LOUIS Users Conference

Don McCall  
Chief Operating Officer

October 2004
Operations Includes...

- Client Care
- Implementation Services
- Educational Services
- Software Development
Key 2004 Overview

- Setting Up Key Metrics, Measurements and Formal Objectives For Each Department

- Introduction of Service Level Commitments For Implementation, Educational Services and Client Care

- Reorganization of Client Care Into Dedicated Teams
Key 2004 Achievements
( Cumulative through August 2004)

- Increased Customer Satisfaction to over 86% for Client Care
- Increased Customer Satisfaction to over 94% for Implementations/Migrations
- Increased Customer Satisfaction to over 98% for Educational Services
- A total of over 85,000 Development Hours in 2004.
Key 2004 Achievements (cont’d)

• Introduction of a Formal Beta and Testing Process that will ensure less software issues

• New Product Releases such as Director’s Station, Rooms, SingleSearch, and Resolver that support Unicorn
Sirsi Operations Summary:
Implementation and Educational Services

October 2004
# Implementation Support: Metrics

<table>
<thead>
<tr>
<th></th>
<th>August 2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>24</td>
</tr>
<tr>
<td>Migrations to Unicorn</td>
<td>33</td>
</tr>
<tr>
<td>Add-on Libraries</td>
<td>118</td>
</tr>
<tr>
<td>Platform Migrations</td>
<td>97</td>
</tr>
</tbody>
</table>
Implementation: Customer Satisfaction

- 100% project satisfaction at midpoint
- 94% on-time rating for schedules
- 94% project satisfaction at final
Implementation: Achievements

- Defined Service Level Commitments
- Created Implementation Ready Reference Manual
- Established procedures for Rooms, SingleSearch, and Resolver Implementations
- Revised Project Manager Handbook/Training Guide
- Project Manager Procedures Manual
- Structured Implementation Group into teams
<table>
<thead>
<tr>
<th>Education Support: Metrics</th>
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<tbody>
<tr>
<td></td>
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<tr>
<td><strong>Cumulative</strong></td>
</tr>
<tr>
<td><strong>August 2004</strong></td>
</tr>
<tr>
<td>----------------------------</td>
</tr>
<tr>
<td><strong>On-site Training (Contract)</strong></td>
</tr>
<tr>
<td><strong>On-site Training (Established Customers)</strong></td>
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<tr>
<td><strong>In-house Training</strong></td>
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<tr>
<td><strong>Distance Training</strong></td>
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<tr>
<td><strong>Customers Trained</strong></td>
</tr>
<tr>
<td><strong>Customer Satisfaction</strong></td>
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</tbody>
</table>
Sirsi Operations Summary: Client Care

October 2004
What is “Client Care”? 

- Consists of two primary groups
  - Client Care Center (formerly Help Desk)
  - Systems Services

- The result of a major reorganization in 2003
  - Primary Goals
    - Increase customer satisfaction
    - Create closer relationships with clients
  - Gathered input from all stakeholders
  - Designed a new organization and new procedures
2004 Overview
(Cumulative through August 2004)

- Opened 23,972 new incidents
- Answered 25,027 phone calls
- Overall satisfaction rating: 86%
- 10% overall increase in Client Care staff
- Average tenure of staff: 48 months
## 2004 Overview

<table>
<thead>
<tr>
<th>Performance:</th>
<th>August 2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speed of Answer</td>
<td>29 seconds</td>
</tr>
<tr>
<td>Abandoned Calls</td>
<td>6%</td>
</tr>
<tr>
<td>Closed on First Contact</td>
<td>28%</td>
</tr>
<tr>
<td>Reopened Incidents</td>
<td>8%</td>
</tr>
</tbody>
</table>
## 2004 Overview

<table>
<thead>
<tr>
<th></th>
<th>August 2003</th>
<th>August 2004</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer Satisfaction:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sampling</td>
<td>10% sample</td>
<td>20% sample</td>
</tr>
<tr>
<td>Survey Results</td>
<td>67% satisfied</td>
<td>86% satisfied</td>
</tr>
</tbody>
</table>
2004 Deliverables

- Continue to build staff
- Take advantage of new support technologies
  - Remote access and screen sharing software
  - New and improved Client Care Website
- Consolidate all US Client Care staff in Huntsville
- Increase overall Customer Satisfaction!!!
Sirsi Operations Summary:
Software Development Update

October 2004
2003/04 Achievements

• Software Delivered
  – Unicorn/Hyperion 2002.0.18 and 2003.0 on 12 different hardware/database platforms
  – Accent v.4 and 2003.0 on 3 different hardware/database platforms
  – SIP2 module and certification program
  – Sirsi Voice Automation
  – EDI module and vendor testing
  – Rooms 1.1 and 1.5 on 2 different platforms
  – Director’s Station
2004 Achievements

• Beta testing
  – Collection Exchange
  – Unicode
  – WorkFlows 2004 (Circulation, Academic Reserves, Cataloging, and Authority)
  – PDA Inventory
  – Unicorn 2003.1 and 2004
2004 Development Hours
(Cumulative through August 2004)

- Number of Hours 85,796
  - R&D 64%
  - Maintenance 18%
  - Overhead 18%
Quality 2004 Results

- Percentage of Defects/Total Hours 2%
- Percentage of Incidents/Defects 2%
2004 Deliverables

- Unicorn 2004 (Unicode)
- Collection Exchange module
- WorkFlows 2004
- Digital Heritage
- PDA inventory and offline circulation
- Rooms 1.7
- Director’s Station
- SingleSearch
- Resolver
Unicorn Development Release Update

• Unicorn 2003.1
  – Credit card payment
  – Suspend user on hold queue
  – Ability to remove favorites in iBistro/iLink
  – User lookup by address and phone number
  – Duplicate user checking during registration
  – Library group filter in Item Search and Display
  – ISBN/ISSN validation during item create

• Unicorn 2004
  – Unicorn Server on Linux RedHat Enterprise
  – WorkFlows 2004
  – Unicode
Emerging Technology Task Group

- **Purpose**
  - Watch for new trends
  - Generate and discuss new opportunities

- **Members**
  - Sirsi staff from all areas of the company
  - Gartner Group services