



If I Ran the Zoo or: How an Idea Becomes a Product

Whitney Murphy

Agenda

2) Research & Sizing

4) Development & Testing



1) Idea Submission

3) Prioritization & Tradeoffs

5) Product Launch

Idea Submission



Where Do We Start?

Our best ideas
start with
YOU





Many Points of Connection

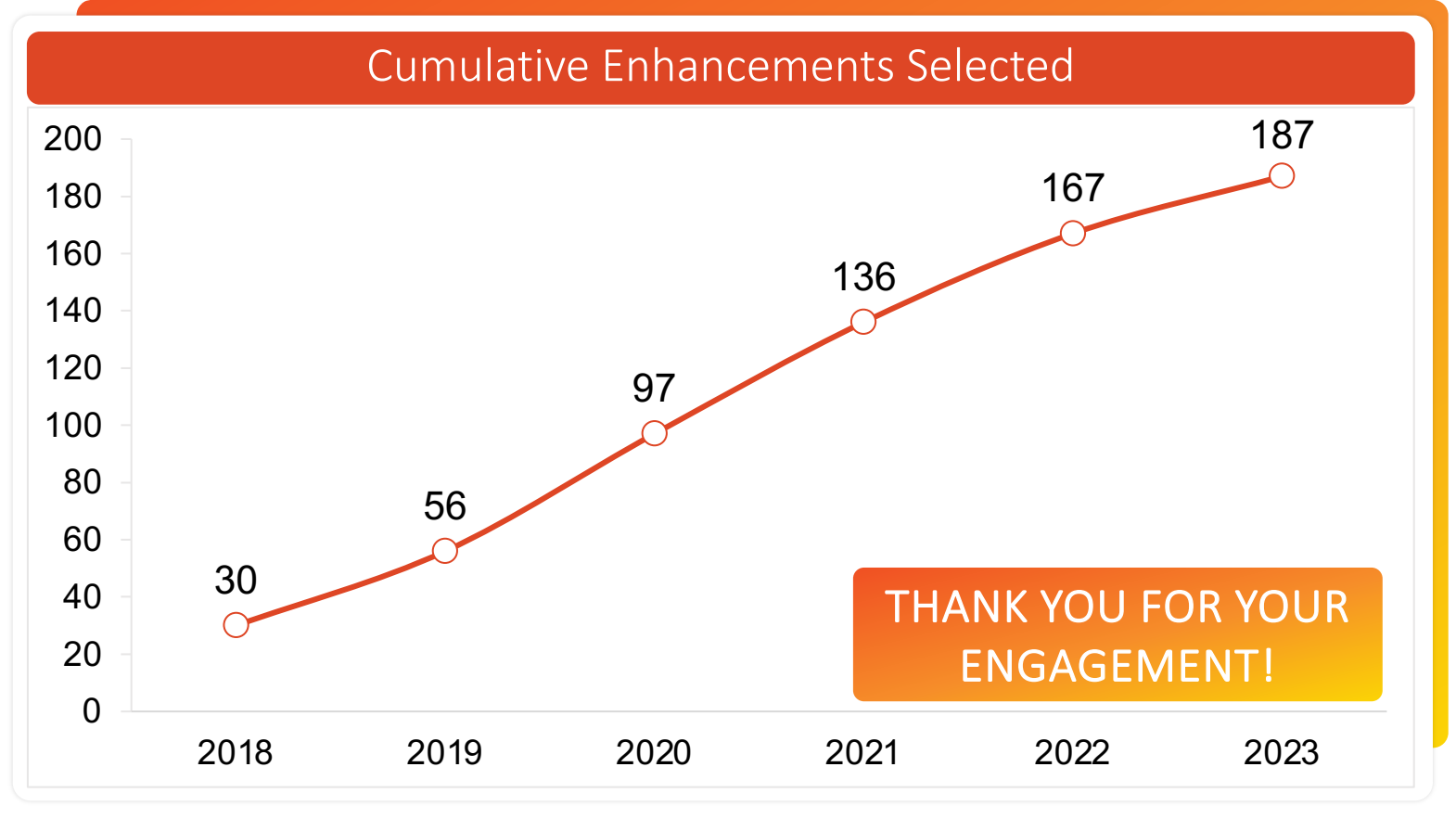
- Focus groups
 - Early adopters
 - Advisory committees
- 1:1 conversations
 - Customer meetings
 - Customer Success discussions
- Market analysis

The image displays two screenshots of software interfaces. The top screenshot is titled 'Productboard' and shows a dashboard for 'Innovative Product Status Board - New'. It features a grid of cards with various icons and text, such as 'Add ability to reprint bills', 'Batch cancel order records', and 'Hidden review file management and bulk delete'. The bottom screenshot is titled 'Idea Exchange' and shows a landing page for 'innovative Part of Clarivate Idea Exchange'. It includes a header with the logo, a main banner with the text 'Innovate with us' and 'Submit your ideas to the community, explore and support others ideas and be a part of defining a better future.', and several sections for user interaction, including 'Have an idea?', 'Vote your favorite ideas!', and 'Product Forums' with links for 'ILS - Polaris' and 'ILS - Sierra'. A search bar and 'Recently Activity' section are also visible on the right side of the interface.



Through the Years...

- From 2018 to present, we have incorporated nearly 190 enhancements into our Sierra & Polaris products
- 30 more ideas are in the planning stage





Idea Exchange is Always Open

- We launched Idea Exchange on 3 April
 - Idea Exchange replaced Idea Lab
- In just **5 weeks**, we have received input from **200** users
- Please visit Idea Exchange to continue submitting and voting for enhancements to help us understand what matters most

Idea Exchange Engagement



201
users



102
new ideas



1,988
votes



141
comments



Idea Submission Review

- You are critical to our product's success; thank you!

- We have many avenues to get solicit feedback and market trends

- Idea Exchange replaced Idea Lab; find us here: ideas.iii.com



Research & Sizing



Define Scale of Requests

- What specifically needs to be built?
- What is the end goal? What does the user need?
- How are we going to measure success?





What Needs to Be Built?

- Review all enhancements received after last planning cycle
- For each enhancement, establish importance, substance and significance; is there a there there?
- The Expert Reviewers are amazing!





What is the End Goal?

- What does the library need? Also, will it help other libraries?

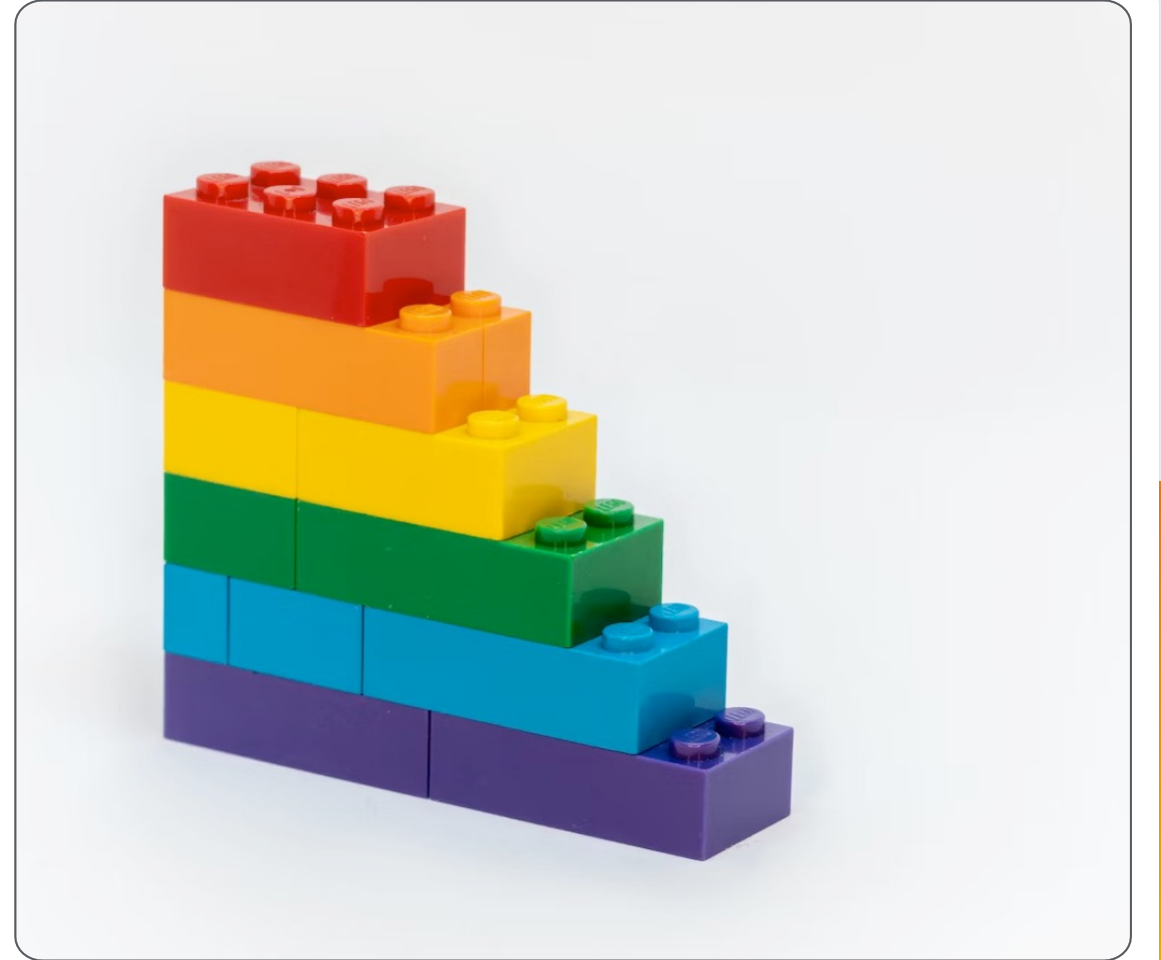
- Are there other ways of satisfying the request?





What is Success?

- We have several ways to measure product success
- Metrics are a crucial tool to assess impact
- User feedback is also key to ensuring product-market fit
- Retention is yet another way to understand overall product success





Process of Elimination

Where Do We Stand?



Is the enhancement simply too expensive?



Is success unattainable?



Does the functionality already exist?

All remaining enhancements go into the backlog



Sizing Up Our Options

- We work with the Engineers to assign sizing estimates to new ideas
- These are rough estimates, designed to provide a sense of scope and the size of the idea
- Partner with the User Experience (UX) team to develop mockups and wireframes





Research & Sizing Review

- During this phase, we need to first start by understanding the request & the end goal
- Next, we have our first round of tradeoffs as we assess feasibility
- With a weeded list in hand, we enlist help from other teams to determine scope & create initial mockups



Picture credit: [LEGO Education](#)

Prioritization & Tradeoffs



Prioritization 101

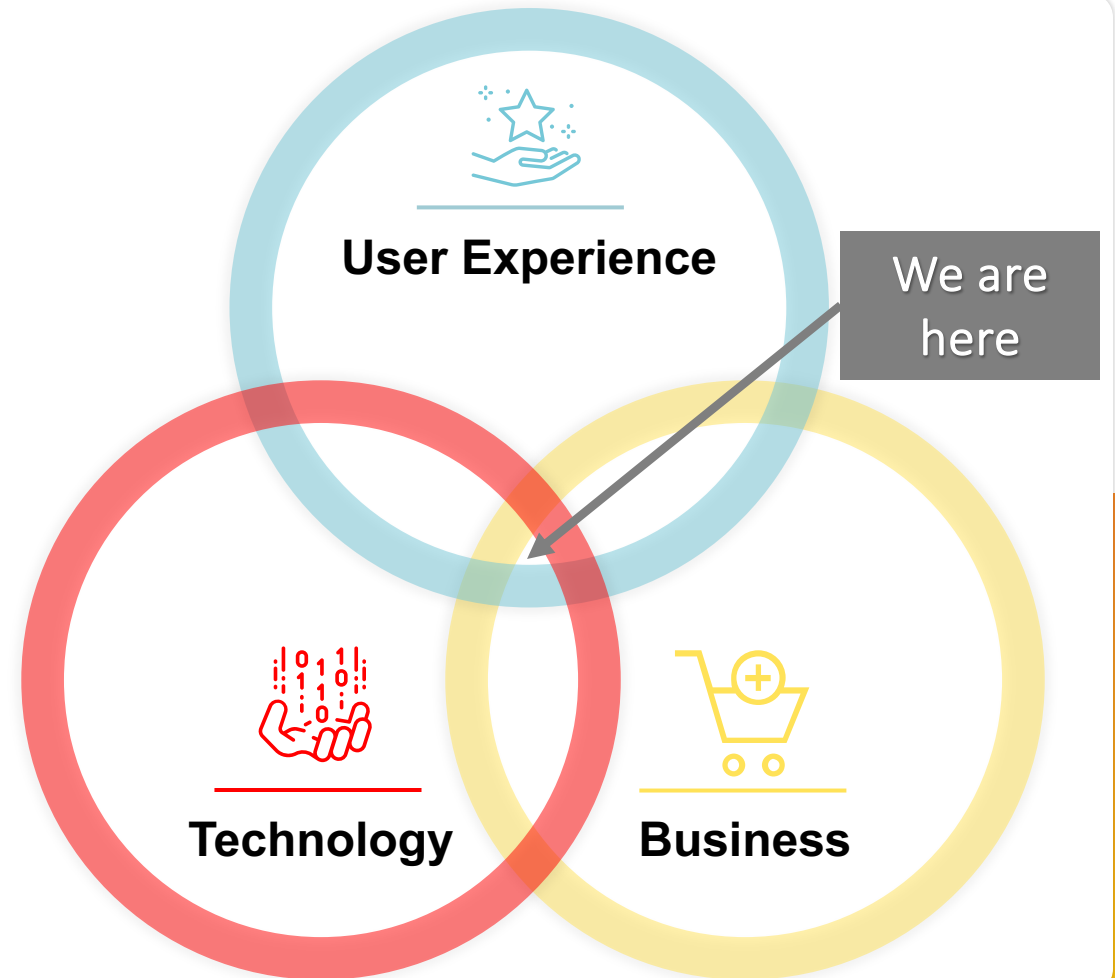
- Our roadmaps start with the backlog
- The backlog is a treasure chest of enhancements; includes all ideas captured over time
- With finite resources & time, we must prioritize these enhancements





Tradeoffs: Intersection of Requirements

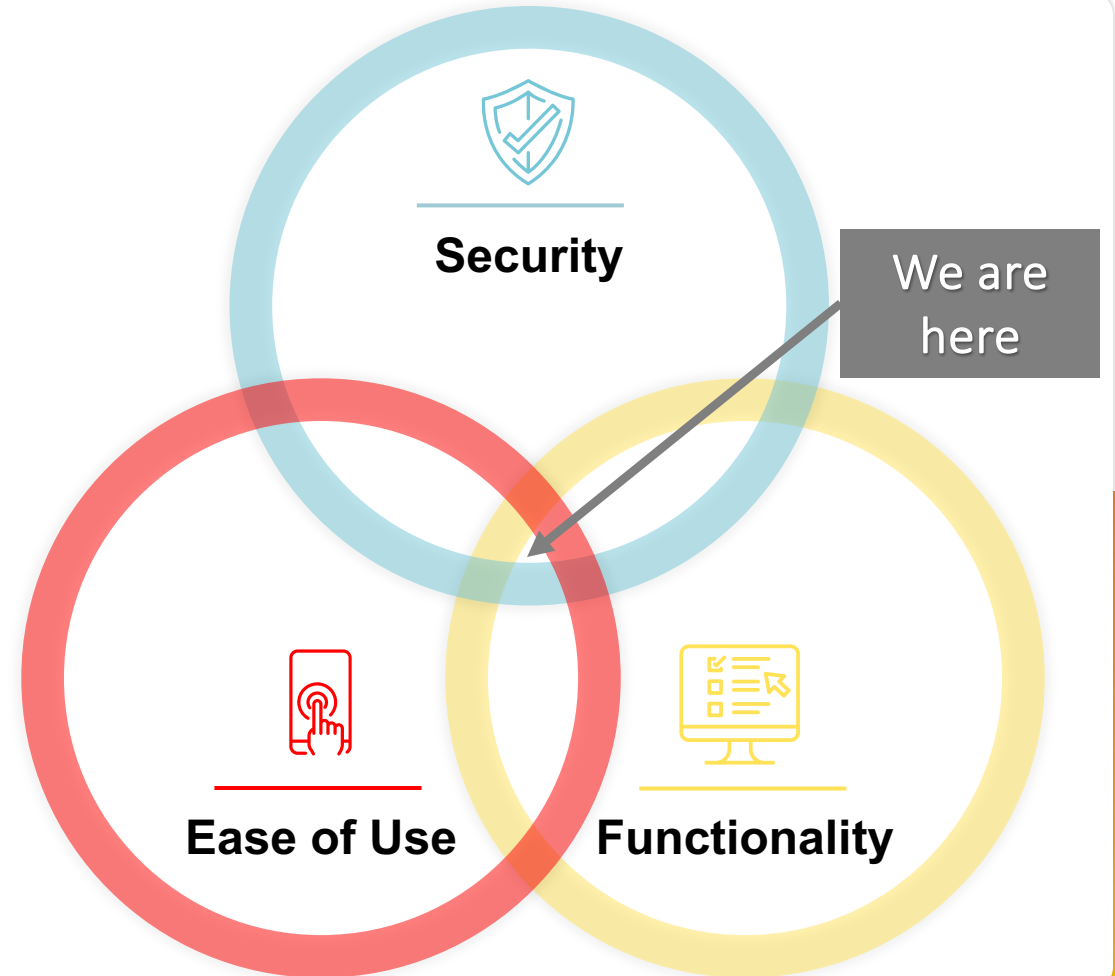
- All releases are a series of tradeoffs, to address needs of all stakeholders
- A good place to start is the intersection across Technology-Business-User Experience
- We aim for the center to deliver the best product





Tradeoffs: Alternate Views

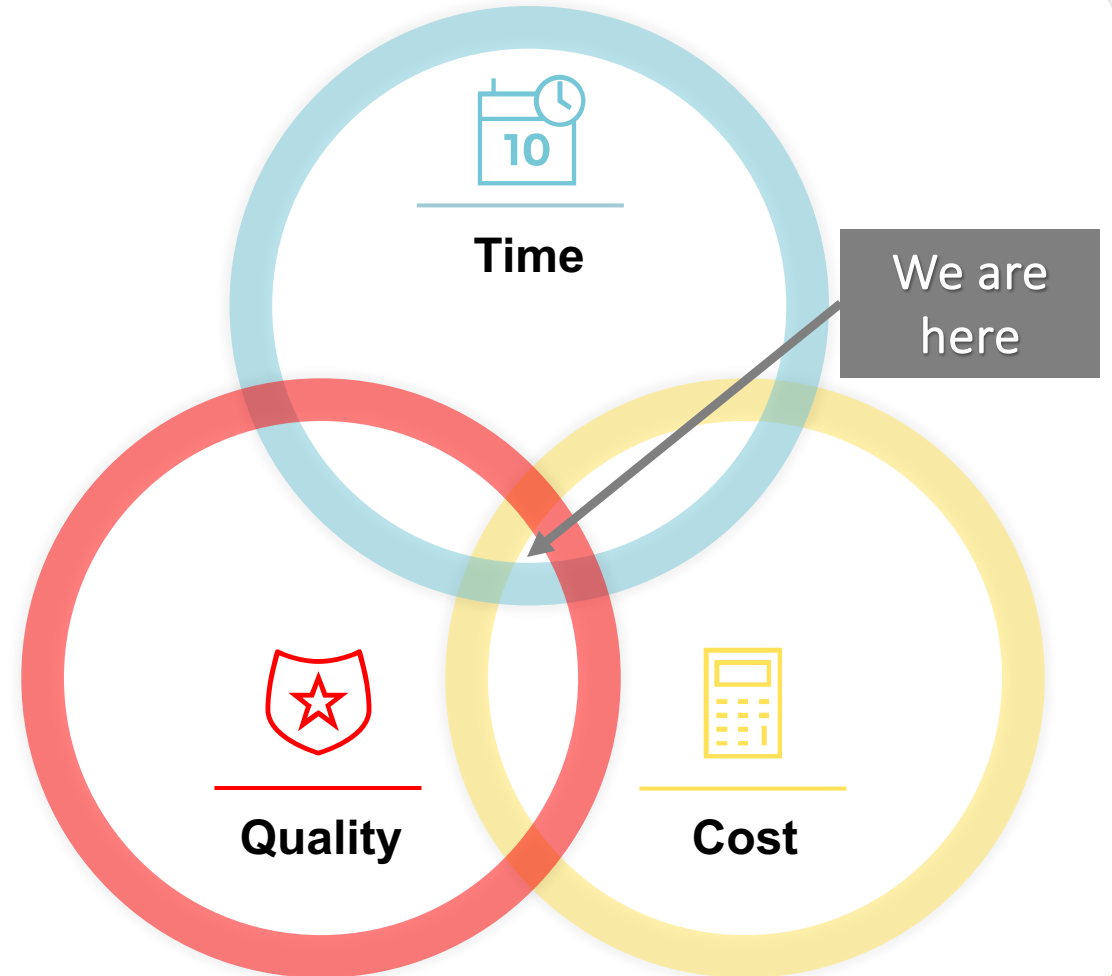
- Another intersection is between Security-Ease of Use-Functionality
- We balance accessibility with improved functionality, ensuring that our products are secure for users





Tradeoffs: Alternate Views

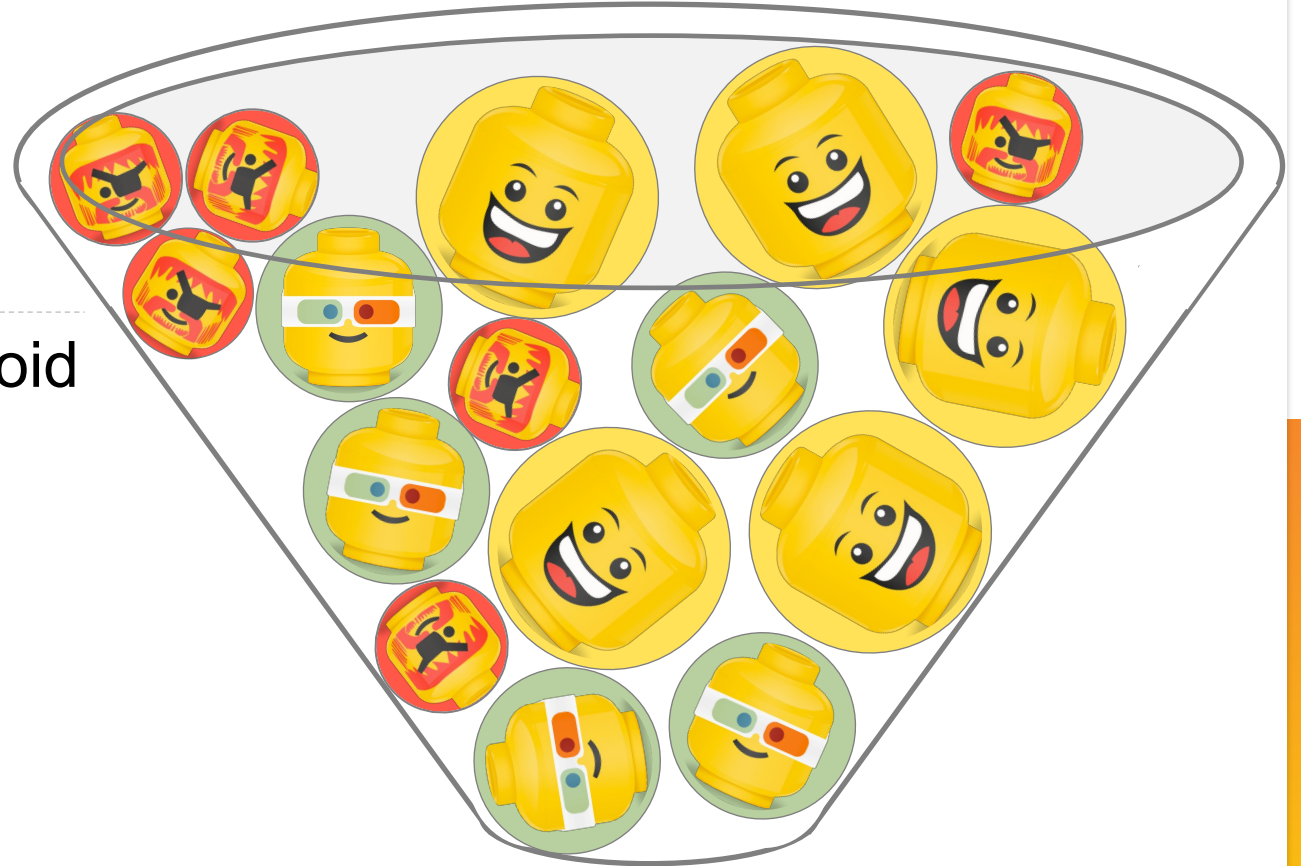
- Finally, we consider the intersection of Time-Quality-Cost
- Once more, finding that spot that balances each of these requirements is where we aim





Decision Time

- Our roadmap has finite capacity
- How do we fill the roadmap but avoid seeing the proverbial cup runneth over?





Prioritization 101 Review

- Work across competing priorities to create the best possible solution

- Aim for the intersection to balance the needs of all stakeholders

- Given finite resources, we have to make new tradeoffs at this stage



Development & Testing



Let's Hand it to Development!

- Now, it's time for our Engineering teams to take over
- These teams design the best solutions based on experience, user feedback & cross-team collaboration
- All of our teams practice a form of agile framework, which supports iterative design





Testing, Testing, 1-2-3

- We are in the last leg before the release is ready
- Our QA team runs extensive testing to ensure our products work correctly
- Some of our products also have beta testers – which are you! THANK YOU to our beta testers!



Product Launch



Hello World!

- With all the hard work done, it's time for go-live!

- We take a deep breath, enjoy the moment & then return our focus to the next release





THANK YOU

Questions?

Game



Game Day!

- Here are 20 enhancements (10 Polaris & 10 Sierra) that need your input! Each idea has a box at the front of the room.
- It's up to you to assign a value to any enhancement. The more strongly you want an idea, the more you pay for it. As a result, there is that much less to spend on other enhancements.
- Ways to assign value include patron benefit, staff benefit, implementation difficulty, cost of implementation, etc.
- You'll have 20 minutes to complete this activity & the results will be shared





Eligible Enhancements

Polaris Enhancements

- Show All Option in Record Sets (46)
- Recaptcha for PAC Registration (2)
- Add Renewals Count to Item Statistics (55)
- Shift/Click to Select a Range in Record (77)
- Upload Patron Barcodes into a Record Set (31)
- Unlock BibKeywordSearch CCL (3)
- Process EDI Invoices (2)
- Sub-Fund Management (3)
- Ad Hoc Item Bulk Change from Find Tool & Bibliographic Record (91)
- Create Record Sets in Saved/Scheduled SimplyReports (88)

Sierra Enhancements

- Reduce Time for Patron Record Payment Lock (22)
- Create a Review File Endpoint (34)
- Increase default java heap setting in iirunner.lax (1)
- Allow Local Create List Saved Exports (10)
- Add Record to List (8)
- Make URL Report Useful/Launch URLs Correctly (9)
- Add Patron Barcode to SIP2 Check-In Response (31)
- Place Holds on Many Vols of Bibs at Same Time (42)
- Clear Jarcache files upon first run of the SDA after an upgrade (17)
- Have System-Generated Review Files Appear in Dropdown in Global/Rapid Update (21)



THANK YOU

Questions?