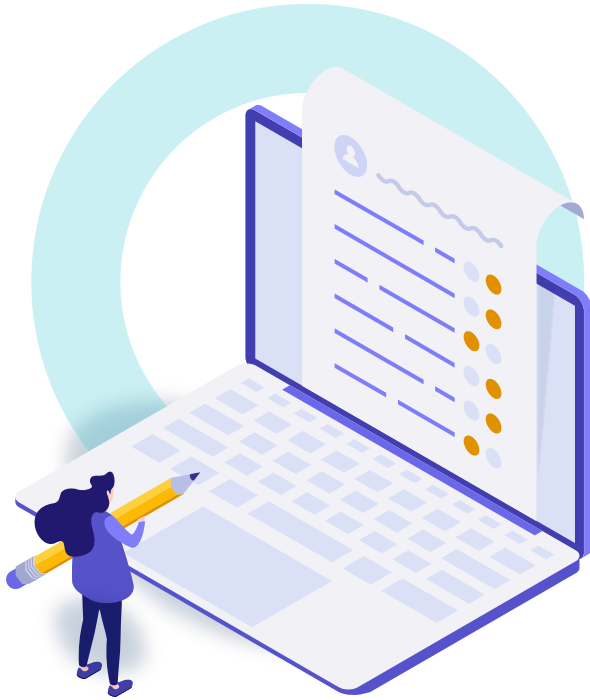# Ex Libris Customer Journey- Continuous Improvement

IGeLU 2022

Shelley Hostetler and Hilary Newman

Agenda

- Introductions

- Your Journey

- Customer Delight

- Support Response and Time to Resolve Initiative

- Q&A

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Introductions

Hilary Newman
Sr. Vice President
Customer Care

Shelley Hostetler
Head, Customer Success A & G,
Americas

- Based out of California, US

- 30 years in Library technology industry,

- Master of Library and Information Science (MLIS) from University of North Texas

- Experience with technology, customer user groups

- Highly focused on relationships and customer experience

- Based out of Illinois, US

- 23 years in Library technology industry,

- Master of Science, Library and Information Science (MLIS) from University of Illinois

- Experience with libraries globally, Support, product management

- Highly focused on library success and putting technology in its place

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You Are the Heart of Our Business

No changes to the way we work together

We are the same trusted, collaborative partner you've always known

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Understanding Your Experience

Solution discovery

Onboarding

Implementation

Renewal and Expansion

Optimization

Adoption

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Prioritizing your experience.
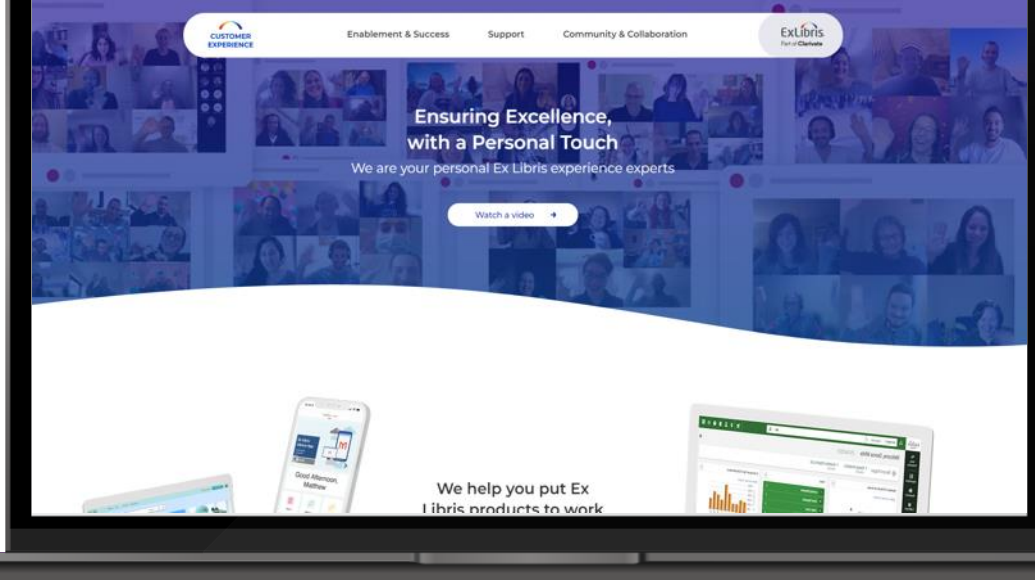
| Alma first year program | Knowledge Acceleration Plan (Webinar sessions) | Periodic Business Reviews | Premium 1-1 Services | Extending Chat Support |

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Alma Year 1 Success Program

Partnership
Dedicated focal point who will be your partner.

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

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

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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

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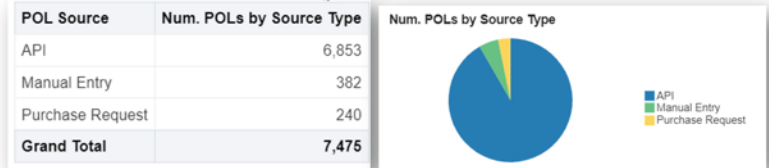
Customer Success in Action: Alma Business Reviews

Objectives

After our Alma Review today, you will be able to…

- Recognize features of Alma that are indicators of strong Alma habits
- Identify areas of Alma not currently being optimized
- Prioritize embracing underused features

Automate routine library services by eliminating the need to switch between systems

POL Source	Num. POLs by Source Type
API	6,853
Manual Entry	382
Purchase Request	240
Grand Total	**7,475**

Num. POLs by Source Type
- API
- Manual Entry
- Purchase Request

3-5 reporting codes in use

Invoicing Integrated with Oracle Financial

Simplify workflows and processes to get the job done

Import Profiles
- 157 total, 19 scheduled

Autoholdings
- 4 in use
- Wiley now available with April release

Use of CZ
- 45% of collections linked to CZ; 30% of portfolios
- Comparative data: 81% for collections and 74% for portfolios

Contact your Account Manager to request an Alma Business Review.

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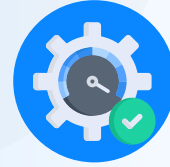Part of **Clarivate**

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

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Chat Support available

ExLibris Alma

ExLibris Primo

ExLibris Leganto

ExLibris Summon
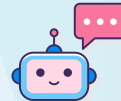
ExLibris Pivot-RP

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

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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.

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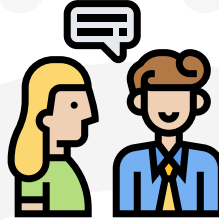
Tickets can stay open for quite some time with no regularly updates.

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.

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Improving Tech and Content Support Responsiveness and Time to Resolution
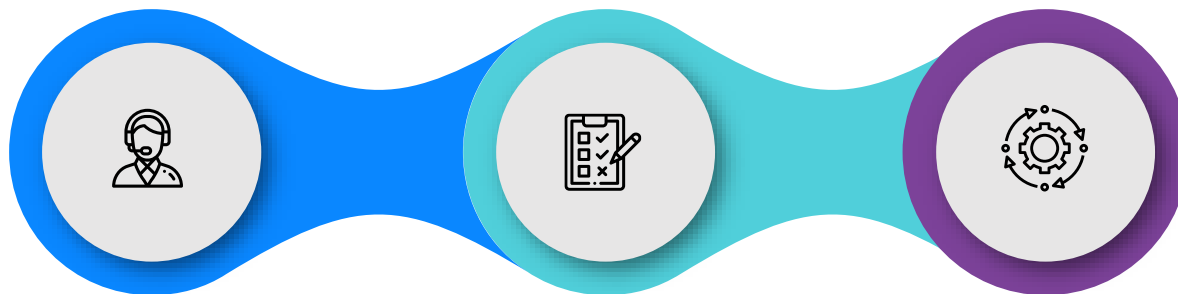
1.Support statuses

Shorter and Clearer

2.Backlog relief

Review differently, allow ongoing responsiveness

3.Process enhancements

chat and more

How will we be more responsive?

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?

1 cause-> many cases

Can it be resolved soon?

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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

- No Pending Product Review- cases will stay in-progress as we consult with product management

Cases Review

- Cases will be allocated to a dedicated team to expedite resolution
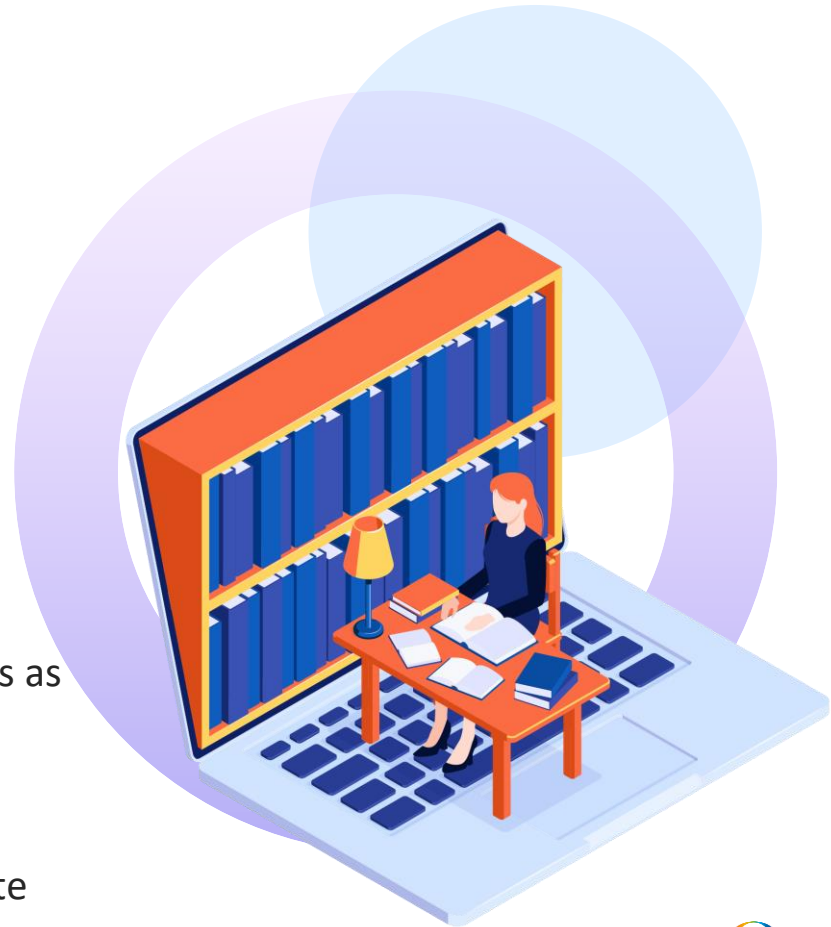
How can you learn more?

Knowledge Article:

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

Join webinars on September 19-21

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Technical Support Leadership

Alon Botvinik
North America

Kevin Cao
APAC- China

Martin Buescher
EMEA

Oscar Caballero
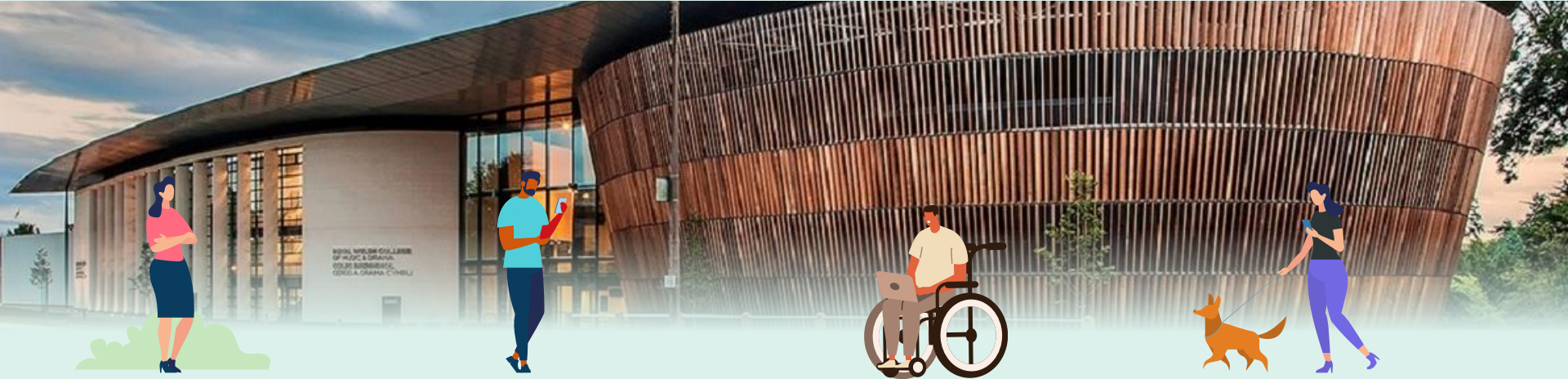Latin America

Zvi Vogel
Australia, New
Zealand and Israel

Matan Ilan
Japan/Korea
Support & Global PMO

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Together
we can make it work!

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Questions – Ask Me Anything!

IGELU
Conference
12th –15th September 2022

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Thank you!

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