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International Group of Ex Libris Users

# Unlocking Potential

An interactive round-table on leveraging Premium Services

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# Agenda

## What to expect from this session?

- Gain more insights about Premium Services

- Discuss use cases and needs

- Share experiences with Premium Services

- Exchange ideas and suggestions

# Services for our Customer Community

## Free Webinars

- Expert-led webinars
- From single-session topics to multi-week "Become an Expert" programs across Alma, Primo and Leganto
- Community service

**Where to find**
*advertised on customer listservs and can be found on [our website](#)*

## Premium Workshops

- In-depth sessions on advanced topics and use cases
- Hands-on virtual work-shops with live instruction and peer interaction in groups of 12 or fewer

**Where to find**
*see what's upcoming on [our Customer Knowledge Center](#)*

## Premium Services

- Tailored training and consulting services
- Customized for unique and distinct needs
- Individual customer-level

**Where to find**
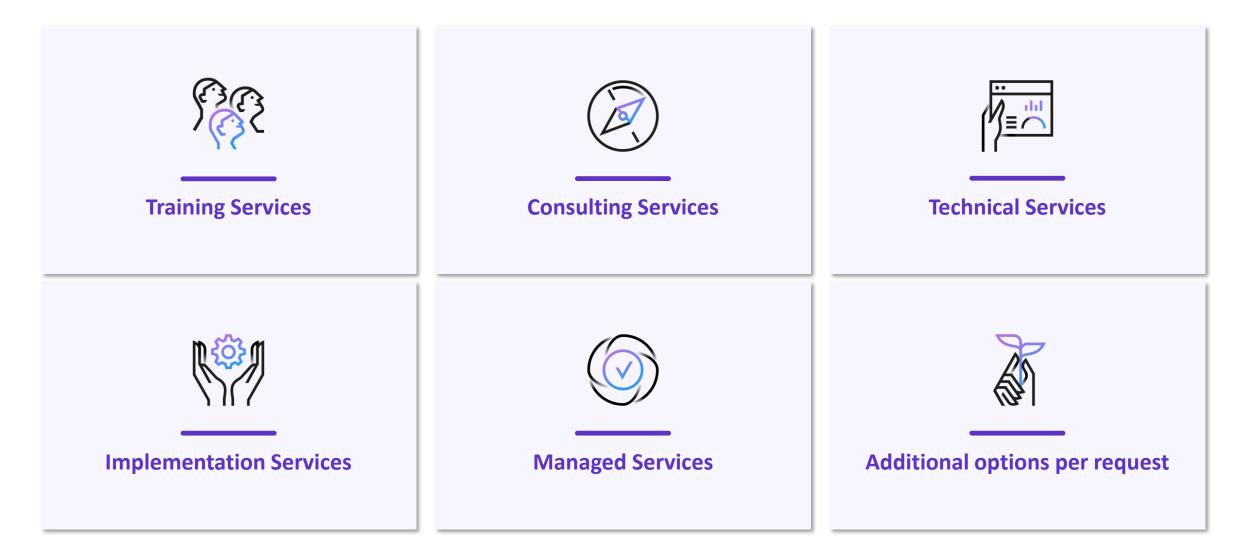*description can be found on [our Customer Knowledge Center](#)*

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# Are you familiar with our Premium Services offerings?

# Premium Services Overview

**Training Services**

**Consulting Services**

**Technical Services**

**Implementation Services**

**Managed Services**

**Additional options per request**

# Premium Services Overview

- Standard training and custom training packages

- Workshops, webinars, custom

- Extend Services
- Definition and set-up of additional work streams and required configurations within implemented solutions

- Optimize Services – review of workflows and configuration

- Customized Consulting – tailored to the library's needs

- Comprehensive set of services to assist with system administration and product configuration

- Annual service subscription

- 3$^{rd}$ party integration

- Mini-applications – creation, hosting and maintenance on subscription

Additional assistance and services you may require to optimize and expand your library operation, to free up staff for new projects and to make best use of your implemented solutions

**Delivered by experts from Professional Services
with regional library knowledge and in different languages**

# Details for Reference

# Training Services

## Use Cases

Library implemented Alma years ago

Most knowledgeable staff have since moved on to other roles

Remaining staff are following established workflows but don't know what they don't know

Haven't been able to keep up with new features; want to refresh/expand expertise

New staff have joined and would benefit from training

## Options

Selection from training menu

Customized and personalized trainings

Workshops

Webinars

For individual libraries

For consortia or user groups

Virtual or onsite

## Examples

Off-the-shelf training session for Analytics

Training series for acquisition workflows (Print and Electronic)

Leganto training for new library staff

Customized session about Primo and CDI

# Consulting Services

## Use Cases

Library would like to review and improve its current use of the systems

Need to support organizational changes and planning

Gain more insights into operations and usage of material + features

## Options

Review and optimize workflows and configuration

Customized Consulting Services

Analytics/reporting – service to build custom analyses, reports, and/or data visualizations

## Examples

Individual workshop to discuss and fine-tune acquisition workflows and set-up

Consolidate e-resource management life-cycle

Consulting session on campus-management

# Implementation Services

**(Post-initial Implementation Project)**

## Use Cases

You would like to set-up additional functional areas and take them in operation

You would like to implement new features released but do not have capacity or experience

Your organization merges with another library which should be added to your systems

Your library will become member of a network

## Options

Extend Service – training, configuration and roll-out of unused system functionality

Configuration, data services and training for addressing organizational changes and reflecting them in the systems

## Examples

Training, workflow analysis and set-up of Resource Sharing

Appending a new library to an Alma institution

Adding an institution to an Alma network

Integrating additional external data sources into Primo

# Technical Services

## Use Cases

Library leadership would like to promote value and impact of the library

Increase of efficiency - request to reduce manual work and increase automation by 3rd party integrations

Lack of capacity or knowledge of library/organizational IT staff

Special data requests – data preparation, data changes, uploads

## Options

3rd party integrations incl. development

Custom add-on development / Mini-applications

One-time service with an option for ongoing solution hosting and support

Data services

## Examples

Specification and development of a connector between Alma and an external payment system

Data preparations for migration

Data modifications per library request within Alma

Bulk changes on user data via API

Import of meta data from YouTube into Alma

# Managed Services

## Use Cases

Not enough bandwidth in the library team to cover ongoing requests for system administration and configuration adjustments

Struggling to find the time to build system expertise and set up new functionality to support the library needs

Change of staff / temporary knowledge gaps

## Options

Assisting your library with system administration and product configuration

Comprehensive list of services for Alma, Primo, Polaris, INN-Reach

Easy access to our product experts

Offered as an annual service subscription model

## Examples

Library plans a strategic project that requires specialized attention or activities and needs to free up staff from day-to-day work by outsourcing system administration

Library lost its Primo administrator and signs up for assistance to cover the time until a successor is onboard and trained.

# Premium Services – Our Mission

- Understanding and Addressing Your Needs

- Enhancing Product Utilization

- Optimizing Workflows Together

- Developing Services Based on Your Input

- Incorporating Feedback for Improvement

# For More Information

Get in touch with your Account Manager
or contact us at
Premium.Services@clarivate.com

Take a look at our Premium Services Page
https://exlibrisgroup.com/services/professional-services/

Meet us here at IGeLU to tell us what you need and
discuss options for your library

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# Thank You

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