

Leaning in – improving processes at the University of Salford Library

Jenny McNally



University of
Salford
MANCHESTER



Plan for the session

- What is Lean and why is it useful?
- Tools to go through the review process
- Examples of Alma changes we've made as a result at Salford

What is Lean?

- A structured approach to reviewing processes and finding ways to improve them developed for the manufacturing industry
- Lean can be quite involved and you can even gain different levels of qualifications.
- I've adapted to make it a fairly "light touch" approach
- I've used for system related processes but could work for any processes

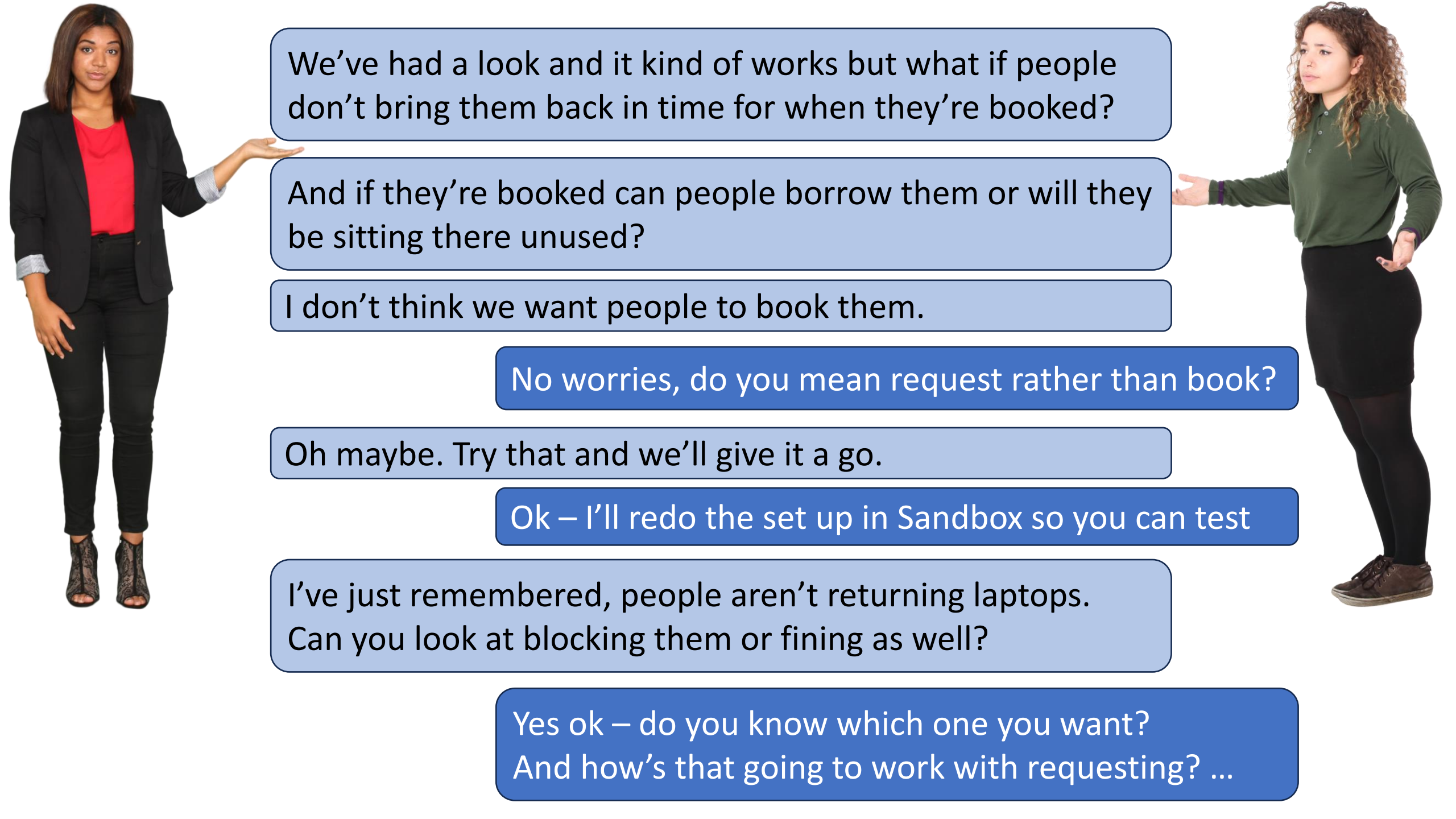


We want users to be able to book laptops to pick up whenever they want

Ok you can do bookings in Alma - we can try that out – I'll get that set up in Sandbox.

Here you go all set up and ready to test





We've had a look and it kind of works but what if people don't bring them back in time for when they're booked?

And if they're booked can people borrow them or will they be sitting there unused?

I don't think we want people to book them.

No worries, do you mean request rather than book?

Oh maybe. Try that and we'll give it a go.

Ok – I'll redo the set up in Sandbox so you can test

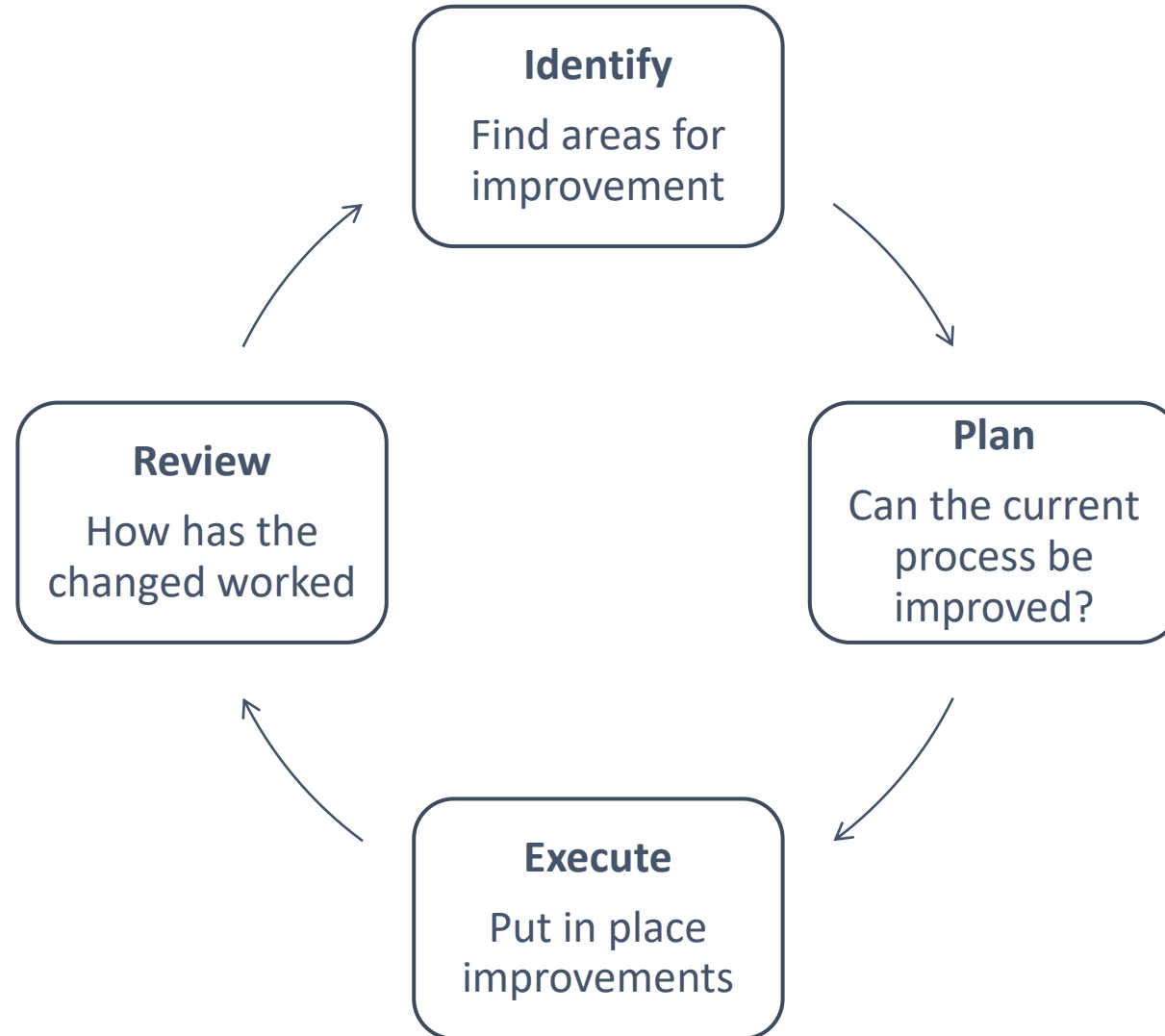
I've just remembered, people aren't returning laptops. Can you look at blocking them or fining as well?

Yes ok – do you know which one you want?
And how's that going to work with requesting? ...

What can Lean help with?

- Shared understanding of what needs changing
- Understand why not just what – there might be a better solution than the change requested
- Make sure whole process works with any changes
- Identify any other problems and address those at the same time
- Avoid jumping straight to making system changes
- Helps planning work load and system changes

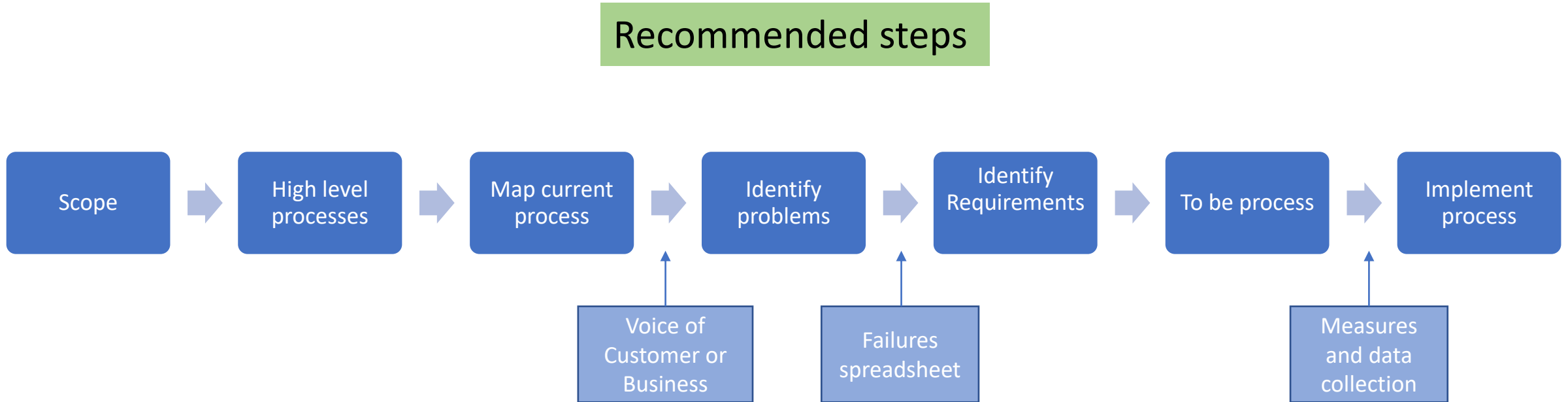
How to use Lean



Who should be involved in a Lean process review?

- Review Leader – useful if they're not too close to the process so can provide an objective view
- Service owner – able to provide wider view and make decisions about changes
- People who 'do' the process
- Technical advice – if it involves systems, involve the people who know how they system can be configured. Whilst you can aim for developing the ideal process if it involves e.g. Alma then you will be constrained by how the system works

Tools for carrying out a Lean review



Optional extras for more complex processes

Scope

What?

A template to outline what you're planning to do.

Why?

Helps define what you are, and as importantly, what you aren't going to review

Ensures all team agreed on what they're doing

Can review and update as go through project

Tip

Focus on stating the problem/ goals and not the solution. It's a common mistake to jump straight to trying to solve the problem before setting out the scope.

Problem Statement: Extended loan laptops are currently available for loan for 4 weeks to all students and no booking or reservations are possible.

Extended loan laptops are only available on a first come first served basis which can cause frustration and results in an unfair process.

Users don't know when they'll be able to borrow one and it makes it an unequal service for users who aren't able to check back in regularly.

As there's no fines or charges until the laptop is declared lost there is no incentive to return them.

It is time consuming process to loan out the laptops taking around 10 mins each time

Goal:To provide a system so that all students have a chance to borrow and extended loan laptop, that's efficient to administer and uses an easy to follow process.

In scope: Extended loan laptops

Out of scope: 24 hour and 7 day laptops

Customer Benefit:

Better access to extended loan laptops
Quicker to borrow
Fair service available to all students

Business Benefit

Less time consuming
Less chance for mistakes – currently manual process
Less rechecking needed e.g. daily checking of waiver forms
Better stock management
Increased customer satisfaction

Employee Benefit

Clear processes
Easier to train new staff
Less chance for mistakes
Easier to manage user expectations
Job satisfaction – able to offer better service to users

Efficiencies

Less time-consuming process
Easier to train new staff on the process
Better stock management of high value items – less likely to need replacements or time taken to track down 'lost' laptops

High level processes

What?

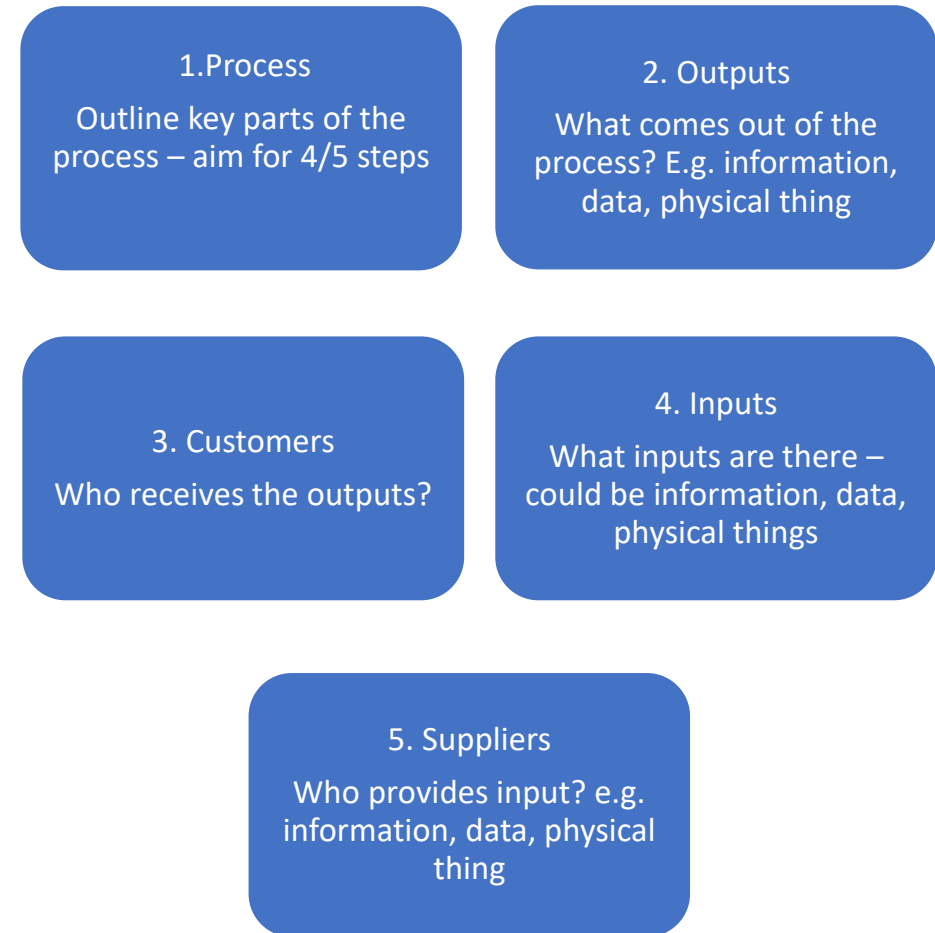
The SIPOC, in official Lean talk, maps out the high level processes involved.

Why?

Helps clarify what the process covers; helps identify who and what will be impacted by changes

How?

Work with all members to map out a high level version of the process. To make it high level you may need multiple diagrams – you're aiming for 4 or 5 steps in the process.



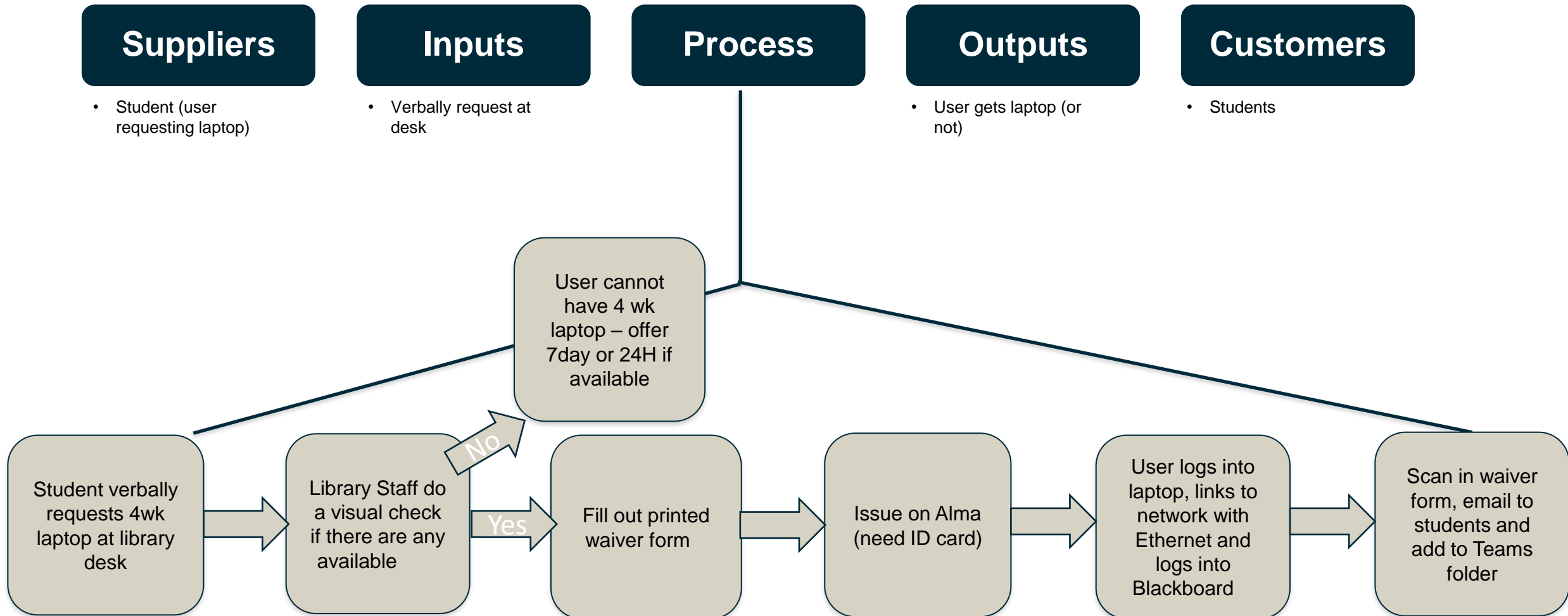
High level processes example

This is one of the SIPOC diagrams from laptop requesting.

We had 3 altogether, this one plus:

- Returning laptops
- Completing waiver forms

SIPOC – borrowing 4 week laptop



Detailed 'as is' process

What?

Documenting the current process in as much detail as possible

Why?

Clarifies all the steps/ people/ decisions involved and will help you identify where there are potential improvements

How?

Work with the whole review team. You could also invite others who 'do' the process, especially if there's different people doing different bits to map out the process.

An extra step could be doing a walk through with someone as they carry out the process for real (called Gemba in Lean).

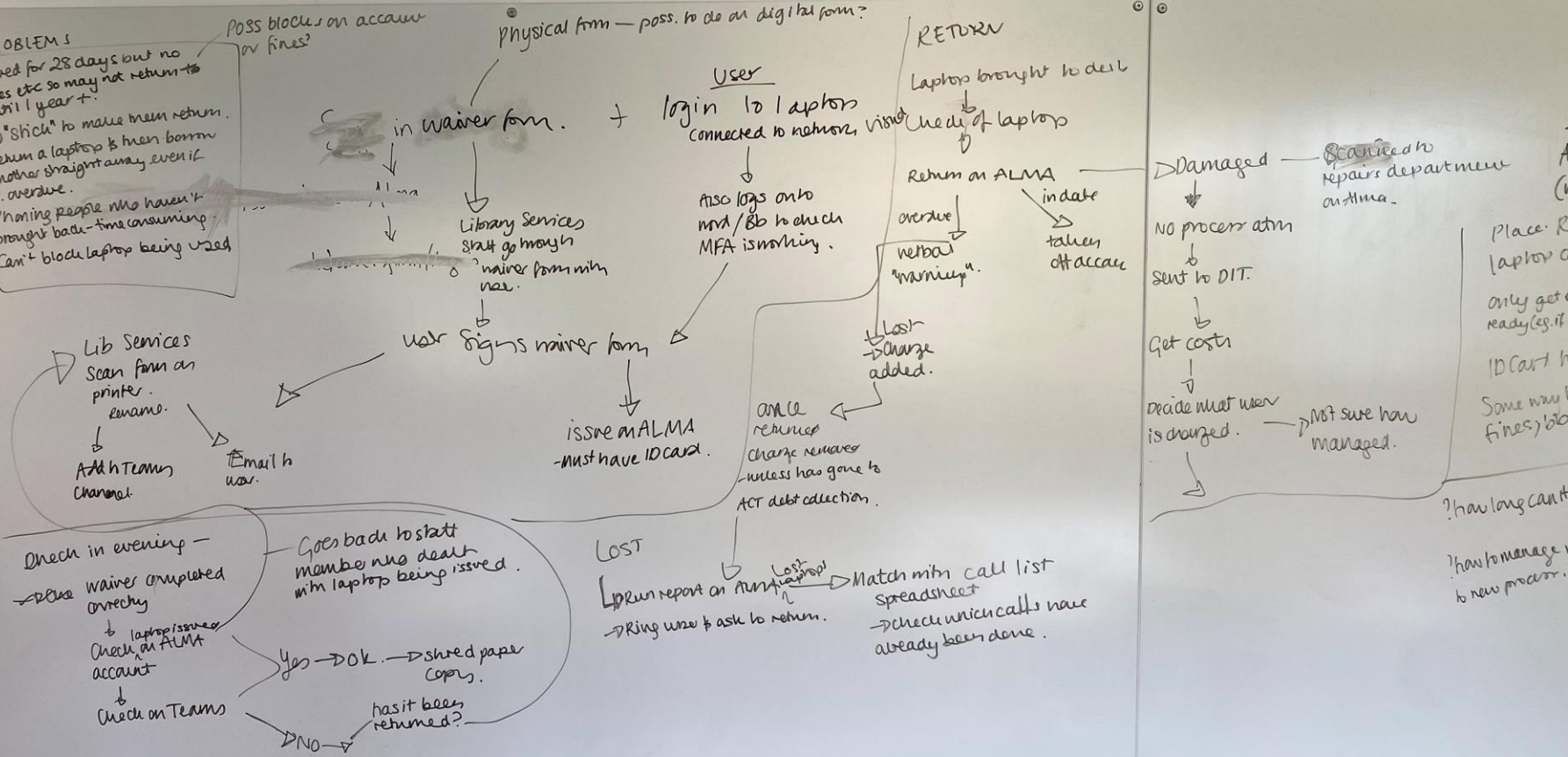
This makes sure what's being documented is actually what happens rather than what people think is happening!

PROBLEMS

Issued for 28 days but no fines etc so may not return until 1 year +.
 NO "stick" to make them return.
 Return a laptop & then borrow another straight away even if v. overdue.
 Phoning people who haven't brought back - time consuming.
 Can't block laptop being used

POSS blocks on account or fines?

Physical form - poss. to do a digital form?



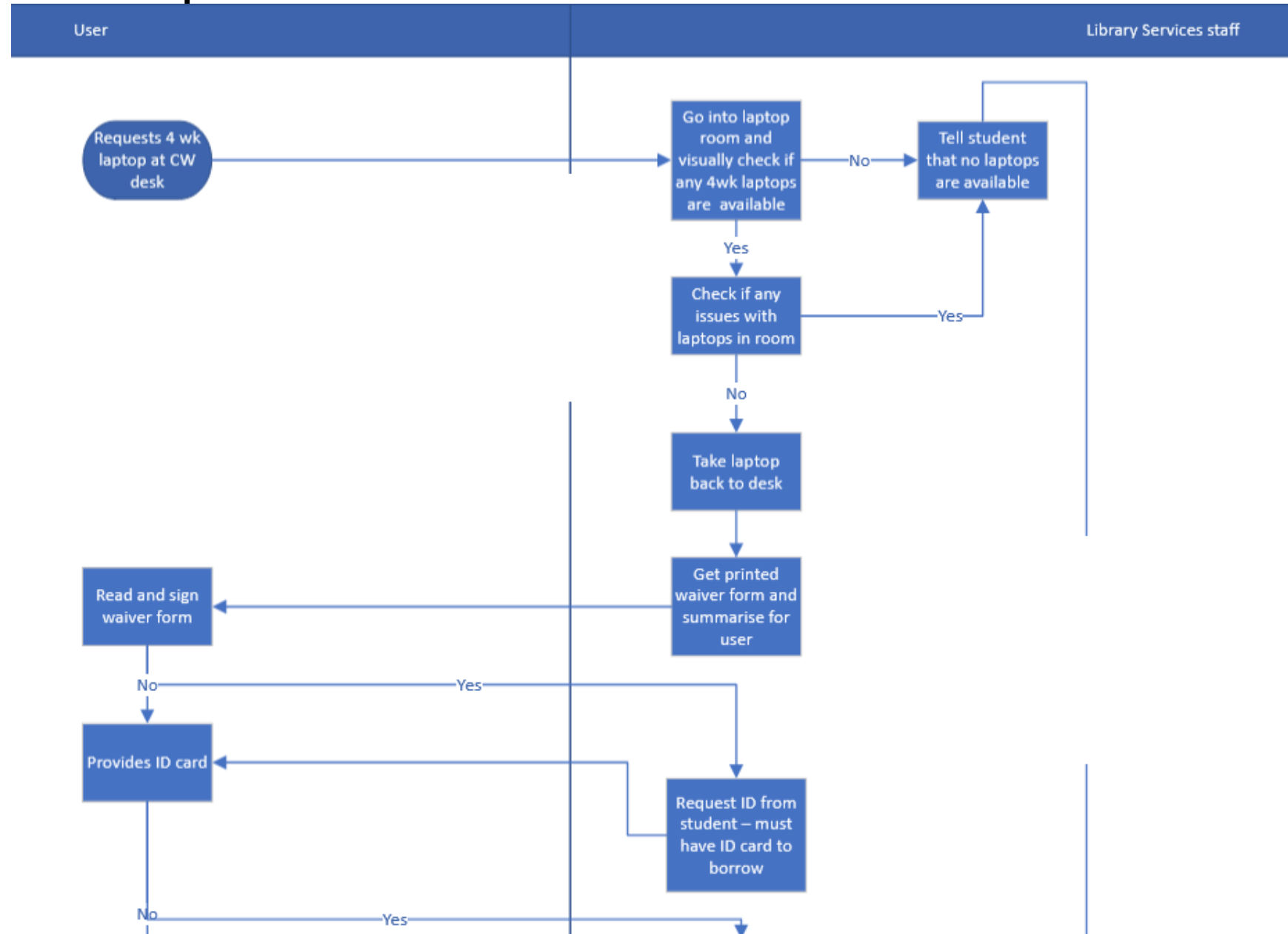
Place R laptop only get ready (esp. if ID card h Some want fines) etc

? how long can it
 ? how to manage to new process.

As is process - example

Current process for issuing.

Also had separate diagrams for return, waivers and lost laptops



Identify problems

What?

Identify points where the process is inefficient or not working.

Why?

This identifies areas for potential improvement

How?

Review the process diagram with the team.

Lean calls problems 'wastes' and suggests 8 different types. The type isn't so important but does help you think about the kinds of things you want to look for.



DEFECTS

Waste from a product or service failure to meet customer expectations



OVERPRODUCTION

Waste from making more product than customers demand



WAITING

Waste from time spent waiting for the next process step to occur



UNUSED TALENT

Wastes due to underutilization of people's talents, skills, and knowledge



TRANSPORTATION

Wasted time, resources, and costs when unnecessarily moving products and materials



INVENTORY

Wastes resulting from excess products and materials that aren't processed



MOTION

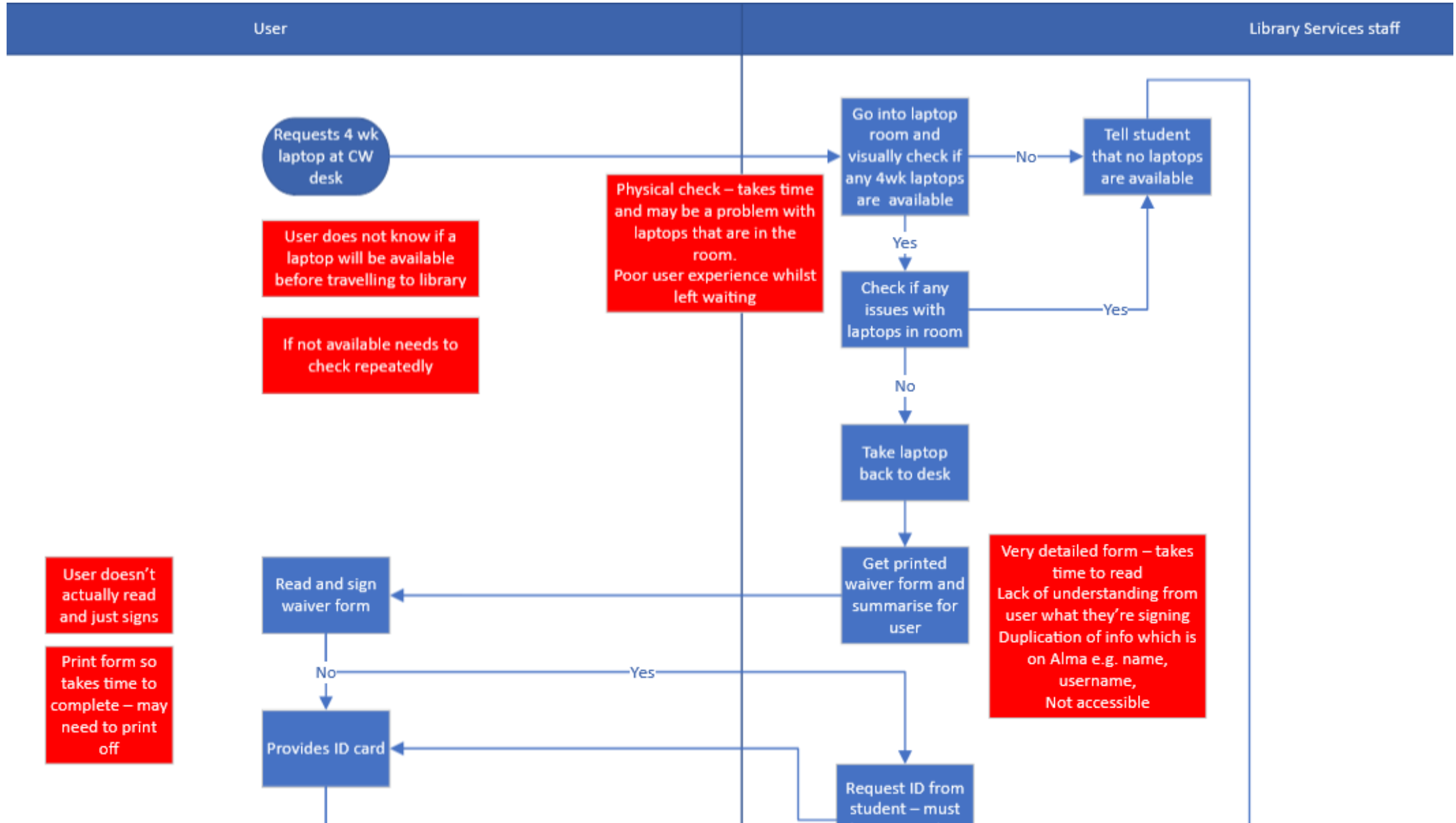
Wasted time and effort related to unnecessary movements by people



EXTRA-PROCESSING

Wastes related to more work or higher quality than is required

As is process - example



Requirements (Kano Analysis)

What?

Document what the process has to do, what it would be good to do and what would be nice to have

Why?

This clarifies what the new process has to include and what is not essential

How?

Work with the team to identify what needs to go in each category

	Essential	More Is Better	Delighter
	Agreement on terms (waiver)	Waiver should be made digital to avoid paper print/ users should be able to complete waiver or parts beforehand	Email with instructions etc before pick up. (Either when request is placed or when ready for pick up)
	Place laptop requests (any laptop can fulfil request)	Provide equality of access	
	Only get email to collect when actually available	Joined up process	
	Require ID card to borrow	Not need to double check waivers	
	To encourage returns, introduce fines, blocks, when overdue	Laptop should be ready to go when user comes to collect it	

To be process

What?

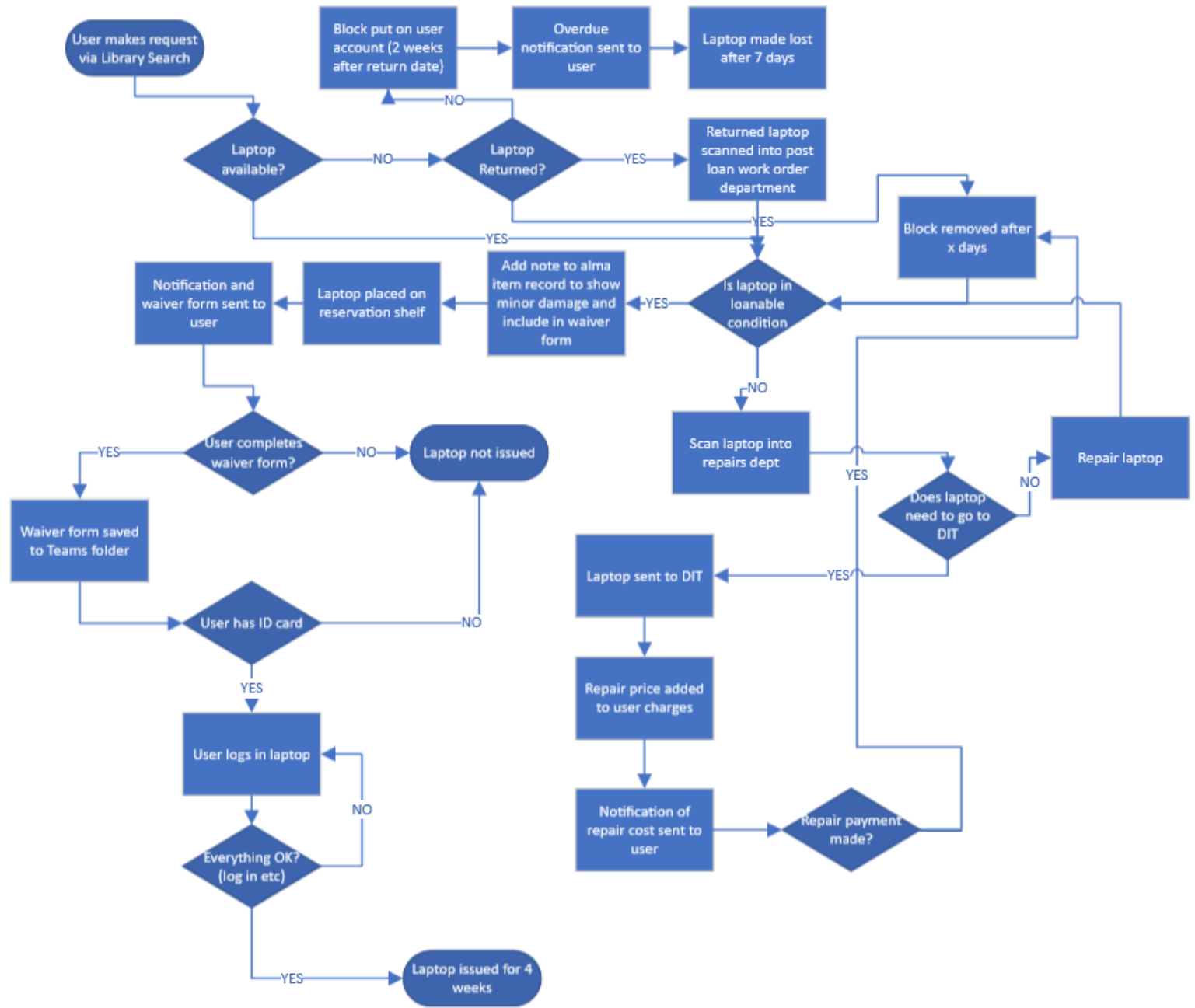
Use the information gathered so far to develop a new process.

Why?

Mapping it out ensures everyone's got the same understanding and let's you go back and review and identify any further changes needed. It helps you think through the new process before implementing so you're clear on system changes needed and how to communicate the changes to staff and users.

How?

Develop a process diagram similar to the one in 'As is process'.



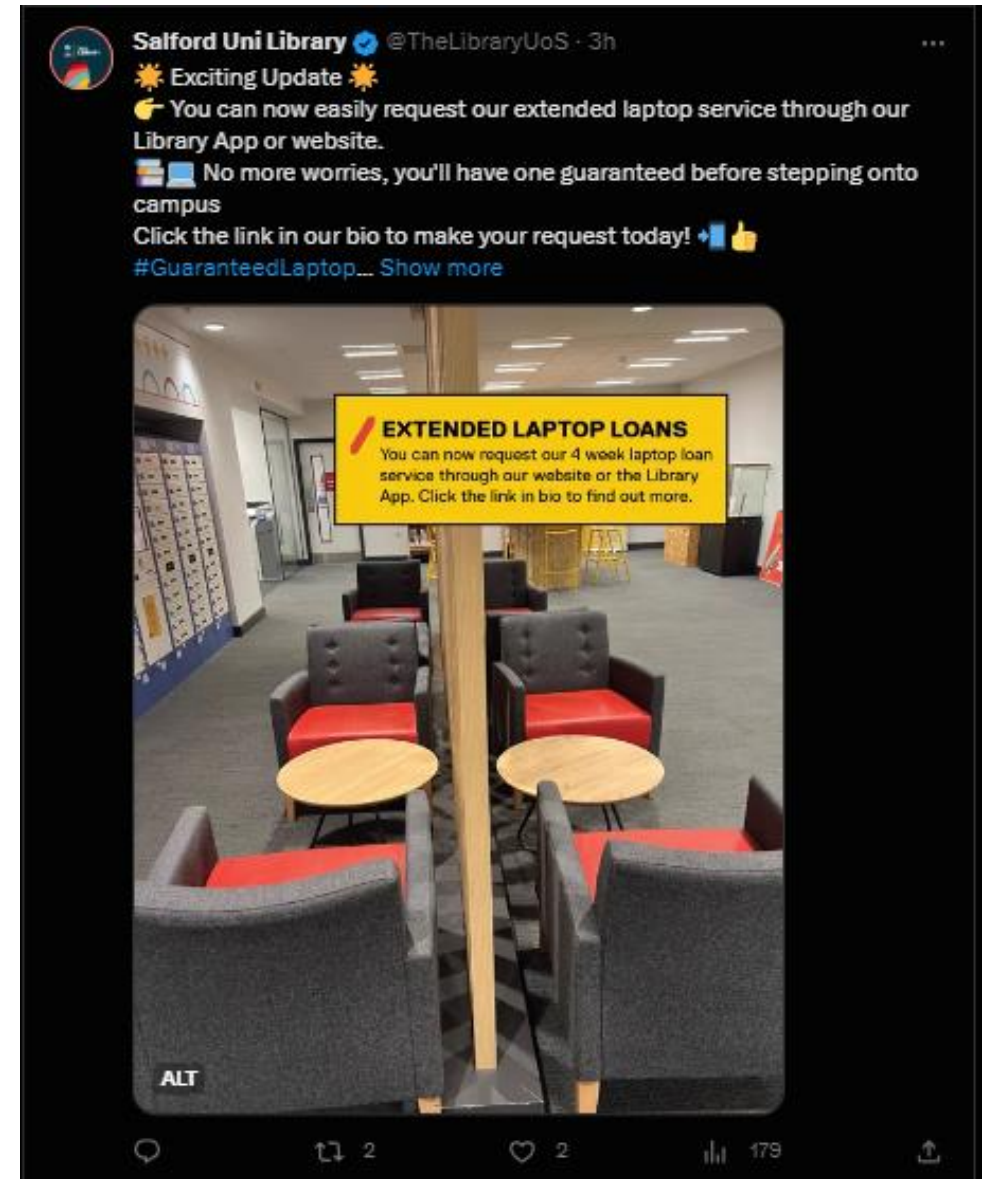
Execute and review

Execute

Once the new process is agreed this needs to be put in place so general considerations around change management and communication is needed.

Review

Before concluding the process review ideally you should agree when it should be reviewed. You can revisit the measures identified during planning and gather any further feedback on the process. Which may lead to you needing to start the process again!



Added extras

- Voice of Business / Customer – surveys etc
- Failures spreadsheet – pulls together issues and summarises themes
 - Drill into why the failure is happening
- Data collection plan – how to measure success of changes

Other process reviews

- Purchase requests/ ILL
 - Moved from emails to single form in Primo VE for ILL and requests to purchase items
 - User details captured
 - Reduced re-entry of data – automatically created in Alma
 - Library staff can identify best way to supply – convert to purchase request if needed
- Reading Lists and digitisation
 - Integration with DCS
 - Digitisation identified by library not lecturers
 - Details in DCS/ Alma no spreadsheets!

Questions?

- Jenny McNally
- j.mcnally@salford.ac.uk