the Lean guidelines. Not surprisingly, it was tougher for some more than others to detach from well-known processes, just as it was much easier for “outsiders” to the workflow to see steps which didn’t add value, but which took time and energy to complete. When push came to shove, the serials ordering process was reduced to six or seven steps, depending on the type of serial. The Lean pattern was repeated for monographic acquisitions (which didn’t have as many steps) with similar results and for electronic resource acquisition and activation.

Agreement to improve the serials acquisitions process came by emphasizing improved internal processes and adding staff (via internal reallocation) without significant change in vendors or technology. The similarities between print and electronic serials resulted in a number of processes being merged. This was not the case with the monographic acquisitions process (which included approvals). Not only were local processes evaluated, but a recommendation was made following lengthy discussion to leave our long-time approvals vendor and move to YBP. We chose to establish a system-wide virtual approval plan, where automated processes would do the pre-order checking and, at least at first, no physical books would ship automatically. This was a huge step for a very traditional operation, and one which would alter workflows and a number of job descriptions. The most radical piece, although no one realized it at the time: selectors would place their own orders without intervention from ARC staff. With support from the University Librarian and the Directors for Central Technical Services and Collection Development, ARC went forward with our largest Lean project. The unit’s role was developed. A 16-month time frame for meeting completion, and processing efficiency were defined as within scope of review. Seven members of the group made an unexpected request to change the status of the CTS Director from “on call expert” to participant and to add seven more appropriate participants. Eight participants were chosen on the basis of supervisory responsibility or unique expertise. A customer — a branch librarian sometimes critical of unit services — was added to the mix. The nature of the objectives reinforced the decision to use a standard Lean process, and to schedule three full-day meetings — a Kaizen Blitz.

Two facilitators from OE guided the process, and as with ARC, kept planners on task and on schedule, established ground rules, focused the discussions, and defused occasional tense moments. The facilitators were flexible and adapted quickly when the group made an unexpected request to change the status of the CTS Director from “on call expert” to participant and to add seven more objectives — focusing on collaboration within CTS, training, documentation, and technology needs. After adding the new member and finalizing the objectives, the group analyzed the gap between its current state and an imagined ideal to develop a pragmatic vision of a more efficient future.

Although the planners worked through the Lean review in the traditional way — with a structured multi-day blitz — the composition of the team, the nature of the work performed within unit and the unit’s position in the CTS workflow produced atypical results. Of the twenty seven action items developed, twelve extended beyond the boundaries of CCU. Although the group may have felt more comfortable looking beyond unit borders with the departmental director present, all action items were generated at the staff level. CCU’s straightforward workflow with few hand-offs, did not prove to be fertile ground for streamlining. Action items focused on efficiencies...