

Report of the UUGI Executive Committee  
SuperConference 2008  
Detroit Michigan, Renaissance Center

Submitted May 9, 2008

Dear UUGI Members:

This report is a summary of the two question and answer sessions held between UUGI and SirsiDynix Executives at the 2008 SuperConference.

The first meeting was held the afternoon of Friday, April 4, with representatives from UUGI, CODI (Customers of Dynix Inc), and SirsiDynix.

In attendance from UUGI: Mark Andrews, Chair; Debby Conrad, Past Chair; Carla Clark, Chair-Elect; Debbie Martin, Secretary; Dave Slater, Treasurer; Michael Bowden, Program Co-Chair; Karen Eggert, Member-at-Large; Merry Bortz, Web Master; Coleen Neary, Elections Committee; Shawn Carraway, Elections Committee; Ranny Lacanienta, Liaison to CODI

In attendance from CODI: Amy Terlaga, President; Chris Hauser, President-Elect; Colleen Medling, Past President

In attendance from SirsiDynix: Gary Rautenstrauch, CEO; Matthew Hawkins, COO; Tom Gates, VP Marketing; Berit Nelson, VP Product Management

The second meeting was held on Monday, April 7, during SuperConference with all attendees welcomed, and various SirsiDynix representatives, including Gary Rautenstrauch, Talin Bingham, CTO, Berit Nelson, John Dickson, VP Engineering, and Matthew Hawkins

In Friday's meeting, the UUGI Executive Committee spoke with the SirsiDynix executives about some of the broad issues with the company's future direction, concerns about client care, the future of iLink/iBistro/EPS, and customer questions about pricing structure. The questions were based upon the responses to the survey sent to the membership from the UUGI Executive Committee.

The same topics were introduced at the Monday afternoon session, along with some more product-specific questions. In the interest of (relative) brevity, this report will combine the responses from both meetings, when the questions were covered in both meetings. In some instances the order of the questions and responses has been rearranged in the interest of smoothing the flow of this dense narrative. The author of this report is eternally indebted to both Debbie Martin and Mark Andrews for their meticulous note-taking, without which this report would be too paltry to be useful.

Part one: Customer concerns about the future of SirsiDynix:

At both meetings, UUGI asked about the future of the company, and whether Vista Equity Partners has plans to sell SirsiDynix in the near future.

Gary Rautenstrauch stated that at this time there is no plan in the works to buy another ILS. He also stated that Vista is not currently planning to sell SirsiDynix, though they might choose to do so eventually. He emphasized that it is in Vista's interest to increase the value of the company, and that the way to do this is by providing a good product and good service to the customers. A sale of the company will only take place when the company is actually and measurably worth more in the marketplace than it is today. He observed that this has been a year of transition, in terms of both the product and the personnel. He said that the company is committed to improving customer relations and the entire client care system, and to making major investments in new technology to meet these goals.

Gary stated that Vista is not involved in the day to day operation of the company, though they are of course involved with the financial decision making. He said that there are no plans to close any of the offices at this time. Provo, Utah is the main office, but the offices in Huntsville and St. Louis will remain.

Gary declined to give specific answers to some of the questions, citing the fact that SirsiDynix is a privately held company, and as such some of their records are not made public. They do not release their financial information, nor issue a public annual report. They do have a Board of Directors, and a diverse staff of about 500. UUGI asked if the organizational chart could be posted on the web site.

Gary reported that there were 250 new contracts in 2007; 50 new software as a service sites; and 176 new libraries. There are about 7,000 sites and 20,000 SirsiDynix libraries internationally. Growth has been a little faster internationally.

In addition, Gary commented on Marshall Breeding's recent "Perceptions 2007" survey of customer satisfaction with their ILS. He observed that Breeding himself acknowledged that these kinds of surveys tend to bring out the more negative comments, and that any conclusions to be drawn should be tempered by the recent changes at SirsiDynix. Gary agreed that perception is reality, however, and that the company must improve its relationship and communication with its customers in order to achieve better customer satisfaction. He said that the company will focus on increased interaction with the customers and the users groups in the coming year, and in particular SirsiDynix staff will be attending more local, state and regional conferences in order to reach out to customers. Also, the company is planning to re-align the sales territories to more effectively distribute the geographic territory that one person can cover.

## Part two: Customer concerns about client care

Matt Hawkins talked about issues with client care staffing, support and response time to trouble tickets. UUGI Execs expressed concern about the loss of client care staff. Matt stated that there are currently over 30 client care staff devoted to Unicorn support, and that they have an average of ten years of experience. He stated that the average call pick-up time is 13 seconds. He said that they are analyzing and measuring performance and working to improve performance and be responsive to feedback. Some of the current measures include number of calls opened, time required to close a call, and the number of calls that are re-opened. He said that they do send satisfaction surveys out about 20% of the time post-call, though the questions are often general and don't necessarily address the specific call. Improved surveys that relate to particular incidents are in the works.

Matt described the implementation of Salesforce.com, a Customer Relations Management (CRM) solution. He intends for this to be an effective tool for improving client care interactions, and for improving internal communications. Client Care staff will receive extensive training on the new CRM system, which has a powerful knowledge base.

Matt also mentioned the new Client Care Portal. Response from the UUGI Execs was largely positive. However, a usability survey of customers was suggested to provide continuing feedback on the structure and content of the portal.

The UUGI Execs and Matt discussed improved interaction between the customers and the company. Several UUGI Execs commented that their Client Account Managers have turned over multiple times in recent years, making it difficult to maintain an effective long-term history with a single CAM. Also, the UUGI Execs commented that the lag time from enhancement to implementation is very long, and that sometimes a new feature is implemented before it is adequately developed, or that requested functionality is delivered, but costs extra.

Berit Nelson spoke about the development cycle, noting that there is a major new release every 12-18 months. She stated that the patch cluster system does allow some increased delivery of new functionality. She acknowledged that SirsiDynix needs to be aware that competitive open source products can be upgraded faster.

The UUGI Execs and Berit discussed the importance of beta testing, and incentives for beta testing. The group agreed that GL3.1 and Symphony were more stable than some prior releases, and Berit confirmed that they had a good number of beta testers and this contributed greatly to the improved stability of these releases. Plans to do more WebEx sessions prior to a beta release to get feedback and to encourage more beta testing are underway.

The UUGI Execs commented that more interaction during the development phases of the products would be useful. Often by the time that the product is ready for beta testing, important features that the customers want have been overlooked and then it is too late.

One suggestion from the UUGI Execs was that the company might look at the API site and give some sort of “approval” to particular items on the site. Also, the customers need to be more aware of what is available, and how to access information, especially the most current documentation. One suggestion for improving documentation was to put the documentation into some sort of collaborative Wiki, to allow customers to add content with real-life examples. SirsiDynix could then test and approve such additions for inclusion into their official documentation.

UUGI suggested listing goals and targets for implementation and improvements on the Client Care pages, with projected completion dates and progress indicators. Another suggestion was made to add a link for feedback to all closed ticket messages. There will be a way through the portal to provide feedback on any incident/call.

### Part three, the future of the OPAC

There were many questions about the future of iLink and whether all sites would be encouraged to move to EPS eventually. The company has decided to continue to develop and support iLink/iBistro; however, the product will be re-branded as E-Library. Existing iLink/iBistro customers will not have to pay additional fees to use E-Library.

In addition to E-Library, the company is introducing Enterprise, which is an add-on search product. Version 1.0 should be available in August of 2008. The initial release will include faceted search capabilities, fuzzy logic, and consortia support, among other features.

### Part four, customer concerns about pricing

The UUGI Execs observed that there were several questions about the pricing structure and cost increases that appear to be out of line with rates of inflation or other measures that might be used as a basis for pricing.

Gary stated that pricing is not standardized because quotes are often based on RFPs, which can be very complex. He feels that SirsiDynix’s pricing is competitive. There is no plan to decrease the pricing for software as a service; over time this model is considered to be cost effective.

The company is implementing some tools to remedy concerns about pricing structures and billing issues. There is no plan to standardize pricing or publish pricing information because RFPs make this kind of standardization extremely difficult to maintain. The company has also undertaken an effort to regularize maintenance fees. As a result, some sites may have seen a more significant increase in the past year if their fees had not been adjusted over the past several years. The new Customer Relationship Management (CRM) system includes a price quote module that should make it easier to produce quotes for clients for new or additional products.

UUGI Execs made several suggestions for improving billing, including a greater lead time for notification of upcoming fees so that sites can budget more effectively, and bundling fees into fewer--preferably one invoice--per year, with appropriate pro-rating for initial fees so that sites need only pay once a year. Other suggestions included online access to account and billing information, and a request for product discounts for sites that purchase multiple products.

Part five, specific questions from the Monday afternoon session:

Q- In many of our helpdesk calls, the solution is that the problem is fixed in the next version. Are you continuing to support older versions, and why can't a fix be made to the current version rather than our having to wait for a future Symphony version?

A-The current software version and 2 previous versions are supported. Calls are prioritized as priority 1, 2 or 3. 1 is immediate action and 2 and 3 have expected response times. If development is required a fix may be added to a patch cluster or be included in a future release.

Q-What about next generation ILS system (Non-Marc, Dublin Core, Open Source)?

A-Berit-SD already supports Dublin Core and some Non-Marc. There will be more support of this in 3.3. The 09 Enterprise release will handle Non-Marc.

Talin-ILS needs to be open & used by other systems. There is lots of new development such as faceted searching.

Q-Why does SD not use their own products like EPS Rooms to manage their own info?

A-Talin-Enterprise Client Care knowledge base will be indexed and use fuzzy logic. They will use RSS feeds to push data out.

Matt-There are plans to leverage their own technology and improve.

Q-What is happening with EPS Rooms/i-Link/OPACs?

A-Berit-Discussed in sessions throughout the conference. SD will be providing product specific Web-X sessions. Enterprise will be an enhancement to the OPAC. EPS 2.2.2 due out in June 08 and all are encouraged to move to this release. The upgrade path will be to Enterprise.

iBistro/iLink- E-Library is coming which will standardize some features. That is the upgrade path. There will be no extra charge for iBistro/iLink sites to move to E-Library.

Q-What about the K-12 Ecole interface?

A-Features will be added in Java. E-Library will have environment files and more specs by type of library. There is also the K-12 staff web product and SchoolRooms.

Q-What about Office 2007 tie-in?

A-John-SD is using it in a test environment with reports on the new release with success.

Q-What about the printing of routing slips for the serials module?

A-Berit-There is an enhancement suggestion in for this.

Q-Marc holdings functionality is not working in Java 3.1.

A-John – Contact him or Client Care and they will check on this.

Q-When will Single Search with multiple searching begin working or is it going away?

A-Berit – It is not going away.

Q-Will SD be adding EPS Room's content?

A-Talin – SD will not be adding but sites will.

Q-What about LDAP and other end user products?

A-John-There is some ability in iBistro/iLink and EPS and GL3.1.

Q-Would like the Symphony/Serials Solution ERMS interface to work.

A-Berit- SD is working on this. They are working on a report to assist for now.

Q-Would like more flexibility with .csv and Excel output for reports.

A-John – GL 3.1 has that in several reports. They are investigating more options like xml data.

Q-Would like a web based staff client beyond K-12.

A-Berit – This is being developed for release 3.3.

Q-Are there plans for fuzzy searching for checking patron duplicates?

A-Talin-That could be coming using lower level APIs.

Q-Are there plans to develop a Linux platform release?

A-John-Yes.

Q-What about XML outputs?

A-John-This is available in 3.1. There is an XML API now and they are working on it for reporting.

Q-Are there plans to add more sub-wizards/helpers?

A-Berit-Yes. More are added with each release.

Q-Would it be possible to not schedule sessions on Sunday mornings so attendees could attend religious services if desired.

A-Carla-The executive committee will discuss this possibility.

Q-Why is the party on the last day of the conference – to retain people or save money?

A-Tom Gates-SD has to commit to a certain number of rooms financially for each day which is why the party was moved to the last evening.