Leading in a Digital World

How Libraries Win with Trust

Michael Macenas / Account Manager
People consider the library 10x more trustworthy than online sources. But they’re more difficult to use.

People are willing to sacrifice trust for convenience.

Source: Innovative Research Report "Academic Libraries have the Most Trusted Resources, but their Tools are Hard to Use", 2019
What people expect from consumer products
Best Experience

What people expect from libraries
Best Content

TRUST
Where libraries and only libraries can lead

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TRUST
Where libraries and only libraries can lead
To enable libraries to innovate and thrive in a world of fierce competition for people’s time and attention.

We invest in people, technology, partnerships, and services that inspire libraries to create remarkable experiences.
Leadership Combines Software and Library Expertise

Shaheen Javadizadeh
Chief Executive Officer

Rich Levy
Chief Technology Officer

Chris Lang
Chief Strategy Officer

Kathryn Harnish
SVP, Product Strategy

Mark Stapleton
SVP, Global Sales

Hilary Newman
SVP, Customer Support & Success

Raena Morrison
VP, NA Account Management

Akin Adekeye
General Counsel, VP Business Development

Tom Jacobson
VP, Executive Library Advocate & Strategist
Your Innovative Team

ACCOUNT MANAGER

Assigned to your library by region
- Renewals
- Quotes
- Site Visits
- Account Planning

CUSTOMER SUPPORT

Available 24/7 through Supportal
- Report technical issues: Error, system down, bugs
- Questions on functionality or configuration

SERVICES & TRAINING

Multiple teams available by specialty
- Training schedule: https://bookwhen.com/innovative
- Request system analysis or custom development
- Implementation managers assigned by project

CONTACT INFORMATION

Michael.Macenas@iii.com, 630.880.2851
Jack.Dotson@iii.com, 510.496.3763
You Innovative Team

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Tom Jacobson
VP, Executive Library Advocate & Strategist

Raena Morrison
VP, NA Account Management

Christen Deeb
Director, Client Services

Michael Monroy
Director, Global Sales Support
Account Management: Doubled Size of the Team
Account Management Updates

More communication channels

**Monthly**  
- SmartBrief Newsletter: Industry news, Innovative updates  
  - All current customers and industry contacts
- Webinars: Thought Leadership, Innovative updates  
  - IUG Steering Committee
- Calls: Ongoing discussions  
  - Polaris Advisory Committee

**Quarterly**  
- IUG: Annual & regional events  
  - Executive Directors at current customers
- Director Events: Annual events  
  - All Innovative customers

**Annual**  
- CRC and Support: Contact anytime for help  
  - Account review, training, demos
- Site Visits: Submit product ideas  
  - Sponsor, Attend, Present
- IdeaLab: Innovative team, customers, industry contacts  
  - Innovative team and customers
- Industry Events: Innovative team, customers, industry contacts
- Partners: Innovative team and customers

- IUG Advisory Committee
- Executive Directors at current customers
- All Innovative customers
- All Innovative customers
- Innovative team, customers, industry contacts
- Innovative team, customers, industry contacts
- Strategic, Dev, marketing, advisory, etc.
Support Update: Improved Sierra Support Model

SAMANTHA CUNNING
East Team, Central & South America

GARY BELL
Central Team

ED ESCUETA
West Team & Mexico
Support Update: Ticket Backlog Project

2019 initiative to close tickets that are no longer relevant, that have been fixed in newer versions, and more.

- 29.8% **REDUCTION** in ticket backlog in 6 months
- 26.7% **LOWER** ticket backlog than same time last year
- **OVER 1400** tickets closed last week alone
Services Updates: New Managed Services Offerings

- Short-Term Coverage
- Long-Term System Administration
- Customer Success Consultations
- System Health Check
Services Update: Easier to Register for Training

https://bookwhen.com/innovative

Ready to book custom online training? You can do that by the hour, here:

Please use the links below to retrieve workshops by topic or time zone:

- Sierra Workshops
- Polaris Workshops
- Millennium Workshops
- Bootcamps
- Free Hot Topics
- Load Profile Training
- EMEA Time Zones
- APAC Time Zones
Sierra Problem Reports: last 18 months of releases

<table>
<thead>
<tr>
<th></th>
<th>Sierra 3.4</th>
<th>Sierra 4.0</th>
<th>Sierra 4.1</th>
<th>Sierra 4.2</th>
<th>Sierra 4.3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>January 2018</td>
<td>May 2018</td>
<td>Oct 2018</td>
<td>January 2019</td>
<td>Target April 2019</td>
</tr>
<tr>
<td>PR’s fixed</td>
<td>70</td>
<td>74</td>
<td>113</td>
<td>31</td>
<td>67</td>
</tr>
<tr>
<td>No. of Customers on the release</td>
<td>75</td>
<td>136</td>
<td>225</td>
<td>76</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Report run: March 11, 2019

208 customers are on a Sierra version older than v3.4

- Fixed 288 Problem Reports since the release of Sierra 3.4
  - Additional 67 in April with Sierra 4.3 release

- Multiple customers can be on a single Problem Report

- ~30% of the install base not taking advantage of the 288 Problem Reports addressed and various feature enhancements in the last 5 Sierra releases over the past 18 months

At the release of Sierra 4.3, a customer on a version lower than Sierra 3.4 will get the combined value of 355 PR resolutions
# Sierra Roadmap – with Idea Lab

## Themes and Market Problems

<table>
<thead>
<tr>
<th>2018</th>
<th>2019</th>
<th>2020+</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sierra 4.1:</strong></td>
<td><strong>Sierra 4.2:</strong></td>
<td><strong>Sierra 5.0:</strong> Enhanced Interoperability and Improved Staff Workflows</td>
</tr>
<tr>
<td><strong>GA:</strong> in October 2018</td>
<td><strong>GA:</strong> January 2019</td>
<td><strong>GA:</strong> August 2019 target</td>
</tr>
<tr>
<td>Replacing cancelled holds (phase 1)</td>
<td>Replacing cancelled holds (phase 2)</td>
<td>Email due slips in staff checkout</td>
</tr>
<tr>
<td><strong>Sierra Web support for 30 concurrent users</strong></td>
<td><strong>WebPAC Default to HTTPS</strong></td>
<td>Rerun Create Lists queries</td>
</tr>
<tr>
<td>Macros in Sierra Web</td>
<td><strong>Publish Library Privacy Policy in WebPAC (GDPR)</strong></td>
<td>Undo record deletion</td>
</tr>
<tr>
<td>Find in Record</td>
<td><strong>Patron PIN improvements</strong></td>
<td>Prep for modernizing Sierra authentication, phase 1</td>
</tr>
<tr>
<td>Copy and paste complete fields</td>
<td><strong>Scheduler improvements to output delimited records</strong></td>
<td>EDI Improvements</td>
</tr>
<tr>
<td>Security and privacy features for GDPR</td>
<td><strong>Sierra Web multi-window mode</strong></td>
<td>Continuous Sierra Web improvements with tablet/mobile and browser support</td>
</tr>
<tr>
<td>Increase PAID fields limit</td>
<td><strong>Sierra Rest API – continued accounting integration, allow specific bib/marc file deletion</strong></td>
<td>Expanded API Support</td>
</tr>
<tr>
<td>Customize the facets in SDA</td>
<td><strong>Sierra Web support for 30 concurrent users</strong></td>
<td>Expanded SQL Query availability</td>
</tr>
<tr>
<td>Generate new private key</td>
<td><strong>Sierra Rest API – accounting integration, improved performance on items listings, Additional filters and parameters</strong></td>
<td><strong>Sierra Rest API – Accounting Integration: Create &amp; Update Invoices; customer support (PRs)</strong></td>
</tr>
</tbody>
</table>

## Sierra 4.3: Improved Access, Patron Privacy and Interoperability

- **GA:** April 2019 target (in beta)
- Customization of fonts and colors in Sierra
- Add item price to Due Slip data library
- **WebPAC cookie notification**
- **Volume search by record number**
- Amazon link in Inventory Express
- **Bookmarking in Talis Aspire**
- Lyngsoe: Rest API for title paging (Helsinki)
- Sierra Rest API – Accounting Integration, Create Invoices and Pay Service Charges
- Sierra Rest API – Improve Performance

## Sierra 5.1: Improved functionality and user experience for Academic users

- **GA:** 1H ’20 Target
- Prep for modernizing Sierra authentication, phase 2
- Enhancements TBD
- Roadmap challenge winner(s)
- Sierra Rest API – Create a Service Charge Fee (as a fine) for patron & bulk

## Release Themes:

- Ongoing Integration with Innovative Discovery
- Continuous improvement in Staff Workflows and Sierra administration
- High impact enhancements identified and prioritized via Innovative Idea Lab and IUG channels
- Mobilize Library Staff via Sierra Web scalability and performance
- Address high impact customer reported issues

## Market Problems to Solve For:

- Patron engagement via Innovative Discovery
- Ongoing Security & Patron Privacy
- Staff accessibility as requirements and regulations evolve
- Streamlined Staff Workflows

---

**Note:** Customer driven enhancement requests and bug fixes remain a priority for every release

*Your Partner for Library Success*
# Polaris

## Themes and Market Problems

<table>
<thead>
<tr>
<th></th>
<th>2H'18</th>
<th>1H'19</th>
<th>2H'19</th>
<th>2020+</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2018</strong></td>
<td></td>
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<tr>
<td><strong>2H'18</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Polaris 6.1</strong>: Focus on integration enhancements for Discovery</td>
<td>• Released September 2018</td>
<td>• Recorded Books integration</td>
<td>• CloudLink integration</td>
<td>• Improved Novelist feature set</td>
</tr>
<tr>
<td><strong>Polaris 6.2</strong>: Focus on Patron and Staff Engagement</td>
<td>• Released in December 2018</td>
<td>• EDS integration</td>
<td>• Reduce horizontal scrolling in PAC</td>
<td>• MyLibrary! Updates for Polaris features</td>
</tr>
<tr>
<td><strong>Polaris 6.3</strong>: Focus on Patron Security and Tech Services improvements</td>
<td>• Released June 2019</td>
<td>• Patron password reset</td>
<td>• Integration with JetPay</td>
<td>• Maintain bib control # during overlay</td>
</tr>
<tr>
<td><strong>Polaris 6.4</strong>: Focus on Leap parity and Idea Lab Challenge Winners</td>
<td>• End’19 target release</td>
<td>• Leap outreach</td>
<td>• Leap Missing Part Check in</td>
<td>• Leap Manual Billing</td>
</tr>
<tr>
<td><strong>Release Themes</strong>:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• On going Leap parity with Staff Client</td>
<td>• Public library Innovative discovery emphasis</td>
<td>• High impact enhancements identified and prioritized via Innovative Idea Lab and IUG channels</td>
<td>• Improved patron accessibility</td>
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<tr>
<td><strong>Market Problems to Solve For</strong>:</td>
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<td></td>
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<tr>
<td>• Patron engagement, via Innovative Discovery</td>
<td>• Ongoing Security &amp; Patron Privacy</td>
<td>• Staff accessibility as requirements and regulations evolve</td>
<td>• Streamlined Staff Workflows</td>
<td></td>
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</tbody>
</table>

### In Market
- Idea Lab and IUG ballot

### In Development
- Planning

### Note: Roadmap subject to change
2019 Next-Gen Product Plan

<table>
<thead>
<tr>
<th>Innovative Discovery</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Initial release to academic market</td>
<td>• Initial release to public market</td>
<td>• Drive competitive sales/displacement</td>
<td>• Alma integration via Gates</td>
<td></td>
</tr>
<tr>
<td>• Sierra integration via Gates</td>
<td>• Polaris integration via Gates</td>
<td>• Library-defined facets</td>
<td>• E-reader integration for books (CDS)</td>
<td></td>
</tr>
<tr>
<td>• Context Wheel and traditional search</td>
<td>• Browse-based discovery (showcases)</td>
<td>• Course mgmt./reading list integrations</td>
<td>• Ongoing competitive and customer-requested enhancements</td>
<td></td>
</tr>
<tr>
<td>• Docking framework</td>
<td>• Public and private lists</td>
<td>• Citation-driven resource linking</td>
<td></td>
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<tr>
<td>• Articles: searchable, linkable</td>
<td>• Mobile app</td>
<td>• Customizable plug-ins for dock</td>
<td></td>
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<tr>
<td>• E-reader integration (CDS budget)</td>
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<thead>
<tr>
<th>Context Engine / Metadata Management</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>• BIBFRAME-based linked data repository</td>
<td>• OAI-PMH ingest</td>
<td>• Create/edit using BIBFRAME templates</td>
<td>• Collection analyses</td>
<td></td>
</tr>
<tr>
<td>• Connected resources, concepts, agents</td>
<td>• Additional seed metadata sources</td>
<td>• Bi-directional MARCExchange (export MARC)</td>
<td>• ERM alerting</td>
<td></td>
</tr>
<tr>
<td>• Seed metadata – ONIX, LC, Crossref</td>
<td>• Relationship editor to support linking between resources, agents, concepts</td>
<td>• Library-defined relevance and indexing</td>
<td>• Analytics for e-reader books (CDS)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Roll-ups to work-level records</td>
<td>• Seed metadata – ORCID, DataCite, etc.</td>
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<tr>
<td></td>
<td>• Support for Discovery capabilities</td>
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<tr>
<th>Innovative Intelligence</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
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<tr>
<td>• Basic personalization – e.g., recommendations based on user profile and simple behavior</td>
<td>• Enhanced personalization – e.g., machine learning re: user behavior</td>
<td>• Patron account management, including integration with SIS (to support patron engagement)</td>
<td></td>
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<tr>
<td>• Ingest circ usage data</td>
<td>• Ingest COUNTER data</td>
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<tr>
<td>• Analytics for e-reader articles (CDS budget)</td>
<td>• Value metrics for e-content</td>
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<tr>
<th>Displacement: Acquisitions</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
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| Public UI available | Academia UI available | |
|---------------------|-----------------------|
“We have a good partnership with Innovative. We both understand each others’ needs and know how to compromise and work towards what is best for our libraries and their users.”

Executive Director of a Large Consortium of Public and Academic Libraries
Committed to Our Products
Sierra
Polaris
Virtua
Resource Sharing
Encore
Vital
Sky River
Mobile Apps