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ATG Interviews: Kim Massana, CEO, Innovative Interfaces

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that libraries buy for their patrons and patrons choose for themselves.

ATG: *You wrote on your blog, **Leadership Insights**, that although you “own every digital device,” you also “still love to have printed books around.” As the information industry goes through an obvious digital transformation, what future do you think printed books have? Can they play a role in information delivery as library services move increasingly to the cloud? If so, what would that role be?*

SP: In the past few years, I have tried every device you can name from numerous types of Kindles to the Nook, the iPad, Kobo, and several phones. You can't beat the convenience of a digital reader, though I admittedly prefer to read a printed book. For several years, I have talked about the future of the book at conferences, written editorials, and argued that both will co-exist. The digital book will morph as we take advantage of new technologies. That will change the digital

book from just another container, and reinvent it into an entirely different experience. Currently, though the trend is strong, it is not just a steady march to digital. Interestingly, recent AAP statistics show hardcover growth outpacing eBook growth. That surprises some so early in the process.

Libraries will continue to collect and maintain the human record and pass it on to future generations, whether that human record is on a clay tablet, a scroll, a book, or the latest version of an eBook. That's been the role of libraries for the last 5,000 years, and it's an important role that must continue. We at OCLC intend to do our best to help libraries fulfill their vital mission into the future, whatever technology comes our way — print included.

ATG: *The last few months must have been incredibly hectic. How do you relax and recharge your batteries?*

SP: Relaxing and recharging simply has not been on the agenda of late, but in my dreams I would be on a beach somewhere. Normally, I find balance with family activities, reading, blogging, a few concerts sprinkled in for music and a few live sporting events.

ATG: *As a self-described “foodie” how would you rank the restaurants in Charleston? Do you have a particular favorite? What Charleston dish would you recommend to a friend who was visiting Charleston for the first time?*

SP: No visit to Charleston is complete without visiting a few of the city's fine restaurants. I wouldn't even know where to begin. **The Charleston Grill's** shrimp and grits are particularly memorable, but then they were also amazing at **Hank's Seafood** after she-crab soup. If you push me, I would comment on the **Peninsula Grill's** crème brûlée done the right way (it's chocolate!) and their lobster and corn chowder. Not to mention the swordfish at **McCrary's**, and their special homemade bread. Perhaps in another life I would be a food critic.

ATG: *We're impressed! You know more about the Charleston food scene than we do! In any case, we know how valuable your time is, so we really appreciate you talking to us. We learned a lot.*

SP: It's been my pleasure. And I learn from every issue of **ATG**. 🍷

ATG Interviews Kim Massana

CEO, Innovative Interfaces

by **Tom Gilson** (Associate Editor, *Against the Grain*) <gilson@cofc.edu>

and **Katina Strauch** (Editor, *Against the Grain*) <kstrauch@comcast.net>

ATG: *Prior to joining Innovative you spent a number of years in leadership positions with Thomson Elite. Can you tell us about that? What experiences at Thomson Elite helped prepare you for your current responsibilities? What is Thomson Elite's business model?*

KM: I actually had a couple of different positions with **Thomson Reuters**. I was originally based in London working with the Westlaw product, which brought me into contact with the library community since we were selling the product to both academic and law firm libraries. In this role, I got to know academic libraries throughout Europe, Africa and the Middle East. In 2008, I became President of **Thomson Reuters Elite**, which is based in Los Angeles and is a leading provider of enterprise resource planning software (known as ERP) to law firms.

(Editor's note: ERP software includes things like legal time and billing software, docketing software, legal calendar software, etc.)

So in coming to **Innovative** I thought it was a positive combination of my days with libraries and my software background with Elite — in a way the library systems that we're working with are like ERP for libraries. The Elite business is similar to **Innovative's** in terms of focusing on product with a big service component.



ATG: *According to the Innovative Website, you have been immersing yourself “in the library community, listening and talking to librarians at conferences, events, and library visits around the world.” What are the key takeaways from these conversations? What do libraries want from their ILS vendors and Discovery Services?*

KM: There have been a number of themes that have run through my conversations with librarians. Obviously, the library community is very open and I'm continually impressed by how much sharing goes on among libraries both in terms of resources and best practices. Librarians are also focused on changing technology, as well as the changing expectations of users. Users compare libraries to other places where they can get information, like Google, and to places where they can get books, like Amazon. So the expectations have changed and libraries need a library technology partner to help them take their offerings and services to the next level. This is a role we want to play — to be their technology partner of choice, making it easier for their users to find information through discovery and then access that information through the ILS (Integrated Library System) or LSP (Library Services Platform).

ATG: *At your first Innovative Users Group conference in May 2013 you admitted that Innovative had not been good in dealing with third parties and partnerships. You called for greater openness and collaboration. What changes have you implemented to make this happen? Are you satisfied with the progress so far?*

KM: We have made a number of changes that are focused on opening up to the commu-

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nity and the library ecosystem generally. On the product side we've opened our products with the creation of APIs and open databases. We want to make sure that clients have ready access to their information and can make use of it for analysis and other purposes. We have also facilitated the interaction of Sierra and Millennium with other systems within the campus or the city or county that the library is part of.

In 2013, our focus was on partnerships with other vendors to enhance the library user experience and meet the needs of our clients. The integration of EBSCO EDS with Encore Duet was a major step we took last year to improve and enhance the user experience and take advantage of all that EBSCO has to offer. We partnered with OverDrive, 3M, and Bowker to streamline the user experience and more closely integrate our products. We partnered with Chili-Fresh to integrate social media. And these partnerships are continuing in 2014 — the first one for the year was a strategic alliance with Bibliotheca to more closely integrate RFID services into our systems that we announced at PLA.

ATG: *Admittedly, Innovative has already partnered with companies like OverDrive, EBSCO, and Bibliotheca but you've said, "We want to make sure we talk to everybody the libraries want us to talk with." Given that, are you talking to anyone else? What future partnerships can we expect?*

KM: I'm not going to give away any secrets here since we obviously can't announce partnerships until they are signed, but we have a lot in the pipeline. Basically, I talk to potential partners who clients tell me to talk to. If one of your readers has an idea about who I should be talking to, I'd be delighted to hear about it.

ATG: *It was recently announced that Innovative had purchased Polaris. How does this fit into your overall program?*

KM: At Innovative we think we have the opportunity to grow and serve more clients on a global basis. Polaris was a strong company, with a big presence in the public library community in the U.S., and was known for an emphasis on service and support and customer satisfaction. With the combination of the companies we have the knowledge and expertise to create the best products in the market and the scale to invest in the technology changes that libraries are looking for. Things are off to a great start — in the first two weeks of April, we had four new Polaris platform sites go live, a new customer commitment, and a number of users commit to LEAP — the Web-based user interface for the Polaris platform.

A number of questions have come up since the acquisition, so I want to make absolutely clear that Innovative will be continuing to sell and support the Polaris platform in parallel with Sierra and Millennium. We've brought over the entire Polaris platform support team led by Jodi Bellinger, who ran customer sup-

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There are also international offices located in Dublin, Madrid, Paris, Taipei, and Noida, India. See <http://www.iii.com/about/contact> for a full list.

OFFICERS: Kim Massana, CEO; Bryan Uruhart, CFO; Jay Shankar, Senior Vice President of R&D and Support; Chris Le Blanc, Senior Vice President of Global Sales; Gene Shimshock, Senior Vice President of Global Marketing; Satyadeep "CP" Prasanna, Vice President of Strategy and Business Development; Hilary Newman, Vice President, Library Engagement; and Bill Shickling, Vice President of Public Library Products.

ASSOCIATION MEMBERSHIPS: Library Champion (ALA Advocacy – Highest level corporate sponsorship).

KEY PRODUCTS AND SERVICES: Sierra Library Services Platform, Encore Discovery Solution, Millennium ILS, Polaris ILS, Content Pro digital collections management, INN-Reach consortial resource sharing tool, ArticleReach consortial resource sharing tool, SkyRiver cataloging utility, eMARC Express for eBook cataloging.

CORE MARKETS/CLIENTELE: Over 50 Countries. All types of libraries and consortia and all library sizes served.

NUMBER OF EMPLOYEES: 450

HISTORY AND BRIEF DESCRIPTION OF YOUR COMPANY/PUBLISHING PROGRAM: Innovative (www.iii.com) is dedicated to providing leading technology solutions and services that empower libraries and enrich their users worldwide. Founded in 1978, Innovative offers the broadest and most complete portfolio of library automation products on the market today. Innovative's flagship library services platform, Sierra, is the most rapidly adopted product in library automation history. The company's versatile and market-leading solutions also include the Polaris and Millennium Integrated Library Systems, the Encore discovery solution, the Decision Center collection management tool, the SkyRiver cataloging service, and INN-Reach resource sharing. Headquartered in Emeryville, California, Innovative serves thousands of libraries in over 50 countries and has offices around the world.

For a more complete company history see <http://www.iii.com/about/story>.

ADDITIONAL ITEMS OF INTEREST TO ATG READERS: We have significant content partners that allow integration with the Encore Discovery Solution: EBSCO Discovery Service; 3M Cloud Library; OverDrive; ChiliFresh for Encore. In addition, the Inventory Express capability in Sierra allows users to access multiple vendors, including Amazon.com, Baker & Taylor, Brodart, BWI, Coutts Information Services, Midwest Tape, and Ingram Book Group in real time — this makes ordering and comparing pricing simpler.

Kim Massana has a blog called CEO INN-Sights at <http://www.iii.com/community/blogs/>. 

port at Polaris for many years. We've given Jodi a broader role within Innovative, and plan to leverage their best practices across the company. On the product side, we expect to see at least two new releases of the Polaris platform this year, including the new LEAP product. I'm excited that former CEO and President Bill Shickling has joined us as VP for Public Library Products and expect that the combination of our product management and development staffs will accelerate the roll-out of new releases and new products for all our customers.

ATG: *Is Innovative feeling pushback from open source ILS systems?*

KM: We don't sense a tremendous amount of interest in open source from our clients. The feedback that we're getting is that while open source may look like a bargain at first glance, it is not such a great deal when you take into account the total cost of ownership. And, of course, it's very difficult to duplicate robust ILS functionality in an open source system. We have a significant number of clients who were formerly on open source.

ATG: *There have also been questions about product support. What do you say to a customer who has purchased certain Innovative products and then claims that these products weren't supported very well?*

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KM: We're not happy if our customers aren't happy. I'm committed to making our support team the best in the business. We've been investing in expanding our coverage — with the opening of our new offices in Asia and Europe we can now offer true 24/7 support worldwide. We've cut our support ticket backlog in half over the last few months. One of the reasons that **Polaris** was so attractive to us was in the strength of their support function. We've brought over their entire team and are already working to combine best practices.

I know that for some of our early Sierra clients the journey was more painful than it should have been. However, we worked hard to fix the problems, and new installations over the last year have been going very smoothly. There's tremendous interest in Sierra and the number of libraries migrating from Millennium has steadily increased over the last year.

ATG: *With its new investors Innovative has experience a "wave of hiring." What new positions are being added? How do they contribute to Innovative's commitment to openness and collaboration?*

KM: We've been adding a lot of resources to improve our levels of support, as well as adding positions in development to accelerate our roadmap and bring new features to our libraries. We've invested in our international ex-

pansion by establishing centers of operations in Europe and Asia. Over the last year-and-a-half we've created a Library Relations Management group that provides our customers with a single point of contact within Innovative and someone who can be their voice within the company. We've also created a global partnership and alliance team that is focused on forging new partnerships that will benefit our clients by bringing enhanced services and support.

ATG: *The rollout of your RESTful application programming interfaces (APIs) for Sierra fits into this strategy. What specific collaborative benefits can libraries expect from this API rollout?*

KM: APIs by definition are about supporting openness and collaboration. They are a primary method by which we opening up our system for others to program against it — and these others include individual library developers, consultants they may hire, and other library service providers, including vendors with whom we directly compete. The types of APIs we provide, even the specific calls we build into each API, are driven by the needs of our library partners and these third-party vendors. We collaborate with the various groups to ensure that the APIs we provide will meet their needs for integration.

This first release of RESTful APIs for Sierra is a perfect example. We worked with partners, customers and even a competitor on this release. We've collaborated with **EBSCO** and with several of our customers on their own

discovery solutions. In addition, we reached out to **Bibliocommons**, a longtime competitor in the discovery space, to work together on defining API requirements that would provide better integration between Sierra and their product, and our efforts directly benefit our common library customers by providing their public users with a better experience and reducing the staff effort required to connect the two systems.

We repeated that approach with other development partners during this first release (both individual libraries and vendors) for similarly positive results with their projects. And the collaboration doesn't stop with this initial roll-out — we're already working with these partners to prioritize functionality for the next set of APIs. We can't build everything for everybody, but expanding Sierra's "openness" through APIs lets us empower libraries to integrate other offerings and to build their own extensions. It's a model that works for us and for the libraries we serve.

ATG: *In the past some librarians have been skeptical saying things like "the APIs will be nice if it actually ever happens." Can you give us a progress report? Where does the API rollout stand? What open APIs can you point to that are currently interacting with other systems?*

KM: In the first half of 2014 we're rolling out our first installment on a new generation of APIs that employ the modern, RESTful

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programming style, which dominates the technology industry and that our customers and partners are requesting. This Web-based style of information interchange makes it easy for libraries and vendors to connect to our system and interact with just the information they need in order to design new system integrations and applications.

Our forthcoming APIs will support retrieving bibliographic and Item information including item availability. Many libraries and key partners intend to use these APIs to significantly improve the mass retrieval of information from Sierra to power searches in third-party discovery utilities and other applications. And we have begun developing the next phases of REST APIs that will allow updates to the Sierra database from external systems, enabling seamless system interoperability. We plan on the regular delivery of additional APIs as we move forward.

While we're building a new set of APIs, we have a wide variety of existing APIs that enable robust information interchange between our platform and other library systems. Hundreds of libraries currently employ our existing APIs for functions like fines payment, interfacing with patron information, retrieving item status and many other functions. While these legacy APIs are actively used today, we're focusing on updating many of our legacy APIs to enable more efficient data interchange.

ATG: *With all of this growth and expansion, not to mention new products, librarians are concerned about the impact on pricing. What cost increases can customers expect? What products will be affected?*

KM: I don't expect **Innovative's** growth to have an impact on pricing for any of our products.

ATG: *North America makes up 75% - 80% of Innovative client base, but you've indicated that the real opportunity for increased market share lies in places like China, Africa, and the Middle East. What strategies will you employ to take advantage of such opportunities?*

KM: The good news is that our products are already multi-language and multi-currency and can really go anywhere. We have systems operating in 52 countries, including in China, Africa and the Middle East. What we need to do to grow is to deepen our presence in many of these countries. In markets that we know well, like Europe, we've dramatically increased our on-the-ground presence. In other markets, we are working with partnerships that are going to provide the knowledge. Our first partnership of this sort was with **Naseej**, the leading library technology company in the Middle East, and we are now exploring similar relationships in China and Africa. I was just in Saudi Arabia for a series of meetings including the **Naseej** team. They are an impressive group, and our relationship is off to a great start with a number of new sales of Sierra already in the pipeline.

against the grain people profile

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Kim Massana

BORN AND LIVED: A native of Spain, I have lived and worked in Spain, the U.K. and the U.S.

PROFESSIONAL CAREER AND ACTIVITIES: Prior to joining **Innovative**, I was President of **Thomson Reuters Elite**, a leader in software solutions for law firms. During my tenure, **Elite** refined and expanded its global brand and posted significant growth in sales and successful customer installations. I have a business degree and a Master of Business Administration degree from **ESADE** in Barcelona, as well as a Master of Science degree in finance from the **London School of Economics**.

FAMILY: My wife and I live with our three teenage children (two girls and a boy) in Los Angeles.

IN MY SPARE TIME: I travel on business a lot, so my first priority is spending time with family. I also enjoy mountain biking and going out with friends.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: Libraries worldwide are adopting new technologies at a rapid pace driven by the growing expectations of library users. In five years I expect to see further consolidation among library technology companies to give the remaining companies the resources needed to invest in all these new technologies and make them available to their customers. Libraries will also be devoting more of their budgets to technology, as electronic resources become more and more important. The library community will be even more global and interconnected than it is today, and successful companies will need to have a strong international presence to fully support their clients. 🌱

ATG: *With resources being dedicated to expanding into these markets, how will you maintain services to your existing customers in North America?*

KM: North America is our largest market, and we don't intend to let things slip. We've been adding people all around the world to support our global growth, including strengthening our management team to make sure we have the bandwidth to manage all these projects well.

ATG: *Speaking of resource allocation, how will Innovative maintain both Sierra and Millennium?*

KM: We have been investing in both Sierra and Millennium, and we will continue to enhance and fully support both platforms as long as the client demand is there to do so. The same will hold true with the **Polaris** platform. We are seeing a healthy migration from Millennium to Sierra, but clients are deciding to move based on the value of Sierra, not because they are being pushed to do so. We don't do forced migrations.

ATG: *Innovative has dropped its lawsuit against OCLC and has absorbed SkyRiver. But you still intend to compete with OCLC offering bibliographic services. How? What do you offer that they don't?*

KM: We did not drop the lawsuit because we were going to stop competing. Quite the opposite. The lawsuit was a distraction, both for us and for our customers, and we are now free to pursue an aggressive sales and marketing push. We have recently signed a contract with CLiC (Cooperating Libraries in Colorado) as a reseller to make SkyRiver available to all

libraries in the state of Colorado, and this has generated real momentum. In addition the Four Counties Library System in NY, and libraries in Michigan, California, Ohio, Connecticut and New York have all joined just since the first of this year.

We believe we are offering a superior product at an excellent price, and that is always welcome news to the library community. Our customers love the ease of use and intuitive interface, which makes it very easy to train new staff and transition experienced staff who were used to the **OCLC** products. We work with libraries to offer them a customized workflow that works with their vendor arrangements and we continually enhance the SkyRiver database to reduce the number of duplicate and incomplete records that slow searching and record selection. There's a lot to like about SkyRiver.

ATG: *Kim, we always like to end our interviews by getting personal. With the numerous challenges that a CEO faces, what do you do for R&R? What activities do you enjoy outside of work?*

KM: I'm traveling on business a lot, so just being home with my wife and three kids is at the top of my list. I have three teenagers — two daughters and a son — so things are never dull around the house. I enjoy mountain biking and going out with friends. I read a lot while I'm on the road and am currently in the middle of a book by Stefan Zweig (in Spanish) called *Momentos Estelares de la Humanidad*.

ATG: *Thank you, Kim. We really appreciate your thoughtful and candid answers.* 🌱