

How Do We Really Feel About Training End-Users? The Ambivalence of Information Professionals In the Instruction of End-Users

Maribeth W. Eisenmann, MLIS, MA
Global IS Training Coordinator, Bain & Company, Inc.

The proliferation of end-user resources and the increasing expectations and complexity of end user information needs have transformed the role of the information professional as trainer/instructor. We find ourselves facing the significant challenge of developing the skill set necessary to effectively instruct end users while also having to face up to and perhaps adjust our own attitudes about the desirability of increasing end-user research competencies.

INTRODUCTION

Professional services firms and companies, in the management consulting industry in particular, provide their employees with access to a wide variety of information resources and tools. At Bain & Company, a global management consulting firm, for example, all of our employees have, at their desktop, access to Factiva, Thomson Research, OneSource and Euromonitor. The assumption is that analysts and consultants are empowered to do a great deal of their own research and can then rely on information professionals for complex research needs requiring unique sources, skills or knowledge. Information professionals acknowledge that by increasing their end-users' competency in using the tools available, it frees the professional's time for higher value activities. Yet the strategy of empowering end-users has had mixed success at a number of these companies. The question I explored is whether information professionals fully understand and embrace the changes in their role necessitated by the shift from intermediary to trainer. At issue is whether their actions and instructional activities reflect the goal of increasing end user competency.

The primary focus of this paper will be to examine what attitudes information professionals in the professional services and consulting environments bring to their training role and to determine whether ambivalence about the value and impact of end-user proficiency is undermining, either subconsciously or overtly, training objectives. To better understand information professionals' experience in and attitudes about end-user training, I conducted a survey in late April of 2006 of 53 information professionals in law firms, management consulting and investment banking. The survey was conducted via a web tool and responses were anonymous. Of the 53 respondents, 26 were from law firms, 21 from management consulting and 6 from investment banking. Respondents were an experienced group of information professionals with 55% of them having worked in the profession for over 10 years. About 62% of the respondents have been involved in training end-users for more than 5 years.

The survey suggests fairly positive attitudes about training. A majority of the respondents, 86%, found end-user training to be satisfying and rewarding and an equal number felt they had adequate training and skills to effectively train end users. Further, respondents assert that a lot of the training is initiated either by themselves or their team members rather than management or end-users.

Based on the survey, it would appear that professional services firms have enthusiastic, experienced, skilled and committed information professionals conducting end-user training. If we delve a bit deeper, though, we find that the survey and experience also reveal that there are numerous challenges impacting the ability of these information professionals to meet their organization's stated goals in making end-users more self-sufficient.

SELF SUFFICIENCY- ACHIEVABLE?

Making end-users self sufficient in the use of common research tools was seen as desirable by 98% of the respondents. Even more notable is that 92% thought that this was achievable. First-hand observation and comments by colleagues in these firms, however, indicate that the majority of end-users are not nearly as self-sufficient as information professional would like them to be.

Management at these firms would also like end-users to be proficient. They have made a considerable investment in providing direct access for end-users. This has been driven by the assumption that end-users are best served by having more direct access to information and that if they are able to do their own basic research then information professionals are able to focus on complex research where their unique knowledge of sources and advanced searching skills are necessary.

The initial hypothesis considered for this paper was that information professionals are not providing effective training because they perceive end-user self sufficiency as a threat. The survey results indicate otherwise. Asked whether fewer information professionals will be needed in the future as end-users gained more proficiency, 80% of respondents disagreed. This suggests that information professionals in these environments have moved past the idea of disintermediation as a threat.

Disintermediation between users and experts in finding information has had a significant impact in a number of service industries, like travel agencies for instance, and has been discussed extensively in the library literature.¹ Information and research is so critical to professional services firms that they have been on the leading edge of providing direct access. For several years now employees in the companies surveyed have had direct access to a staggering amount of information without intermediation. Perhaps not too surprisingly, the information professionals in these environments have discovered that while end-users may be able to use the tools, the skills of information professionals are still critically needed.

What emerges from the survey data is not necessarily ambivalence around end-user proficiency but more about to what extent proficiency is possible and what the expectations should be given the work environment. While management and information professionals may both say that end-user self-sufficiency is a good idea, a more pragmatic reality actually seems to be prevailing. For example, about a third of respondents indicated that their end-users are expected to be able to do only 26-50% of research on their own; nearly another third

said between 51-75%. Nonetheless, several comments echoed that “it is not feasible to really expect them [end users] to take on too much self research.” Yet another respondent said “they do not search every day so they have limited ability to find targeted or buried material...”

I would argue that one factor reflecting the realities of achieving self-sufficient end users may be the amount of time invested in training. Most firms spend less than 6 hours training end-users in their first year of employment. (Figure 1) Given the vast array of information sources available at the desktop in these environments (consulting firms with Factiva, Thomson, Euromonitor, OneSource... law firms with Westlaw, LiveEdgar, BNA, CCH... investment banks with Factset, 10KWizard, Green Street) it seems likely that only the most self-motivated and practiced end-users would approach any semblance of real proficiency without investing further time in training.

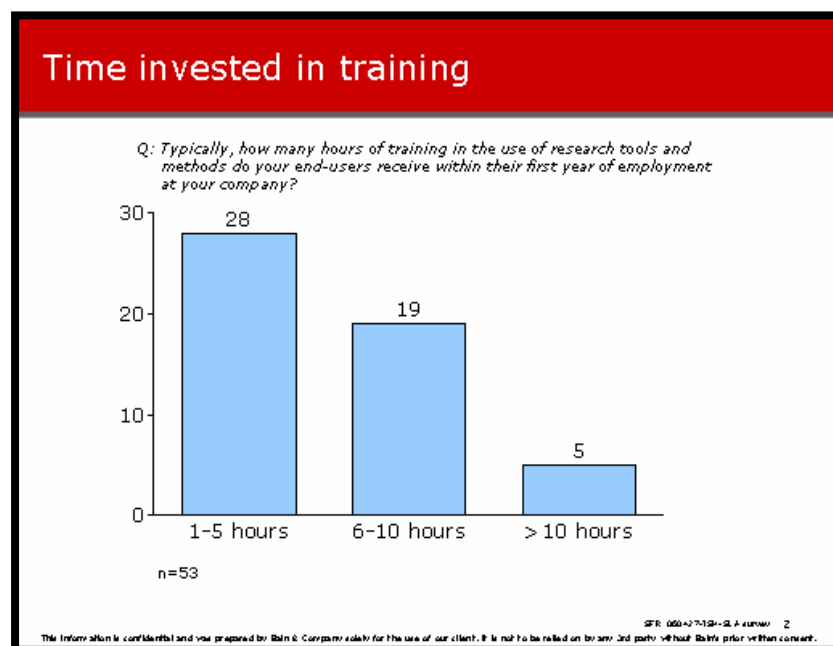


Figure 1

A minority of respondents in the survey, 8% felt that the time invested in training end-users was not worth it. These same respondents were in firms where employees received less than 6 hours of training in their first year. It can not be determined from the survey data whether this is because the perceived return on investment is low or because there are so few hours allocated that training objectives can not be achieved. Add to this that 16% of those surveyed do not think that end-users are receptive to learning research tools/methods and it is clear that for whatever reason, at least some view end-user training as a waste of their time. This sentiment was spread nearly evenly across law firms, management consulting and investment banks, and may reflect a number of frustrations associated with the receptiveness of end-users to training efforts and the level of support these efforts are given by management.

A couple of comments on the survey suggested that respondent's management “does not put a high priority on it (*training*) and it will not encourage users to go to training if there is any type of business in the way.”

A common theme in the survey results sees the problem with end-users being they do not have the time for training, will not show up for formal training unless it is mandatory and do not appreciate the training they receive. One respondent commented that- "It's such a Catch 22. There is a demand and need for it (training). But there is so much emphasis on the billable hour that many people do not show up for training at the last minute. They say they cannot afford the time. But then they spend extra time performing searches that are sub-par."

These are indeed recurring themes across all the different services firms: seemingly robust desire to embrace the role of trainer because end-user self-sufficiency is seen as a good thing, and the countervailing sentiments around end-users not being receptive to training and management not placing a high enough priority on training. Some of the issues are beyond the control of the information professionals in these organizations. I would argue further that some rest solely with information professionals. Specifically, have we fully embraced our new role as trainers? Have we adapted instruction to reflect the needs of end-users in our organizations?

CHALLENGES

Of primary concern is whether information professionals have the right skill set to be effective end-user trainers? The majority of respondents, 86%, feel they do and they are certainly experts in using the tools themselves. Like many subject matter experts, however, they face unique challenges in instructing end-users. Perhaps most important of these, given the theme's we have identified, is making learning accessible to the end-user. One disadvantage they face (perhaps unknowingly) is summed up in a quote from Stolovitch and Keeps that "the greater expertise, the less the expert thinks like a novice learner."² New learners are uncertain how things relate to one another and what importance to put on what. Experts are likely to provide a lot of detail that quickly overloads the learner. While something may be "obvious" to the expert, the end-user often has no idea how pieces of information relate to one another or which are the most important. Instructing end-users in the tools we use so extensively and daily presents a distinct challenge. Consider the following interaction between an expert searcher and a new end-user:

End-User: "I am trying to find an article that was in the Wall Street Journal last week"

Expert: "You can find it by searching Factiva. It is the only source that has the Wall Street Journal full text electronically, other than the WSJ.com site. Just select the Wall Street Journal in the source field, enter keywords from the title in the search box and enter the date range and the article should come up. Oh and then when you download it you can choose to have it emailed, in rtf or print directly..."

End-User: "Isn't the source Factiva? What do you mean source field? Why shouldn't I just type wall street journal and the title in the search box?"

Compare it to following response to the same request from another expert:

Expert: "You can find it using Factiva. Why don't you go ahead and open up the Factiva database and I will walk you through the steps. There are a couple small tips I can show you that will save you a lot of time and trouble the next time you are searching for something. Have you searched by publication before? Do you see about

half way down the search page, in the left column where it says Source, this is where you can specify which publication you want to search, in this case the Wall Street Journal...

In the first exchange the expert assumes that the end-user is thinking about the process the same way they are. The second expert is more attuned to how the end-user may be thinking differently about it. In many ways understanding a learner's needs is not so different from understanding research requirements. Some information professionals have a good deal of success in applying their formidable reference interview skills to uncover a learner's needs and figure out how best to adapt their teaching style. The second example also illustrates recognition of adult learning styles and principles.

Is it possible that any underlying ambivalence is a manifestation of a quite different problem? The survey attempted to get an answer to the question- Are information professionals aware of adult learning principles? It is definitely possible that we may not be keen on training or may feel our efforts are falling short because we don't know how to do it well. Only 42% of respondents indicated they had any training or instruction in how to create a successful learning environment. In fact, most of us, unless instructed otherwise, teach how we were taught. Our experience in the school room either as student or teacher does not necessarily prepare us well for creating a successful learning environment/experience for our end-users. No longer forced to sit in a schoolroom or to be graded on performance, adult learners often have little tolerance for traditional methods of teaching, such as lecturing. Adult learners are also very discerning about what they bother to learn. They want to know why they need to learn something and how they are going to use it. . If trainers do not address the basic needs of adult learners to know "what is in it for them" upfront, they risk losing participants quickly. This may well explain one of the recurring themes in the survey responses that end-users are not receptive to training or will not attend unless it is mandatory.

One of the ways trainers can communicate the benefits of a learning opportunity to end-users is to focus on learner-centered objectives. What sort of goals do information professionals set for training? In the survey, the primary goal identified by 56% of the respondents was "making end-users effective users of research resources available to them." This seems a fine goal from the information professional's perspective though is this likely to be a goal that resonates with our end-users? It seems unlikely that they care as much as we do whether they are using a source "correctly." What end-users care about typically is finding the information needed to do their jobs. Does this require an effective use of tools? Of course, but it is the means not the goal for the end-user.

For example compare the following training session objectives. Which objective do you think would best communicate the benefits of the session to end-users?

Objective #1: After today's session you will understand the basic search features of Factiva and OneSource"

Objective #2: After today's session you will know how to quickly find all the company information you need when you are assigned to your first case team...

Is the content of the training the same? Probably, but the first objective as stated communicates what information professionals think end-users should know while the other is based on what end-users want to know to do their jobs.

Adult learners also look for opportunities to relate what they are learning to previous knowledge. A colleague recently said to me with some disgust, that new end-users were “searching Factiva just like it was Google...” Well of course they are why wouldn't they? They are using methods that have worked for them successfully. This example provides a great instructional opportunity and framework. Pointing out how Factiva is the same and different from Google may be very effective in teaching a new end-user how and when to use Factiva.

Instructing end-users requires a different approach than one would use with another professional. For instance, with another researcher one might discuss the database structure, searchable fields and syntax. Information professionals have both the frame of reference and experience to understand how this all relates to one another and what is the relative importance of the different aspects of the instruction. To effectively use research tools end-users need to understand all of these things as well, but at a much different level. Effective instructors will adapt their style and content to learners needs by relating what is being taught to the end-users previous experience, at a level of detail that does not overwhelm and presented in digestible chunks with the importance of the different elements and how they relate to one another explicitly illustrated.

Almost all adult learners want some control and autonomy over the learning experience. This means making training interactive and encouraging a good deal of participation by learners. In training literature there is an axiom to “never talk longer than the average age of the group.”³ This does not mean that all training sessions should be shortened to 25 minutes, but that the trainer needs to stop lecturing and engage participants in a way that reinforces what they just learned and provides them with the opportunity to influence their own experience. A higher level of activity, discussion and interaction results in outcomes that are less predictable than in other methods such as lecturing or demonstrating a source. This style of instruction requires significant facilitation skills on the part of trainers.

Do information professionals need to be more flexible in training? As mentioned previously there were several comments in the survey responses about the challenges of getting end-users to attend formal training. Formal training sessions are a great way of reaching multiple learners at one time, but if this does not work it may be better to invest that time in reaching learners individually or in small groups when they are most receptive which is when they need to learn what they need to know when they need to know it. The respondents in the survey appear to offer a number of different sorts of training including vendor led, formal in-class, one on one, just in time and instructional tip emails. In these environments where the challenge of getting end-users to attend formal sessions is well recognized, trainers need to be particularly flexible and creative. Almost any interaction can be a training opportunity. Information professionals in these environments appear to have an appropriate focus on just-in-time training, with 90% of respondents providing this to their users.

In the past, educational preparation for information professionals as trainers has largely focused on bibliographical instruction. As highlighted, adult learners in the workplace have different needs and expectations than students in the more traditional academic setting. There are a number of resources and opportunities for information professionals to improve their skills as trainers. Recognition that being a subject matter expert does not ensure success is a major step forward. Learning how to be more effective trainers with adult learners will

continue to be a critical skill set for information professionals to develop in these environments. As cited, the majority of the respondents in the survey had lengthy experience in training end-users, whether they have developed these skills, adapted their style to adult learners in their organizations and are effective instructors is an area for further study.

BENEFITS TO INFORMATION PROFESSIONALS

The motivation to be effective instructors should not be lacking. Information professionals recognize that making end-users more proficient in basic research has multiple benefits. (Figure 2). All agree that it allows them to focus on more complex research and the majority think that it allows them to provide more added value in the delivery of research results and to offer more types of services/products to end-users.

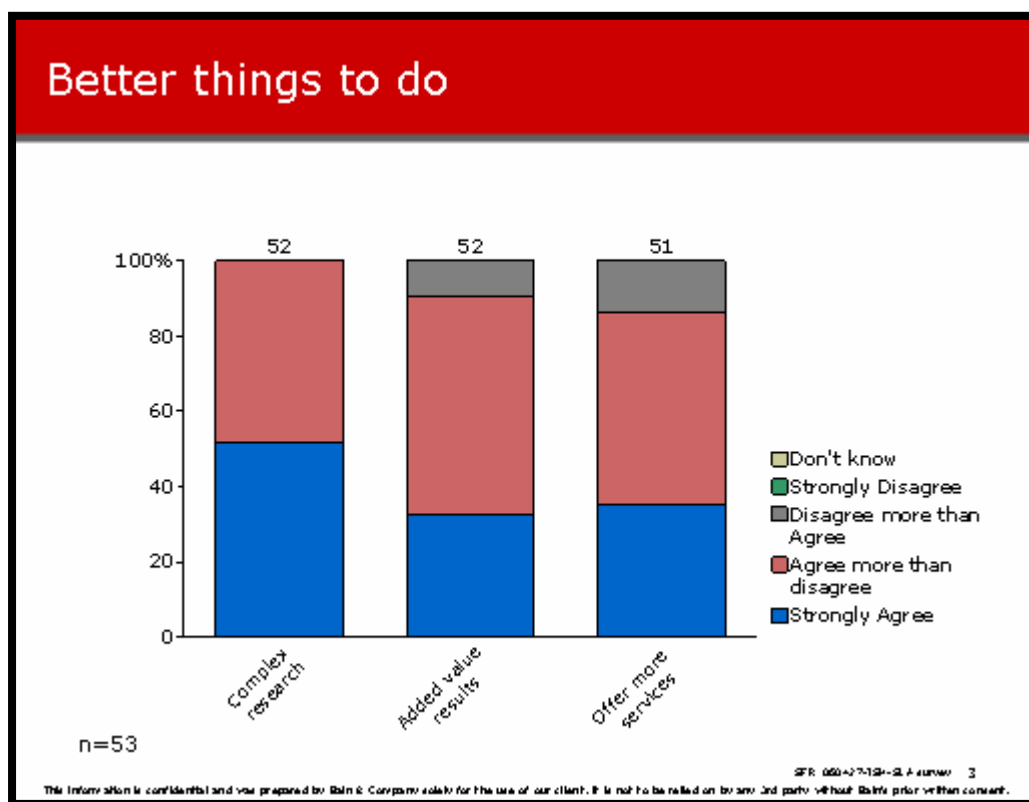


Figure 2

There is less agreement amongst the respondents about how making end users more proficient benefits respondents directly in regard to work/life balance, the ability to pursue professional development opportunities and to build more expertise. (Figure 3)

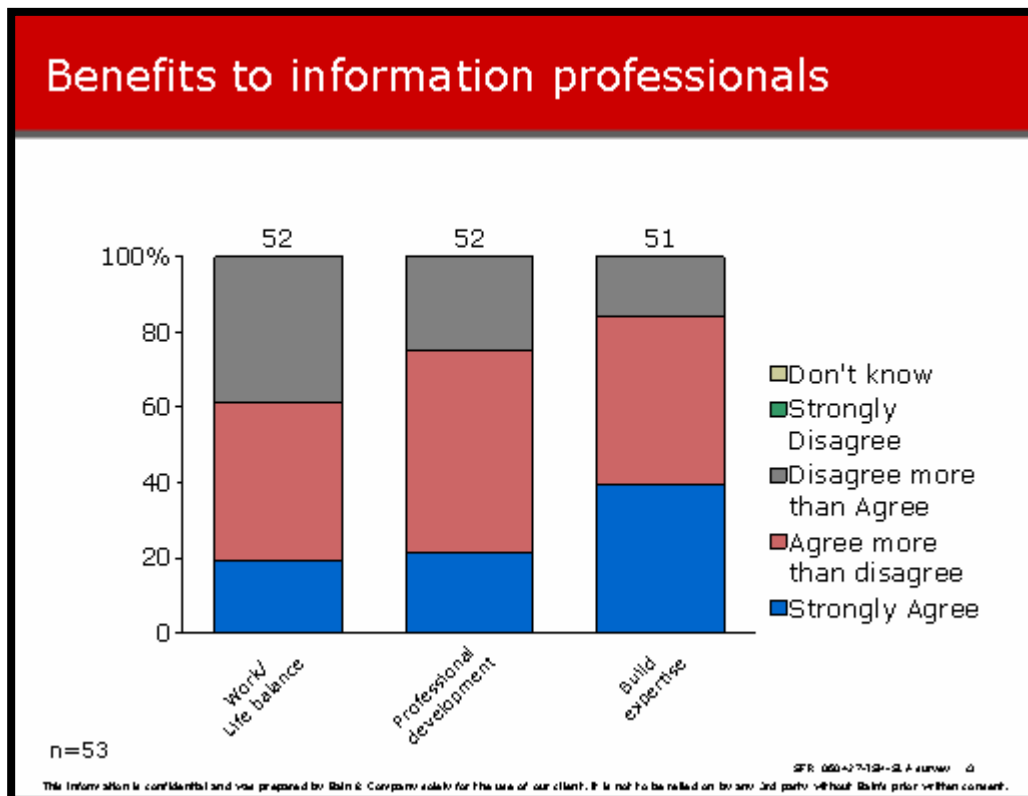


Figure 3

AMBIVALENCE OR PRAGMATISM?

Nearly 50% of those surveyed agreed that their “firm’s output would be better if information searches were conducted by information professionals rather than end-users.” An additional 20% didn’t know what they thought about this statement. It begs the question: Should we really be empowering end-users when information professionals can do research so much better? Is the investment in making resources available at the desktop and the instruction necessary to make end-users effective in their use worth it? Information professionals understandably believe that with their education, unique skills and experience they provide superior results more efficiently. Sources, tools and end-users, however, continue to evolve. Further disintermediation of information in these setting appears likely. If information professionals do not embrace the role of instructors of end-users they risk being perceived as “gatekeepers” who are disconnected from the needs of their organizations and customers. Looking for additional ways to provide value to these organizations will be the challenge as the output of end-users could become similar in quality to that of information professionals.

The survey responses suggest there is little conscious ambivalence about training end-users. It did reveal, however, a range of differing expectations about how self-sufficient end-users can truly become in these environments and a myriad of challenges in instructing end-users to achieve even basic proficiency. Information professionals need to actively demonstrate their commitment to the instruction of end-users and provide leadership in their

organizations. The danger of being perceived as ambivalent is that this can lead to forfeiting the ownership of strategic thinking about and implementing end-user instruction. Information professionals are best equipped to understand, within their environment, what is realistic to expect of end-users in terms of research competencies. If the expectations of either management or end-users themselves are unrealistic, information professionals need to inform and advocate for the resetting of expectations, making appropriate adjustments to the organization's instruction and the investment in end-user tools. In parallel, information professionals need to continue to develop their skill set and take steps to insure that they are providing the most effective instruction possible to end-users. Many information professionals have fully embraced the transformation of their role in end-user instruction and for them, while all the challenges the survey and our experience have revealed have not gone away; recognizing the opportunities associated with the changes have created a more effective mindset. The information professionals' capability to evolve in these organizations and focus on higher-value research, products and services beyond basic research is dependent on the success of this transformation.

Endnotes

¹ Most recently discussed in David Grossman, "A Lesson from Portugal, or Finding Disintermediation," *Searcher*, 14 no.4 (April 2006), 45.

² Harold D. Stolovitch and Erica J. Keeps, *Telling Ain't Training*, (Alexandria: American Society for Training & Development), 31.

³ Sharon Bowman, *Presenting with Pizzazz: Terrific Tips for Topnotch Trainers*, (Glenbrook: Bowperson Publishing), 27.