Build, Share, Success: Comprehensive Roadmap for Building Guides
But First a Question ....

Anyone using project management tools/techniques for the guide creation process?

If so, what...
To ensure that guides are built consistently, managed and completed in the timely manner, and meet the benchmark requirements for guides set by the University Library. We are exploring the use of Springshare and other products to support a conceptual framework of the Service Design model.
The Service Design model

- Different definitions (which is a good thing!), but the primary idea is to design for how the end user will use the service.
- Guides should be tied to learning objectives.
- Include stakeholders in planning, development, and assessment.
- Possibly include students in guide design process.
- Don’t think like a librarian, think like a student!
Planning and organizing the overarching process, which includes:

- Staff
- Tools
- Communication
- Materials

related to the specific service Guide Creation, in order to improve the quality of our product and the interaction between our librarians and our customers... our Colleges, Faculty, and ultimately our Students.
Defining a Process...

Agile with Scrum(*modified*)

- Create *inspect and adapt* feedback loops to cope with complexity and risk.
- Scrum emphasizes decision making from results rather than speculation.
- Time is divided into short work cadences, known as sprints.
Developing a Process... What are the elements?

STEP 1: Intake using LibWizard form
Information gathered from requestor
Set requestor expectations
  Timelines
  Example guides shown
  Templates
STEP 2: Consultation

Purpose / Goal for guide
Review purpose with requestor
Learning outcomes/objectives
Requestor provides content and/or content ideas

Discuss Options
Layout
Suggest content (Library)
Review possible need for web permissions
Assessment
STEP 3: Build

Build (1st sprint)
  Assign SME – from college if possible
  Assign Librarian (Guide Creator)
  Gather and record any needed web permissions (outside workflow)
  Initial build complete – submit for review through Publishing Workflow

Internal Review (following first sprint)
  Content
  Accessibility
  Web permissions
  Technology (Embedded content – widgets)

Stakeholder Review (possible stakeholders)
  Requestor or SMEs

Update from feedback (2nd sprint starts)
STEP 4: Launch

Publish/Launch/Market

Post on Library Announcements
Requestor announces within college
Add guide to course content
STEP 5: Assess

Learning outcomes assessment

Ongoing assessment
  Use statistics
  Student/faculty feedback
  Other assessment measures embedded in course.
What are our Product needs:

- Ability to schedule and track Guide builds for planning and reporting purposes.
- Need data on where requests originate, time to plan/build, and assigned librarian.
- Facilitate and track communication between the client (school/faculty) and our Librarians.
- House documentation related to the guide request.
- Track the guide review process.
Possible software solutions

- Sharepoint
- Quickbase
- MS Project
- MS Planner
- Office 365 Groups
- Software PM tools: Active Collab, JIRA, TargetProcess
- LibCRM and other SpringShare products
- Others?
Using Springshare

- LibWizard - Submission form
- LibGuides - Guide discussion boards
  - Communication between SCRUM team members
  - Track guide review dates
  - Note web permissions/image use
  - Track versioning
- LibGuides - Hidden boxes or tabs
  - Track guide review dates
  - Note web permissions/image use
  - Track versioning
- LibCRM – Ultimate solution we hope!
Useful Resources on Service Design
