

# Customer Life Cycle at Ex Libris

ELUNA | May 2017

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# Overall Integration Cycle



# So What Have We Accomplished?



## Product strategy implemented

- Summon over Alma
- Intota vision
- Unified enriched Content
- Leganto powered by SIPX



## Added 170 Workflow Solutions employees to Ex Libris

- Overall 800 employees



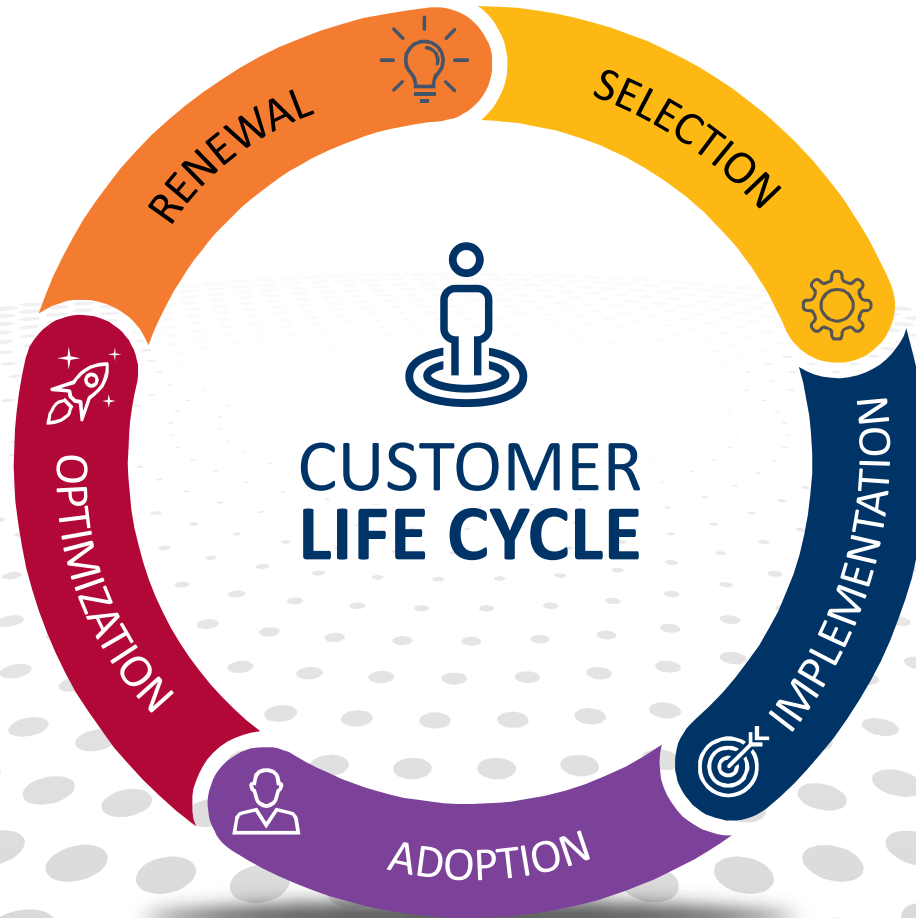
## Customer facing functions consolidated

- Ease migration to Alma

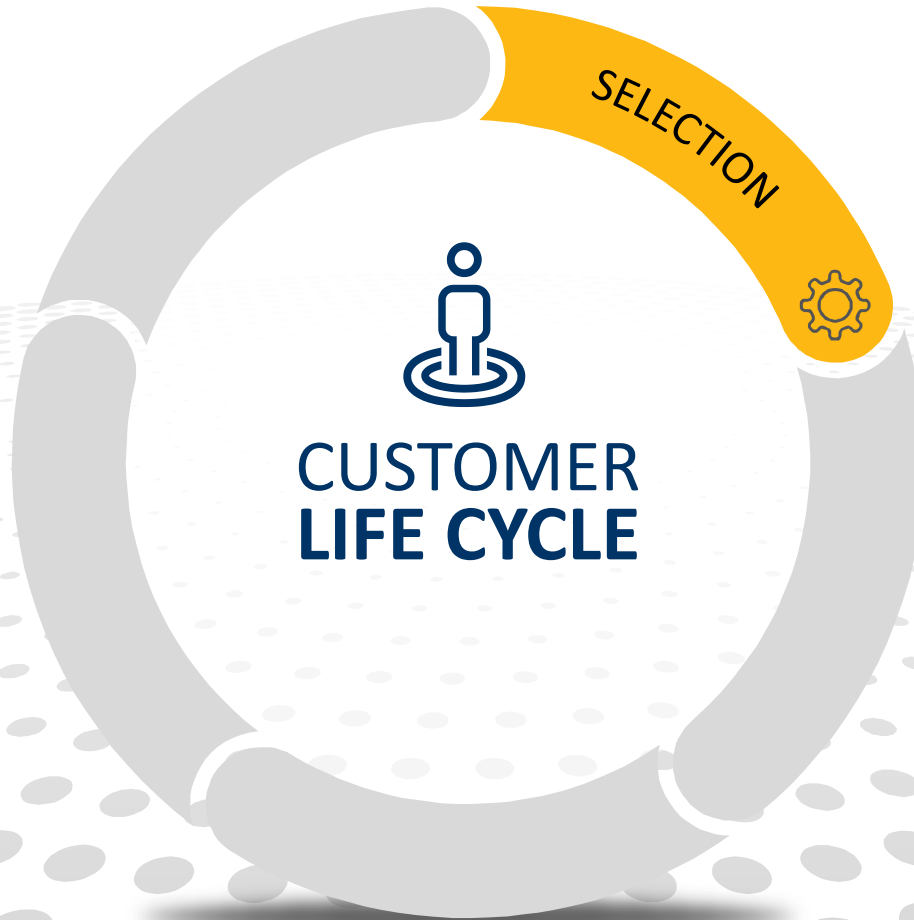


## Information Systems integrated

- Customer facing – SFDC, CKC, Status Page, Ideas
- Internal – Office 365, ERP



Service  
**Source**<sup>®</sup>



# Key Goals of Next-Gen Library Services Framework



# Driving Forces

Unified Resource Management

The Cloud

Better integration with other systems

Open platform

Ability to focus on new services

- Resource List management
- Other connections to Teaching and Learning
- Research Data Management

Community and collaboration



# Unified Resource Management

## Manage all resources in one set of workflows

- Consistent with budget allocations

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## Better manage e-resources

- Available to more staff
- Utilize Knowledgebase and Community data
- Open metadata



## Functionality for all resource management processes

- Cataloging
  - Fulfillment
  - Acquisition, including new models
  - Serials
  - Digitized resources
- 
- ...delivered in new ways

## Expose rich library data

- Linked Data



## Today's Environment

Multiple systems, duplicate data,  
and duplicate workflows

Integrated Library System

Link Resolver

Knowledgebase &  
Record Services

E-Resource Management System

Digital Repository(s)

## Next-Gen Environment

Single system, unified data,  
and unified workflows

**Ex Libris**  
**Alma**

Print, Electronic & Digital  
Resource Management

# Content Inventory 2017



<b>COLLECTIONS</b>	<b>3,159</b>
<b>PROVIDERS</b>	<b>339</b>
<b>RECORDS</b>	<b>2,915M</b>



<b>TITLES</b>	<b>414,032</b>
<b>PUBLISHERS</b>	<b>182,076</b>
<b>REFERED TITLES</b>	<b>50,758</b>
<b>ACADEMIC SCHOLARY TITLES</b>	<b>121,486</b>



<b>COLLECTIONS</b>	<b>2,236</b>
<b>PROVIDERS</b>	<b>264</b>
<b>RECORDS</b>	<b>1,232M</b>



<b>COLLECTIONS</b>	<b>33,761</b>
<b>PROVIDERS</b>	<b>6,765</b>
<b>RECORDS</b>	<b>1,775M</b>

Alma

<b>COLLECTIONS</b>	<b>15,262</b>
<b>PROVIDERS</b>	<b>2,514</b>
<b>ENRICHED BIB RECORDS</b>	<b>1,647M</b>
<b>AUTHORITY FILES</b>	<b>18</b>



<b>COLLECTIONS</b>	<b>6,446</b>
<b>PROVIDERS</b>	<b>637</b>

# The Cloud is Calling



# Integration with Other Systems

Library system is no longer an island

## Need interoperability

- Materials suppliers
- Campus finance systems
- Student information systems
- Mobile devices
- Self-check



Open Source,  
especially Discovery

# Integration with 3<sup>rd</sup> Party Discovery Systems

The screenshot shows the ExLibris Developer Network interface. At the top, there's a navigation bar with 'Developer Network' and links for Docs, Tech Blog, Code & Apps, Forum, and Dashboard. A search bar is also present. Below this, a 'Resources' section lists various systems: Primo, Alma, Rosetta, bX, SFX, MetaLib, Aleph, and Voyager. The main content area is titled 'Integration with 3rd Party Discovery systems' and includes a sidebar with a list of APIs and integrations. The main text explains that Ex Libris provides flexibility to deploy any discovery system and that Alma integrates with third-party discovery systems using various protocols. A diagram titled 'Third Party Discovery System' illustrates the integration process, showing a search for 'American History' and a list of results, with numbered callouts (1, 2, 3) indicating specific integration points.

ExLibris

Login | Signup

Developer Network Docs Tech Blog Code & Apps Forum Dashboard

Search

Resources: Primo Alma Rosetta bX SFX MetaLib Aleph Voyager

APIs

Integrations

- 3rd Party Discovery systems
  - Fulfillment services
  - Services page
- Bursar
- Digital (Remote)
- Finance
- NCIP
- OAI
- Publishing
- Remote Storage Facility
- Resource Sharing
- Self Check
- SMS
- SRU
- Users in Alma
- Z39.50

Ex Libris Developer Network / Alma / Integrations / 3rd Party Discovery systems

## Integration with 3rd Party Discovery systems

Initial Documentation. Subject to changes.

Ex Libris provides institutions with the flexibility to deploy any discovery system. Alma integrates with third party discovery systems using several protocols and methodologies. This article summarizes the integration points.

The following diagram illustrates the main functions in a discovery system that require integration with Alma:

The diagram shows a 'Third Party Discovery System' interface. It includes a search bar with the text 'American History'. Below the search bar, it says 'Results: 1 of 1,576'. The first result is 'American History Illustrated, John Williams, 1975', with a note 'Available at the Main Library' and a 'Get It' link. To the right, there's a 'Welcome, John Smith' message and a 'Loans' table. The table has columns for 'Title' and 'Due'. The rows are: 'History of America' (Due: 12-Jun), 'History of Alaska' (Due: 15-Jun), and 'History of Florida' (Due: 17-Jun). There are three numbered callouts: 1 points to the search bar, 2 points to the 'Get It' link, and 3 points to the 'Loans' table.

Third Party Discovery System

My Library

Search: American History

Results: 1 of 1,576

American History Illustrated, John Williams, 1975  
Available at the Main Library  
[Get It](#)

Welcome, John Smith

Loans:

Title	Due
History of America	12-Jun
History of Alaska	15-Jun
History of Florida	17-Jun

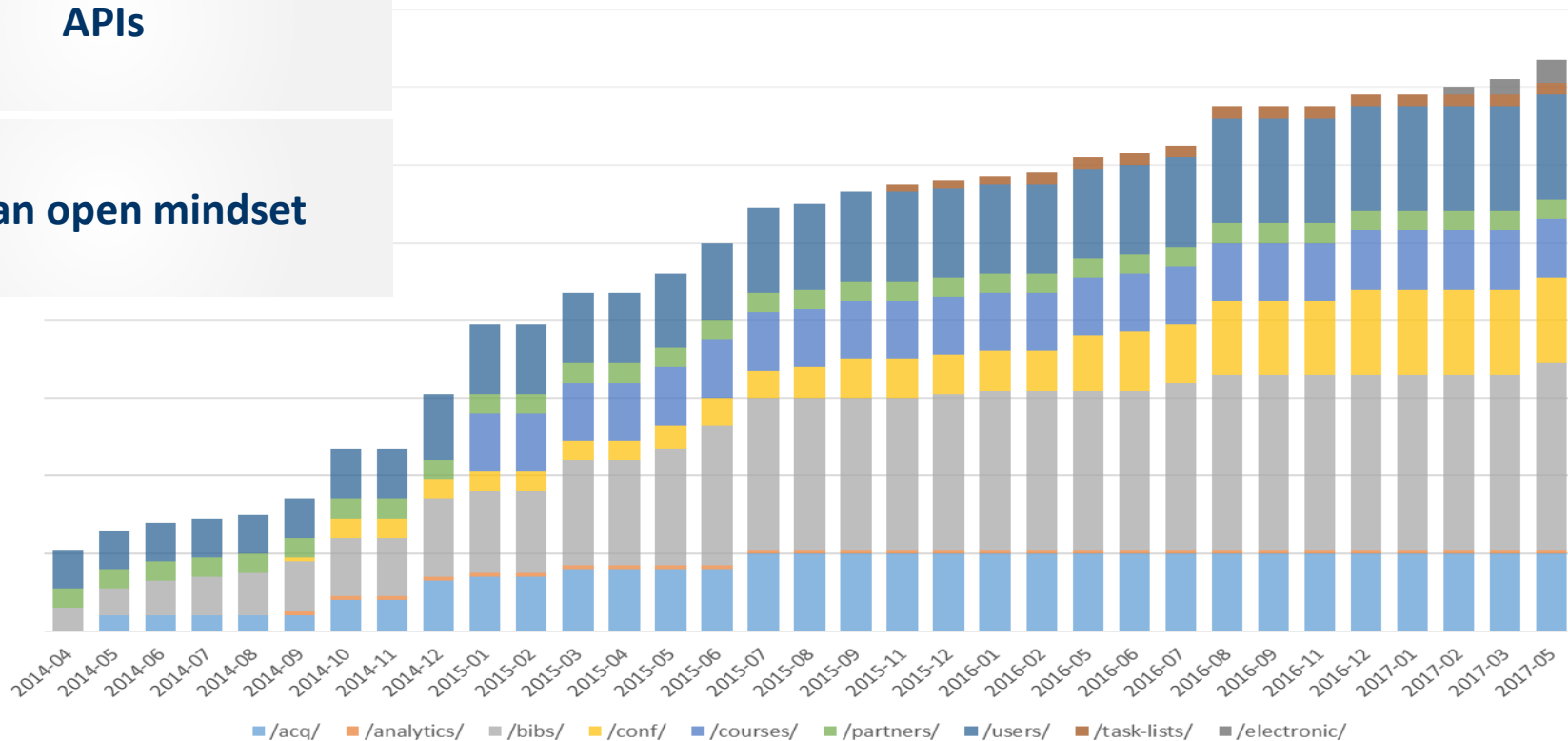
More...

# Requires an Open Platform

APIs

And an open mindset

ALMA API GROWTH





# CUSTOMER LIFE CYCLE

IMPLEMENTATION





# Practiced Professional Services Organization



Defined  
methodology and  
processes

Robust Alma  
Migration Engine

Implementation  
tools

Training program

Global Professional  
Services  
organization

**PROVEN RESULTS!**

**100% on time delivery**

**Over 90% satisfaction**



# Think Global, Act Local



## THINK GLOBAL

Implementation Methodologies,  
Kits, Tools, Processes,  
Systems, KPIs



**CONSISTENCY & EFFICIENCY**



## ACT LOCAL

Language, Culture, Time Zone,  
Market Priorities



**CUSTOMER CENTRIC**

# Successful Implementation Key Drivers

## Library/Ex Libris partnership

- Open communications
- We are equally invested in the library's success

## Change management aspects

- Alma is different...

## Strong project management

- Clear and predictable schedule

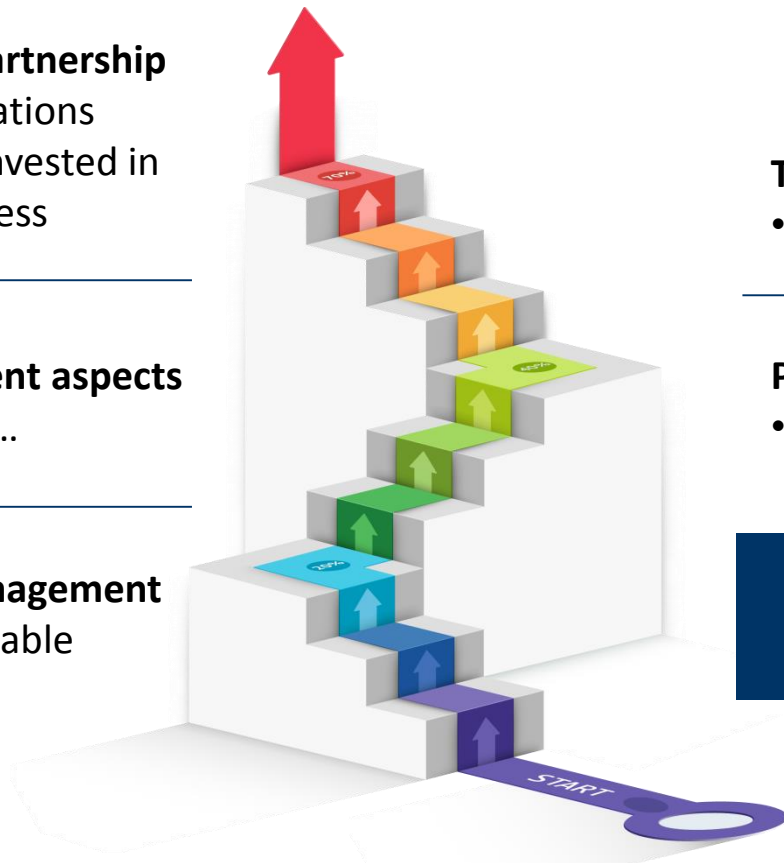
## Training is key

- Great content for training

## Preparing for the migration

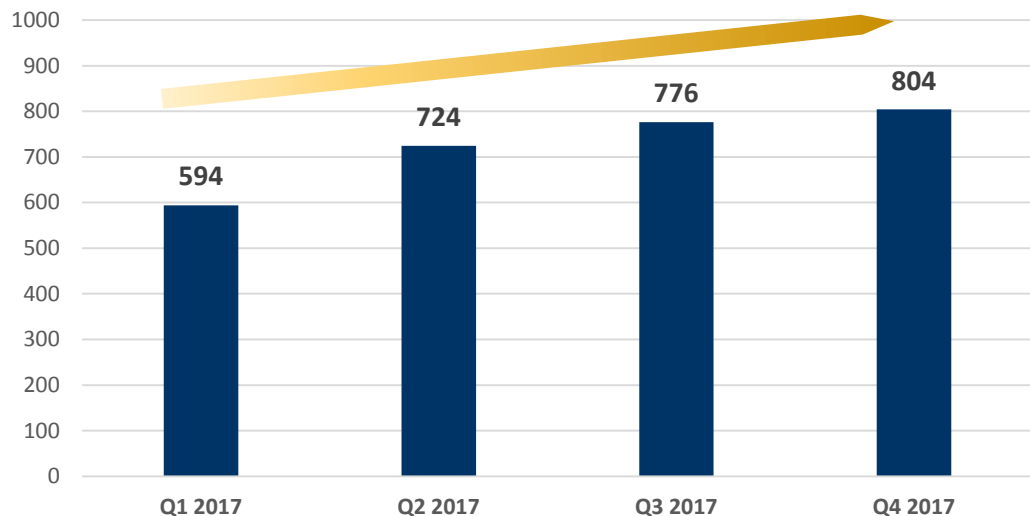
- Opportunity for library to map data

*It takes 3-6 months to realize Alma's added value*



# Professional Services 2017 Plans & Initiatives

## Alma Implementation Pipeline



## Highlighted NA Libraries Live in 2017

- Eastern Michigan University (1<sup>st</sup> SOA)
- University of California, Santa Barbara
- University of Pennsylvania

## Consortia:

- University of Georgia (31)
- California State University (23)
- CT State Colleges & Universities (18)
- Keystone Library Network (18)

Increase  
Implementation  
scalability

Focus on  
consortia

New products  
& offerings

Expand Professional  
Services team

# Global Education Team

Global Education organization is responsible for customer education and training across all Ex Libris products



## GOALS

### DEVELOP, PRODUCE & MAINTAIN PRODUCT TRAINING KITS

#### 2017 kits highlights:

- Alma Digital
- Alma New UX
- Using Primo
- Summon over Alma
- campusM
- Rosetta

### OPERATE EDUCATION PROGRAMS

- Alma Administration Certification – monthly cycle (280 customers certified in Q1 2017)
- Primo Administration Certification – planned in 2017
- Alma and Primo “Ask the Expert”

### DELIVER TRAINING

- Post-implementation customer training engagements




# CUSTOMER LIFE CYCLE



ADOPTION

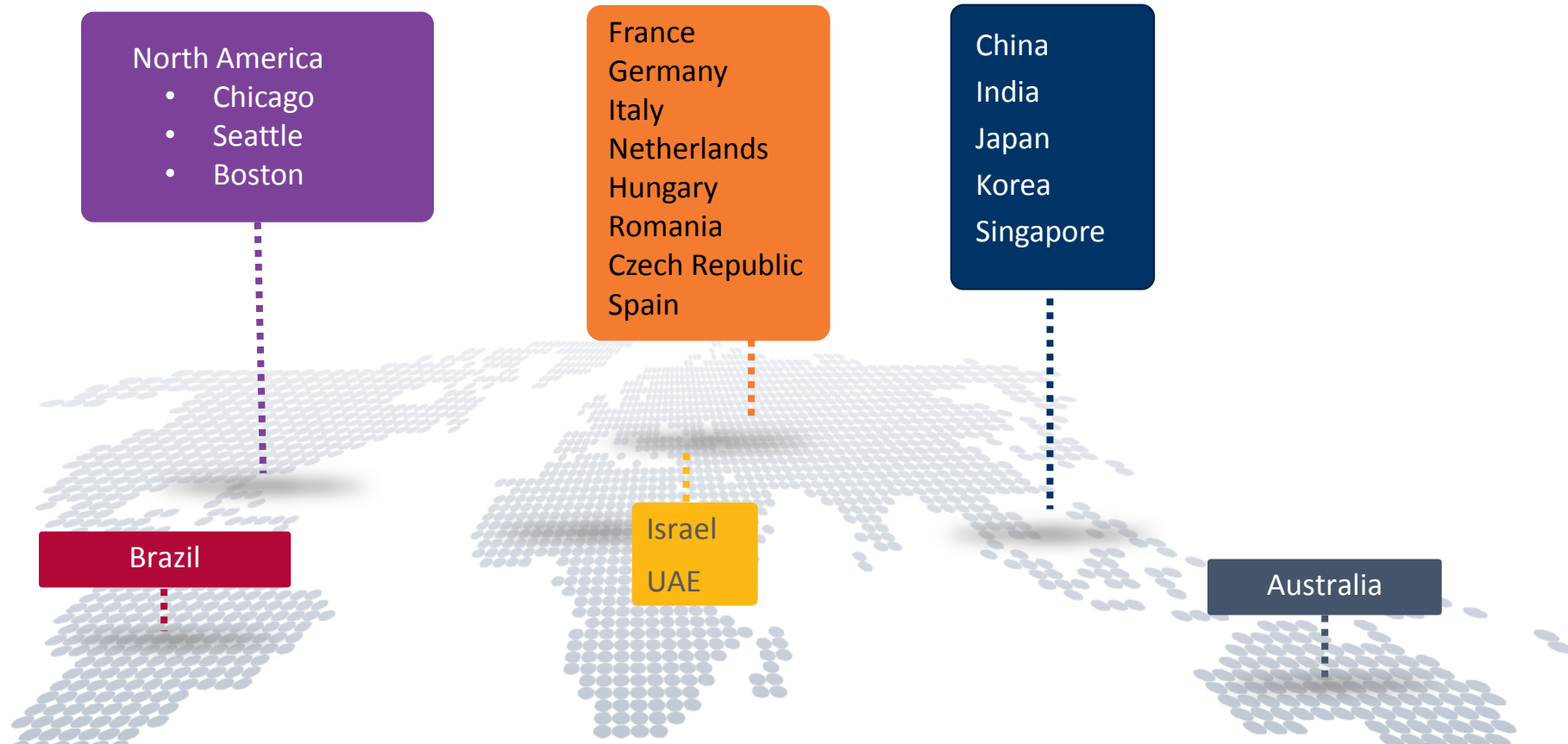
# Factors for Successful Adoption

## Everett Rogers “Five Factors”

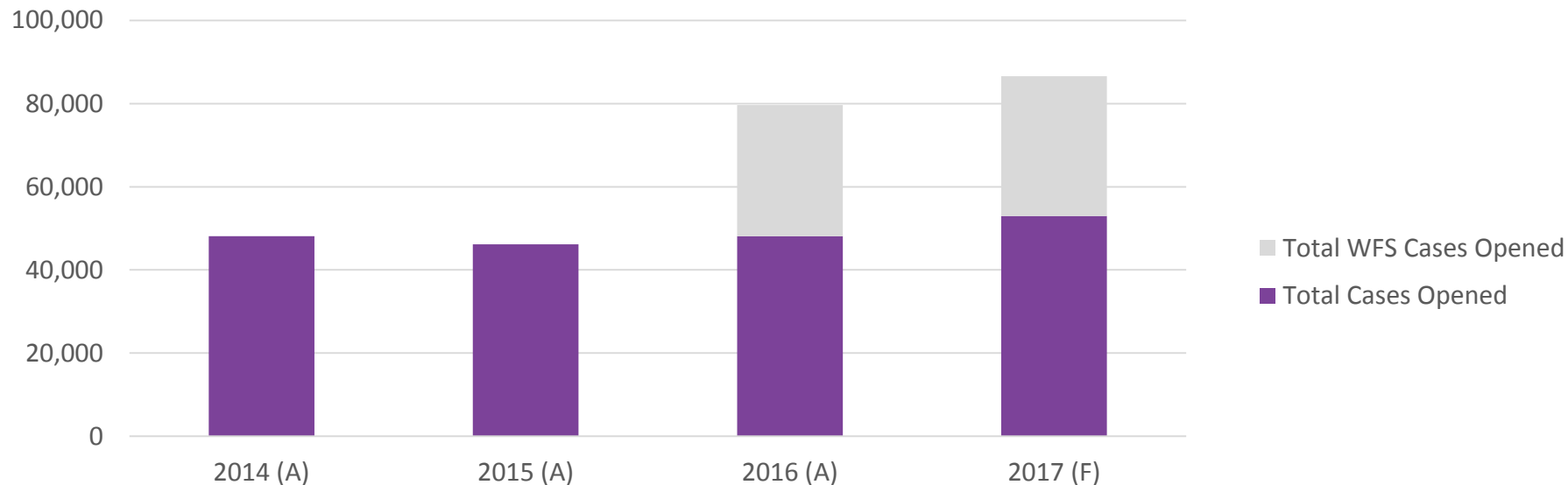
Trait	Definition	 ExLibris a ProQuest Company
Relative Advantage	Being better than the ideas it supersedes	Open, unified Resource management in the Cloud
Compatibility	Consistent with values & experience of potential adopters	Designed for libraries with libraries
Complexity	Relatively difficult to understand and use	Web-based; Documentation; Support; Customer Success
Trialability	Can experiment on a limited basis	Sandboxes
Observability	Results are visible to others	Community Sharing

Account for 49-87% of the variance in the rate of new product adoption

# Global Support Presence in 18 Countries



# Overall Customer Support Volume



STABLE CASE VOLUME  
OVER PAST YEARS

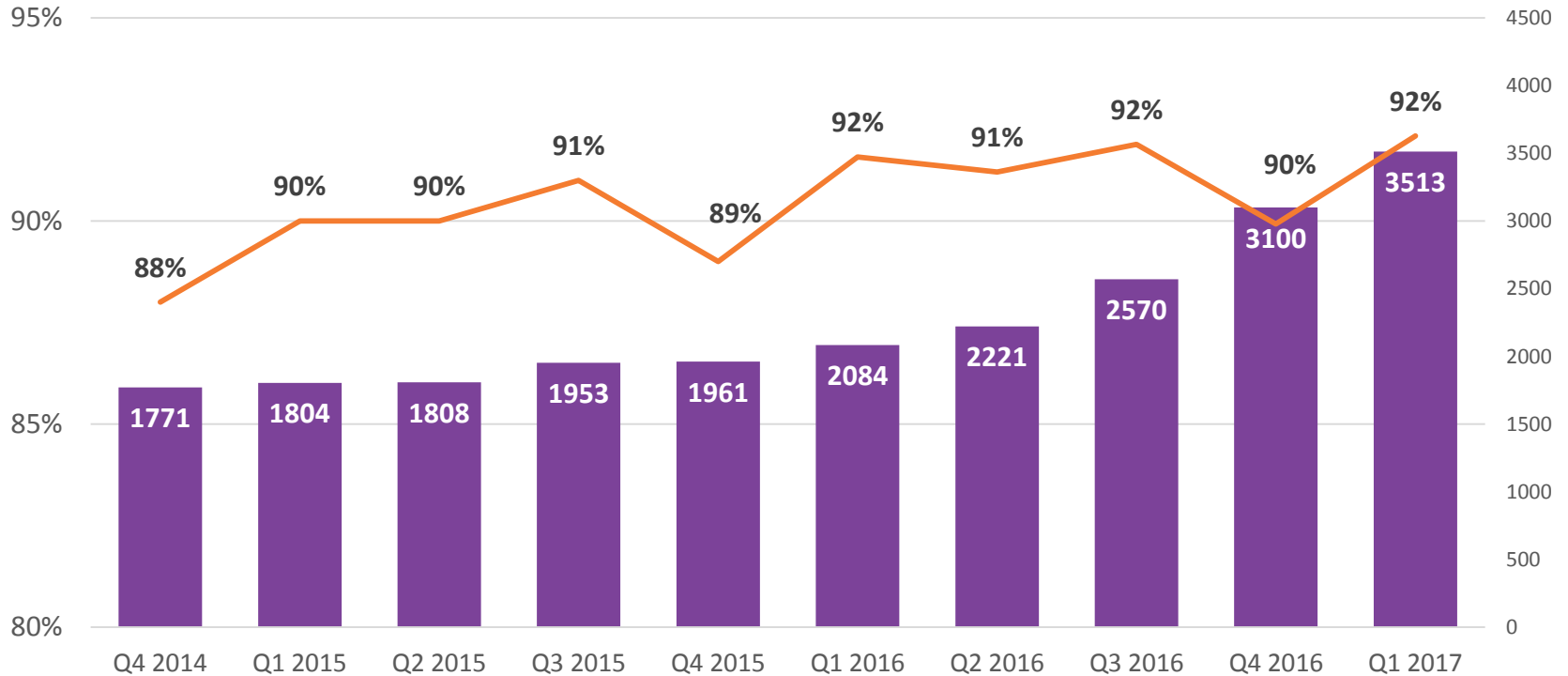
SIGNIFICANT GROWTH  
IN NUMBER OF  
INSTITUTIONS

1/3 OF ALL CASES ARE  
RELATED TO CONTENT

DECREASE IN  
SFX, VOYAGER AND  
ALEPH CASES



# Case Surveys Satisfaction Rate



# Case Surveys Drive Improvement!

## MEASURE

Results appear on personal dashboards for all levels: analysts to COO

## REPORT

Monthly report to support management

## ENGAGE

- Phone call follow up for outstanding cases
- Ongoing communication of improvements



01

02



03

04



05

## ANALYZE

Weekly content analysis for all comments received

## ACT

- Support processes change upon customer feedback
- Results serve as basis for professional training

# Customer Success Team



*“Customer success is about getting customers to use your product with a smile on their faces.”*

**Newly expanded team at Ex Libris: 2 in 2016; 7 in 2017**

**Ensures customers feel they are receiving value for their investment**

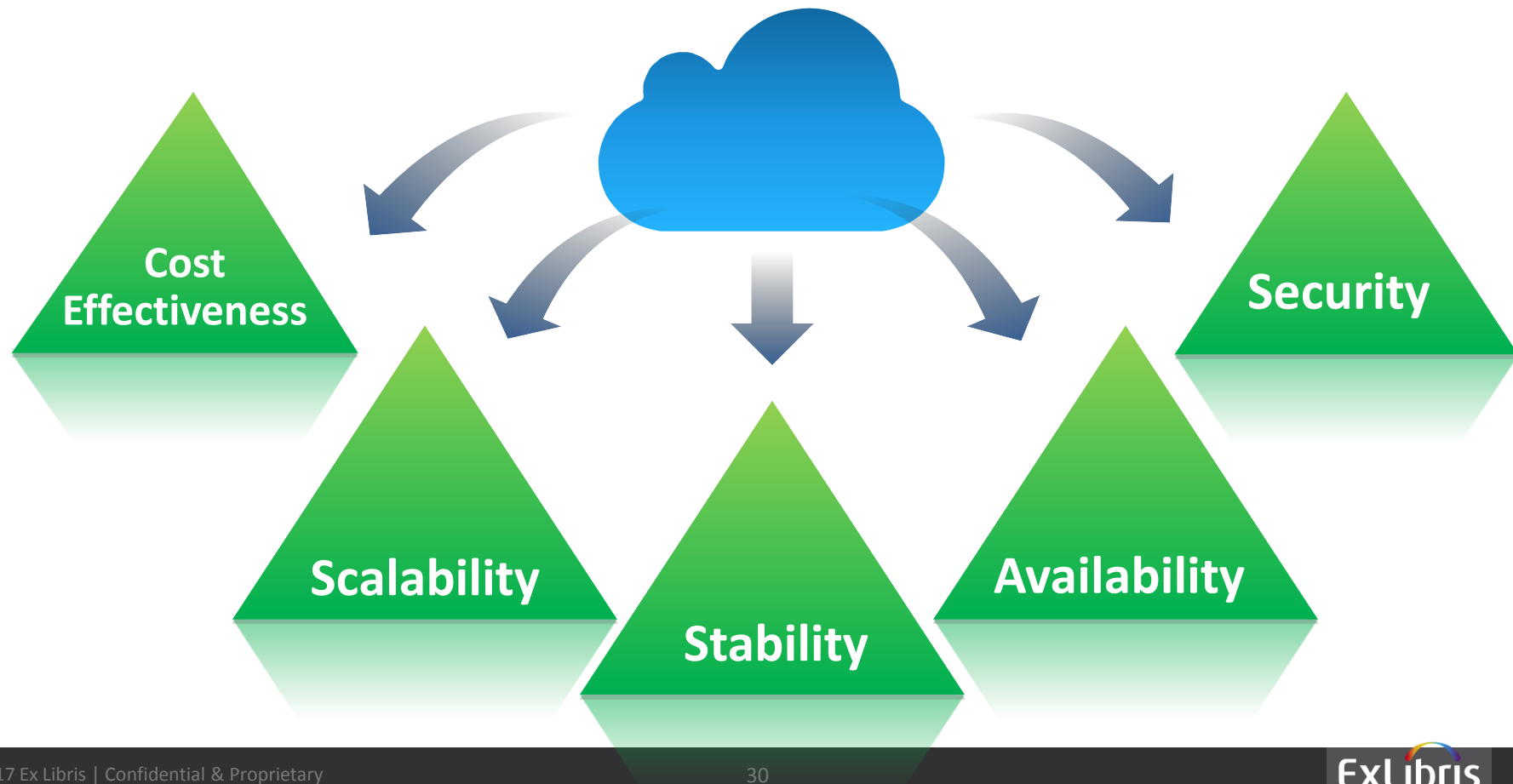
**Works with other Ex Libris departments when a customer is “in pain”**



# DATA CENTER TOUR



# Ex Libris Cloud Requirements



# Cloud Uptime 2016 - 2017

	# live institutions	% of customers meeting Contractual SLA (99.5%)	% of customers meeting internal SLA (99.85%)
ExLibris Alma	579	100%	100%
ExLibris Summon	1217	Yearly uptime 99.97%	
ExLibris Primo	996	99.90%	99.80%
ExLibris Primo Central	1700	Yearly uptime 99.94%	
ExLibris campusM	49	100%	100%
ExLibris SFX	417	100%	100%
bx	480	Yearly uptime 99.97%	
		>99.97% OF CUSTOMERS MEET SLA	>99.90% OF CUSTOMERS MEET INTERNAL SLA

# Certified with the Most Rigid Security Standards

## MAINTAIN EXISTING CERTIFICATIONS



ISO/IEC 27001:2013



Data centers are  
SSAE-16 certified  
(formerly SAS-70)



ICO Registered (UK  
Data Protection Act)



CSA STAR – Self  
assessment



ISO 27018:2014  
Privacy Standard

## PLAN FOR NEW CERTIFICATIONS IN 2017:



US Federal - FedRAMP (Alma/Primo)



ISO 22301: 2012 -  
Business Continuity Management Systems Requirements



# We Are at Cyber War...

Ex Libris continues to experience DDoS attempts that aim to prevent legitimate users from accessing services by increasing the load on the system



**Attack patterns change dynamically**



**May result in short disruptions to system performance**



**Increased number of attacks as of Q4/2016**

## Type of attacks identified:

**Primo Search Attack**

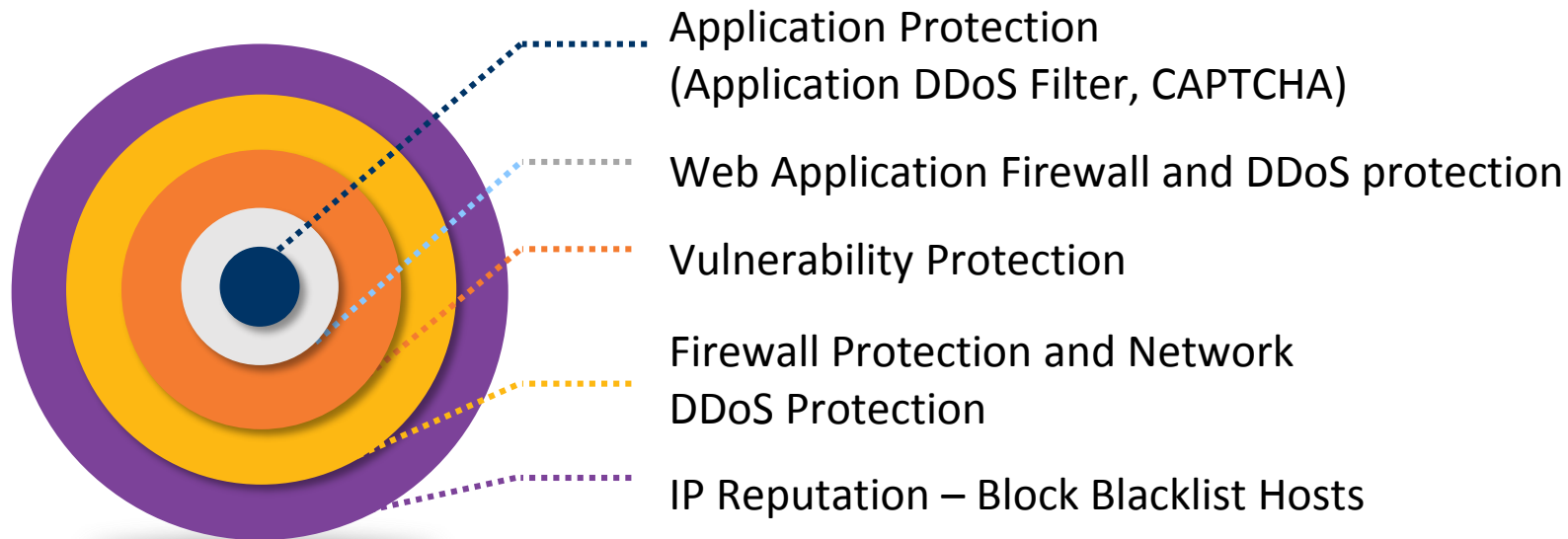
**Mail Sending  
Functionality Attack**

**Global DNS  
“Dyn Attack”**

# Layered Protection

**AUTOMATICALLY BLOCKING SUSPICIOUS ACTIVITY**

**CONTINUOUSLY PROTECTING AGAINST NEW PATTERNS**





# CUSTOMER LIFE CYCLE



OPTIMIZATION

# Ex Libris Customer Knowledge Center



[Training](#) | [Documentation](#) | [Knowledge Articles](#) | [Developer Network](#) | [More Sites](#)

What can we help you with?

Search



[System Status](#)

[Submit a Case](#)

Browse by product:

[Alma](#) [Primo](#) [Summon](#) [Rosetta](#) [campusM](#) [Leganto](#) [Aleph](#) [Voyager](#) [SFX](#)  
[bx](#) [360 Services](#) [Intota](#) [Ulrich's](#) [Metalib](#) [Verde](#) [DigiTool](#) [360 KB](#) [+](#)



Knowledge Articles

Access quick answers to questions our  
Support team is asked



Product  
Documentation

Learn from comprehensive material prepared  
by our documentation team

Featured Topics

- > Security Update - Customer Announcement
- > Introduction to the Knowledge Center
- > Introduction Video for 360, Summon, Intota, AquaBrowser and Ulrich's Customers!

**KNOWLEDGE ARTICLES,  
DOCUMENTATION & TRAINING  
UNDER A UNIFIED PLATFORM**

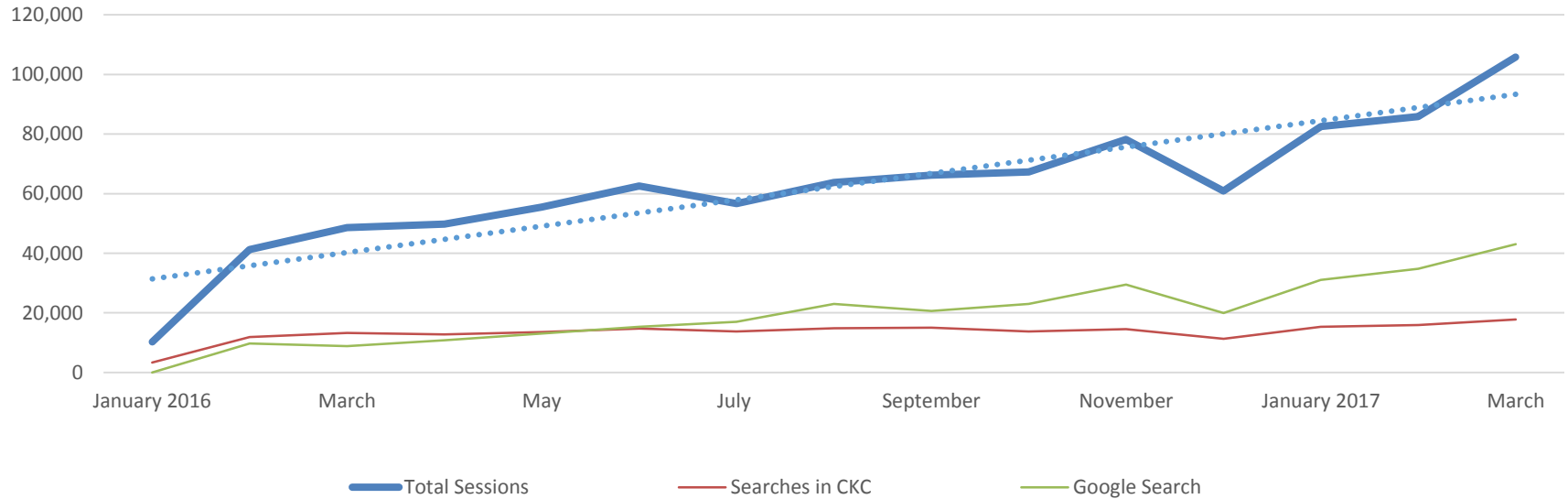
**SINGLE SEARCH FOR  
ALL CONTENT**

**MODERN CUSTOMER  
EXPERIENCE**

**FREE AND OPEN  
TO ALL**

# Customer Usage Goes Up

## KNOWLEDGE CENTER TRAFFIC



Was this article helpful?



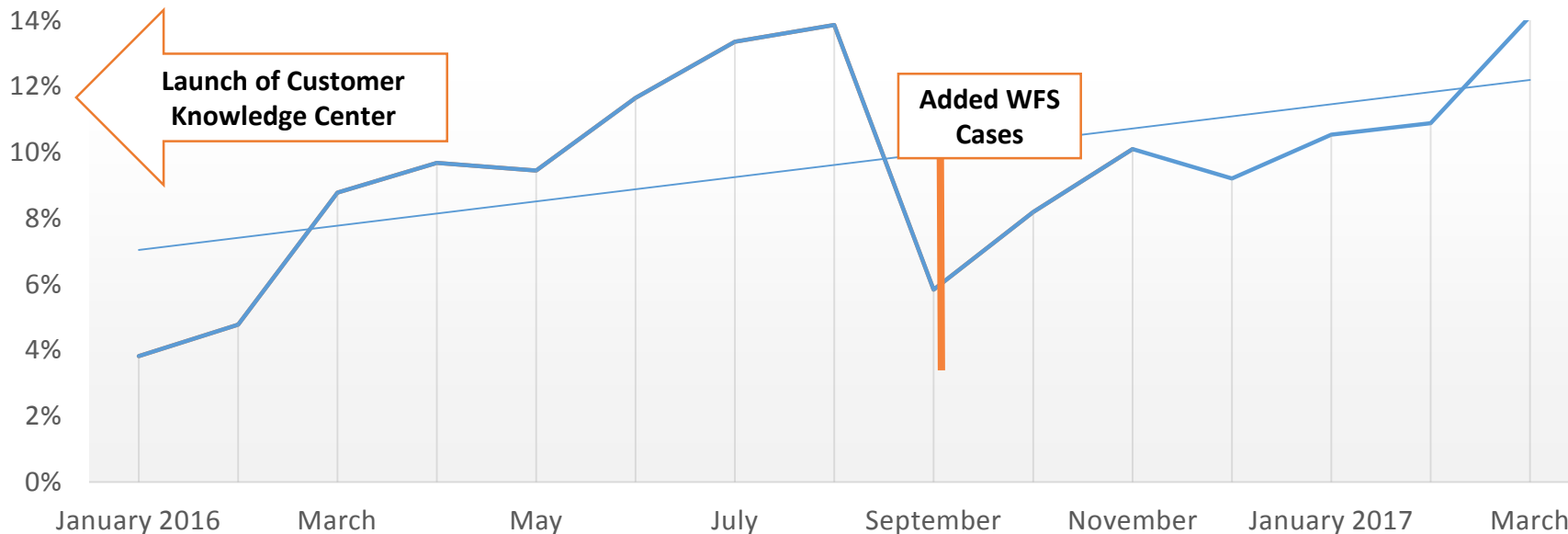
Yes



No

# Closely Integrated with Global Support

## % CASES CLOSED WITH KNOWLEDGE ARTICLES



**HIGHER CUSTOMER CASE  
SATISFACTION**

**AIM TO DECREASE TIME  
TO RESOLUTION**

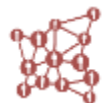
# Working with the Community



Authorities



Bib Records  
Enrichment



SFX  
Contributions



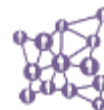
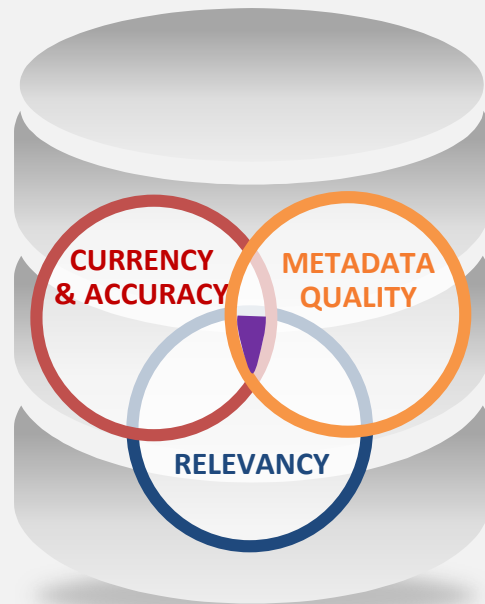
PWG (NERS)



Tailored  
Collections



Community Voting



Alma CZ  
Contributions

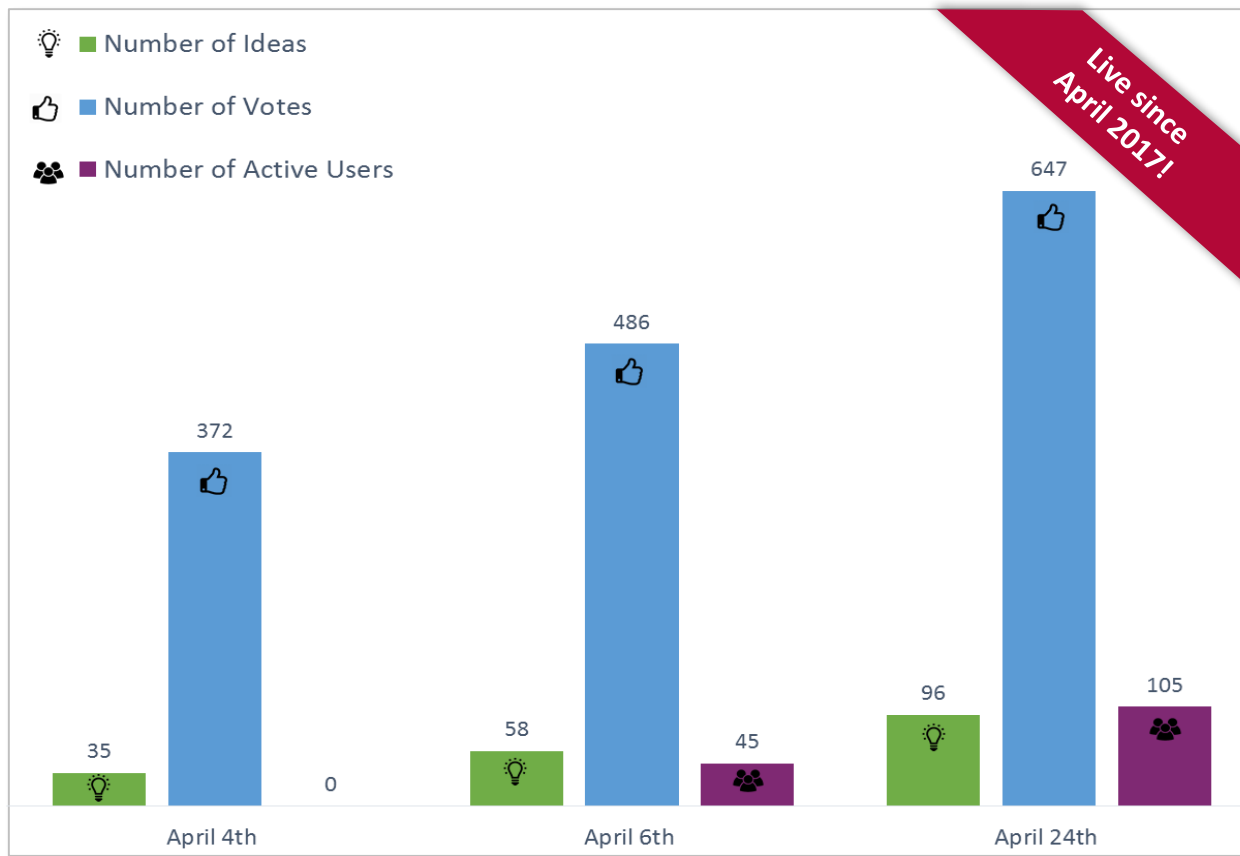


Support Surveys




KB Advisory Board

# New! Content Operations Voting in Ideas Exchange





# Single Tenant Status Page – Coming Soon...











































 **System Status**

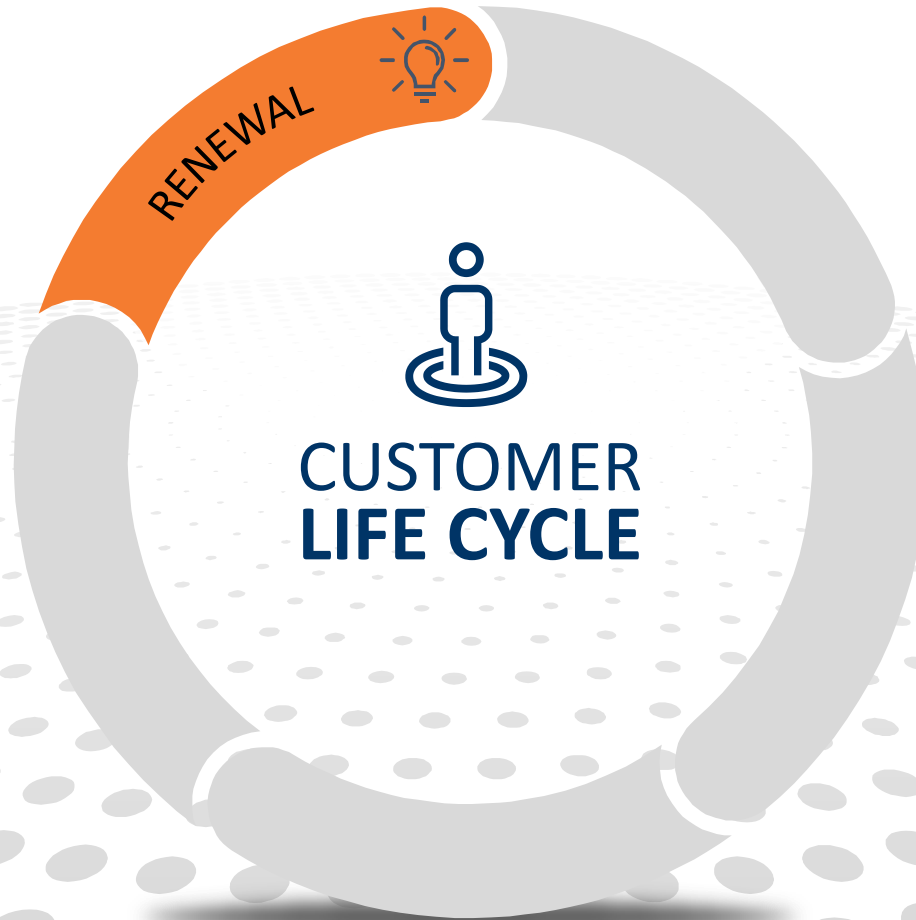
[System Status](#) | [Single Tenant](#) | [Privacy Policy](#) | [Security](#)

The System Status page presents the latest information on the availability of all multitenant instances. You may check this page at any time to see the current status information, or subscribe to be notified via email of interruptions to any individual service. If you are experiencing a real-time, operational issue that is not indicated below, please inform us by opening a customer support request.

**Product:**  **Region:**

[Remember my instances](#) [Reset](#)

	Instances	Email Alerts	Current Status	Apr-23	Apr-22	Apr-21	Apr-20	Apr-19	Scheduled Maintenance
<input type="checkbox"/>	Aleph EU01								
<input type="checkbox"/>	Aleph NA01								
<input type="checkbox"/>	Aleph AP01								
<input type="checkbox"/>	Primo EU01								
<input type="checkbox"/>	Primo NA01								
<input type="checkbox"/>	Primo AP01								



# Continue to Earn Your Business

## Deliver continuous value

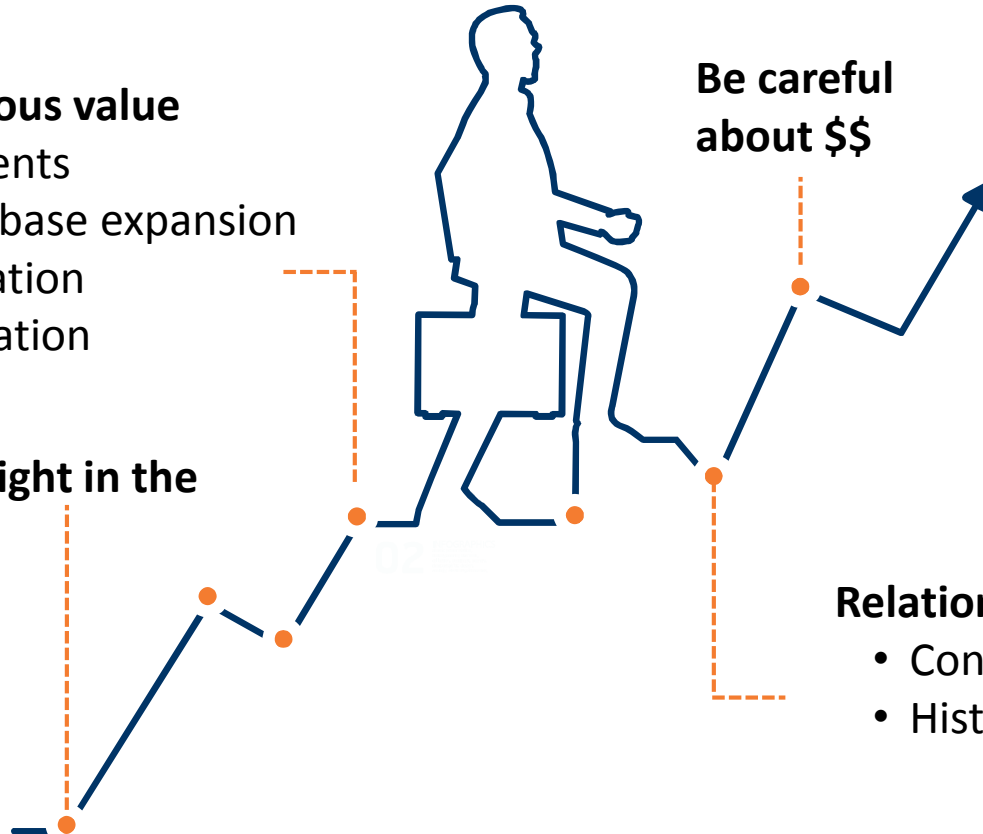
- Enhancements
- Knowledgebase expansion
- Documentation
- Communication

## Do everything right in the first 4 steps

Be careful  
about \$\$

## Relationship

- Contact
- History



# Continue to Share Your Vision



## NEW INTEGRATIONS

- Summon over Alma
- Ulrich's in SFX

## NEW SERVICES

- Leganto
- Alma-D

## UNDERSTAND TRENDS

- In library
- On campus
- In higher education

# WHAT MAKES **EX LIBRIS** DIFFERENT?







# Thank You

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