IUG Enhancements Forum notes

5/7/19

Presenters: Beth Juhl, Jeremy Goldstein, Jennifer Thie

Forum recorder: Gwyneth Jelinek

Beth Juhl, University of Arkansas Libraries:

* At IUG last year, we had just gotten Idea Lab up and running. There had only been 3 timed challenges and Always Open had just been added. There were more questions than answers.
* Now, there have been 5 more timed challenges and the recent winners have been announced
* To date, 51 ideas have been implemented from Idea Lab
* On the IUG website under “enhancements” you can see all selected ideas
* Ideas keep getting selected even if there is not a current timed challenge – the iii product owners can select ideas from Always Open at any time.
* Polaris ideas are selected over Sierra ideas at a rate of 3/1 but times…they are a changin’!
* Of the registered members, 20% have submitted an idea and 90% have voted
* To participate, the Idea Lab url is idealab.iii.com
* Sierra has a slightly bigger community, but Polaris has a slightly more active community
* The idea lab leadership team makes tweaks as needed to ensure that Idea Lab works best for its users. One such tweak made was adjusting the graduation criteria needed (views and likes) for ideas to go on to the expert review stage
* Another tweak made was to split the Always Open space into a Sierra side and a Polaris side
* The idea lab team posts in the IUG forums when ideas need just a few more votes/comments to go on to the next phase
* There is a Strategic Partners area in which you have to be a Strategic Partner to see
* Sierra folks can see Polaris challenges and vice/versa – in case anyone is interested in learning about what the other product can do (or needs improvement on)
* Any iii product customer can participate in Idea Lab – you do not have to be a member of IUG to do so
* Everyone in all libraries can vote. In the old enhancements process, only a library as a whole got a vote. The front line staff are invaluable in knowing how the products are used on a daily basis and provide great feedback
* iii plans to do annual schedules of timed challenges so we can prepare
* Jeremy Goldstein and Beth Juhl are the current IUG Idea Lab co-coordinators. Maisam Nouh will replace Beth who is going on to be IUG secretary.

Things we can all work on to make it more successful:

* Sometimes ideas get put in that are too big in scope (e.g. Print Templates are hard!). It is more helpful to know exactly what is hard about it and how it could be better. Use cases are everything!
* We need great moderators and expert reviewers and are currently recruiting
* We are trying to figure out how to spotlight lesser used features that may not get as many votes, but need to be enhanced nonetheless
* We need more academic library participation

Jennifer Thie, Innovative

* Jennifer has been with iii since October 2018 and became the liaison to the idea lab committee in January 2019.
* The iii team also includes Laura Frasca and Deidre Stretton (Sierra side product owners), Kellie Conner (Polaris product owner), Toni Minick (Inspire), Tate Davis
* The Idea Lab team have regular phone calls to plan and discuss best practices and challenges
* The product owners are constantly in Idea Lab, reviewing ideas, and seeing what can be selected
* iii is paying close attention to the feedback happening in Idea Lab
* The product owners don’t necessarily wait for an idea to graduate to expert review phase – they can go in ask questions, make comments, and grab ideas ahead of schedule to put the best ones forward towards the road map
* In March we had the Polaris Potluck and Sierra Smorgasboard challenges in which past-popular ideas were pre-seeded to get feedback on which were the most important to implement first. The ideas were pulled from Always Open as well as from the old enhancements process
* An advantage to the challenges with pre-seeded ideas is that the winning/prioritized ideas get on the road map faster
* The winning ideas from Sierra Smorgasboard and Polaris Potluck are:

Hold Modifications “My Account” (an idea from Eeva Stierwalt in Always Open) that will be in Sierra 5.1. Ability to suspend holds in bulk on patron account (an idea from Wes Osborn from a previous timed challenge that didn’t “win”) will be added to Polaris 6.4

* We learned that we need a longer announcement cycle and so there is now a focus on announcing planned timed challenges well in advance
* Ideas don’t “go away”. You can still comment on archived ideas
* Pairwise works by comparing each idea against all the other ideas as a precise way to determine importance
* Follow the iii blog <https://www.iii.com/blog/> or the forums on [www.innovativeusers.org](http://www.innovativeusers.org)

Timed challenge announcements:

June 2019 Polaris: Only the Lonely: Time for Tech Services – ideas to improve back-room staff workflow and efficiency

September 2019 Sierra: Sierra Create Lists Challenge

October 2019 Polaris: Lions and Tigers and Holds, Oh my!

November 2019 Sierra: Death to the Pop-ups

* In each challenge, some ideas will be pre-seeded (pulled from Always Open and other timed challenges) but there is also opportunity for the community to put in new ideas
* In Q4, the 2020 challenges will be announced
* Don’t forget that Always Open is…always open
* If you attended the Sierra or Polaris road map sessions and noticed the light bulb icons next to road map items…those ideas came from idea lab

Jeremy Goldstein (took questions/comments from the group)

Q (Question), C (Comment), A (Answer)

* C: We LOVE Idea Lab
* C: Idea Lab is time consuming. You have to specifically mark it on your calendar to remember to get in there and view/comment/like
* A: Idea Lab moves ideas forward more quickly as compared to the old ballot procedure – where some ideas would get stuck there for years without moving forward
* Q: Can we lump ideas together (ideas that are similar or make sense to work together)? We want to be able to point to other ideas that might work well with this one.
* A: You can share ideas. Moderators are there to recognize two similar ideas and get the ideas flowing among them
* Q: Can we continue to comment on winning ideas so we don’t get into a situation of “I didn’t expect it to work that way”?
* A: the PO’s can talk to people who make the comments to find out what they really want
* C: (about archived ideas) – We should be able to comment on archived ideas – it is intended to be a bank for ideas, not a cemetery. Archived ideas should be able to be revived so they don’t need to be re-created from scratch
* C: A user would like a ranking of ideas instead of pairwise
* C: There is a bug in which the ability to comment gets grayed out
* A: Spigit is aware of the bug and we’ll remind them to fix it
* Q: Is there an Idea Lab app?
* A: Not yet, but the site is mobile responsive
* Q: How can you best promote your idea?
* A: You can email it to groups of people or tag more than one person in the comments
* Q: Will there be an Inspire Always Open?
* A: Probably in the future
* Q: (from iii to audience) Would you like a feature in which iii can post a question and solicit feedback from libraries (if platform allows?) Would you log-in and see questions of the week?
* A: yes
* Q: How to get prompts/reminders to go into Idea Lab?
* A: Sierra listserv, IUG forums, following ideas or people in Idea Lab itself – sign up to be alerted via email
* C: Future plans for Idea lab team are to clean up the list of registered users so we can send emails from Idea lab
* C: We can turn on a feature so that if there is new activity it will send an email
* Q: (from iii) do we need to send more emails about challenges?
* A: yes
* Q: (from iii) Define how this is a lot of work for libraries?
* A: Ideas have to be promoted with members to encourage them to vote. We can’t get an email every time there is a new idea. Writing down all the valuable ideas takes time (they commented that they could create a whole new position at their library focused solely on working in Idea lab).

Overall, the audience raised their hands that they prefer Idea Lab over the old enhancements process. In the old system, they felt that by the time an idea was ready to be voted on or implemented on, they didn’t understand it anymore. This system is way more interactive.

Respectfully submitted,

Gwyneth Jelinek