1. **What are the best ways to prepare library staff and faculty for upcoming changes, such as an ILS migration**

Provide schedules that detail when changes will occur and how they will be managed.

Set clear goals, be transparent, and provide reasons for why the change will happen and what it will improve.

Prepare documentation and map workflows (including how the workflow will be similar to “old processes”). Consider obtaining a sandbox for experimentation and feedback.

Share information early and often through regular meetings

Set realistic expectations and acknowledge that imperfection is okay. The new system will not be perfect and there will be things that were better in the old system.

Offer patience and reassurance.

Identify the team/roles clearly to all and delegate appropriately where possible.

Involve staff in preparing and cleaning up data to give a sense of investment.
Work with vendors to adjust or delay timing of other work, such as acquisitions shipments, to make sure staff have time to adjust to new system before resuming regular workload.

Understand what can be expected of the vendor in their responses to your specific library needs versus their business practices.

2. **How can we effectively provide and update documentation and training?**

Develop diagrammed workflows and post, along with process information.

Work through processes together, in a room, to help identify problem areas or streamline workflow.

Don’t reinvent the wheel; use collegial expertise from other institutions. Provide the documentation in a visible shared space with a clear structure to its arrangement.

Determine documentation location and structure before technology change so this is not another area that must be learned.

Create a culture of documentation and empower sharing the editing (ex. include in performance plans to help people understand it is part of their job).

Use communication tools (ex. Confluence, Slack, internal listservs, but also checklists).

3. **What morale problems have you encountered during technological changes and how can we help staff cope?**
Roadblock mentality, often driven by fear of not knowing how to do the work.

The loss of the feeling of expertise, not being a go-to person anymore because they no longer know the system.

To cope:
Clearly communicate goals.

Use libguides, map out workflows to illustrate a new process workflow.

Remind frequently that everyone is in the same boat.

Give staff initial tasks that they can successfully accomplish, to open the door to trying more difficult things.

Be clear that new technologies and change are part of their job. Incorporate “change” language into the job description and make sure job descriptions are general enough to remain timely or fix any that are dated.

4. **How can we handle people who are resistant to change?**

Give and use checklists and regular feedback (ex. “check in” on progress every two weeks) and adjust deadlines as necessary.

Provide access to training and webinars.

Incorporate performance plans as necessary that clearly state the goals tied to new processes.

Maintain a limit of how long the staff member can be re-trained on the same task, to allow everyone else the time to do their jobs as well.
Implement one-on-one meetings.

Try to keep the overall workload similar, if possible. Consider putting lower priority tasks on the back burner to allow staff time to learn

Celebrate successes.

5. **What are the lingering repercussions of technology change, sometimes well after migration, and how can they be addressed?**

Identifying holdout staff – unwarranted and/or continued resistance to the changed process, etc.

Need for additional and ongoing training, including mini-training sessions.

Need to handle software updates, which can be very frequent with next-gen ILS.

Provide random reminders of new functionality.

Strive to pull in those on the periphery, such as the public services staff for an ILS migration.