What was done?



## Focus on a successful journey



We help you put Ex Libris products to work

Alma first year program

Knowledge Acceleration Plan (Webinar sessions)

Periodic Business Reviews

Extending Chat Support

Premium 1-1 Services

# Alma Year 1 Success Program



## Partnershi

Dedicated focal point who will be your partner during 1 Year.



## Milestone

Short-term and long-term goals with agreed upon milestones.



## Best

Learn and implement Alma best practices.



## Calenda

Regularly, scheduled meetings with your focal point.



## Alma

Assistance for meeting your local library needs and realizing the value you expect.



## Guidanc

How to find answers, online training, product support and more.



# Alma Success Journey



- Technical readiness for Go-Live
- Perform main operations at basic level
- Familiarity with primary workflows

- Increase working knowledge of Alma in order to manage system independently
- Build expertise with primary workflows
- Gain knowledge to perform key configurations
- Adopt best practices

- Maximize efficiency and optimize for local needs and goals
- Continuously uncover new efficiencies
- Ongoing adoption of new features

We've added a program to help new customers succeed with Alma immediately!

# Knowledge Acceleration Program (KAP)

Beyond the implementation workshops, the KAP program is essential to Year 1 Success. In 6 sessions, you will cover:

Fulfillment

Acquisitions

ERM

Analytics

CDI



# Free Continuing Education Webinars

- Multi-part training sessions, offered globally, covering a wide range of highly popular topics in detail
- Some examples: Implementing Acquisitions in Alma, Alma Analytics Masterclass, Managing Electronic Resources, Become an Expert: Leganto, Become an Expert: Primo VE

# Consultancy Services

Learn how to perform specific actions in Alma, then conduct a teach back, if necessary. Examples of topics below:



## Acquisitions

Fiscal rollover | Invoicing | SUSHI

## Resources

Publishing Profiles | ERM

## Fulfillment

Resource Sharing | Bookings

# Premium 1-1 Services

## Educate

- Individualized training sessions chosen from a plethora of Alma, Primo, and Analytics topics
- Customized training designed to target specific areas of need

## Extend

- Hands-on assistance with implementing a new feature or integration.
- Banks of consulting hours to be used for training or consulting needs

## Optimize

- Workflow analysis to streamline use of Ex Libris systems
- Deliver detailed recommendations based on best practices

# Premium Services Testimonials



“ This training consultancy was **value** for money. We all came away learning so much, and wished we had known some of the things much earlier ”



“ We were able to clarify issues that were not fully understood and were **encouraged to use other features** of Alma ”



“ One of the benefits is just a **greater confidence** that people have that their workflow is what it should be. As an early Alma user, people weren't sure that they were truly doing things the right way and I think **now we truly do believe that we are doing things the right way.** ”

We saw from looking at the recommendations that one of the areas that presented us with the most challenges was cross-functional activities. Now that we are aware of that challenge, it will **allow us to assess future workflow changes more closely in those areas** because we know in the past it's given us challenges. ”



“ This service provided us **an opportunity to identify problems within the system as well as sharpen our skills.** Our consultant has been as asset to us as we learn how to operate the system and manage our resources and discovery platform. I would recommend this service to all customers ”

# Chat Support available

ExLibris  
Alma

ExLibris  
Primo

ExLibris  
Leganto

ExLibris  
Summon

ExLibris  
Pivot-RP



NA, LATAM,  
EMEA, ANZ- up to  
10,000 chat  
sessions annually



Live, not bot



Minutes,  
not days



Over 50%  
complete  
resolution within  
the chat itself!



Higher  
satisfaction  
rates



Additional  
Products and  
customers under  
planning



# Listening- Customer Delight Survey

"The customer service is awesome."

Prompt, professional and excellent service.

Timely response to tech issues.

I enjoy a great rapport with my service representatives.

Great customer service and rapport :)

Customer service is excellent, they know the service they provide and the needs of customers, a personalized and adequate service

I appreciate Ex Libris support--staff is helpful, knowledgeable.



Ex Libris has very courteous and helpful customer service agents to help with problems with Summon.

I always have a positive experience when dealing with support.

Excellent tech support

Ex Libris is a company that provides an excellent support service, incidents are dealt with **very quickly**. In addition, if it is an emergency, the portfolio manager can be easily located, and he helps to solve it.

# Always Listening



Tickets can stay open for **quite some time** with no regularly updates.

**Response time** in case of malfunctions should be (much) shorter

They take a **long time to resolve** cases

**Time it takes** for cases to be resolved.

Better support - more knowledgeable analysts, **faster resolution times, more frequent updates.**

One other thing that could be improved, is **how quickly cases** are picked up on Salesforce. Sometimes you can wait a couple of weeks to have your problem initially seen to. I will add once a case has been picked up, the service is brilliant!

Hire more support staff to **shorten response time.**

**Turn around time** on customer support cases could improve. I've had a ticket open for over a month and have not received an answer. I've made this clear in the ticket and I have still not received the help I need.

# Improving Tech and Content Support Responsiveness and Time to Resolution

3

**Process enhancements:**  
chat and more



2

**Backlog relief:**  
Review differently,  
allow ongoing  
responsiveness

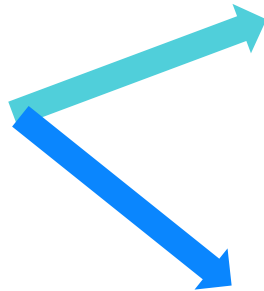


1

**Support statuses:**  
Shorter and Clearer



# How will we be more responsive?



Immediately, **shortening the queues** to increase responsiveness, by segregating (as a one-time effort) old cases.  
Keeping the queues levels reasonable over time

**Intensively analyze** the segregated cases to process and close them efficiently over the next months.

Still  
Relevant?

1  
cause->  
many  
cases

Can it be  
resolved  
soon?

# What will change?

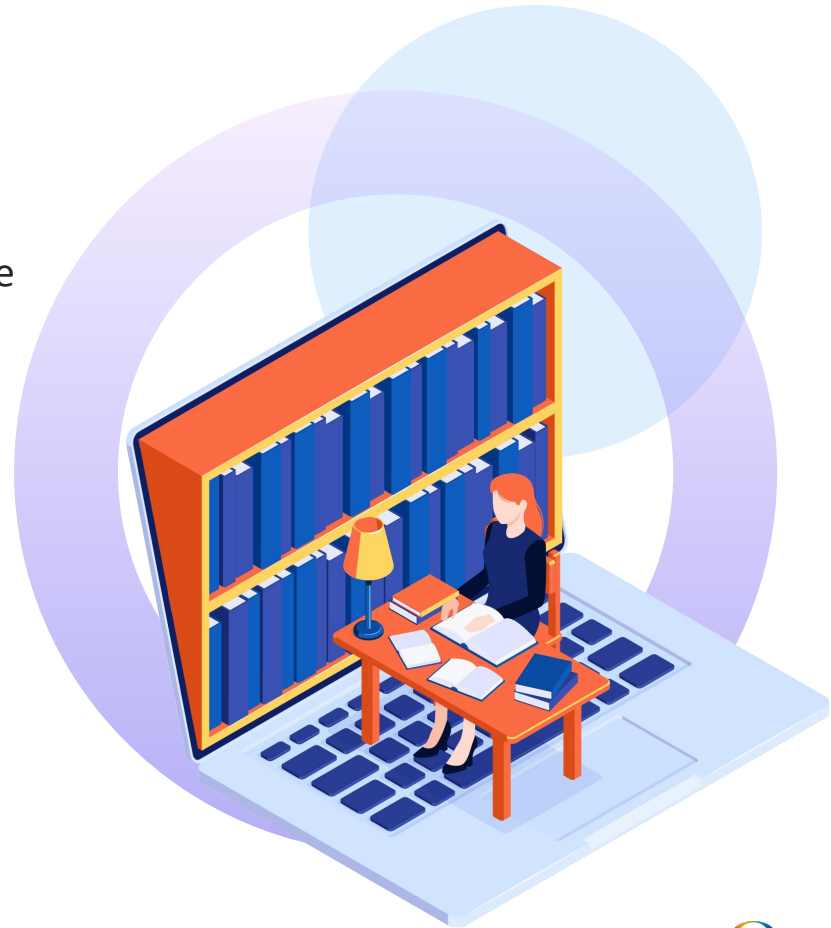
**Starting September 14, 2022:**

## Case Statuses:

- Closed cases can be cloned easily at any point in time
- Pending Customer Input- 2 weeks to reply with more information (reminder after 1 week)
- Pending Customer Testing- allows 3 months to review (reminder after 45 days)
- No Pending Work Plan- Cases that will not meet the foreseeable work plan will be closed.

## Cases Review

- Cases will be allocated to a dedicated team to expedite resolution



# How can you learn more?



---

Knowledge Article:

[Support Response and Time to Resolve Initiative - FAQ](#)

Join webinars on September 19-21

# Technical Support Leadership



**Alon Botvinik**  
North America



**Kevin Cao**  
APAC- China



**Martin Buescher**  
EMEA



**Oscar Caballero**  
Latin America



**Zvi Vogel**  
Australia, New  
Zealand and Israel



**Matan Ilan**  
Japan/Korea  
Support & Global PMO

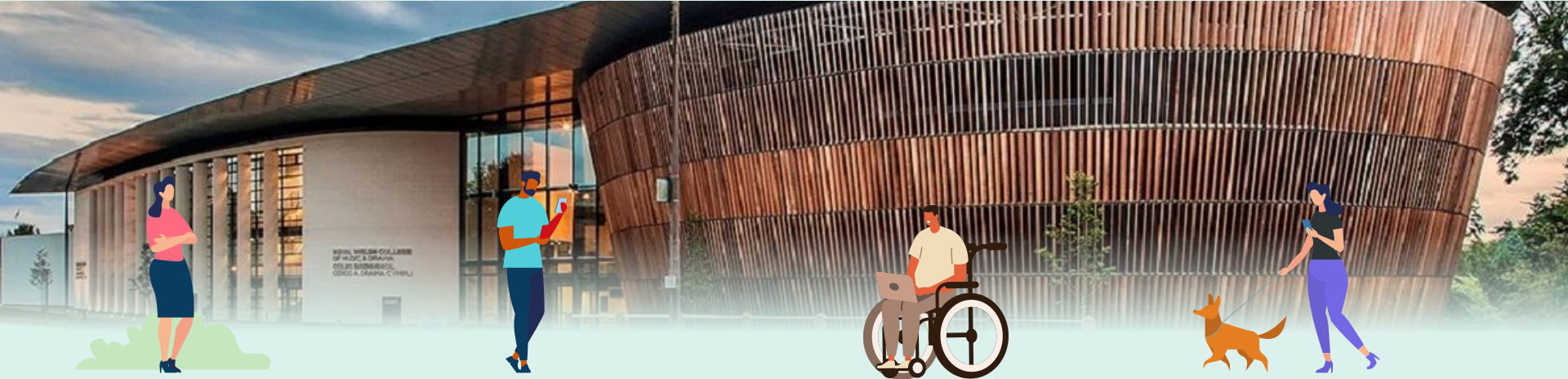


**Together**  
we can make  
it work!





# Questions – Ask Me Anything!



# Thank you!



# Ex Libris Customer

# Journey-

# Continuous Improvement

IGeLU 2022

Shelley Hostetler and Hilary Newman



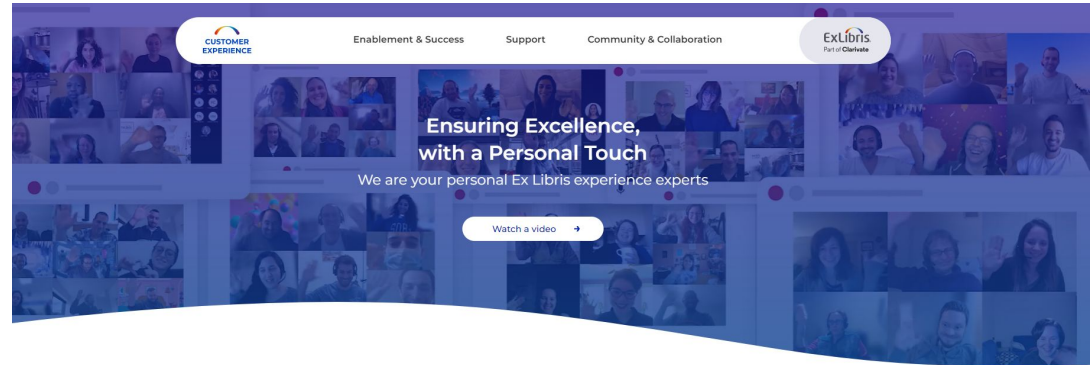
# Agenda

- Customer Journey:
  - What was done?
  - What's next?
- Q&A



# What was done?

- Focus on a successful journey
  - Alma first year program
  - Knowledge Acceleration Program and continuing education webinars
  - Periodic Business Reviews
  - Extending Chat Support
  - Premium 1-1 Services



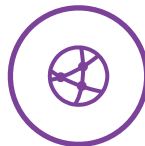
We help you put Ex Libris products to work

# Alma Year 1 Success Program



## Partnership

Dedicated focal point who will be your partner during Year 1.



## Milestone

Short-term and long-term goals with agreed upon milestones.



## Best Practices

Learn and implement Alma best practices.



## Calendar

Regularly scheduled meetings with your focal point.



## Alma Assistance

Assistance for meeting your local library needs and realizing the value you expect.

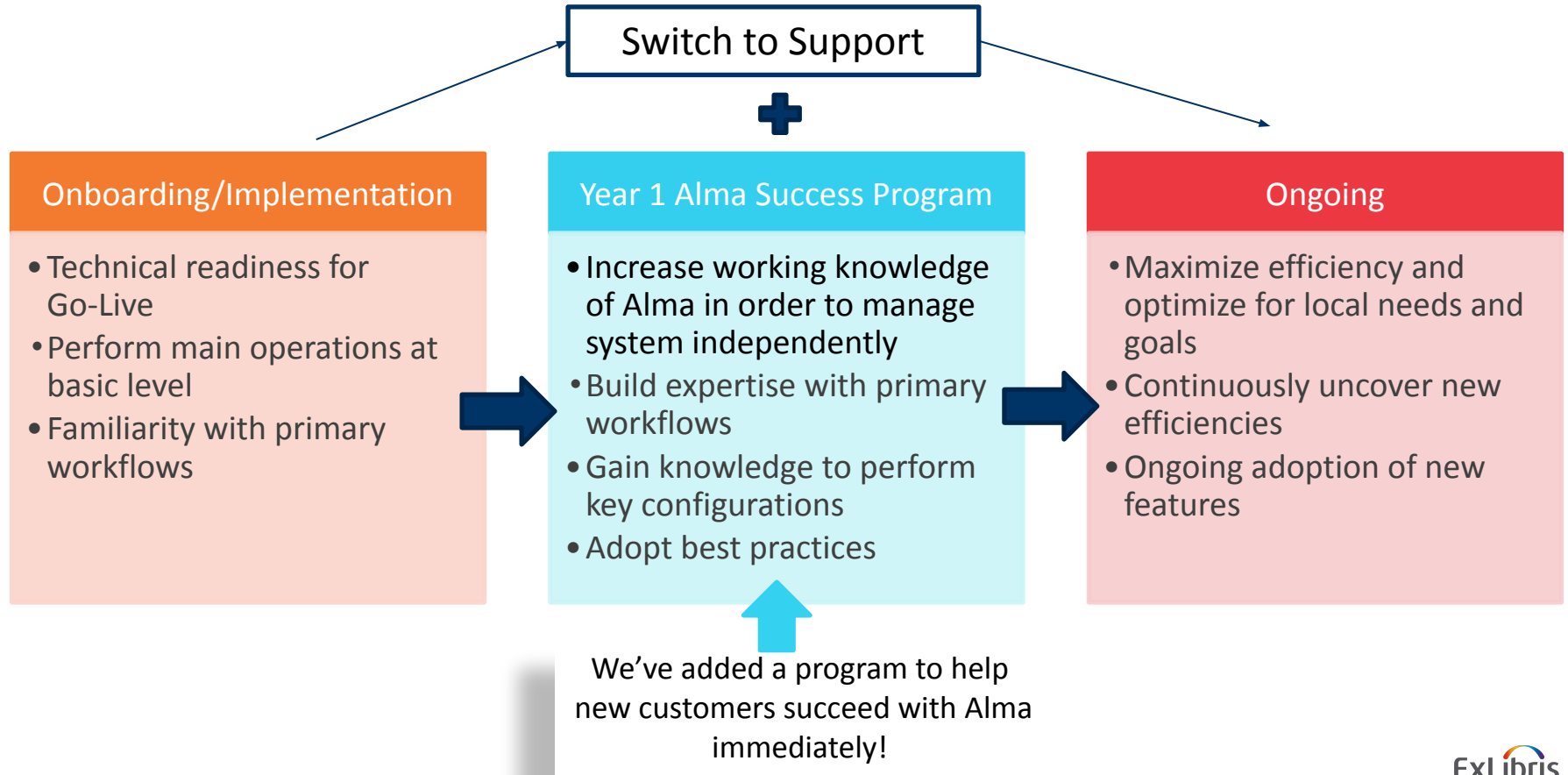


## Guidance

How to find answers, online training, product support and more.



# Alma Success Journey

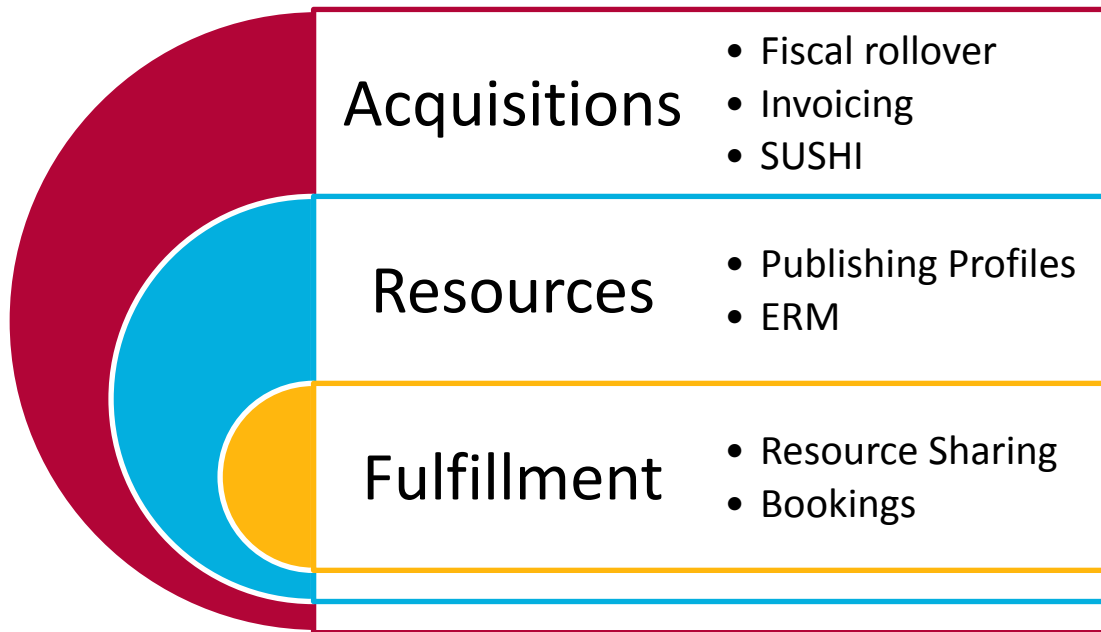


# Knowledge Acceleration Program (KAP) and Free Continuing Education Webinars

- Beyond the implementation workshops, the KAP program is essential to Year 1 Success. In 6 sessions, you will cover a range of topics libraries often look to optimize shortly after go-live:
  - Fulfillment
  - Acquisitions
  - Electronic Resources Management
  - Analytics
  - Central Discovery Index and Discovery
- Free Continuing Education Webinars
  - Multi-part training sessions, offered globally, covering a wide range of highly popular topics in detail
  - Some examples: Implementing Acquisitions in Alma, Alma Analytics Masterclass, Managing Electronic Resources, Become an Expert: Leganto, Become an Expert: Primo VE

# Consultancy Services

- Learn how to perform specific actions in Alma, then conduct a teach back, if necessary. Examples of topics below:



# QBR

- From Shelly

# Premium 1-1 Services

- Educate
  - Individualized training sessions chosen from a plethora of Alma, Primo, and Analytics topics
  - Customized training designed to target specific areas of need
- Extend
  - Hands-on assistance with implementing a new feature or integration.
  - Banks of consulting hours to be used for training or consulting needs
- Optimize
  - Workflow analysis to streamline use of Ex Libris systems  
Deliver detailed recommendations based on best practices

# Premium Services Testimonials



“ This training consultancy was **value** for money. We all came away learning so much, and wished we had known some of the things much earlier ”



“ We were able to clarify issues that were not fully understood and were **encouraged to use other features** of Alma ”



“ One of the benefits is just a **greater confidence** that people have that their workflow is what it should be. As an early Alma user, people weren't sure that they were truly doing things the right way and I think **now we truly do believe that we are doing things the right way.** ”

We saw from looking at the recommendations that one of the areas that presented us with the most challenges was cross-functional activities. Now that we are aware of that challenge, it will **allow us to assess future workflow changes more closely in those areas** because we know in the past it's given us challenges. ”



“ This service provided us **an opportunity to identify problems within the system as well as sharpen our skills.** Our consultant has been as asset to us as we learn how to operate the system and manage our resources and discovery platform. I would recommend this service to all customers ”

# Chat Support available

ExLibris  
Alma

ExLibris  
Primo

ExLibris  
Leganto

ExLibris  
Summon

ExLibris  
Pivot-RP

- NA, EMEA, ANZ- up to 10,000 chat sessions annually
- Live, not Bot
- Minutes, not days
- Over 50% of chats are fully resolved within the chat itself!
- Higher satisfaction rates
  
- Additional products and locations are under planning



# Listening- Customer Delight Survey

"The customer service is awesome."

**Prompt**, professional and excellent service.

**Timely response** to tech issues.

I enjoy a great rapport with my service representatives.

Great customer service and rapport :)

**Customer service is excellent**, they know the service they provide and the needs of customers, a personalized and adequate service

I appreciate Ex Libris support--**staff is helpful, knowledgeable.**

Ex Libris has very courteous and helpful customer service agents to help with problems with Summon.

I always have a positive experience when dealing with support.

Excellent tech support

Ex Libris is a company that provides an excellent support service, incidents are dealt with **very quickly**. In addition, if it is an emergency, the portfolio manager can be easily located, and he helps to solve it.

# Always Listening

Tickets can stay open for **quite some time** with no regularly updates.

**Response time** in case of malfunctions should be (much) shorter

They take a **long time to resolve** cases

**Time it takes** for cases to be resolved.

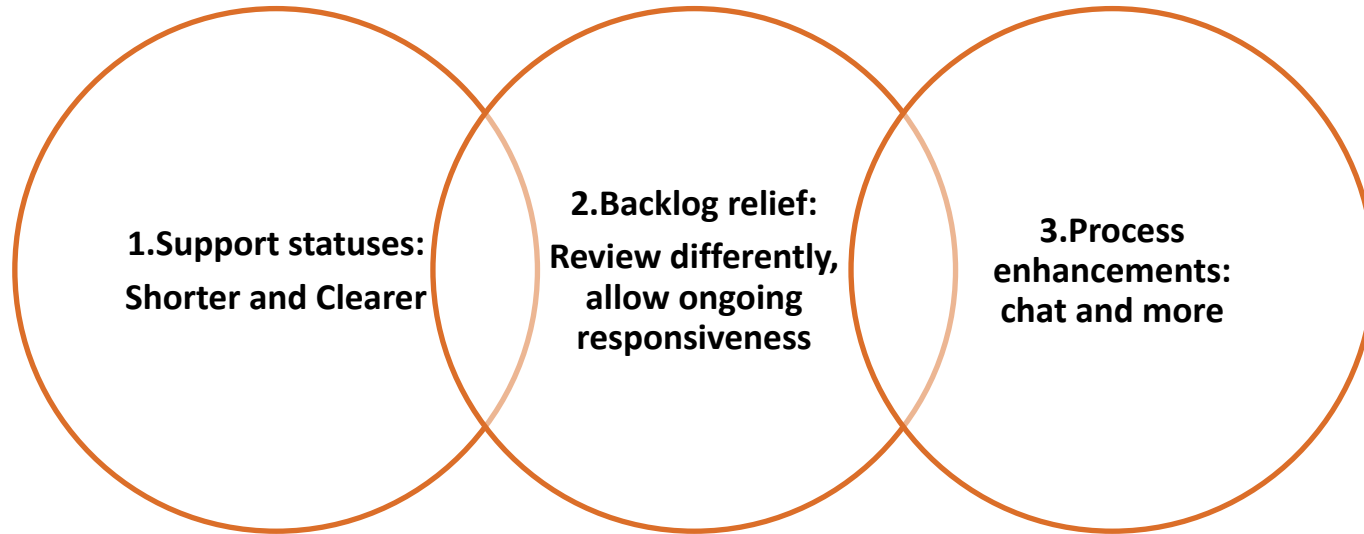
Better support - more knowledgeable analysts, **faster resolution times, more frequent updates.**

One other thing that could be improved, is **how quickly cases** are picked up on Salesforce. Sometimes you can wait a couple of weeks to have your problem initially seen to. I will add once a case has been picked up, the service is brilliant!

Hire more support staff to **shorten response time.**

**Turn around time** on customer support cases could improve. I've had a ticket open for over a month and have not received an answer. I've made this clear in the ticket and I have still not received the help I need.

# Improving Tech and Content Support Responsiveness and Time to Resolution



# How will we be more responsive?

Today



From Sept 14<sup>th</sup>.

1. Immediately, shortening the queues to increase responsiveness, by segregating (as a one time effort) old cases.

Keeping the queues levels reasonable over time

2. Intensively analyze the segregated cases to process and close them efficiently over the next months.

Still  
Relevant?

Can it be  
fixed soon?

1 cause->  
many cases

# What will change?

Starting September 14, 2022:

- Case Statuses:
  - Closed cases can be cloned easily at any point in time
  - Pending Customer Input- 2 weeks to reply with more information (reminder after 1 week)
  - Pending Customer Testing- allows 3 months to review (reminder after 45 days)
  - No Pending Work Plan- Cases that will not meet the foreseeable work plan will be closed.
- Cases Review:
  - Cases will be allocated to a dedicated team to expedite resolution

- Together we can make it work!

# How can you learn more?

- Knowledge Articles: XXXXX
- Join webinars on xxx,xxxx dates
- Contact your Support team

# Technical Support Leadership



**Hilary Newman**  
Sr. Vice President  
Technical Support



**Alon Botvinik**  
North America



**Kevin Cao**  
China



**Martin Buescher**  
EMEA



**Oscar Caballero**  
Latin America



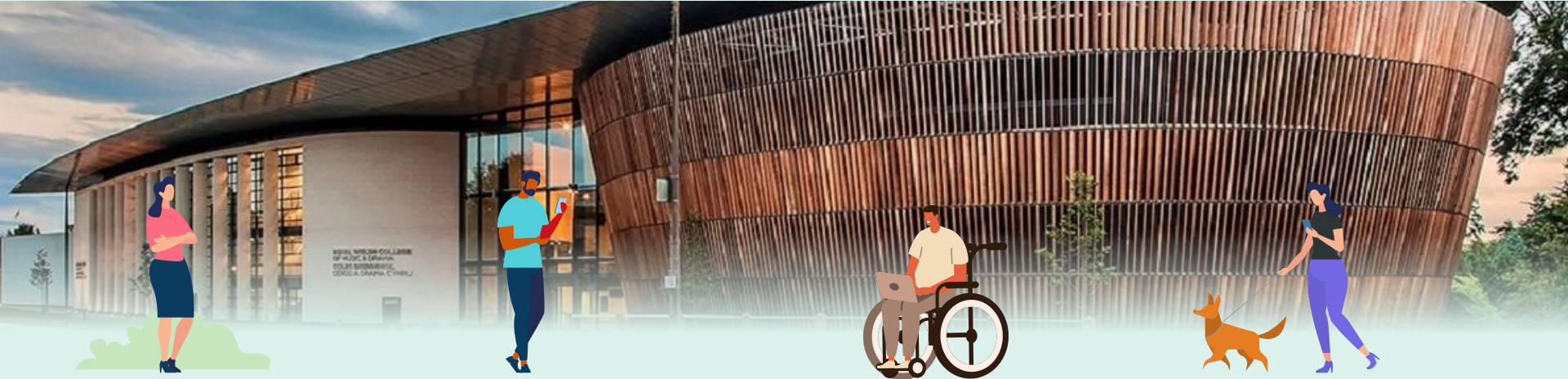
**Zvi Vogel**  
Australia, New  
Zealand and Israel



**Matan Ilan**  
Japan/Korea  
Support & Global  
PMO



- Q&A



# Thank you!