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Thirty Days and Counting: Conducting Effective Product Trials for Library Resources

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Abstract

Product trials for evaluating potential new resources can be a challenge for any library. To be most effective, several key elements must be addressed including determining suitable trial dates, establishing and confirming access, creating appropriate links, publicizing product availability, collecting usage data, and gathering feedback from participants. If one or more of these steps is missed, it is all too easy for trial access to run out before much useful data is gathered. The University Libraries at Virginia Tech have developed a method for managing this process through a Trials Workflow team and the use of free, Web-based project management software from Trello. Readers will learn about our workflow for conducting trials and discover how we work with our vendors to better manage the process for product trials.

Background

This paper describes some of what we have learned about conducting effective product trials at the University Libraries at Virginia Tech. Over time, our workflow has become much more systematic, allowing better management of the overall process as well as generating more effective assessment data at the end of a product trial.

Virginia Tech is a comprehensive research university with a current enrollment of over 32,000 students. The library has had an e-preferred policy in place since 2012. With more than 260 undergraduate and graduate degree programs, we must review resources that support a wide range of disciplines. Needs of the university community also encompass a diverse range of formats such as books, journals, databases, video, and data files. When available, product trials can provide an effective means to assess new resources before committing to a subscription or purchase.

Conducting Effective Trials

There are far more products available than any library could hope to acquire. The challenge has been how to find those that best meet the needs of our users. Trials provide a noncommittal way for us to try products to determine the level of interest and gauge their usefulness. Conducting a trial can also help identify potential problems or concerns early in the selection process. Finally, trials can be used to directly compare similar types of product offerings.

Timing is perhaps the most critical factor in the success or failure of a trial. The decision to run a trial and the time at which it should commence should always be determined by the library, not by an aggressive vendor sales representative looking to push their product. Two main considerations govern our timing for trials at Virginia Tech. The first is our fiscal year, which runs from July to June. We are often looking to begin new subscriptions with the start of the calendar year and we may have some one-time funds available to spend in the spring. The second, and more important, consideration is to find times when faculty and students are on campus and will be most likely to have time to look at a product. Given these considerations, we have found the month of October works well in the fall semester as does February in the spring semester.

Most trials run for only a very limited span of time, with 30 days being typical. It is sometimes possible to extend a trial but, even so, it is important to make good use of the time available. In addition to the issue of when to have a trial, there are several other areas that can be problematic when it comes to trials. Determining how best to market and publicize a trial is one such example. Gathering user feedback in a coordinated way is another. Even just keeping track of multiple trials and where each one stands can be a challenge. Adopting a systematic approach can help maximize the usefulness of any product trials a library conducts.

Our library felt the need for a tracking tool to monitor progress. We settled on Trello for a variety

of reasons. Trello is a freely available project management software tool that allows multiple users to collaborate. The graphical interface is intuitive, and the system provides an easy way to monitor progress and collect relevant trial data in one place.

Trello uses a system of boards, lists, and cards to organize information. We create one board that includes all trials during a given fiscal year. Separate lists for current trials, future trials, and completed trials then enable us to see at a glance where a trial is in the process. Color-coded labels allow further refinement. Finally, information about individual trials is placed on a Trello card we create for each product under review. These cards can easily be moved from one list to another as the status changes. Each such card also includes a product description, pricing information, links to feedback results, and any relevant attachments such as usage data.

Trello also allows a checklist to be created and used to monitor progress of each trial. Most of our trials are initiated at the request of subject liaisons but others may result from interaction with vendors. Some of the key tasks that must take place at the start of a trial include establishing trial dates, setting up IP ranges, confirming access, creating appropriate links, and publicizing availability. Getting trials off to a good start is important and having the checklist helps avoid missing any steps in the process.

The checklist feature is also quite useful as we come to the end of a trial. We need to collect usage data, evaluate feedback surveys, and remove any public links from our website. Those products deemed to have been successful in the trial phase are then discussed further among the collection management team and may be sent on to the director of Collections and Technical Services for final review and approval. In some cases, a purchase decision is made right away but often we may need to consider further or gather more data.

Product Evaluation Using Trello

Several factors are important in evaluating the viability of a potential resource. The freely available version of Trello is an effective management tool for centralizing data and communication. Evaluating a product during a trial requires many different pieces of information. A Trial Workflow team was assembled to address the various tasks and includes members specializing in acquisitions, collections management, and assessment.

Members of the Trials Workflow team cover an array of functions and collect a range of information and data important to evaluating a resource. Relevant data such as price quotes, user comments, and usage statistics are easy to attach to a Trello card. All team members have access to Trello and can post and update data as needed. Gathering and compiling data in a readily, accessible place is key to streamlining the evaluation process.

Trello supports the coordinated workflows of each team member by providing a place to maintain records associated with each trial. Starting the process is the head of Acquisitions, who adds information regarding price quotes and licensing terms. Determining the uniqueness of a resource is performed by the Serials Unit head, who conducts an overlap analysis with existing resources and adds this information to a card. Platform access has a tremendous impact on user perception, and the Collections Technology specialist makes sure that access to the resource is available for the duration of the trial.

When the trial has ended, the Assessment librarian adds usage information and notes the availability of COUNTER reports, the efficacy of usage statistics, or the absence thereof. Close attention is paid to user surveys and written comments from professors and students, particularly those concerning usability and the user experience. A Google Form is used to collect user feedback and a link to the responses is attached to the Trello card.

Technical challenges sometimes arise limiting access to the database, and when this happens it is often necessary to repeat a trial. Other reasons for repeating a trial may include unavailable usage data or zero survey comments. In some cases, user feedback and usage may be high, but if there is a planned platform change in the near future, we may choose to repeat the trial after the new platform is implemented. And at times a request is made by a new liaison or professor to repeat a trial.

Once all the relevant data is assembled and the Trials Workflow team has conducted their reviews, a recommendation goes forward to the director of Collections and Technical Services. For those products that received a positive recommendation, the director and the Collection Management team then weigh the cost against factors such as whether the resource can replace existing print, fill a specific gap in the collection, and is an appropriate resource for student success and strategic priorities.

Conclusion

The increasing cost and number of electronic resources makes product trials an important part of the collection development process. Managing trial activities require complex and multilayered tasks that can rapidly become disorganized without a systematic approach.

Developing a method for managing the trials process and using project management software such as Trello has enabled the Trials Workflow team in the University Libraries at Virginia Tech to conduct more efficient and consistent product trials. Regardless of the specific tool(s) used, the importance of having a well-ordered process of conducting trials cannot be overstated.