

WORKFLOW CONSULTING



DOES ANY OF THIS SOUND FAMILIAR?

- We implemented our system years ago and haven't made the changes we could to take advantage of all the new features and improved workflows.
- When we started using our system, we never thought we'd need all the reports that we do now – how do we get them?!
- There has to be a better way to do this!

With Innovative's Workflow Consulting services, an experienced Senior Library Training Consultant will visit your library to examine your current workflows, identify opportunities for improvement, and suggest changes to increase efficiency. Depending on the needs of your library, your consultant will focus on workflow optimization in specific areas, such as holds, technical services, collection development, reporting, or circulation.

In addition, we'll discuss new features for your system, ensure your Innovative products are working in sync, and make sure that your system is set up to give you reports you need. Workflow Consulting services include staff training on targeted functions and a written report of our findings and recommendations.

Here are some things our Training Consultants have heard after recent Workflow Consulting visits:

- This way saves so much time.
- I didn't know we could use the system that way!
- I didn't know we owned that product.

● OBJECTIVES

- Establish clear understanding of library's goals and needs
- Identify key workflows and procedures to be analyzed
- Analyze current workflows with staff and management
- Examine current system settings and configurations in key areas
- Provide written report detailing recommendations to improve workflow, maximize system capabilities, optimize library efficiency

● PROJECT SCOPE

- Customer chooses emphasis for visit, examples include:
 - » Technical Services
 - » Circulation/Web OPAC
 - » System Functions
- Establish and review library's goals and needs assessment
- Analyze current workflow, processes and procedures
- Examine current system settings/configuration
- Discuss workflow improvements and configuration changes for optimal functional efficiency in defined key areas
- Discuss and review tools for statistics gathering and database analysis

● APPROACH

■ Innovative is committed to:

- Tailoring our proven planning, instruction, and facilitation processes to the library's culture and business needs
- Collaborating with the library's leadership and staff team to ensure optimal relevance and transfer of learning from the consulting
- Providing recommendations to the library for optimizing system performance and workflow processes to increase productivity

● DELIVERY

- A senior Innovative consultant provides service
- Service is typically delivered on-site
- Sold in 1-day increments, two-day minimum
- A detailed written report is provided within three weeks of on-site visit