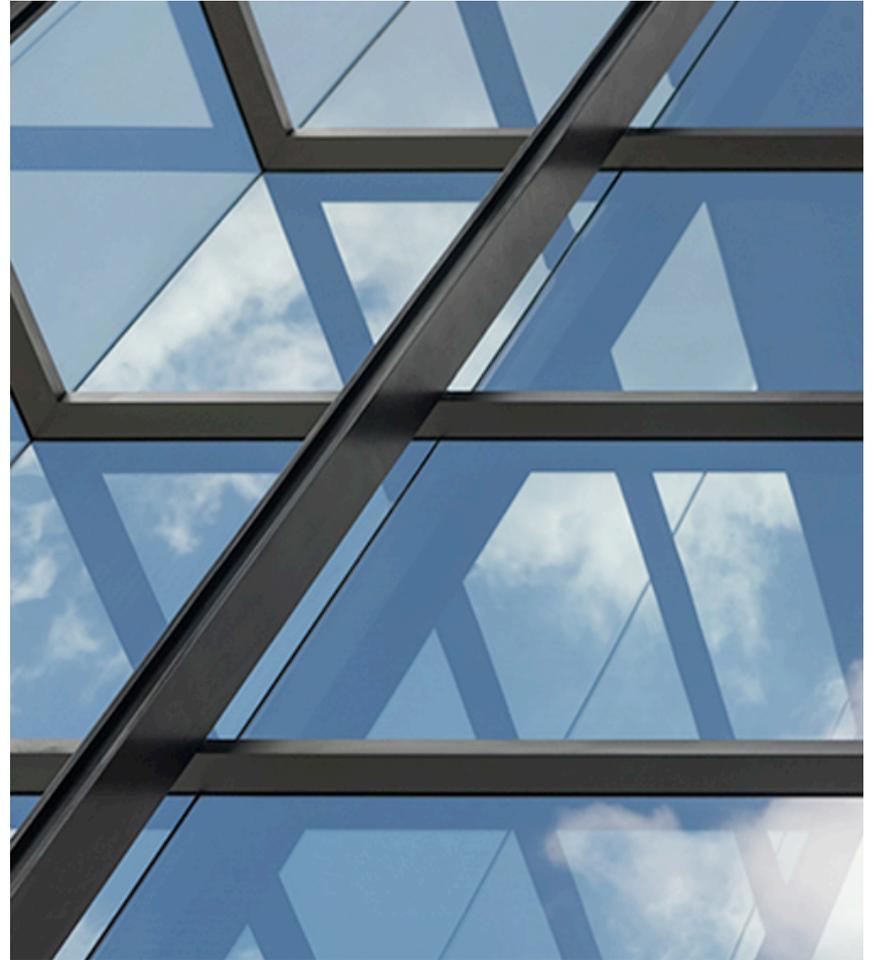


## CRIG Seminar 2019

# Design Thinking in Academic Libraries: Building Capacity for User-Centred Services

**Edward Luca**

Manager, Academic Services  
University of Sydney Library



# My Journey in Design Thinking

**2013-2016:** worked at UTS Library as a Communication Officer

**2015:** started teaching user experience and design thinking

**2016:** published my first journal article using design thinking

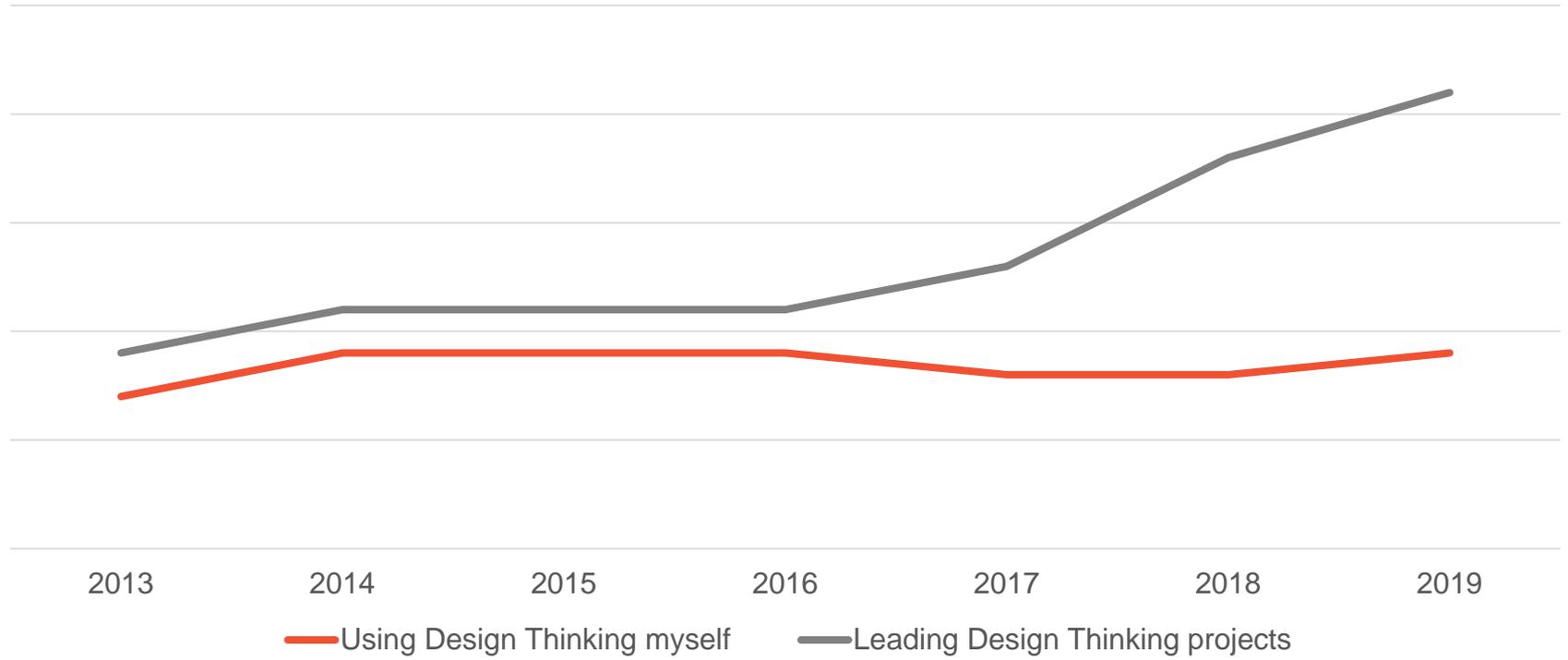
**2017:** moved to the University of Sydney as an Academic Liaison Librarian

**2018:** co-led a Design Thinking Community of Practice

**2018:** became a Manager, Academic Services (Medicine & Health)

**2019:** started my PhD (which may or may not use design thinking)

# My Journey in Design Thinking



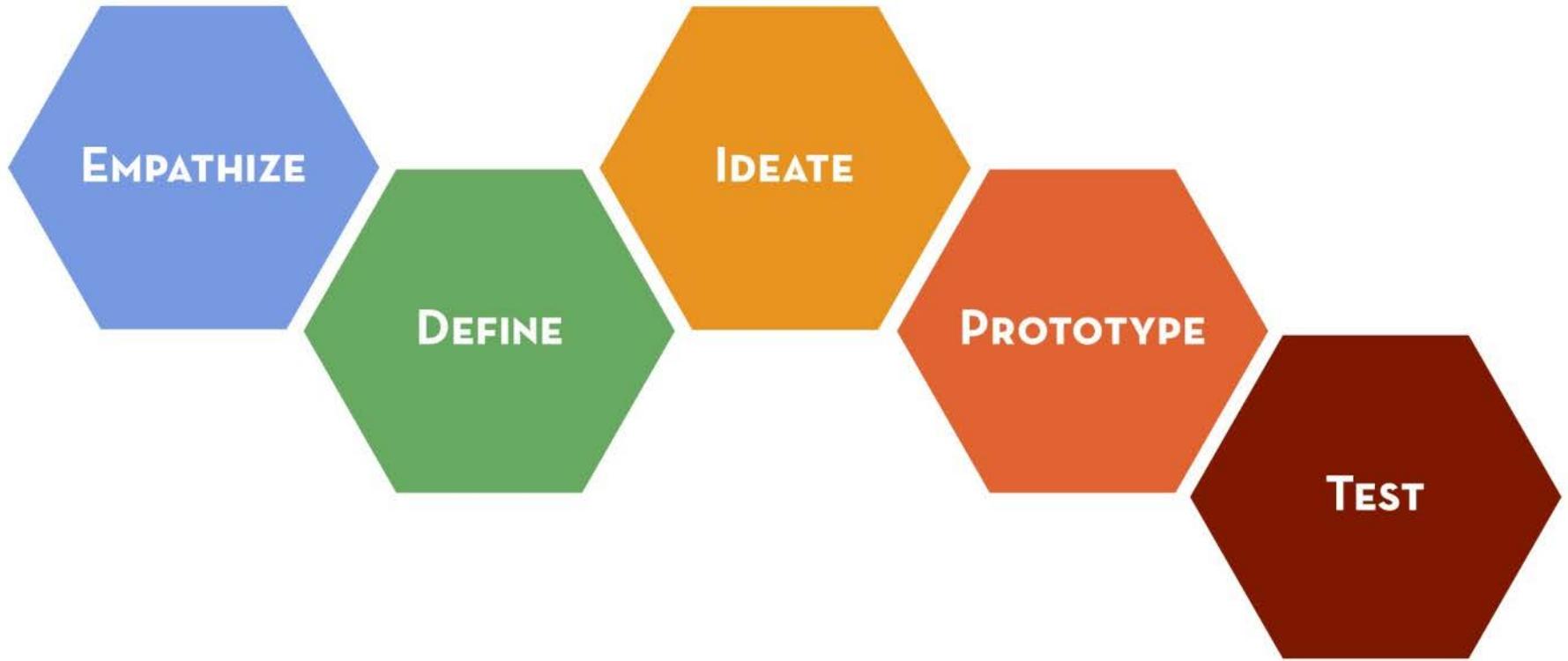


An intellectual  
approach emphasising  
empathy, abductive  
reasoning and rapid  
prototyping  
(Kolko 2012)

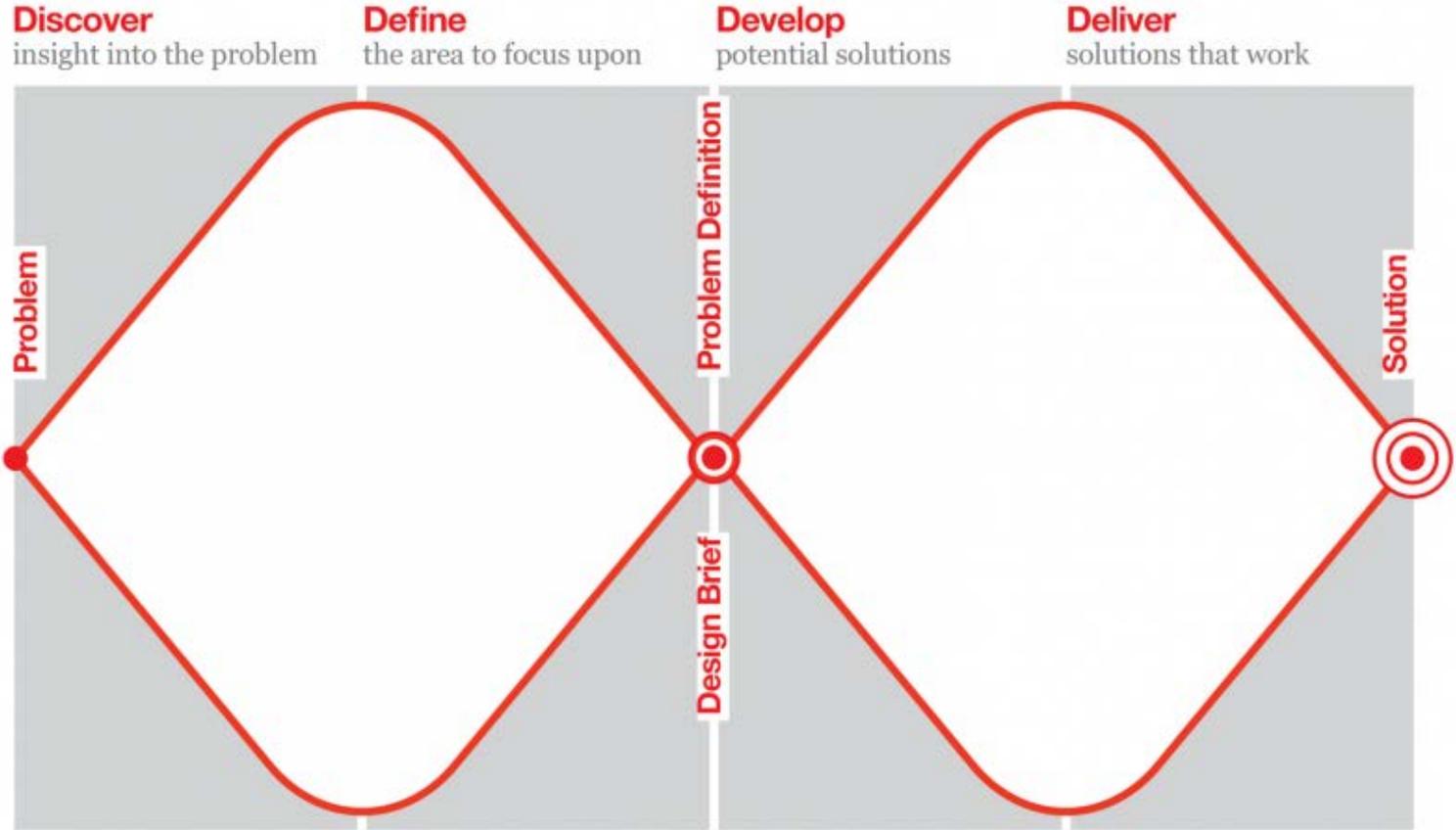




A process of creative problem-solving



Stanford d.school model

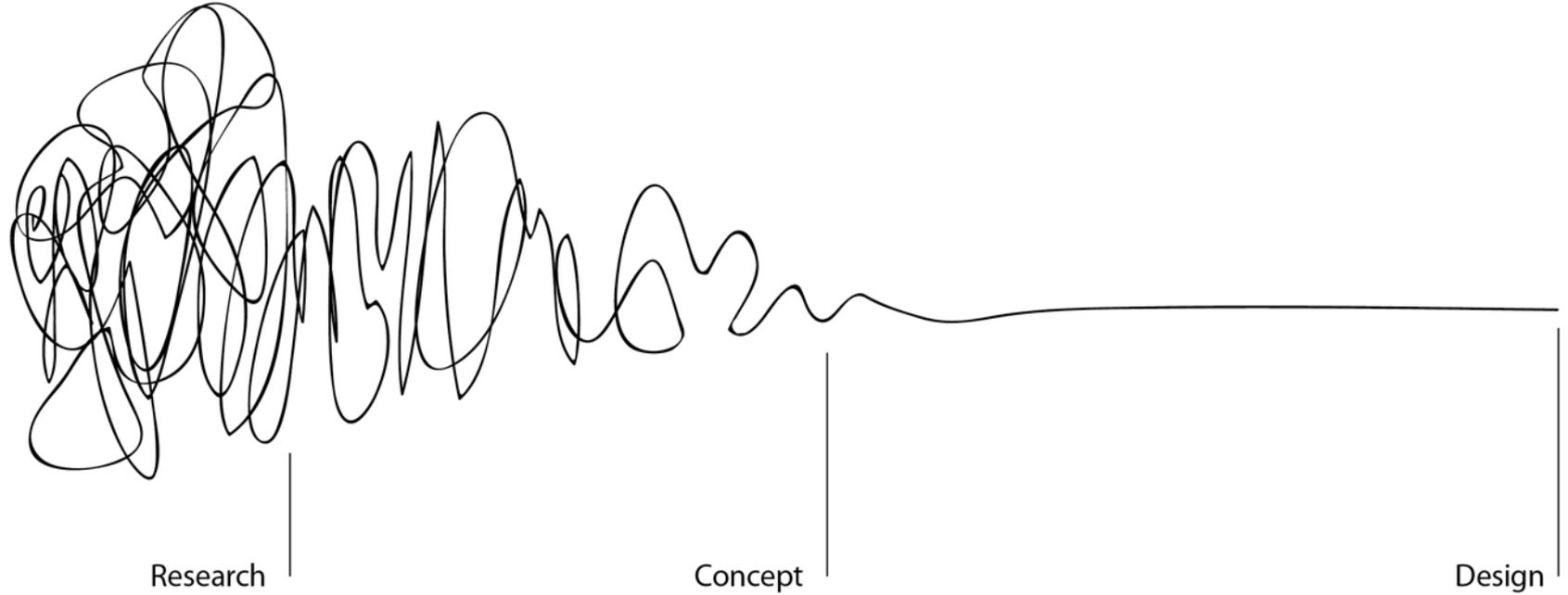


Double Diamond (British Design Council)



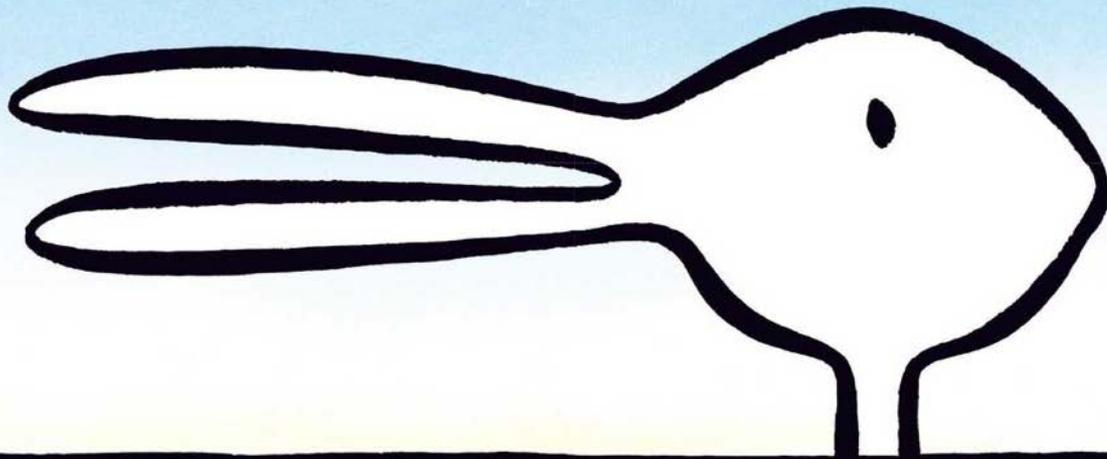
Uncertainty / patterns / insights

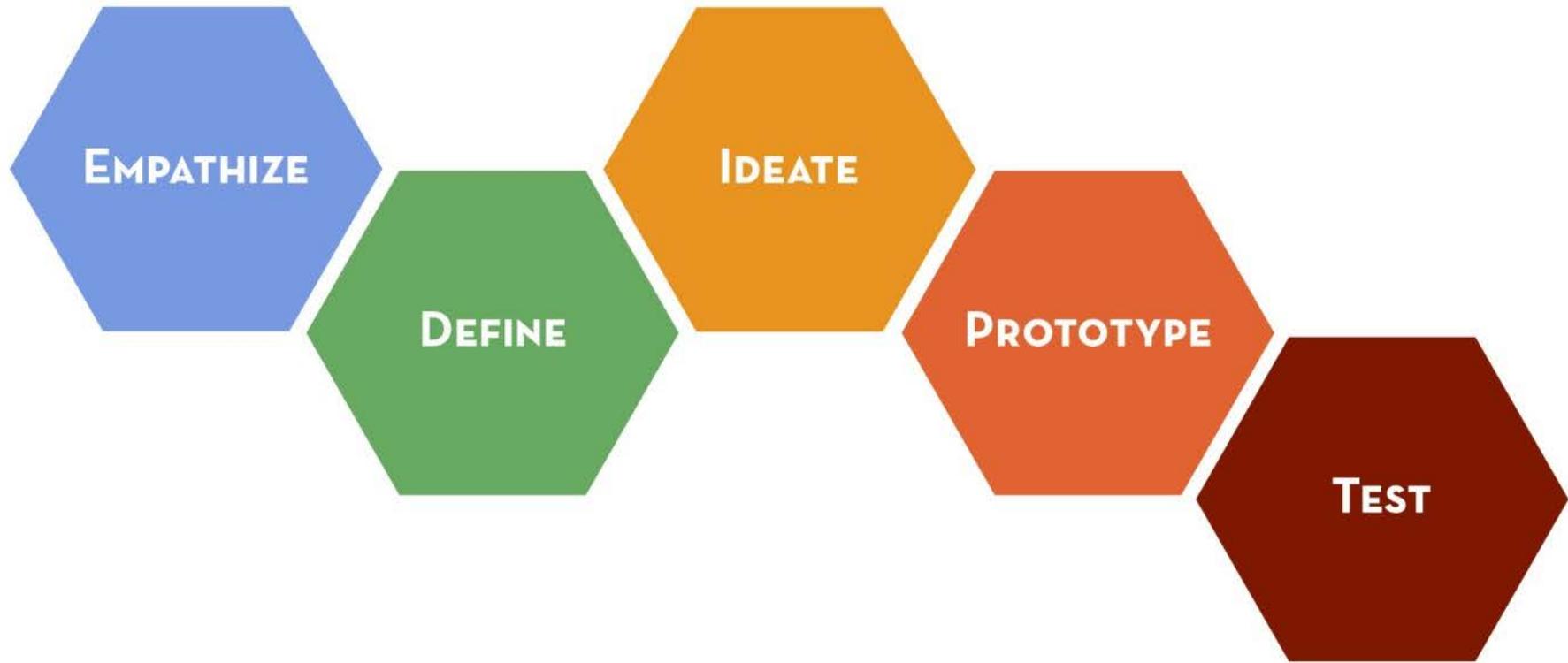
Clarity / Focus

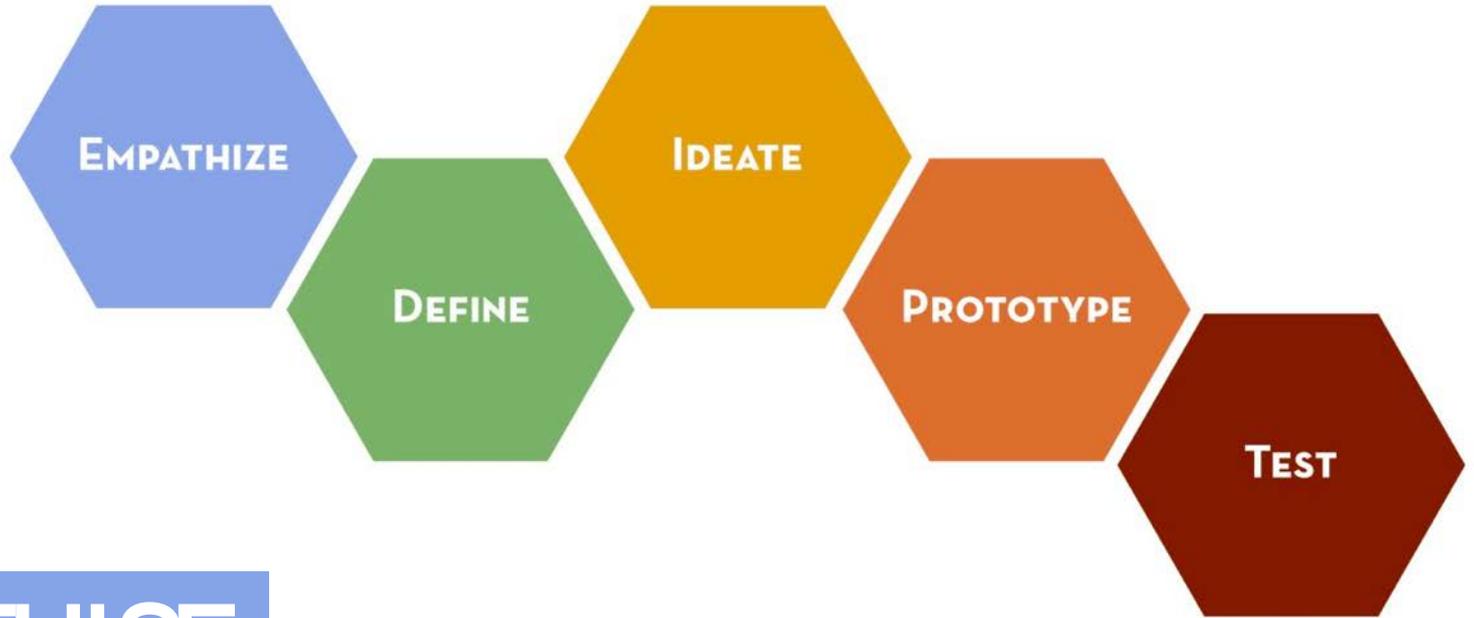


Are you kidding me?  
It's totally a duck.

It's for sure a rabbit.



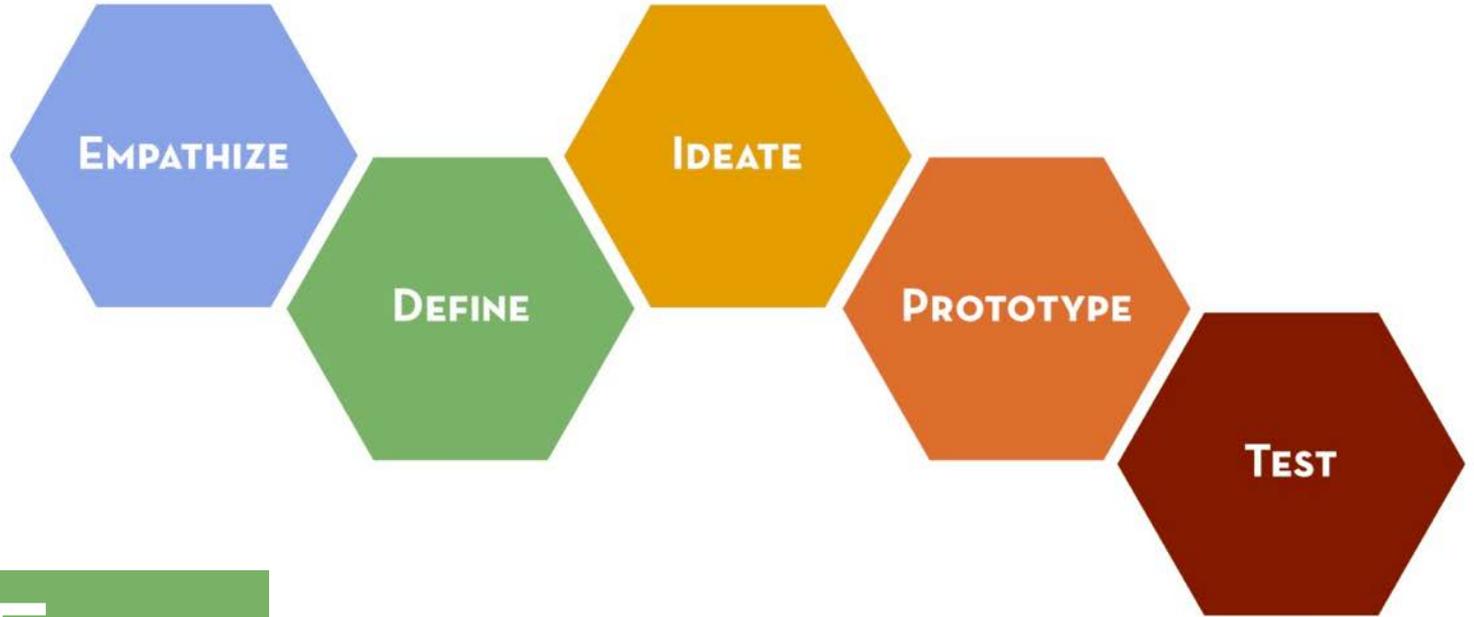




# EMPATHISE

Gather data to  
understand your users  
and their needs





# DEFINE

Describe the specific problem you have identified

**We get a lot  
of enquiries  
at the desk  
about  
printing**

**How might we  
make printing  
in the library  
more intuitive  
for users?**

# Clark Andrews

**AGE** 26  
**OCCUPATION** Software Developer  
**STATUS** Single  
**LOCATION** San Jose, CA  
**TIER** Experiment Hacker  
**ARCHETYPE** The Computer Nerd

Friendly

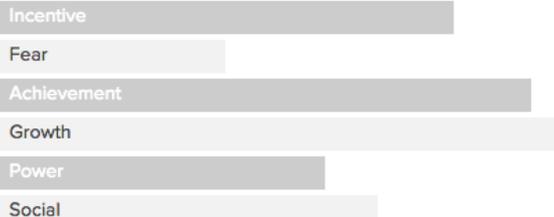
Clever

Go-Getter



"I feel like there's a smarter way for me to transition into a healthier lifestyle."

## Motivations



## Goals

- To cut down on unhealthy eating and drinking habits
- To measure multiple aspects of life more scientifically
- To set goals and see and make positive impacts on his life

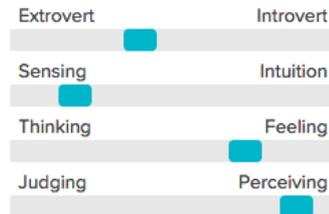
## Frustrations

- Unfamiliar with wearable technology
- Saturated tracking market
- Manual tracking is too time consuming

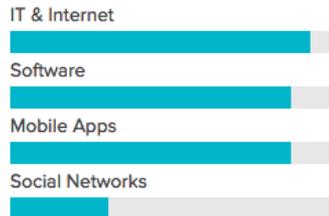
## Bio

Aaron is a systems software developer, a "data junkie" and for the past couple years, has been very interested in tracking aspects of his health and performance. Aaron wants to track his mood, happiness, sleep quality and how his eating and exercise habits affects his well being. Although he only drinks occasionally with friends on the weekend, he would like to cut down on alcohol intake.

## Personality



## Technology



## Brands





# PERSONA NAME

## Short description of this persona

Descriptive text that explains a little bit about who the persona is. This will provide background context for the information below and help your audience develop empathy for the persona.



*"A quote for persona that demonstrates emotion and/or job to be done. Make sure it sounds like something a real customer would actually say."*

Importance to Customer



Typical Journey

Alternate Journey

NEEDS & EXPECTATIONS

### PHASE 1 (Describe in customers' language)

- Customer needs
- Customer expectations

### PHASE 2

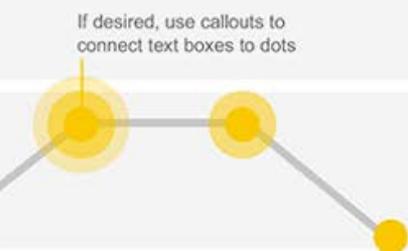
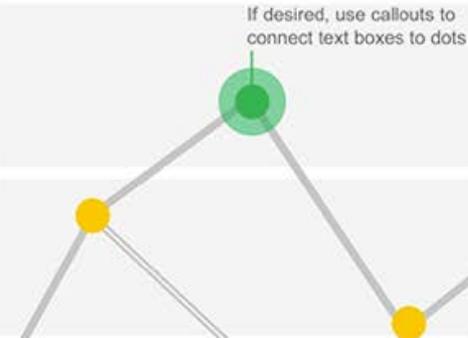
- Customer needs
- Customer expectations

### PHASE 3

- Customer needs
- Customer expectations

### PHASE 4

- Customer needs
- Customer expectations



- "Customer quotes"
- C-SAT, NPS
- Social Media Sentiment
- Metrics / KPIs

- "Customer quotes"
- C-SAT, NPS
- Social Media Sentiment
- Metrics / KPIs

- "Customer quotes"
- C-SAT, NPS
- Social Media Sentiment
- Metrics / KPIs

- "Customer quotes"
- C-SAT, NPS
- Social Media Sentiment
- Metrics / KPIs

VOICE OF CUSTOMER

YOUR LOGO

## TASKS

What tasks are users trying to complete? What questions do they need answered?



## FEELINGS

How is the user feeling about the experience? What really matters to them?

## INFLUENCES

What people, things or places may influence how the user acts?

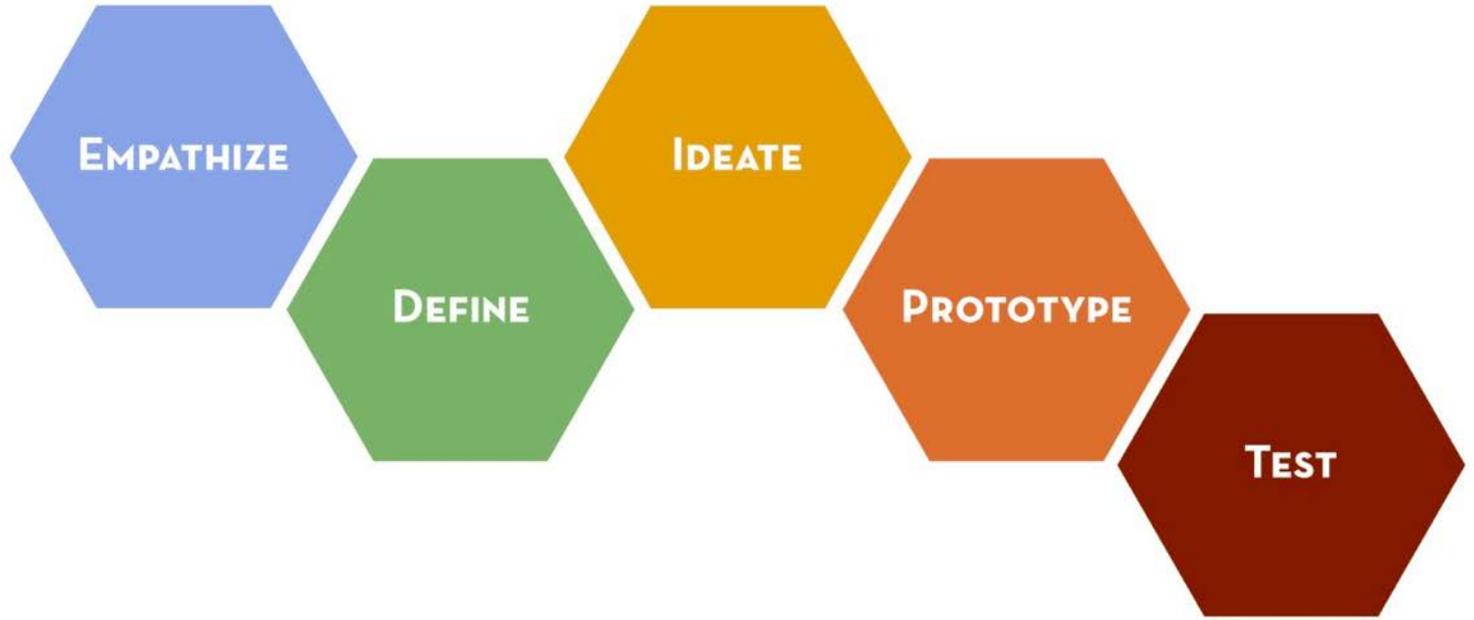
**NAME**

## PAIN POINTS

What pain points might the user be experiencing that they hope to overcome?

## OVERALL GOAL

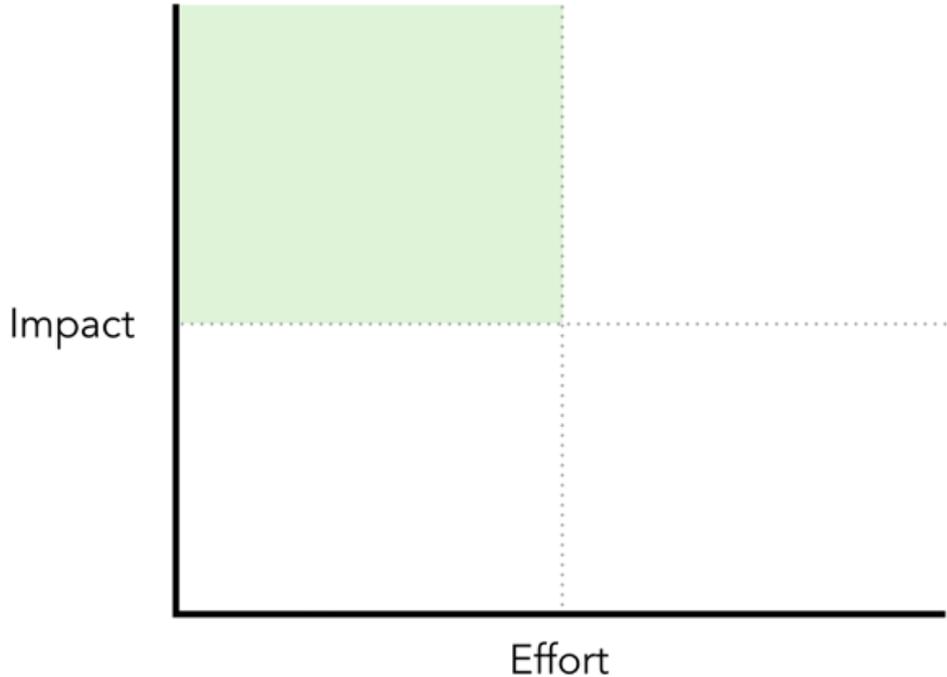
What is the users ultimate goal? What are they trying to achieve?



# IDEATE

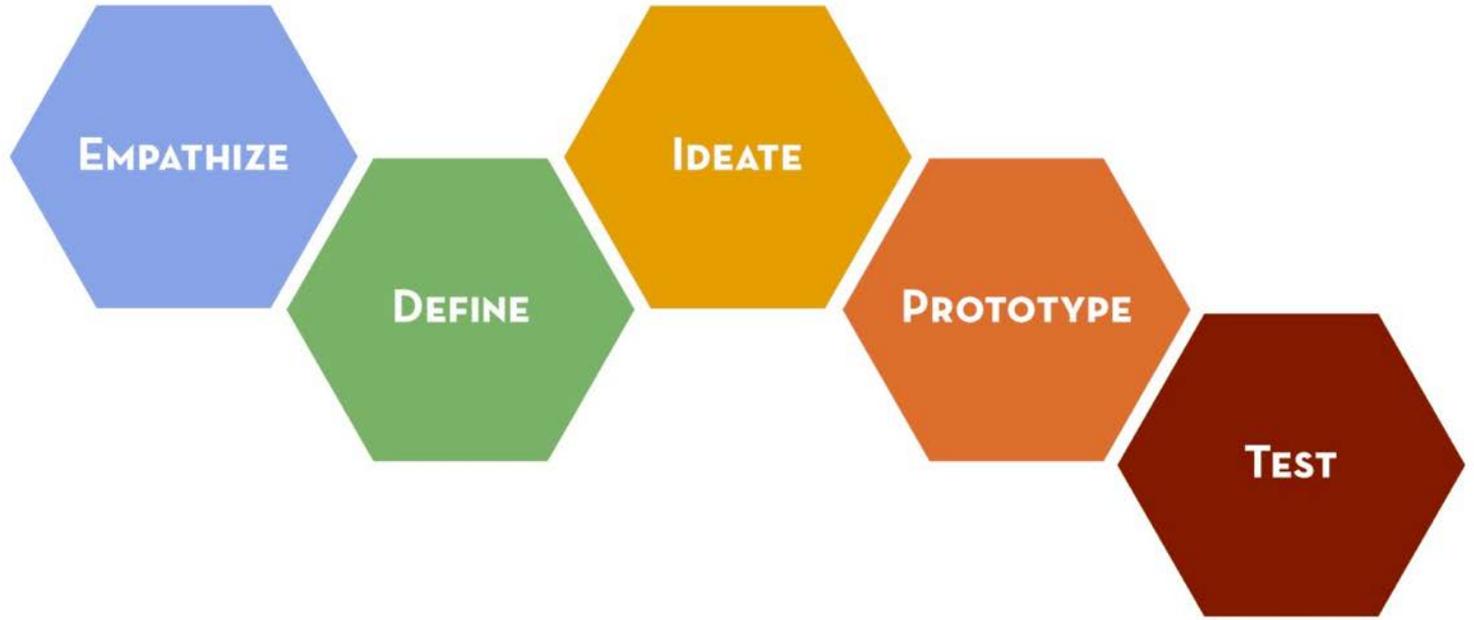
Generate ideas to meet  
your users' needs





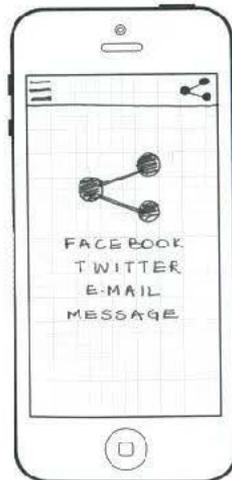
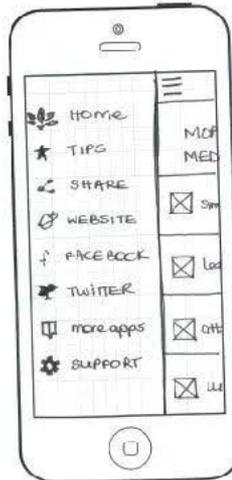
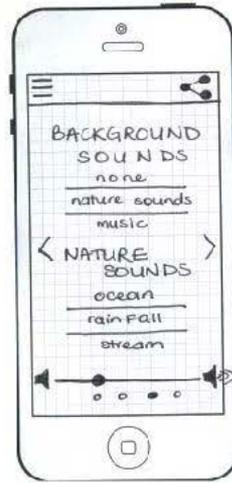
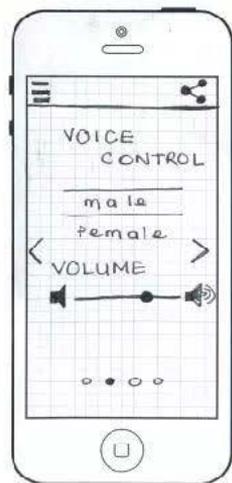
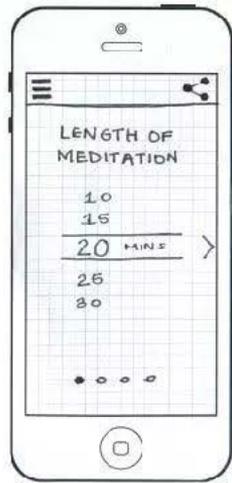
IMPACT/ EFFORT MATRIX | Lightning Design Jam

[bit.ly/ Impact\\_Effort\\_Matrix](https://bit.ly/Impact_Effort_Matrix)



# PROTOTYPE

Create mockups of  
your solution





PHOTO



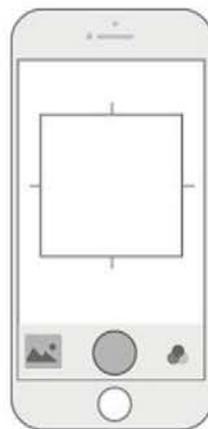
ALBUMS



WELCOME



FILTERS



CAMERA



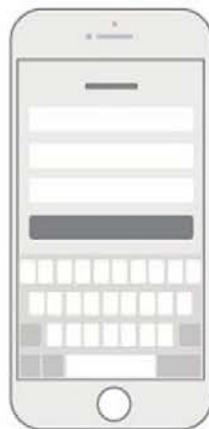
MUSIC



VIDEO



FORM



SINGUP



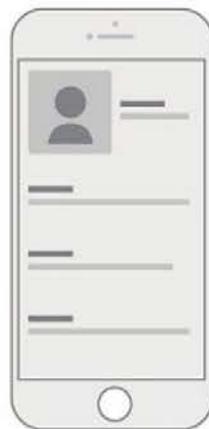
PICKER



BLANK



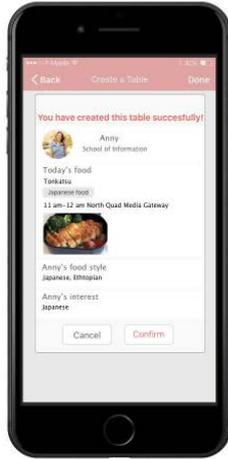
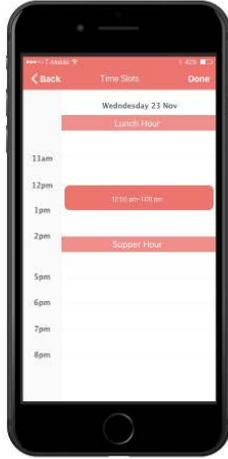
CONTACTS

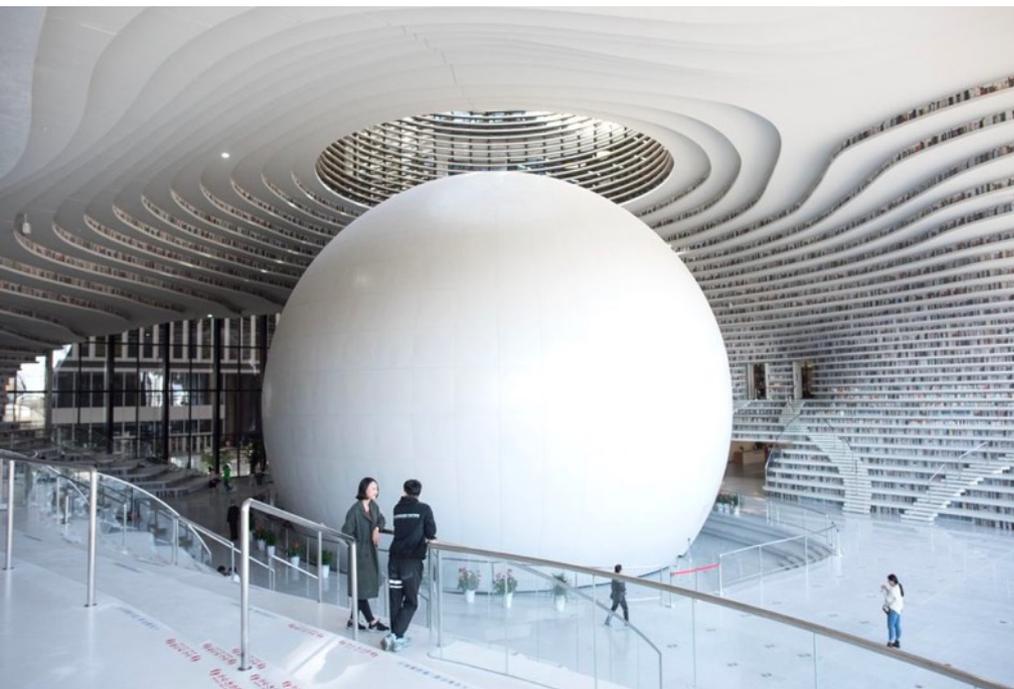


CONTACT



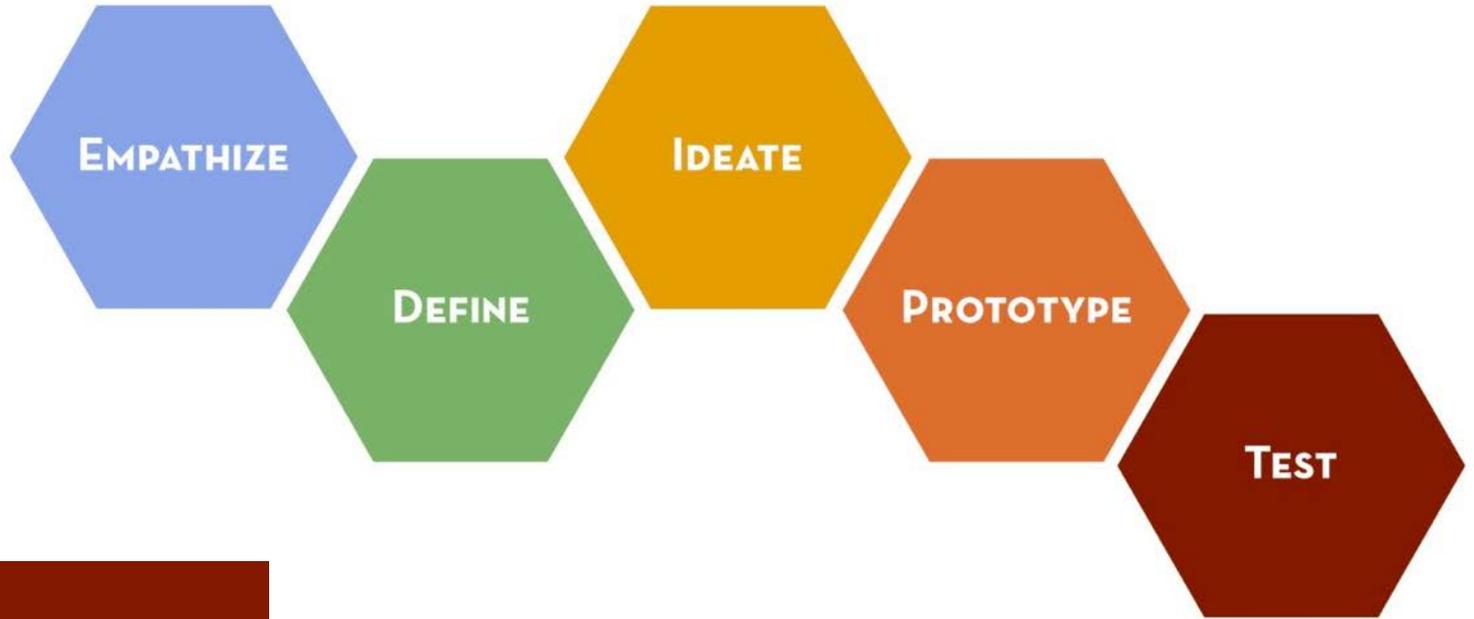
NEW CONTACT





Binhai Library, Tianjin (China)





# TEST

Test your mockups with users and modify based on their feedback



# Research Methods

ASPECTS OF RESEARCH	QUANTITATIVE	QUALITATIVE
Relationship between researcher and subject	Distant	Close
Relationship between theory/ concepts and research	Confirmation	Emergent
Research strategy	Structured	Unstructured
Image of social reality	Static and external to actor	Processual and socially constructed by actor
Nature of data	Hard, reliable	Rich, deep

(Shareia 2016)

**How can Design Thinking  
be used in academic  
libraries?**

# Systems

U.Va. Home My Account

University of Virginia Library

Search Search

[Go to Virgo for more options >>](#) Also try: [Journal Finder](#) [Databases A-Z](#) [Site Search](#)

[Home](#) [About the Library](#) [Research](#) [Collections](#) [Services](#)

### News & Events

 Lorem ipsum dolor sit amet, maiores ornare ac fermentum, imperdiet ut vivamus a, nam lectus at nunc. Quam euismod sem. [Continue reading...](#)

 Lorem ipsum dolor sit amet, maiores ornare ac fermentum, imperdiet ut vivamus a, nam lectus at nunc. Quam...

 Lorem ipsum dolor sit amet, maiores ornare ac fermentum, imperdiet...

[Continue reading...](#)

### Current Exhibitions

 Lorem ipsum dolor sit amet, maiores ornare ac fermentum, imperdiet ut vivamus a, nam lectus at nunc. Quam euismod sem, semper ut potenti pelentesque quisque.

Explore Library News, Events, and Blogs...

### The University of Virginia Library

maiores ornare ac fermentum, imperdiet ut vivamus a, nam lectus at nunc. Quam euismod sem, semper ut potenti pelentesque quisque. In eget sapien sed, sit duis vestibulum ultricies, placerat morbi amet vel, nullam in in lorem vel.

[Libraries & Labs](#)  
[Link Two](#)  
[Link Three](#)  
[Support the Library](#)

### Improve Your Research

Lorem ipsum dolor sit amet, maiores ornare ac fermentum, imperdiet ut vivamus a, nam lectus at nunc. Quam euismod sem, semper ut potenti pelentesque quisque. In eget sapien sed, sit duis vestibulum ultricies, placerat morbi amet vel, nullam in in lorem vel.

- [Research Guides](#)
- [Databases A-Z](#)
- [Journal Finder](#)
- [Library Instruction](#)

### Find Spaces & Services

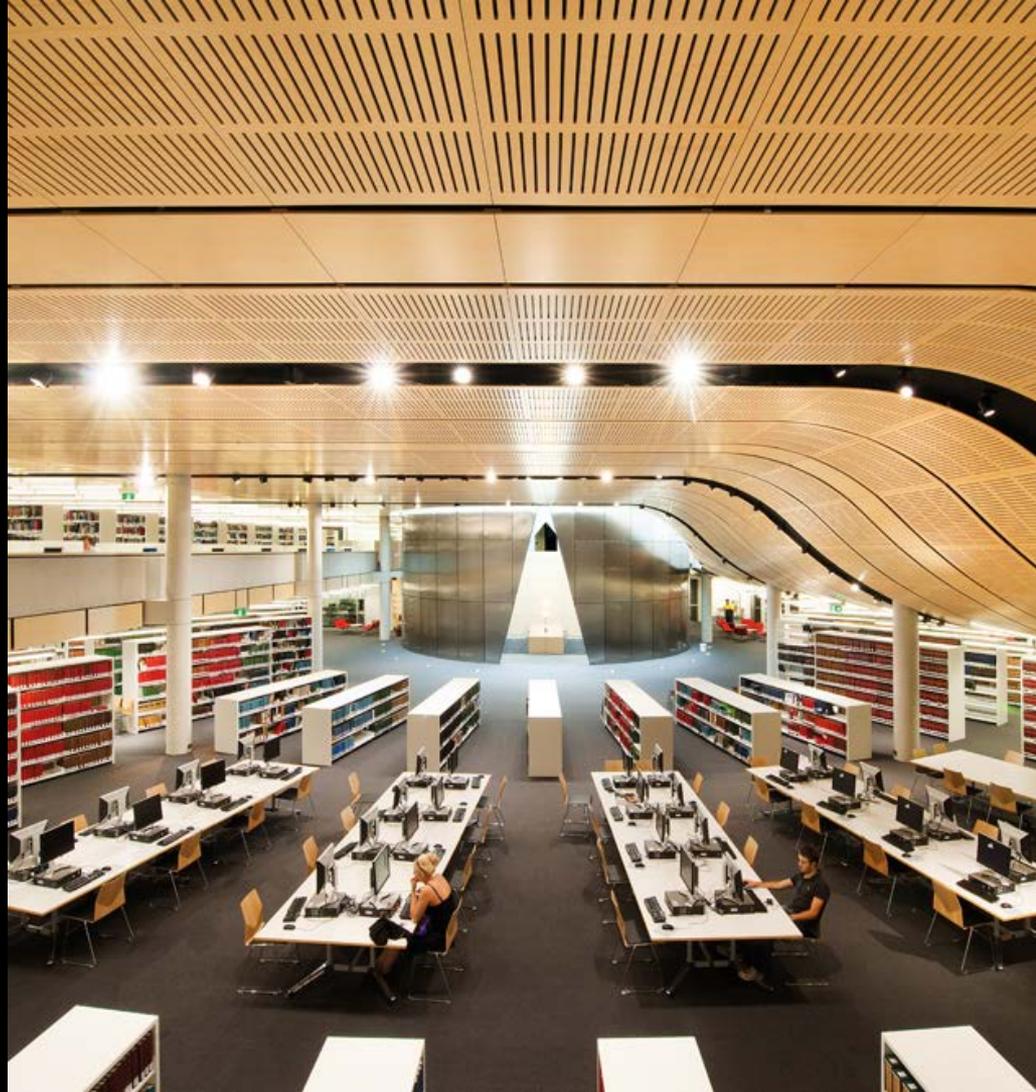
Lorem ipsum dolor sit amet, maiores ornare ac fermentum, imperdiet ut vivamus a, nam lectus at nunc. Quam euismod sem, semper ut potenti pelentesque quisque. In eget sapien sed, sit duis vestibulum ultricies, placerat morbi amet vel, nullam in in lorem vel.

- [Map of the Libraries](#)
- [Room Reservations](#)
- [Scanning](#)
- [LEO Delivery](#)
- [Interlibrary Loan](#)

Have questions? Need help?  Phone: 434.924.2031  Email: [library@virginia.edu](mailto:library@virginia.edu)  Chat now

Hours	Using the Library	Initiatives	Other Sites	© by the Rector and Visitors of the University of Virginia  This library is a Congressionally designated depository for U.S. Government documents. Public access to the Government documents is guaranteed by public law.
Staff Directory	<a href="#">Library Use Policies</a>	<a href="#">Hydra Partnership</a>	<a href="#">UVaCollab</a>	
Jobs	<a href="#">Accessibility Services</a>	<a href="#">AIMS Project</a>	<a href="#">SIS</a>	
Press	<a href="#">Off-grounds Access</a>	<a href="#">GIS Institute</a>	<a href="#">ITS</a>	
Site Map	<a href="#">Library &amp; ITS Accounts</a>	<a href="#">Media Commons</a>	<a href="#">U.Va. Home</a>	
Feedback	<a href="#">Directions &amp; Maps</a>	<a href="#">Preservation</a>		

# Spaces



# Programs

Check

Bias  
Viewpoint  
Objectivity

Check  
Assess

Bias  
Self assess  
Everything  
is biased  
Impact  
of being  
biased  
importance

When/why  
does bias  
matter?  
When is it  
good?

How to  
assess  
bias?

Authority  
Expertise

Check  
assess

where  
does  
authority  
come  
from?

Impact  
important

How do  
assess?

Viewpoint

Audience  
Intended

Check  
assess  
Audience/  
Intended

Why does  
this matter?  
Why you  
should be

Impact

How  
you  
assess

How

Content/  
detail  
Relevance  
Coverage

Check  
match my  
situation  
against content

Origin  
knowing needs  
is crucial

Impact:  
when-always

How assess  
personal  
intentionary

Reliability

Accuracy  
Evidence  
Validated

check  
how to  
ascertain

Where does  
it come  
from?  
What is fact  
truth?

fact vs opinion  
situations  
When do  
facts matter

How assess  
Accuracy  
Likelihood of  
truth

Time

Currency

Check  
currency

What is the  
issue?  
Information value  
validity change-  
with time

Importance  
relates  
to accuracy

Currency  
different  
scenario

Sound up

# Services



# Dave's Law

Users should not have to become mini-librarians in order to use the library

(Pattern 2012)

**I'm going to share two  
case studies with you**

# Towards a **User-Centred** Systematic Review Service

# What are systematic reviews?

A systematic review attempts to collate all empirical evidence that fits pre-specified eligibility criteria in order to answer a specific research question.

- clearly stated objectives
- pre-defined eligibility criteria
- explicit, reproducible methodology
- systematic search of the literature
- assessment of validity of included studies
- systematic synthesis and presentation of findings

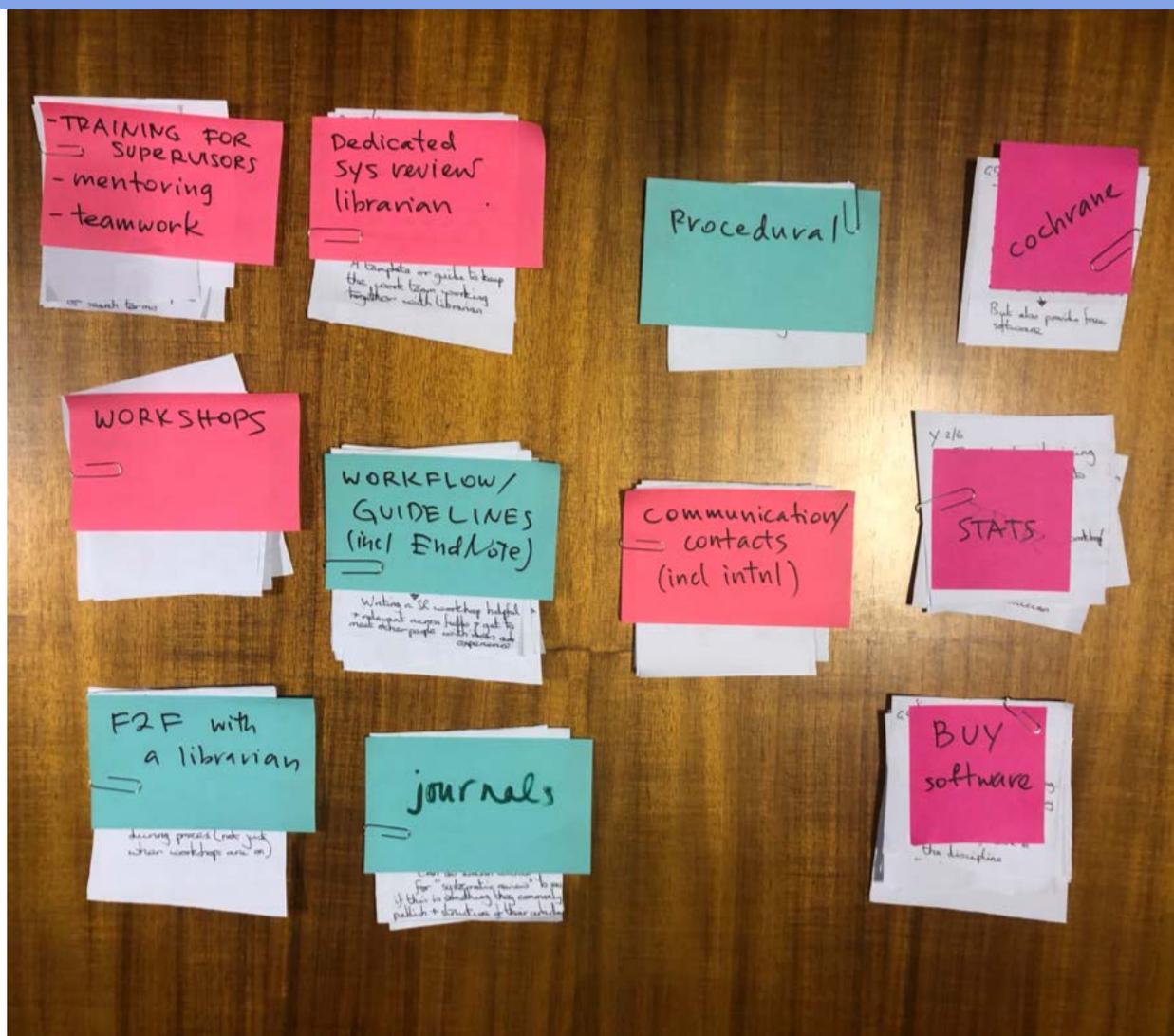
Higgins JPT, Green S (editors). *Cochrane Handbook for Systematic Reviews of Interventions* Version 5.1.0 [updated March 2011]. The Cochrane Collaboration, 2011. Available from [www.handbook.cochrane.org](http://www.handbook.cochrane.org)

## What we wanted to know

- What are the career levels and disciplines of researchers conducting systematic reviews?
- How do researchers define a systematic review?
- What services, either offered by the University or externally, are researchers conducting systematic reviews accessing?
- What are researchers' pain points when conducting a systematic review?
- How would researchers prefer to access systematic review support?

# EMPATHISE

Workshop to understand  
the research process  
(and a quick survey)



## Survey

- 103 responses, primarily Medicine & Health (74%), followed by Science (22%), Arts & Social Sciences (3%) and Engineering (1%)
- Primarily higher degree by research (HDR) students and early career researchers (ECRs)
- The largest group of respondents demonstrated a 'moderate' level of understanding of the systematic review process
- Opportunity to recruit participants for our user research workshop

# Survey

Level of understanding	Example of response	Percentage
None	'I don't know' or left blank	5%
Basic	'A search of the literature with a defined question'	33%
Moderate	'A critical evaluation of the academic literature on a specific topic'	45%
High	'A robust, reproducible, structured critical synthesis of existing research'	17%

# User Research Workshop

14 participants were asked to:

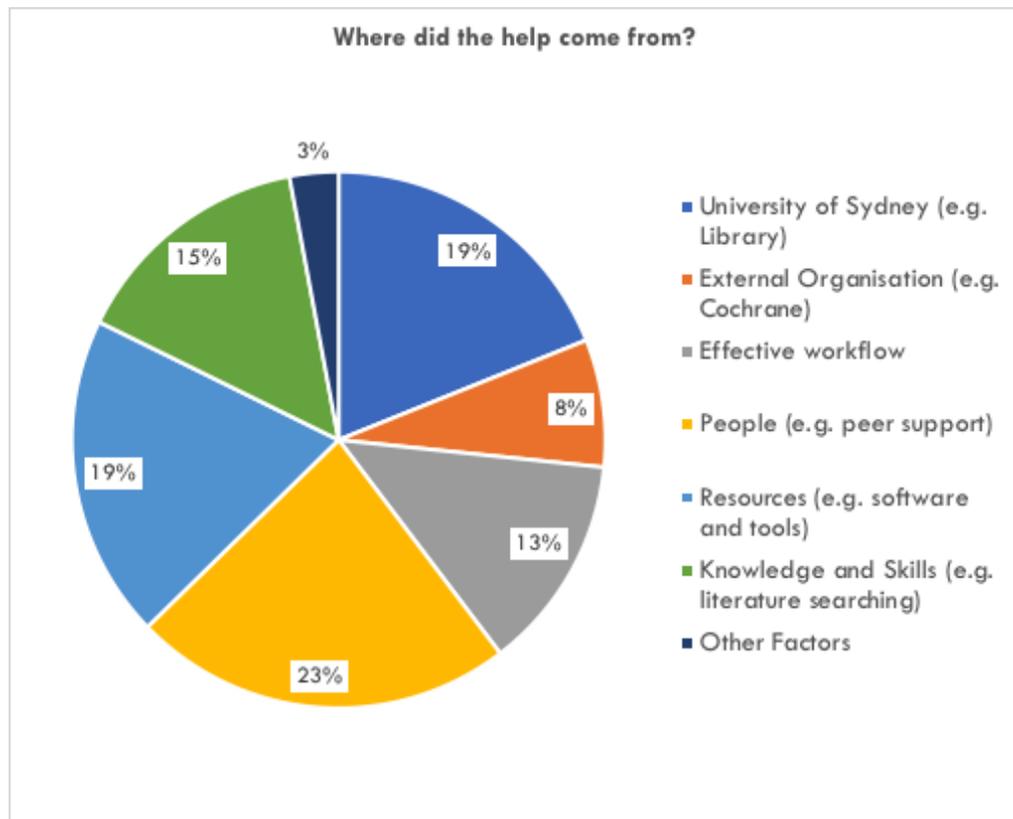
- Identify **stages** in the process of conducting a systematic review
- List things that **helped** in each stage (resources, services, information, activities, people, etc.)
- List the **issues** that they faced during the process
- Ideate **possible solutions** using the Brainwriting method



# Stages of the systematic review process

Preparation
Define Research Question
Develop and Register Protocol
Plan Search Strategy and Select Databases
Perform Search
Screen Results
Data Extraction and Appraisal
Analysis and Interpretation
Write and Publish

## Things that helped



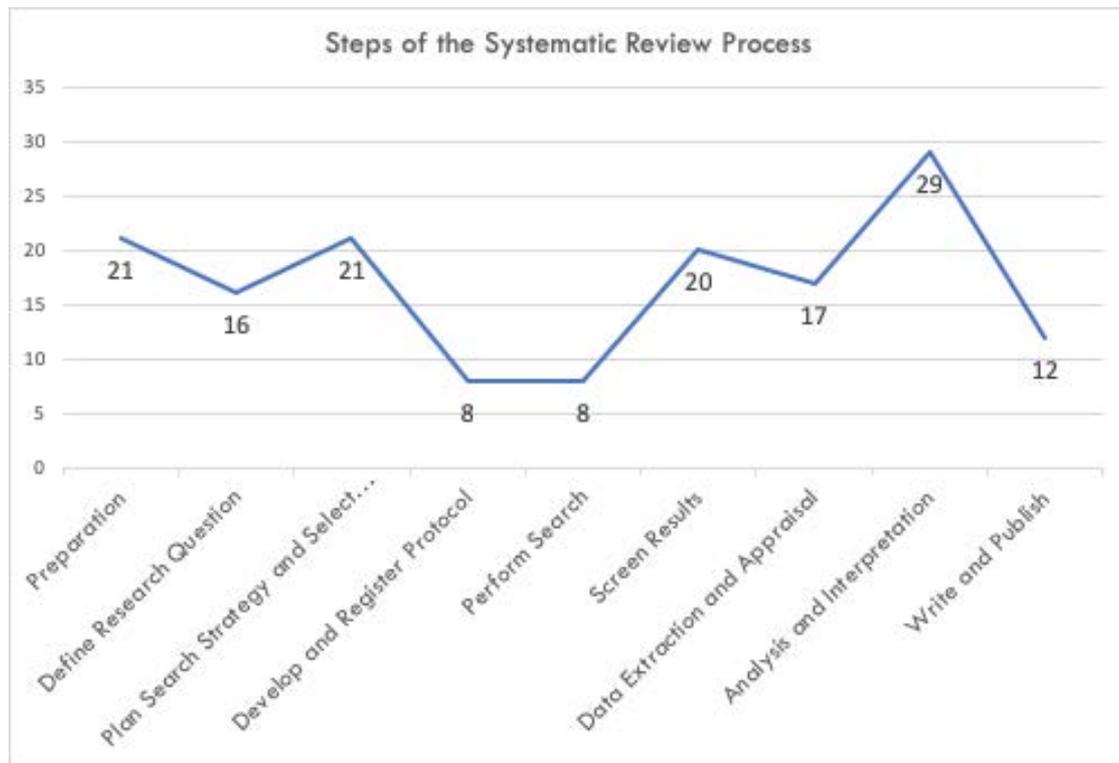
## Pain points

- **Access, availability or affordability**
  - **Knowledge or skills**
- 
- Researchers identified gaps in service relating to resources (full-text content, statistician, software), and the most significant constraint was a lack of time.
  - The most voted for issue in the knowledge and skills theme, “selecting relevant terms”, relates to library skills, but the second and third most voted for issues, “defining research question” and “understanding inclusion/exclusion criteria”, may be better addressed by subject experts.

## Knowledge or skills issues

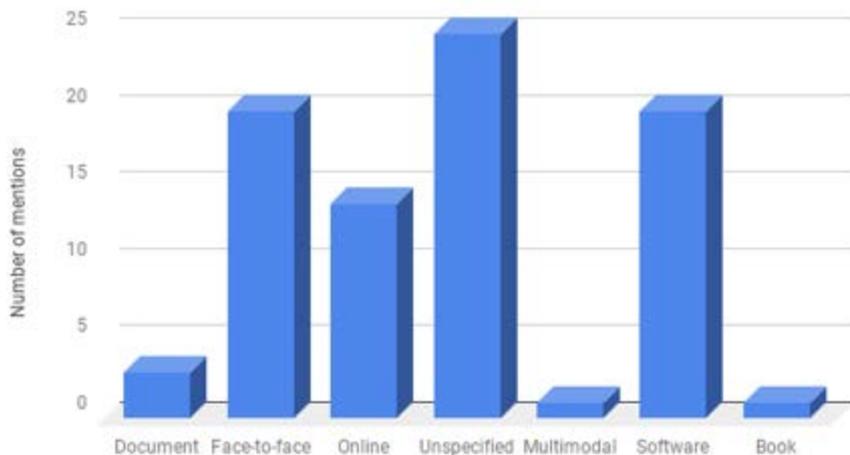
Common issues encountered	Number of mentions
Understanding different types of systematic reviews	18
Defining research question	10
Quality of data	9
Selecting databases	8
Checking if another systematic review exists	6
Selecting appropriate software	6
Extracting data	6
Finding a journal to publish in	6
Selecting relevant terms	5
Understanding different types of systematic reviews	5

## Knowledge or skills issues

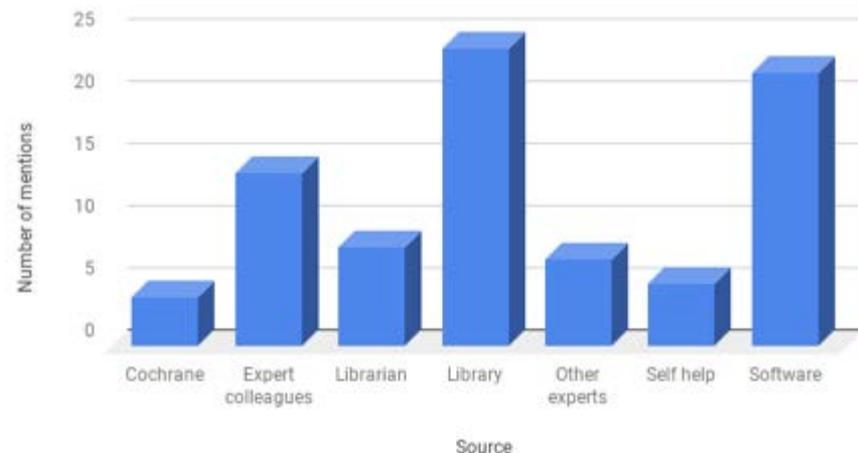


# Possible solutions

Preferred mode of delivery according to Brainwriting



Where a proposed solution comes from



# DEFINE

The steps of the process according to our users

Preparation
Define Research Question
Develop and Register Protocol
Plan Search Strategy and Select Databases
Perform Search
Screen Results
Data Extraction and Appraisal
Analysis and Interpretation
Write and Publish

## **HOW MIGHT WE**

simplify the research process for  
users who are conducting  
systematic reviews?

# IDEATE

Analysed all the user-identified pain points and categorised them



**Tips**



**Tools & resources**



**Need help?**



**References**



Note - didn't look quite this fun

# Systematic Review Toolkit: Systematic Review Portal

## Systematic Review Portal

Before you start

Define research question

Develop and register protocol

Plan search and select databases

Perform searches

Screen results

Data extraction and appraisal

Analyse and interpret

Write and publish

PROTOTYPE

Created a simple mockup to test with users

## What is a systematic review?

A systematic review is a method of answering a question by finding and appraising all the relevant research that has been published on that topic.

This guide will take you through the steps involved in conducting a systematic review. Support is available for each part of the process.

## Preparation (average timeline - 5 months\*)

- **Before you start** - determining if a systematic review is the best way to answer your question
- **Define research question** - scoping your topic, types of studies to include
- **Plan search and selecting databases** - composing a search strategy
- **Develop and register a review protocol** - declaring the methods you will use

## Conducting review (average timeline - 10 months\*)

- **Perform searches** - collecting the evidence, recording your search results
- **Screen results** - determining which studies to include in your review
- **Data extraction and appraisal** - using tools to assess the quality of the evidence
- **Analyse and interpret** - synthesising the results to answer your question

## Write and publish (average timeline - 3 months\*)

# TEST

Tested a high-fidelity prototype before launching

## Preparation

(average timeline - 5 months\*)

### Before you start

determining if a systematic review is the right fit and an overview of the logistics in conducting a review.

### Define research question

scoping your topic, types of research questions and writing a focused question for your review to answer.

### Develop and register a review protocol

declaring the methodology and eligibility criteria used to determine what evidence will be used.

### Plan search and selecting databases

composing a search strategy to locate all relevant evidence to answer your question.

## Conducting reviews

(average timeline - 10 months\*)

### Perform searches

collecting the evidence, recording your search, and exporting to a reference manager.

### Screen results

determining which studies to include in the review and methods for reporting on decisions.

### Data extraction and appraisal

using tools to assessing the validity of the evidence.

### Analyse and interpret

methods to synthesise the results and table the findings to answer your question.

## Write and publish

(average timeline - 3 months\*)

### Write and publish

writing up your review and getting it published

## Testing the prototype

- Once we were happy with our content, we brought in an external UX agency to conduct **two rounds of usability testing**
  - With postgraduate researchers, our primary audience
  - With academics teaching systematic review methods
- Tested interaction design, language, content discoverability and navigation
  - “Why would you conduct a scoping search?”
  - “How do you know when you’ve searched enough databases?”
  - “What is a critical appraisal tool used for?”

# What we did next



## Research support

## Find information &amp; data

## Systematic reviews

Stay up-to-date in your field

Finding datasets

Finding theses

Request an item the library doesn't have

Suggest an item for our collection

## Manage information &amp; data

## Publish information &amp; data

## Promote &amp; communicate

## Measure impact

## Services &amp; training

## Preparation

## Conducting reviews

## Write &amp; publish

## Overview

## Before you start

## Define research question

## Develop and register protocol

## Plan search and select databases

## What is a systematic review?

A systematic review is a method of answering a question by finding, appraising and synthesising evidence in a systematic and unbiased way.

This guide will take you through the steps involved in conducting a systematic review. Click one of the stages below to see information, tips, resources and support available for each part of the process.

### Preparation

(average timeline - 5 months\*)

#### Before you start

determining if a systematic review is the right fit and an overview of the logistics in conducting a review.

#### Define research question

scoping your topic, types of research questions and writing a focused question for your review to answer.

# Structure of each stage

**Evidence**, synthesised information about the process and workflow

**Tips**, best practice suggestions from Library staff

**Tools & resources**, links to suggested websites, guidelines and databases

**Need help?** Who at the University can support you with this stage

## Preparation

(average timeline - 5 months\*)

### Before you start

determining if a systematic review is the right fit and an overview of the logistics in conducting a review.

### Define research question

scoping your topic, types of research questions and writing a focused question for your review to answer.

### Develop and register a review protocol

declaring the methodology and eligibility criteria used to determine what evidence will be used.

### Plan search and selecting databases

composing a search strategy to locate all relevant evidence to answer your question.

## Conducting reviews

(average timeline - 10 months\*)

### Perform searches

collecting the evidence, recording your search, and exporting to a reference manager.

### Screen results

determining which studies to include in the review and methods for reporting on decisions.

### Data extraction and appraisal

using tools to assessing the validity of the evidence.

### Analyse and interpret

methods to synthesise the results and table the findings to answer your question.

## Write and publish

(average timeline - 3 months\*)

### Write and publish

writing up your review and getting it published



## Tools & resources



### Tools

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#### PRISMA

[PRISMA flow diagram template](#) (DOC, 56 KB)

[PRISMA chart generator](#)

#### Reporting on your searches

[Search text template for Cochrane reviews](#)

Best practice examples from Cochrane on how to write about your searches in a Cochrane review. Examples can be adapted to suit your systematic review.

#### Database search tools

[Flinders University's Database Syntax Guide](#)

A comprehensive table of operators used across different databases.

[Flinders University's guide to translating your search from Medline](#)

A guide detailing how to adapt your Medline search for CINAHL, PsycInfo and Scopus.

#### Managing references

[EndNote](#) (Tool)

[Mendeley](#) (Tool)

### Resources

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[PRISMA website resources](#)

Contains links to PRISMA explanatory documents, checklists, and advice for citing PRISMA in your systematic review.

### Database search guides

[How to search in Medline](#) (PDF, 484KB)

[How to search in Embase](#) (PDF, 484KB)

[How to search in PsycInfo](#) (PDF, 484KB)

[How to search in CINAHL](#) (PDF, 484KB)

[How to search in Scopus](#) (PDF, 484KB)



### Need help?



The Library's [EndNote guide](#) contains information and advice about using EndNote to organise your research. You can also get help with EndNote through [Chat Now](#).

For help with specific databases or to troubleshoot problems with EndNote, contact your [Librarian](#).



### References



- Higgins, J.P.T., & Green, S. (2011). [Cochrane handbook for systematic reviews of interventions](#) .
- Gough, D., Oliver, S., & Thomas, J. (2017). [An introduction to systematic reviews](#) (2nd ed.). Los Angeles: SAGE.
- Liberati, A., Altman, D.G., Tetzlaff, J., Mulrow, C., Gøtzsche, P.C., Ioannidis, J.P.A., Clarke, M., Devereaux, P.J., Kleijnen, J., & Moher, D. (2009). [The PRISMA statement for reporting systematic reviews and meta-analyses of studies that evaluate health care interventions: Explanation and elaboration](#). *PLoS Medicine*, 6(7), e1000100.

<h1>SYSTEMATIC REVIEW SERVICE CHARTER</h1>	STANDARD	ACADEMIC	PREMIUM
	1-3 hours	3-5 hours	5-20 hours
	Available to postgraduate students and beyond	Available to post-doctoral researchers and beyond	
	Up to <b>two</b> research consultations N/A	Up to <b>three</b> research consultations Requires acknowledgement of librarian or library's contributions in the Acknowledgements section	N/A  Requires the librarian to be listed as co-author on the publication (with University Library affiliation)
Review or refine your research questions or topic			
Provide advice on finding existing systematic reviews			
Recommend databases for your subject area			
Review or create up to <b>one</b> search strategy			
Provide advice on grey literature sources			
Provide support for reference management using EndNote			
Provide advice on documenting search results (e.g. PRISMA)			
Review or create up to <b>three</b> database searches			
Edit search strategy based on results			
Run the searches and extract the results			
De-duplicate references and prepare an EndNote library			
Contribute to the Methods section of the paper			
Provide copies of search strategies for inclusion in the appendix			



## About this site

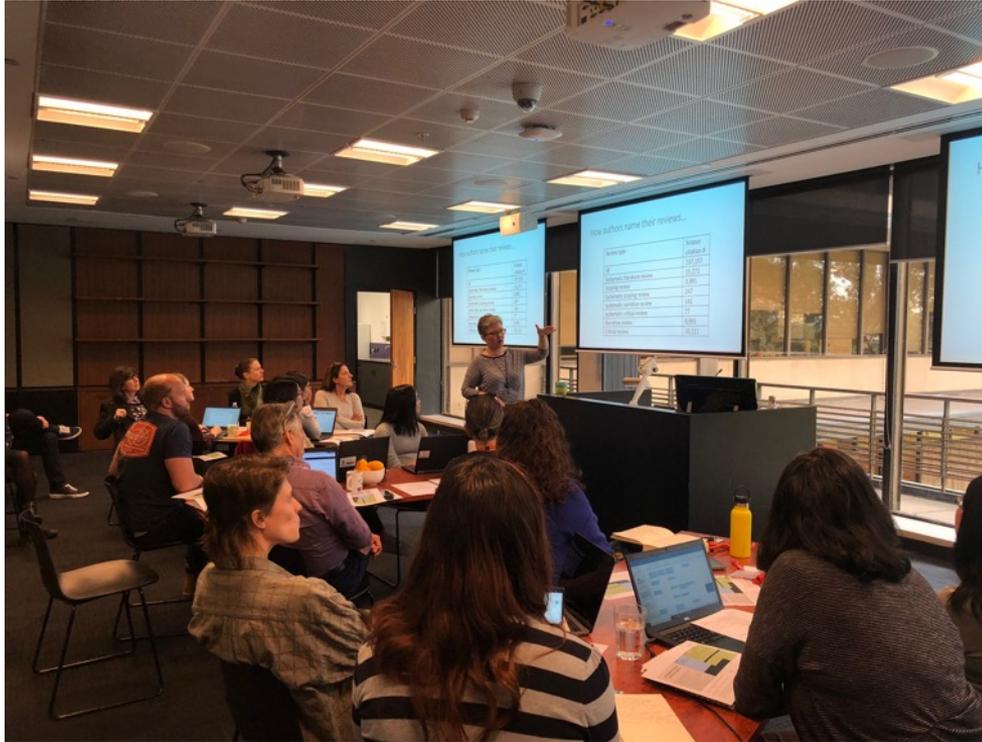


We developed this canvas site to guide you through the process of literature searching. No matter which field of study or what research topic you're working on, you'll need to have a good understanding of the literature that's already out there.

Searching for information is something you do every day as well as for your academic studies. Our aim here is to raise your awareness of your search habits, and enable you to *purposefully* plan out and execute effective searches.

- After completing these modules, you will be able to:
- > turn your research topic into a searchable question
  - > find research methods literature
  - > use a scoping search to find synonyms for your topic's main concepts
  - > compare databases and select the right ones for your research topic
  - > search comprehensively in databases to retrieve relevant literature
  - > adjust a search strategy to retrieve more relevant results

# Staff Competencies



**C1.** Systematic review definition and appropriate review question

**C2.** Systematic review process and methodology

**C3.** Comprehensive searching

**C4.** Managing results

**C5.** Referral

## Future directions

- Continue to refine our systematic review workshops, which offer a balance between one-on-one support and self-service
- Look for further opportunities to collaborate with academics and professional service units for additional support
- Investigate licensing for systematic review software to assist with the screening process
- Evaluate and refine systematic review service charter and staff development program

How do we demonstrate  
the **impact** of our client  
engagement?

(a work in progress)

# EMPATHISE

Workshop to understand  
client engagement



## Collect Information

- Understand the **useful data** underpinning a client engagement



## Client Engagement

- Record the **types of activities** that constitute client **engagement**



## Report Engagement

- Understand what **current systems** are already being used to record engagement activities

9 library staff members participated in a user research workshop

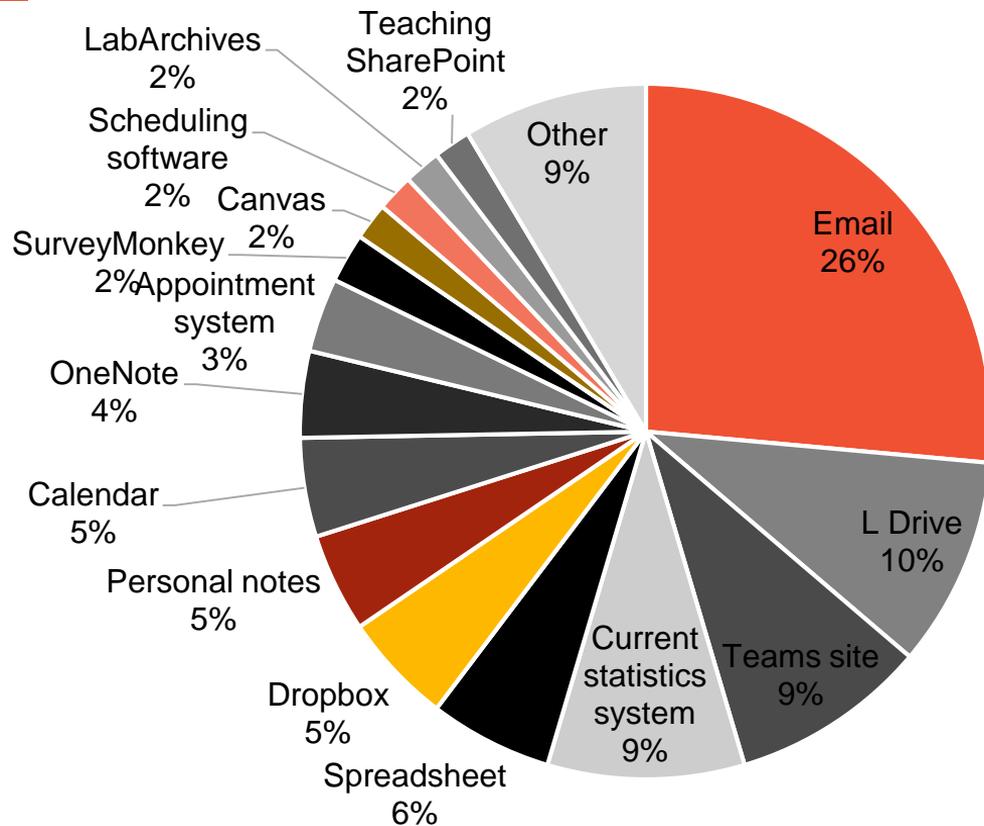
61 different kinds of engagement activities were identified by the group

66% of those were listed as one-off activities, and 34% were considered ongoing

**Use Case 1: Library wishes to profile an individual's Library engagement**

<b>Activity</b>	<b>Pre-interaction</b>	<b>Post-interaction</b>	<b>Systems</b>
Type of client engagement	What information the user needs from the system in order for the interaction to be successful	What information somebody needs from the system in order to report the interaction	What systems are currently being used to capture this data
One-off   Ongoing			
- Research Consultation	<ul style="list-style-type: none"><li>- Client name</li><li>- Faculty affiliation</li><li>- Which campus they're based at</li><li>- Research topic</li><li>- Contact information (email address, phone number)</li><li>- Previous research consultations</li><li>- Other Library interactions</li><li>- Student's supervisor?</li></ul>	<ul style="list-style-type: none"><li>- Client name</li><li>- Faculty affiliation</li><li>- Which campus they're based at</li><li>- Topic of consultation</li><li>- Date of consultation</li><li>- Mode of delivery</li><li>- Time taken</li><li>- Evaluation data/client feedback</li><li>- Any outputs resulting from engagement</li></ul>	<ul style="list-style-type: none"><li>- ASEO</li><li>- Email</li><li>- LibAnswers</li><li>- LibCal</li></ul>
Role:			

# SYSTEMS



# INTERACTIONS

What we think we do:

Original Interaction Types
Research Consultation
Research Report
Meeting (non- Library)
Grant or Promotional Assistance
Project
Events and Exhibitions
Conference
Other



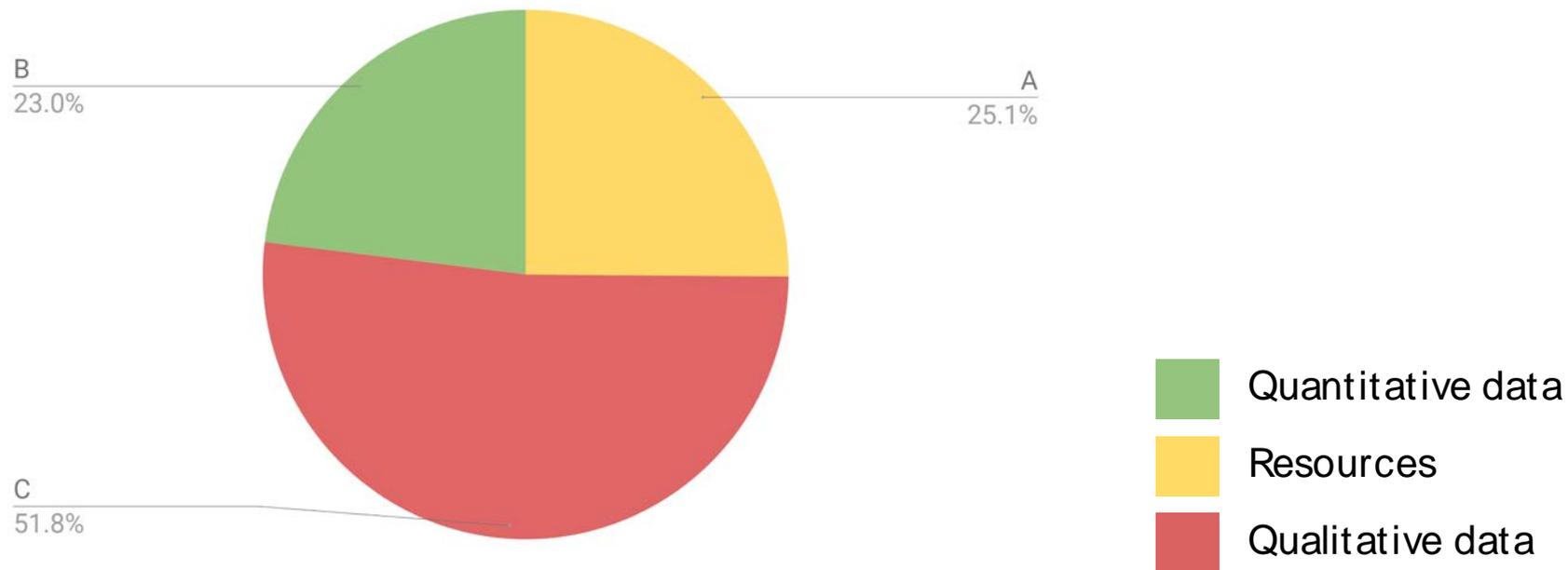
What we actually do:

Proposed Interaction Types
Individual Consultation
Collaborative Project
Promotion
Business Intelligence
Invitation to Collaborate
Committee Meeting
Delivering Training
Hosting an Event
Individual Report
Attending Event or Training
Networking meeting

# DATA POINTS

540 unique values,  
820 unique uses

## All Interactions



## Deal breakers list

Deal breakers	Current system	Future CRM
Customise interaction types by role	X	Supported by user research
Interactions listed under staff member's profile automatically	X	Supported by user research
Automated profile creation for clients (other than csv import)	X	Supported by user research
Emails captured/scheduled automatically	X	Supported by user research
System used to 'push' engagement activities	X	Still not sure
Clear advantage/selling point to encourage uptake	X	Still not sure

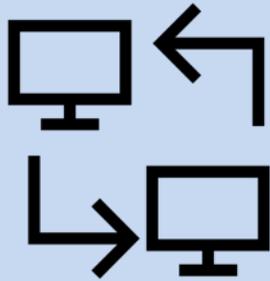
## **HOW MIGHT WE**

enable staff to deliver excellent client engagement and also meet our reporting requirements?

# DEFINE

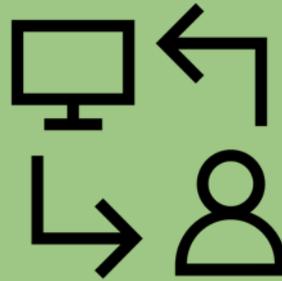
What do we actually  
want to do here?





### **Automated system**

Train staff to adopt  
standardised workflows  
for activities



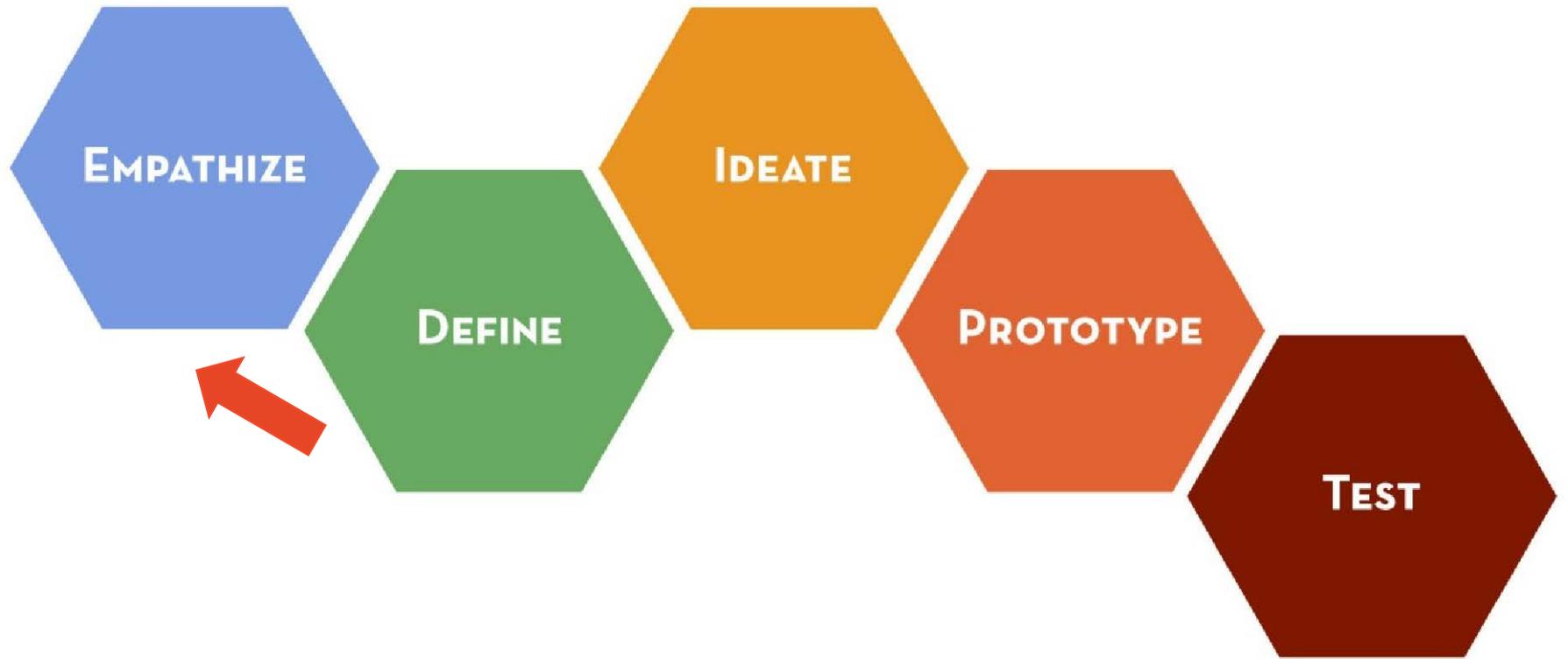
### **Manual system**

Train staff on the value  
of reporting and  
encouraging adoption  
of the system



### **Combination system**

System prompts staff to  
enter information about  
'high potential' activities



**Things *you* should know**

Design Thinking is **flexible**,  
you can use it as much or  
as little as you like

**Quantity over quality:**  
you need to trust that the  
details will come later

**You can learn as you go,**  
so don't be afraid to  
experiment with new  
methods and approaches

You can take an academic approach, but **don't lose the freedom** that comes from exploration

Make sure that you  
**tell somebody**, so that  
others can learn from your  
work

Things **leaders** should know

Design thinking can help you  
to develop an **evidence base**  
for making decisions

Staff need to be given the  
**freedom to take risks**, don't  
expect answers right away

**You can model the process**  
in planning sessions and use  
it to start conversations

The idea of doing research **can be intimidating**, so think about how you can gradually introduce it into your team's work

Staff won't make **service design** part of their work unless you support them

We become more  
empathetic

We begin to think  
outside the box

We get more  
comfortable with  
ambiguity

# What happens when librarians embrace design thinking?

We look critically  
at the services and  
programs we  
develop

We learn to take  
creative risks

We create a space  
for everyone

**Thank you!**

