

Lean Library Management

Eleven Strategies for Reducing Costs and Improving Customer Services

John J. Huber

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Foreword

How many of us have as much budget as we need? We have a long list of unfunded projects and new technologies to purchase. Economic times *demand* that every dollar be “well spent.” Technology has moved ahead at light speed, and library users have embraced it. The ability of mobile devices to access massive amounts of data has left many believing that a library is unnecessary or redundant. Some of these believers are politicians and decision makers who have control over library budgets and see libraries riding off into the sunset in favor of an all-digital information world.

Your prime motivation to apply the lessons and ideas in this book is simple and fundamental: they save time and money that you can then use in more creative ways. *Lean Library Management* is a way of thinking that embraces the leanness of motion and efficiency and enables staff time to be devoted to less clerical work and more professional activities. By applying the lessons in this book you will better utilize your staff’s talents, eliminate job monotony, and increase staff retention. It is simply good business.

As a society we have become universally impatient; for example, when our computer takes sixty seconds to boot, when our lunch order takes more than three minutes. We have come to expect “instant gratification” from service providers, be they electronic or human. If the casual Internet user or the student assumes that they can get everything they need on the Web, almost instantly, with little effort, why should either need a library? To survive, libraries must maintain a competitive edge in our immediacy-driven society and our live processing, instant sharing electronic world. We can accomplish this by aggressively searching for ways to slim our back-of-the-house and service methods. This will allow us to redirect staff abilities to do a better job marketing how our professionals know how to access authoritative information and how they *can* make a difference to our customers.

I’ve been a longtime devotee to the concept of kaizen—making small continuous improvements to reap efficiency. *Lean Library Management* empowers this school of thought by energizing staff members who know services inside and

out. John Huber's book focuses staff creativity and brainpower by challenging mind-sets.

My first encounters with a "productivity expert" were in the County of Los Angeles Public Library and later the City of Scottsdale (AZ) Public Library. These encounters weren't greeted with the best mental attitude. Who is this person to come "fix" us? What does this "expert" know of libraries? I am now a convert. Although John Huber helped me with numerous projects, I'll share one example. John came to the Tulsa City-County Library to address a longstanding bottleneck of delivery service to the then twenty-three libraries. Branches and customers complained about the slow turnaround time, errors of incorrect books received, and misdirected personnel or payroll documents. The growth in volume had impacted the effectiveness of our process, causing high turnover in delivery drivers due to backbreaking work with negative coworker comments about poor service. Library service and operations were adversely impacted at their most fundamental level. No one wanted to take this on. It meant "criticizing" staff who had done their level best to make the current system work. It was complex. A fresh view was needed to untangle the bottleneck that impacted every service and function. This story had a happy ending. The new Lean methods reaped ergonomic benefits for branch staff and delivery drivers, reduced staff turnover, improved morale, and internal and external customers received their books, organizational mail, and documents in a timely manner. Positive comments were heard throughout the library system.

As you can see, Lean-minded principles are about methods for service improvements, not about hurting feelings or making anyone feel less valued because change is suggested. Lean-minded improvements require periodic audit. Clinging to what works and has served us for years will eventually work against us. We must stand back and look at the big picture—survival of library service is dependent on our response to this immediacy-driven society. Library boards and city or university administration want to see how dollars invested reap results. The Lean principles can provide you with tangible hard data and monitored results.

The fear of cutting staff positions if improvements are made is probably at the core of why people resist change. However, with these Lean improvements, you have many more options than before. Use this opportunity to make some shifts in workload to ensure that the most critical tasks are accomplished. Staff can be cross-trained for better coverage and job descriptions rewritten to meet the organizational needs. Often positions are vacated through natural attrition and bring you the opportunity to reevaluate staffing needs. It is all a gradual evolution. There was no drive to reduce staff levels, but we did provide our staff with more time to service the customer rather than service the processes. And remember, reductions in hiring and training new staff, in industrial injuries with loss of work time and productivity, and in staff complaints are also organizational cost savings.

Do the Lean methods work everywhere? You need to assess where they apply and what improvement will make the greatest difference for your organi-

zation. If changing the size and location of a book return cart can make it easier and faster for staff to check in books, service is improved times your number of branches times your numbers of books received. A small improvement can reap big results. Finding bottlenecks is easy. They are legendary among your staff; just ask. The bottleneck might be one of your pet ideas. Focus on the result, not on who thought of the idea. Times change and so do methods. Slow down and experience your expectations as a customer when shopping, using the bank or a personal service. Does your library meet this same high standard for ease in use, delivery times, and feeling of being well served? Every dollar spent in the quest for Lean methods is more than repaid in results and happier staff. Whether a circulation clerk, librarian, or delivery driver, libraries attract and hire smart people. All of us want to be utilized at the highest skill levels possible. It adds purpose and value to our jobs. Let go of the routine or rote tasks. Employees who feel valued bring crowd-pleasing internal and external customer service and begin to see other ways service can be tweaked or enhanced. Libraries as a place are so much more than the thoughts expressed here. In these times of fast-changing digital connectivity options and stressed budgets, the use of Lean methods to redirect staff resources to unleash and offer services your library is known for is even more critical. Even the most well-run libraries with healthy budgets can profit from Lean methods. Good luck on your Lean journey!

*Linda Saferite, CEO
Tulsa City–County Library, 1996–2009*

Preface

Increased customer expectations coupled with tough competition, changing technology, slashed budgets, and reduced staff—sound like today? Yes, but the year I'm referring to is 1981. Inflation approached 11 percent, the unemployment rate reached nearly 10 percent, IBM launched the personal computer, and overseas manufacturing companies were winning the hearts and minds of the American consumer. U.S. manufacturing, once the envy of the world, faced an uncertain future. Some industry leaders fell back on old traditions and familiar solutions, while others responded by looking for new and innovative management techniques.

Today's threats to library service are similar. RedBox and now Blockbuster are providing kiosk delivery of \$1.00 DVD rentals; Google provides easy-to-use, one-click engagement search tools; Amazon.com delivers books within twenty-four hours; McDonald's now offers free Wi-Fi service; Amazon's Kindle e-book sales are zooming; and Apple has upped the ante with the release and upgrades of their iPad. This is all occurring while library budgets are under pressure and staffing levels are slashed. Your customer expectations for fast, friendly, and effective service have certainly not diminished; in fact, due to the competition and a struggling economy, customer expectations have never been higher. In the face of this challenge, some library leaders will retreat to old and familiar techniques, while others will search for new and innovative ways to respond.

The parallels between the manufacturing industry of the 1980s and libraries today are numerous. Can libraries rich with history and experience learn survival techniques from the manufacturing industry? I believe they can, and that is why I wrote *Lean Library Management: Eleven Strategies for Reducing Costs and Improving Customer Services*.

Nearly thirty years ago, I was a part of history. I had joined a small band of young engineering consultants working for Accenture Consulting (formerly Andersen Consulting). We were challenged to introduce a breakthrough management concept developed by the Toyota Motor Company called the Toyota

Production System to a reluctant U.S. manufacturing industry. The Toyota Production System was the forefather of what is now called Lean Manufacturing. This small band of consultants not only had success but also sparked what would change the entire U.S. manufacturing industry. Lean Manufacturing is now the cornerstone of nearly every manufacturing company's operational improvement strategy, not only here in the United States, but throughout the world. It is no longer an option but a requirement for survival.

Lean is a very simple concept: constantly strive to reduce the distance between you and your customer by eliminating all of the waste in your service delivery cycle. Lean accomplishes this by attacking the waste that lies hidden behind poorly designed process flows, outdated business models, ineffectual organizational structures, inflexible software systems, and stagnant procedures. Waste is defined by any delay or nonvalued activity in the process. Reduce this waste, and the distance between you and your customer is reduced. In addition, your costs will go down. Specifically, by eliminating wasteful delays and nonvalue activities in your service cycle the speed, accuracy, and quality of service to your customers will dramatically improve. Therefore, Lean provides a vehicle to improve customer service and at the same time reduce your costs.

After applying Lean concepts to more than 100 of my manufacturing clients, I have had the privilege to work with many different types of libraries across North America. In this book I will help you understand and apply the concepts of Lean to your library environment.

Lean Library Management begins with an introduction to the transformational power of Lean by comparing it to a smooth-flowing river as opposed to a twisting/turning river with dangerous white-water rapids. I define Lean in terms of its history, its philosophy, and the benefits it can provide. The book's chapters provide eleven strategies that you can use to cut waste and costs dramatically while improving customer service:

- Strategy One shows how libraries can embrace the business side of their endeavors and recognize, benchmark, and measure their performance against for-profit competitors, such as Amazon.com and Google.
- Strategy Two discusses why organizations of all types (including libraries) tend to resist change initiatives, and it provides specific ways you can transform your organization to a culture that embraces change.
- Strategy Three reveals an essential key to Lean transformation: the realization that libraries are actually a series of delivery service chains (also called service delivery chains), not an amalgam of separate departments.
- Strategy Four examines these delivery service chains in terms of performance metrics and shows you how to use these performance metrics.
- Strategy Five focuses on the book delivery service chain and dives deep into a library success story to illustrate how you might transform your own book delivery performance.

- Strategy Six covers another common problem area: the holds/reserves delivery service chain.
- Strategy Seven encourages you to abandon your budget cost control management style and embrace the Lean philosophy of cost reduction by eliminating wasteful activities that create gaps between you and your customer.
- Strategy Eight discusses how one overall performance measure can capture how Lean your library can become.
- Strategy Nine shows how Lean can be used to provide digital materials to customers.
- Strategy Ten uncovers the power of Lean's "pull" demand philosophy versus the common "push" demand philosophy most libraries incorporate.
- Strategy Eleven focuses on branch service performance and how the design of the physical branch can dramatically affect how the customer interacts with your library. A case study in which a library would have been better served to think Lean prior to pouring the concrete makes this concept a reality for all readers.

The book ends with an appendix that features additional valuable tools you can apply in your Lean transformation effort.

Libraries today are under unprecedented pressure to lower costs and expand digital services. Librarians are also facing increasing competition in both services and available funds. Lean strategies can be invaluable in facing this environment. In a time of shrinking budgets and more demanding customers, you may find that Lean is the right tool at the right time for your library.

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Kansas City Public Library
Lakeland Library Cooperative
Mid-Continent Public Library
New York Public Library
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Oklahoma State University Library
Ottawa Public Library
Southern Maryland Regional Library
Association
Tucson/Pima Library
Tulsa City–County Library
Tulsa Community College Resource
Learning Center
Youngstown Mahoney Library

Introduction

After providing consulting services to the manufacturing, distribution, and retail industries for more than twenty-five years, I can now say with confidence, I really like working with libraries and librarians. Your bathrooms are much cleaner than those of my manufacturing clients, your personal hygiene is much better than some of my shop floor friends, and you are a highly educated group of people who share my love of books.

Most important, I have a great deal of fun working with libraries. Before we dive deep into the serious business of Lean, as a form of introduction, I would like to share with you a couple of stories from my favorite libraries and the great camaraderie I have witnessed working with the library community. To begin, I would like to tell you a story about the first time I was invited into a library to serve as a process improvement consultant.

As a consultant, I have worked for steel mills, airline manufacturers, furniture manufacturers, consumer product assembly plants, high-tech electronic manufacturers, and automobile component suppliers, and I even served as the director of operations for a biotech research, design, and development company. My experience with libraries was primarily a typical customer point of view. I had no idea what went on behind the circulation desk or in those hidden rooms.

About ten years ago, when I received a call from Linda Saferite, the former CEO of the Tulsa City–County Library (TCCL), requesting my assistance to improve their customer service delivery performance, I was hesitant. I was a manufacturing, distribution, and retail consultant. What did I know about libraries?

I met with Ms. Saferite, curiously enough, on September 11, 2001, at 9:30 a.m., less than one hour after the World Trade Towers attack. It was a day none of us will forget, but for me it was also the day I started a new area of practice, library consulting.

After Ms. Saferite successfully battened down the hatches, she explained to me their dilemma. A few years ago they had added a feature to their integrated

library system allowing customers to create Internet holds from their home or office and have the books delivered to their chosen branch. The service was so popular within the Tulsa community that TCCL's delivery system was bombarded by demand and they were falling further behind in their deliveries every day. As I listened to her, all I could think was, "What do I know about libraries?"

However, as we toured the facility, I began to see some very familiar scenarios. As compared to my manufacturing clients, the acquisitions department served as the purchasing department, the technical services department reflected a manufacturing assembly line, the circulation department looked like an operations inventory control department, and the shipping department echoed the distribution and logistics arm of most of my manufacturing clients. Finally, the circulation desk looked exactly like a retail checkout counter.

Who knew? Behind the desks and hidden walls of a library lie a purchasing group, a manufacturing assembly line, an inventory control department, a distribution operation, and a retail shop. I was not only home, but all my skills and experiences were being expressed in this one organization. It was the Super Bowl for this manufacturing consultant: all of the issues and opportunities of my separate manufacturing, distribution, and retail clients wrapped up in this one complex organization.

Over the next three months, we applied the concepts of Lean to TCCL's delivery process, starting at the time a customer requests a book until the book is delivered to the hold shelf. The results were dramatic. Prior to the project, TCCL had two delivery drivers (who also served as sorters) and two vans to support an annual circulation of more than 4 million and nearly 400 thousand hold/reserve requests. They were behind four to five days in their shipments and falling behind more and more every day. By applying the concepts of Lean, we replaced the archaic use of tote boxes with book trucks, upgraded the vans to box trucks, and created the innovative hold shelf ready, sticky label concept. We reduced TCCL's overall delivery lead time by 60 percent, eliminated the backlog, improved delivery capacity by 110 percent, and improved staff productivity by 30 percent. On top of this, the delivery group was able to meet a 48-hour delivery target 95 percent of the time. We did all of this without increasing staff; in fact, we freed up circulation and branch staff to spend more time on customer service activities. This is what Lean is all about: improve a process, reduce lead time, reduce costs, and improve customer service.

A year later we presented our results to over 300 librarians at the Seattle PLA conference. At the end of the presentation, many of those in the audience rushed the stage seeking more information. (It was very cool.)

Now, nearly ten years later, TCCL's circulation has grown by 50 percent and their customer holds/reserves have grown by 25 percent, and only recently have they considered adding a third delivery truck and driver. Over the past eight years, we have applied the concepts of Lean throughout TCCL's entire service delivery chain, including circulation, branches, acquisitions, technical services, cataloging, processing, outreach, bookmobile, and even gift book pro-

cessing. I believe TCCL's efforts to streamline their processes and improve customer service is one of the reasons they were voted a Five Star Library by the *Library Journal*.

My second story happened a few years later after I had gained much more experience working with libraries. I believe this story puts an exclamation mark on my statement, "I like working for libraries!"

I was invited to Baltimore, Maryland, by James Fish, Director of the Baltimore County Public Library (BCPL). I was asked by Mr. Fish to help his group evaluate and improve their customer service delivery performance. On my first-day commute, as I often do, I turned on my rental car radio to get a taste of the local flavor.

"Arrggg, ye matie, ye be on the air," said the Baltimore disk jockey.

"Ahoj, ye scurvy dog, argggggg," the caller responded.

This "Pirate Talk" continued until I pulled into the parking lot of BCPL's Central Library. Obviously I discovered Baltimore had some interesting local flavor.

First days can be tough. You are never quite sure how the day will go. Most first days go great, but on occasion things can get a bit dicey. For example, a few weeks prior to my Baltimore trip, I had an interesting experience with a library out west. The director had invited me in but had not informed the staff why I was there. Understandably, the staff was a bit suspicious and defensive about who I was and what I was about. It took a day or two for them to get comfortable with me and, more important, enthusiastic about the project. In the end we had a successful project, but it was a tough first day.

Because of this recent experience, I entered the front doors of the Baltimore County Central Library a bit more apprehensive than usual. To prepare myself, I rehearsed the day's agenda in my head. First, meet with Mr. Fish, understand his project purpose and objectives, arrange for a five-dollar tour, and then meet with a select few of Mr. Fish's team to organize the project, cross-functional team members, and project structure. I felt at ease as I found my way to the front receptionist. It was a good plan.

"Good morning," I said. "I am John Huber. I have a meeting with Mr. Fish."

"Yes, Mr. Huber; we are expecting you."

I looked for Mr. Fish's office as she guided me toward the back offices when, surprisingly, she took a hard right turn into a large conference room where about twenty people sat around a conference table.

The group stared me down as I was guided to one of the two remaining empty chairs. My mind scrambled. I had not had my second cup of coffee and I was not quite ready to kick off the project to this large group from the word "Go."

After a moment though, I was ready. I had done this hundreds of times before but, nonetheless, meeting a room full of people for the first time and winning their confidence can be tricky. As I began to speak, a man dressed in a pirate outfit—hat and eye patch included—entered the room and headed right for me.

“Ahoy me heartie,” he said as he shook my hand, “ ‘Ave these scallywags offered ye a pint of me special ale yet?”

Well, to say the least, I was taken aback. “Coffee, please,” I replied. Turns out, September 19 is *Talk Like a Pirate Day*.

(I learned later that Talk Like a Pirate Day was started by a couple of guys in Portland, Oregon. The story goes that each afternoon, they liked to play racquetball together and they also liked to *hit* each other with the racquetballs. Each time they were hit they would yell, “AAARRRRGGG.” This started the pirate talk. Apparently the pirate talk carried over to the local bar to impress the girls with colorful pirate approach lines. After years of this banter, these two industrious gentlemen sent a letter to Dave Barry, the Pulitzer Prize–winning columnist with the *Miami Herald*. The letter introduced the concept of Talk Like a Pirate Day and Mr. Barry fell in love with the idea. He wrote an article suggesting that on September 19 everyone in the entire country should talk like a pirate. Apparently someone in Baltimore read the article.)

What a wonderful tone this librarian set for our project. The project resulted in a strategic shift for BCPL’s delivery philosophy, and the improvement results were dramatic. We also had a great deal of fun making it happen. (I don’t think any of my manufacturing clients would have walked into a meeting wearing a pirate outfit.)

Tulsa City–County Library showed me that my library clients and my manufacturing, distribution, and retail clients have a great deal in common. Baltimore County showed me that libraries have a wonderful, fun, and welcoming culture.

Thirty years ago I helped introduce the concept of what is now called Lean to a reluctant manufacturing industry that eventually transformed that very industry. With this book, I feel privileged to introduce the concepts of Lean to your library. In this book, you will learn the concepts, philosophies, and tools of Lean. You will learn how to apply these concepts to your library and you will learn how to dramatically reduce the service gap between you and your customer by improving your customer service delivery chain while reducing costs, inventory, and service delivery lead times.