Quick Facts

Sarah Tudesco
- Program Director, Assessment & User Experience Research at Yale University Library
- Team: 2 professionals: User Experience, Research Librarian & Library Business Analyst

Yale University Library
- Large, research university with 6,000+ undergraduate students and 7,500+ graduate students.
- The Faculty of Arts & Sciences
- There are

Yale University Library
- 15 libraries
- XX staff
Request to Delivery Task Force

Yale University Library will undertake a review of its request-to-delivery workflows to identify possible areas for improvement, which could include improved management tools and their related support as well as increased staffing.

The task force will make recommendations to improve the turnaround time and efficiency of request-to-delivery workflows for collections that support the sciences.

Task Force Members from:
- Director of Collection Development
- Director of Electronic Resources & Serials Management
- Library Information Technology
- Library Preservation and Conservation
- Selector – Physics, Geology, and Linguistics
- Collection Manager – Science Library
- Collection Development – Medical Library
- Finance
- Assessment & User Experience Research
2019: Sep. – Task Force Charged

2019: Oct.-Dec. - Data Gathering

2020: Jan.-Feb. Service Blueprinting


2021: Jan. Data analysis

2021: Feb.-Mar. Report to sponsors
I. What is it?

II. What does this have to do with user experience?

III. What does this have to do with us right now?

IV. Service blueprinting in action
I. What is a service blueprint?

- It is a detailed **model of the steps in a service** from start to finish *
- It is a **communication tool** and a path to shared vision
- It is a generator of **team buy in**
- It is an **analysis** of the critical points in a service
- It is an **artifact** that can and should be shared, edited, and discussed widely

* “Start” and “finish” are relative terms!
I. What is a service blueprint?

Reasons to generate a service blueprint:

*Improve an existing service*
By understanding the original service in detail – it’s possible to *identify pain points* and eliminate or ameliorate them.

*Design and plan a new service*
A blueprint for a new service allows for the creation of *service prototypes* and testing before a service is launched to customers.

*Understand an existing service*
There are many services which have become so ingrained in organizational culture that they are no longer understood by anyone. Blueprints can reveal *silos and areas of opacity* in existing processes.
1. What is a service blueprint?

Reasons to generate a service blueprint:

*Understanding the actors in a service*
When there are many actors (patrons, liaison librarians, license review team members, technical services staff, budget managers, finance department staff, etc.) it can be very useful to have a blueprint to help manage the complexity of a situation.

*Transitioning a high-touch service to a low-touch service or vice versa.*
Broadening or narrowing the audience for a service requires careful consideration as to how that might be achieved. A blueprint can help guide the way for this.
II. What does this have to do with user experience?

Based on what you’ve heard so far…

what do YOU think

service design blueprints

have to do with user experience?
II. What does this have to do with user experience?

*User Experience*

The user experience is the measure of your end-user’s interaction with your services.

*Service Design Blueprints*

The blueprint describes the systems, the actors, and the processes that constitute the service that the user engages with.
What does this have to do with us right now?

Reasons to generate a service blueprint:

*From the charge...*

Review[ing] [the library’s] request-to-delivery workflows to identify possible areas for improvement ... [and] making recommendations to improve the turnaround time and efficiency of request-to-delivery workflows for YUL collections that support the Sciences.
IV. Anatomy of Blueprint
License failure
Bird’s Eye View of the Mast Service Blueprint for Request to Delivery Service
Request to Delivery Blueprint: Close-Up

- First phase of the process
- Illustrates where a request begins and gets initially processed
Request to Delivery Blueprint: Close-Up

- Second phase of the process
- Outlines the steps of the license review and vendor setup process.
- Cross-departmental communication issues are visualized (multiple methods of documenting and forwarding issues).

### Licensing/Preliminary Order Phase (L Phase)

<table>
<thead>
<tr>
<th>Step</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>L1</td>
<td>Submit E-Resource Purchase Request form</td>
</tr>
<tr>
<td>L2</td>
<td>New Vendor Setup</td>
</tr>
<tr>
<td>L3</td>
<td>Request received by E-Resources Team</td>
</tr>
<tr>
<td>L4</td>
<td>License sent to License Review Team</td>
</tr>
<tr>
<td>L5</td>
<td>License entered into license tracking system</td>
</tr>
<tr>
<td>L6</td>
<td>License made available to claim (aka License up for grabs)</td>
</tr>
<tr>
<td>L7</td>
<td>License claimed by member of License Review Team</td>
</tr>
</tbody>
</table>

- **Acquisitions Online Resource Order Request Form**
- **ERMS Acq (Lead Acq Ass't)**
- **ERMS Acq (Lead Acq Ass't)**
- **License Review Team**
- **ERMS Acq (Lic Ass't)**
- **ERMS Acq (Lic Ass't)**
- **License Review Team member**

- **Selector**
- **Library Business Office (LBO)**
- **Email (E-collections mailman list)**
- **Sharepoint 2007 (Internal – LRT)**
- **License Review Team**
- **ERMS Acq (Lic Ass't)**

- **Collection Manager**
- **Voyager**
- **Drupal form produces a formatted email. Info copy/pasted.**
- **Email (LRT mailman list)**
- **Information needs to copied & pasted from email to Sharepoint system.**
- **Email (LRT mailman list)**

- **Sharepoint 2007 (External – ER)**
- **Workday**
- **If license not provided, need to reach out to Vendor to get the license.**
- **Can there be fewer emails?**
- **Can there be less copy / pasting?**
- **Email (LRT mailman list)**

- **Drupal Website Form**
- **Vendor setup may take a long time (Especially International Vendors).**
- **Communication Loops**
- **Email**
- **Did license or terms come attached to the order require? This varies by request.**

- **Could there be integrations from form to tracking system?**
- **Email**
- **Police about vendor setup in Workday (tax forms, etc.)?**
- **Suggestion from MF. Should this be in the Order phase (O2)?**

- **The funds used to pay for resources may need to abide by rules**
- **This is also an opportunity to decrease headaches and improve integration**

- **If vendor has license or terms of service - policy is to review against new standard.**

- **Should selector be able to track progress of license review?**
- **Can be a time log before license is claimed.**
Blueprint Activities

- Built blueprints for multiple, relevant scenarios.
- Consulted with subject matter experts in different areas (Finance, License Review, E-Resources Acquisitions, E-Resources Management).
- Captured ideas, questions as staff outlined the steps in the request to delivery workflow.
- After task force activities resumed in Fall 2020, we reviewed and revised blueprints to reflect a changed service environment.
- Moved to the next stage of the blueprint process – synthesis and analysis.
- Worked to identify strategic themes – recommendations that will require the organization to make long term changes and innovations.
- Also identified tactical fixes – areas that might be acted on in the short-term to improve the service.
Benefits of the Blueprint

- Blueprints can **uncover weaknesses** in our organization. Poor user experiences can often be attributed to internal organizational issues. A blueprint effectively maps key dependencies, thus allowing the library to identify the stress points.
- Blueprints help **identify opportunities for streamlining and optimization**. The visualization of relationships in blueprints uncovers potential improvements and ways to eliminate redundancy.
- Blueprinting is most useful when coordinating complex services because it **bridges cross-department efforts**. Users encounter many touchpoints throughout one journey and don’t know which department owns which touchpoint.
Resources


2. Service Blueprints: Definition. NN/g Nielsen Norman Group.


4. The difference between a journey map and a service blueprint. Megan Erin Miller. Practical Service Design.
Thank you & Questions

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